Overview of Companies

Last Modified on 10/04/2023 1:52 pm EDT

This guide provides an overview of the Companies module. It is intended for general users.

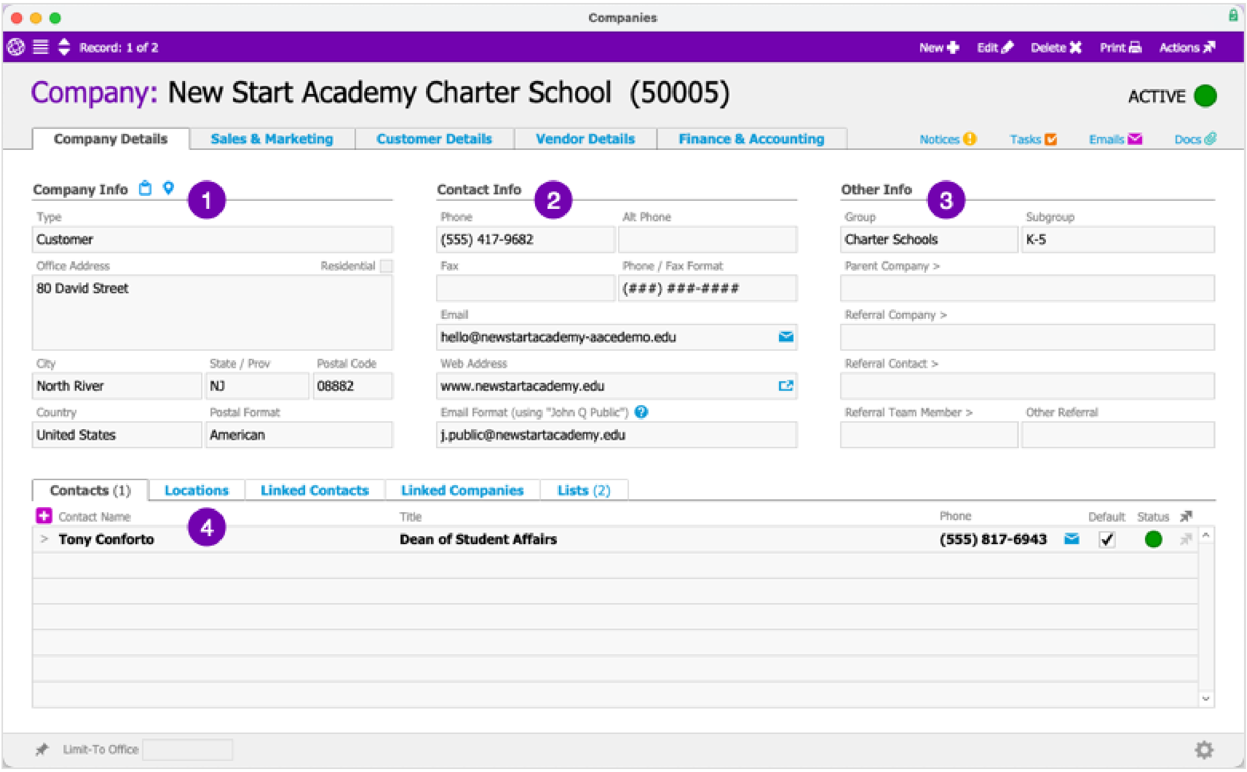
The Companies module gives you extensive functionality and settings for working with other organizations. You can create company records for leads, customers, vendors, partners, team members, and more. You can easily configure company records in aACE to fit your specific business needs.

Navigate from Main Menu > CRM & Sales > Companies. Use the Quick Search (https://aace6.knowledgeowl.com/help/using-the-quick-search-bar) bar to locate the desired Company record. When you display the detail view (https://aace6.knowledgeowl.com/help/overview-of-the-detail-view), a company record has multiple navigation tabs:

- Company Details
- Sales & Marketing
- Customer Details
- Vendor Details
- Finance & Accounting

Company Details Tab

From the Company Details tab, you can review and edit foundational information about a company.



1. Company Info

aACE lists the company record type and address for your company in this section. You can click the Clipboard icon ( ) to copy the company's address. When you click the Location icon ( ), aACE opens a web browser to view the specified address in Google Maps.

2. Contact Info

Contact Info contains phone, fax, email, and web contact information for the company. It also shows formatting conventions for those fields.

