# Configuring the aACE CRM App

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This guide explains how to set up the CRM app. It is intended for system administrators.

This app helps you 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. It is designed to be installed on an individual's mobile device. 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).

## Before You Start

The system administrator needs to complete the following:

1. Configure aACE for mobile apps (https://aace6.knowledgeowl.com/help/configuring-aace-for-mobile-apps).
2. Obtain the app by emailing a request to aACE Support (), then deploy it on the needed devices.
3. Configure your aACE server for remote access (https://aace6.knowledgeowl.com/help/enabling-remote-access-to-your-aace-system-fms19).
   Note: If your aACE server is *not* configured for remote access, your users will still be able to record and edit contact information; however, they will not be able to submit their records until they return to the office.
4. In aACE, set up the user records (https://aace6.knowledgeowl.com/help/setting-up-new-users) for CRM App users.
   Note: Users *cannot* be logged in simultaneously on two devices. For example, if a user opens aACE on a desktop, then submits contact records from the app, the desktop session will shut down.

## Configuring the App

The first time you open the app after downloading it to a device, it will display the Settings screen for configuration:

- **aACE Server Address** — Enter the IP or DNS alias for your aACE server. If you do not know this address, please consult your IT specialist.
- **aACE File Name** — Enter the name of the aACE Mobile file hosted on your server.
  Note: Unless your system has been renamed, this should be "aACE Mobile".

- **aACE Account Name and Password** — Enter the aACE login credentials for the team member who will use the app.

Tap the popover button ( ••• ) and tap Configure App. This will download default settings and the needed transaction and master data from aACE.

## Using the App

After you finish configuring the app, tap Done to start the initial data sync and begin using the app (https://aace6.knowledgeowl.com/help/using-the-aace-crm-app).

## Actions Menu

The Actions menu has additional options for managing data.

The app stores data temporarily, then transfers it back to aACE as the central repository. Only data that has changed in the app or in aACE is transferred. This helps maximize the speed of the app. After extended usage, there may be discrepancies in the data time stamps (e.g. data that exists in aACE, but doesn't show up in the app). Resetting the data can quickly create a new baseline of accurate records.

- **Configure** — Verifies the server connection, resets the app data, downloads any needed settings from your aACE Mobile file, and refreshes all master data, followed by all transaction data. This may take a significant amount of time if you are storing a large amount of transaction and master data in your app.
- **Done** — Refreshes the transaction data and opens the app for use.
- **Refresh Transaction Data** — Syncs all transaction data on demand (see below for details).
  Note: Transaction data is refreshed regularly during normal use of the app, but irregularities may occur due to the nature of syncing. If you notice issues with the data, you can troubleshoot by tapping the Refresh link to get a clean update from aACE.
- **Refresh Master Data** — Syncs all master data (see below for details).
  Note: Master data is only updated when the app is initially configured or when you manually refresh it. This streamlines the data being synced between the app and aACE. If your team updates any relevant master data in aACE, manually refresh master data in the app to retrieve the latest data.
- **Reset App** — Wipes all data from the app. After this reset, you must re-configure the app.
  Note: Resetting data clears out information that isn't being used, which helps maintain

the app's responsiveness.

**CRM App Transaction Data**

- Leads in Open status
- Log data

**CRM App Master Data**

- Companies in Active status
- Contacts in Active status

## CRM App Specific Settings

These settings can help customize the app to your company and personal workflows. To update these preferences at any time, tap the gear icon from any module's list view.

- Use Google Maps — Changes the default mapping software from Apple Maps to Google Maps.
- Enable Live Sync — Sets the app to continually send data updates to aACE. This feature works best when you have a strong connection. When the connection is less steady (e.g. traveling cross country or on an airplane), you can disable this feature. When Live Sync is toggled off, the CRM App locally stores all the work you do. When you have a stronger connection and are ready to sync your data, you must re-enable the Live Sync.

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