

Using the aACE CRM App

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This guide explains how to use the CRM app to enter new contact data and sync it with your aACE system. It is intended for general users.







After your system administrator has [configured the CRM App](#) (<https://aace6.knowledgeowl.com/help/configuring-the-aace-crm-app>), it enables you to take contact information on-the-go, including companies, contacts, and leads. It features an offline mode that lets you access and create data even when you have low or no connectivity. 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>).








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

On Open

When you open the app, open leads display in the Leads module list view, if applicable; otherwise, the Companies module list view displays.

CRM App Icons


	Close App	Closes the app and returns you to the FileMaker App Launcher.
	Module Navigation	Displays icons for moving between Companies, Contacts, and Leads. On an iPhone, this navigation is at the top of the screen; on an iPad, it is at the bottom.
	New Record	
	Sync Data	Sends all pending updates and downloads any relevant updates from aACE for the <i>current</i> module.
	Search	
	Sort	

	Settings	
	Sync Error (List View)	Displays a list of all records in the current module that have sync errors (if any).
	Live Sync	Toggles the app between continually sending data updates to aACE (when you have a strong WiFi connection) and locally storing your work until you can sync later (when your connection is less steady, such as traveling cross-country or on an airplane).
	List View	Returns you to the previous listing of records.
	Edit Record	
	Record Navigation	Arrows that take you 'up' to the previous record or 'down' to the next record.
	Sync Error (Detail View)	Displays any error for the current record that resulted from the last sync operation. Errors must be resolved before the record can be synced to your aACE system.

Edit Mode

To ensure that data is not inadvertently modified while browsing through records, you must manually switch to edit mode before making any changes. In edit mode, you can use the Delete button: depending on a record's status and links to related records, this button will delete or deactivate the record (e.g. active leads in aACE can only be deactivated). The record on your mobile device is immediately affected, while the record in your aACE system is updated at the next sync.

Sync Errors

With Live Sync enabled, the app immediately displays any errors encountered during the sync. If you have disabled the Live Sync, the app gathers errors at the next sync and you can review them by tapping the Sync Error icon ().

- From the list view, tapping the Sync Error icon displays *all* records with sync errors in

that module.

- From the detail view, tapping the Sync Error icon displays details about any error(s) for the current record.

Troubleshooting and Customizing the App

If you need to troubleshoot the data or update settings to customize the app for your personal workflows, please have your system administrator refer to the guide for [configuring this app](http://aace6.knowledgeowl.com/help/configuring-the-aace-job-shop-app) (<http://aace6.knowledgeowl.com/help/configuring-the-aace-job-shop-app>).