You can click the Email icon ( ) to create a new email. aACE opens a new email draft in your email application with the specified email address in the "To" line. Similarly, when you click the Web Address icon ( ), aACE opens the linked web address in a web browser.

The Help icon ( ) displays instructions for setting the format for the company's email addresses.

3. Other Info

The Other Info section is used to link other company, contact, and team member records. Additionally, you can group companies together to further organize your company records.

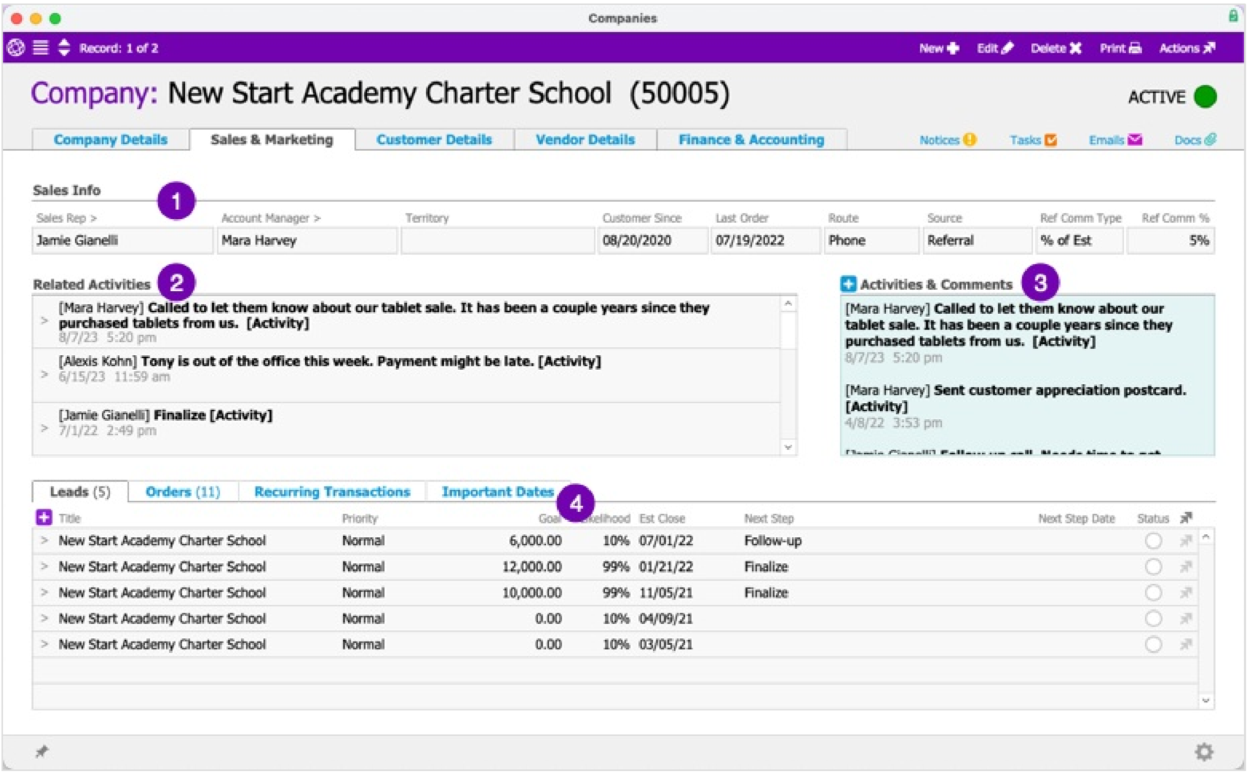
4. Additional Portals

These additional portals (i.e. Contacts, Locations, Linked Contacts, Linked Companies, and Lists) are used to specify further details about the company. On these tabs, you can:

- Create contacts (https://aace6.knowledgeowl.com/help/overview-of-contacts) and specify the primary contact for communications
- Add office locations for the company
- Link contacts from other companies
- Link other companies
- Organize your companies using a list (https://aace6.knowledgeowl.com/help/overview-of-the-lists-module)

Sales & Marketing Tab

The Sales & Marketing tab allows you to view important sales information, such as the sales representative and account manager. You can also review related activities, leads, orders, recurring transactions, and important dates from this tab.



