

Overview of Team Members

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This guide provides an overview of the Team Members module. It is intended for advanced users.

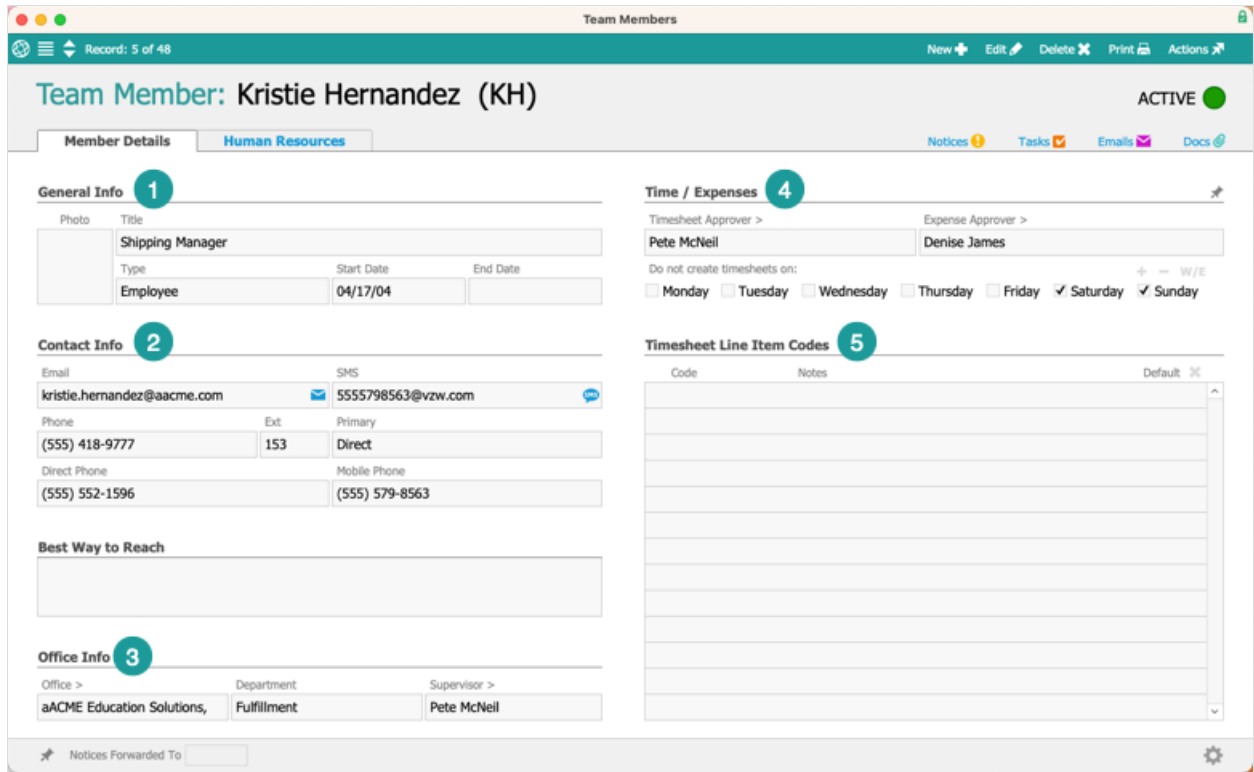
This module provides details for each of the team members in your aACE system. To access the Team Members module, navigate from Main Menu > Internal > Team Members, then locate the desired team member record.

Please note that in aACE, the terms 'team members' and 'users' refer to different people:

- Team Members – Personnel who interact with aACE, but do *not* necessarily log in. All their work may be conducted outside of aACE (e.g. warehouse staff who use the Pick App on a tablet).
- Users – Personnel who interact with *and* log in to aACE. This means they need to have access to your main system.


Member Details Tab

The Member Details tab is where you can manage basic information about the team member.




1. General Info


The General Info section displays basic information about the team member such as their photo, their job title, what type of team member they are, and their start and end dates at your company.

To add a photo to a team member's record, click Edit in the header, then click the Add icon () in the General Info section. Select a image file from your file selector, then click Insert.

2. Contact Info

You can use aACE to store contact information for each team member. Below the specified contact information, you can note detail for effectively reaching the team member in the Best Way to Reach text field.

If a team member has an email recorded on their Team Member record, you can click the Email icon () to open a new email draft in your email application. aACE will auto-fill the "To" line with the team member's email address.

Similarly, you can click the SMS icon () to open your email application with the team member's specified SMS address auto-filled in the "To" line, if applicable.

3. Office Info

You can [assign a team member to an office and department](https://aace6.knowledgeowl.com/help/managing-a-team-members-status-office-and-department#TransferringTeamMembers) within your aACE system. Defining the office and department determines what records they can view and manage.

You can also assign a supervisor to a team member.


4. Time / Expenses

You can assign timesheet and [expense approvers](https://aace6.knowledgeowl.com/help/assigning-expense-approvers-to-team-members) directly from a team member record. Additionally, you can prevent aACE from creating timesheets on certain days. This feature is useful for reducing clutter in your system.

