Using the aACE CRM App

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This guide explains the CRM App functionality and workflows. It is intended for general users.

The aACE CRM App allows you to enter and update company, contact, and lead information from your mobile phone web browser. You can view companies, contacts, and leads you've previous loaded with low or no connectivity. Creating and editing records requires a connection to aACE. For an example of how this feature can help your team, read our feature highlight (https://www.aacesoft.com/resources/access-contacts-and-leads-on-the-go-with-the-aace-crm-app).

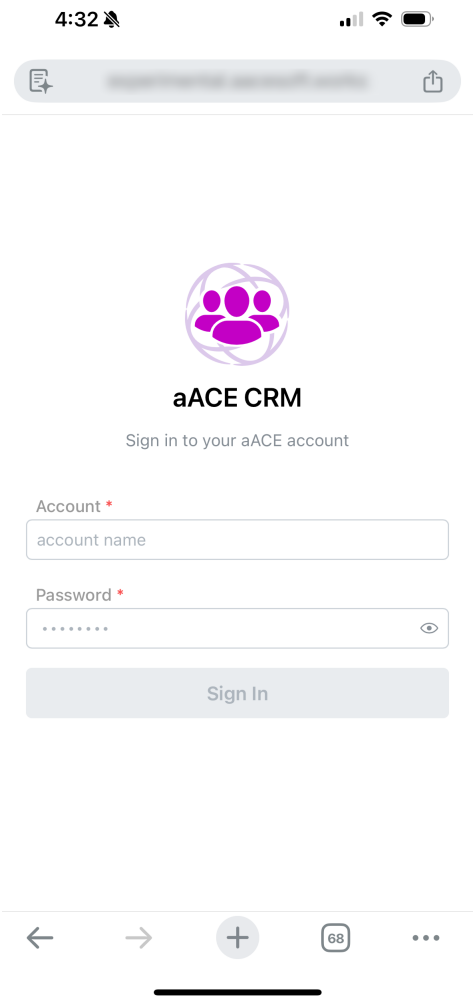
If your system administrator has customized the app, some details in this guide may no longer match your system.

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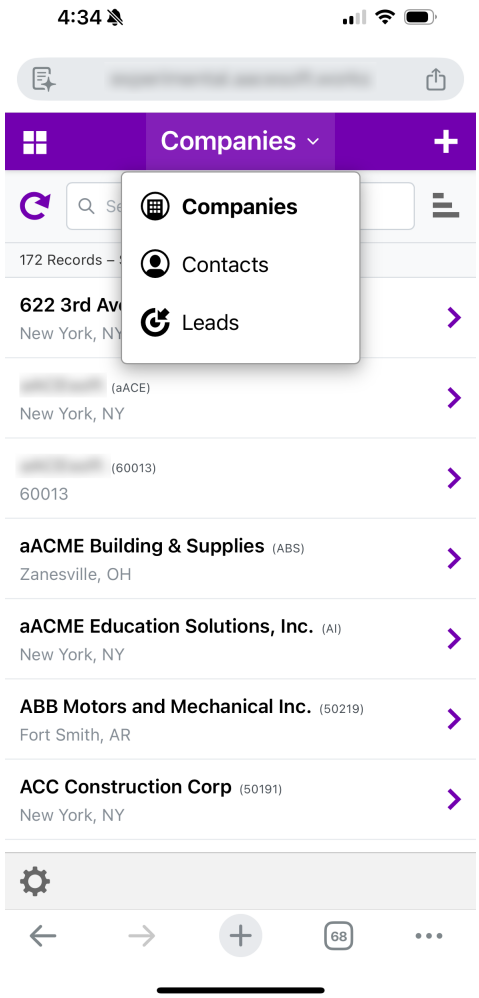
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Opening the CRM App

To access the CRM App, enter the web address for the app provided to you by your aACE Representative. Then, enter your aACE login credentials.



Once you are logged in, aACE displays the Companies module. You can open different modules (e.g. Leads and Contacts) by selecting the module dropdown. Each module has similar actions but contains different aACE data.



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Navigating the CRM App

There are many icons within the CRM App that perform various actions.

List View Icons

Icon	Icon Name	Description
	App Selector Menu	Displays the App Selector Menu, which allows you to navigate between other aACE apps if applicable.
	Refresh	Reload data from aACE
	Add	Adds a new company, contact, or lead, depending on the module you are viewing

Icon	Icon Name	Description
	Sort	Sorts the current list. The sort options vary depending on the module you are viewing.
	Settings	System administrator settings for aACE connection and the Log Out selection.

Detail View Icons

Icon	Icon Name	Description
	Edit	Enters edit mode for the record
	List View	Displays the module list view
	More Options	Displays the record ID and additional actions
	Notes	Displays a field to input notes about the record
	Add	Adds a new company, contact, or lead depending on the record section
	List View Record Navigation	Moves to the previous or subsequent record in the list view without leaving the detail view

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Editing, Saving, and Reloading Records

To ensure that data is not accidentally modified while browsing through records, you must select the Edit icon (), make your record changes, then select Save. If you have strong connectivity, your changes are sent to aACE. aACE then validates the record and if something is missing or invalid, the app tells you why and allows you to make corrections. If another user edits the same field in aACE while you have the record open, the app confirms which value to use.

If you have low connectivity, your changes are not saved and the entries remain in the form.

You can select the Refresh icon () to reload the latest data into the app from aACE. If you have low connectivity, the CRM App keeps a local copy of records you've already loaded so lists and record details still display.

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Troubleshooting and Customizing the App

If you need to troubleshoot the data or update settings to customize the app for your personal workflows, contact your aACE Representative at support@aacesoft.com.