1. Sales Info

You can find specific sales information for the company in the Sales Info section. This information includes team members assigned to working with the company; customer start date; last order; contact information; and commissions information.

2. Related Activities

Any activities added to records linked to the company record appear in the Related Activities section. aACE also provides a Go-To button (>) to the record the activity was entered on. Additionally, related activities listed here include the time, date, and team member.

3. Activities and Comments

The Activities and Comments section differs from the Related Activities section. Activities and Comments is a collection of activities and comments (https://aace6.knowledgeowl.com/help/adding-activities-support-or-next-steps) added to the company record specifically; Related Activities collects activities from other system records.

It is important to note that activities entered at the company record's Activities and Comments section will appear in the Related Activities section. However, entries in the Related Activities section will not appear in the Activities and Comments section.

You can add a new activity or comment to the company record by clicking the Add icon ( ).

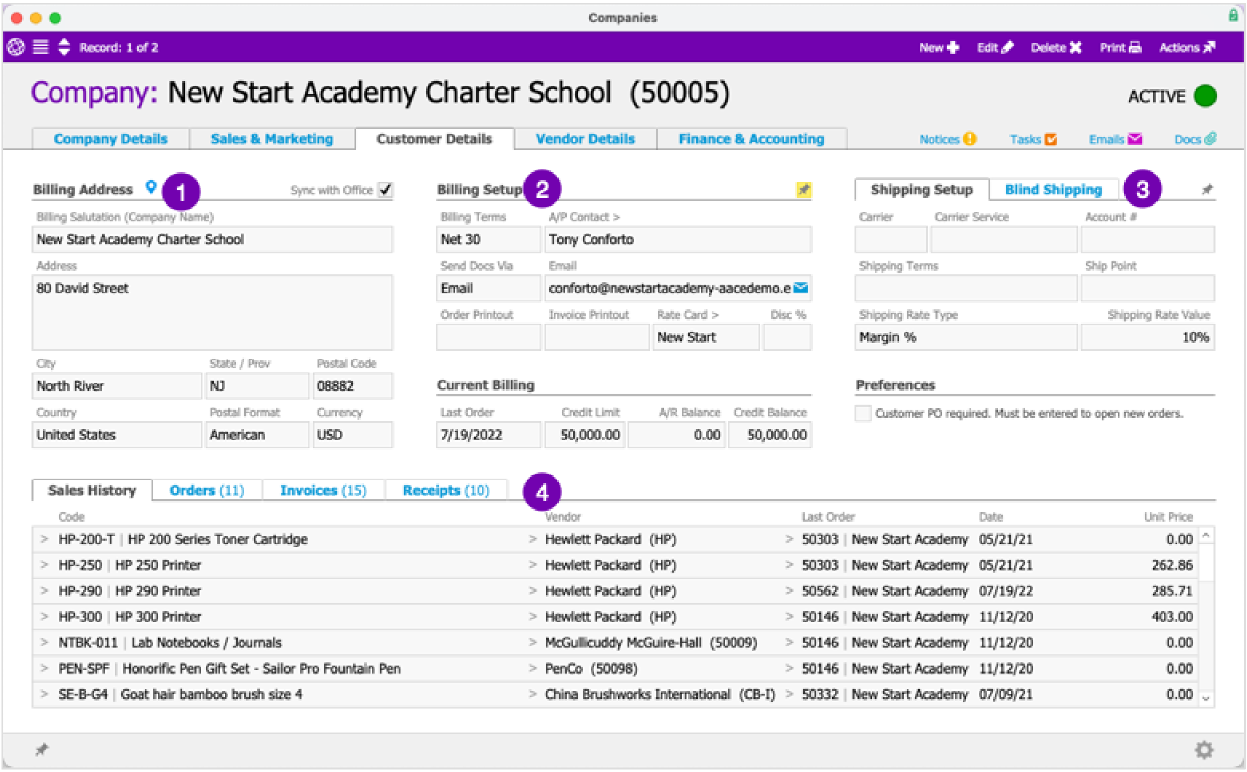
4. Additional Portals

The additional portals are collections of sales and marketing records from within your aACE system that relate to the company. For example, when a company places an order, aACE adds that order to the Orders tab.

The Important Dates tab is used to keep track of noteworthy dates relating to the company. aACE can send notices to you and your team members when the important date arrives. You can learn more about the Important Dates feature by reading our feature highlight (https://aacesoft.com/never-miss-an-important-date-with-aace/).