For example, suppose a team member works Monday - Thursday. You can tell aACE not to create a timesheet for this team member on Fridays to prevent blank pending records.

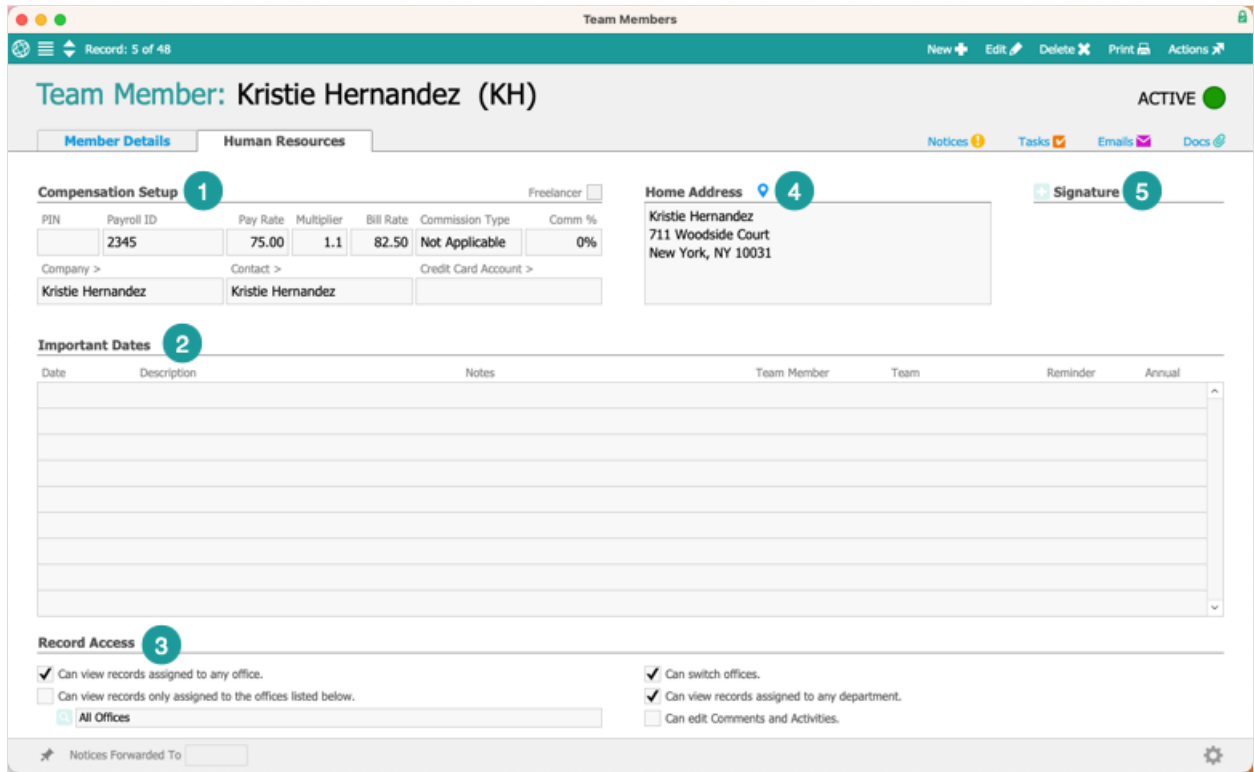
5. Timesheet Line Item Codes

Team members can record their time in aACE using [time-type line item codes](https://aace6.knowledgeowl.com/help/overview-of-line-item-codes#RecordInfoSection) (LICs). You can add any time-type LICs that team members will apply to their timesheets to the Timesheet Line Item Codes section.

To add a time-type line item code, click Edit, then click the first empty line in the list. You can type the LIC info or use the Line Item Codes Selector ().

Human Resources Tab


The Human Resources tab handles more specific HR information than the Member Details tab.



1. Compensation Setup

Any compensation-related information can be managed at the Compensation Setup section. In addition to general compensation information, you can specify a [Company and Contact for the team member](https://aace6.knowledgeowl.com/help/creating-a-team-members-related-company-and-contact-record) (<https://aace6.knowledgeowl.com/help/creating-a-team-members-related-company-and-contact-record>).

2. Important Dates

aACE can help you keep track of important dates associated with the team member. For example, suppose you want to note the team member's birthday. You can add the birthday as an important date by clicking Edit > choosing a date, either by typing it in or using the Calendar icon (). Once a date has been selected, you can enter additional details about the date.


You can also specify a team member or entire team for the important date notice. When the date arrives, aACE will send a notice to any team members included in the Team Member or Team fields.

3. Record Access


aACE lets you control the varying levels of access to records and transactions for individual

team members.

4. Home Address

You can note a team member's home address in the Home Address text field. The Location icon () opens a web browser to view the specified address in Google Maps.

5. Signature

You can upload an image of the team member's signature by clicking Edit, then clicking the Add icon () or by dragging the signature file onto the Signature box. This signature can be used to automatically sign checks if you have configured the [relevant aACE preferences](https://aace6.knowledgeowl.com/help/accounting-data-entry-preferences)

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