Customer Details Tab

You can view various customer-related details and records for companies. These details primarily include information regarding billing & shipping. However, you can also access the sales history for this company, including previous orders, invoices, and receipts.



1. Billing Address

aACE lists the billing address for your company in the Billing Address section.

2. Billing Setup

Any information relating to a company's billing is found here. This includes billing terms, contact information, printouts, rate cards, and discounts.

The Current Billing sections holds financial information about the company, such as their last order and credit information.

3. Shipping

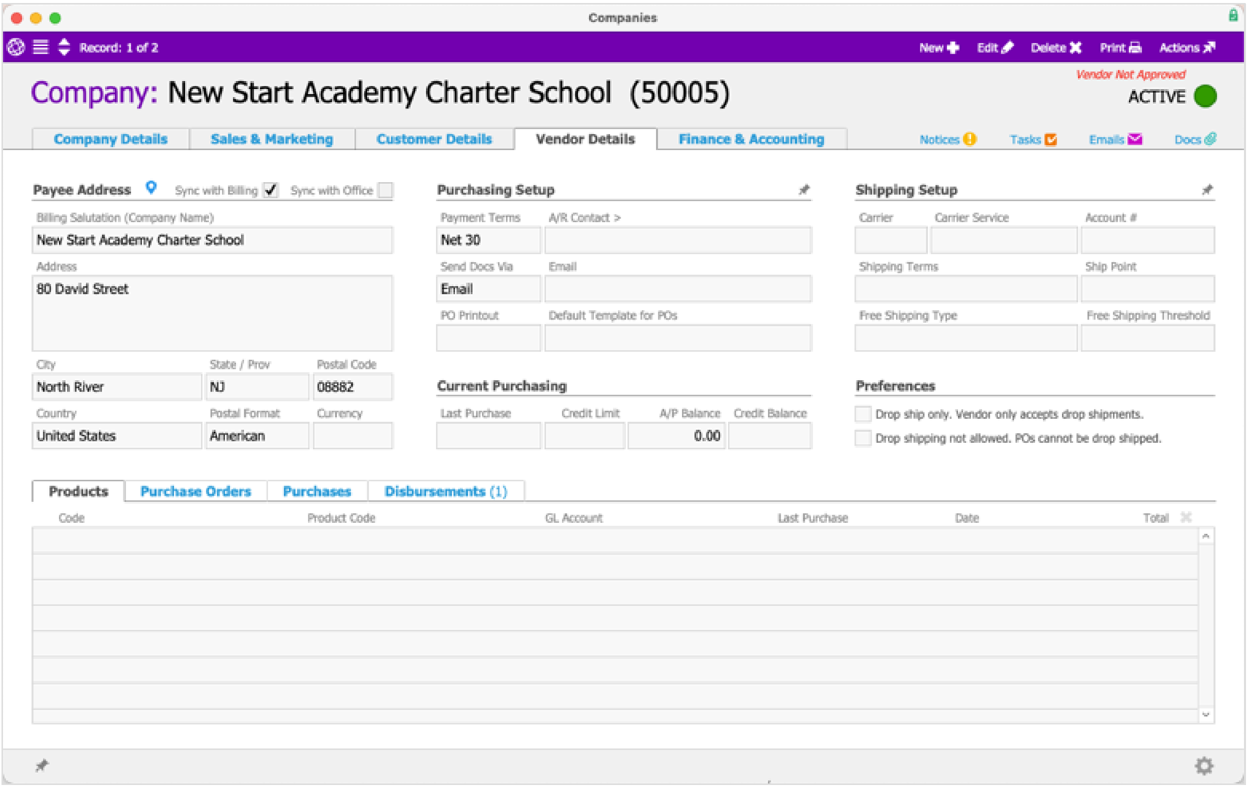
You can enter shipping information for the company. You can specify the default shipping settings as well as a company logo for blind shipping.

4. Additional Portals

These tabs give you details about specific records relating to this company's sales history with your company.

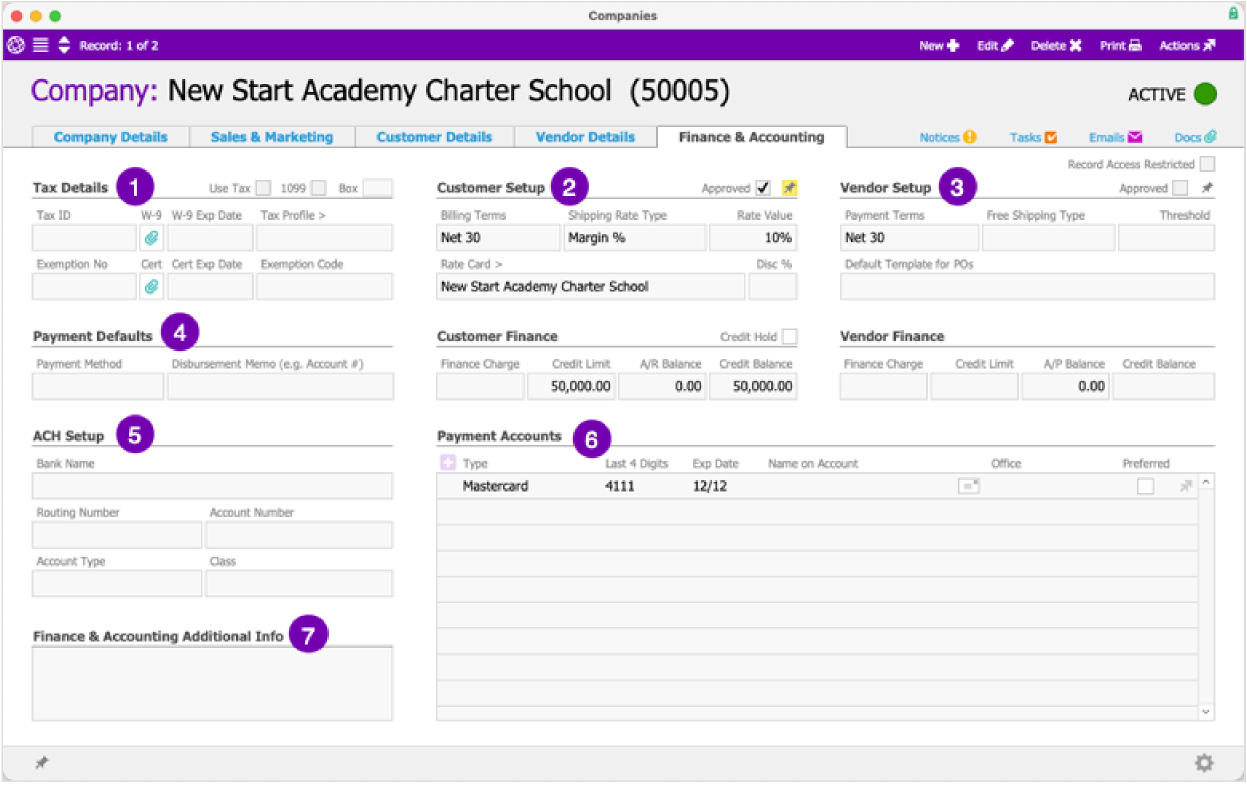
Vendor Details Tab

This tab is very similar to the Customer Details tab described above. You can view vendor-related details for companies here. These details focus on purchasing and shipping activity. You can also review records for related products, purchase orders, purchases, and disbursements.



Finance & Accounting Tab

The Finance & Accounting tab allows you to manage all things money & accounting related for each company record. This includes tax details, billing and purchasing terms, customer discounts, payment defaults, ACH setup, and payment accounts.



1. Tax Details

You can specify any tax details for a company. If a company is tax exempt, you can also specify those related details here.

2. Customer Setup and Customer Finance

The Customer Setup and Customer Finance sections are where you can tell aACE the default billing, shipping, and other finance details for a customer company. Depending on your internal approval process for companies, you can mark the Approved flag to specify a company has been approved for business.

3. Vendor Setup and Vendor Finance

Like the customer details, the Vendor Setup and Vendor Finance sections are used to specify certain information about a vendor company.

4. Payment Defaults

You can tell aACE what the company's default payment method and disbursement memo are.

5. ACH Setup

The ACH Setup section is used to note a company's banking information.

6. Payment Accounts

You can store a company's payment information in the Payment Accounts section. When a company places an order or requests a refund, you can select a payment method on the related record.

7. Finance & Accounting Additional Info

Any additional information about a company's financial or accounting information can be typed into the Finance & Accounting Additional Info text field.