

Overview of Companies

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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.

Company: New Start Academy Charter School (50005) ACTIVE

Company Info 1

Type: Customer

Office Address: 80 David Street

City: North River, State / Prov: NJ, Postal Code: 08882

Country: United States, Postal Format: American

Contact Info 2

Phone: (555) 417-9682, Alt. Phone:

Fax: , Phone / Fax Format: (###) ###-####

Email: hello@newstartacademy-aacedemo.edu

Web Address: www.newstartacademy.edu

Email Format (using "John Q Public"): j.public@newstartacademy.edu

Other Info 3

Group: Charter Schools, Subgroup: K-5

Parent Company >

Referral Company >

Referral Contact >

Referral Team Member > , Other Referral:

Contacts (1) 4

Contact Name	Title	Phone	Default	Status
Tony Conforto	Dean of Student Affairs	(555) 817-6943	✓	●

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.

Company: New Start Academy Charter School (50005) ACTIVE

Sales Info (1)

Sales Rep >	Account Manager >	Territory	Customer Since	Last Order	Route	Source	Ref Comm Type	Ref Comm %
Jamie Gianelli	Mara Harvey		08/20/2020	07/19/2022	Phone	Referral	% of Est	5%

Related Activities (2)

- [Mara Harvey] Called to let them know about our tablet sale. It has been a couple years since they purchased tablets from us. [Activity] 8/7/23 5:20 pm
- [Alexis Kohn] Tony is out of the office this week. Payment might be late. [Activity] 6/15/23 11:59 am
- [Jamie Gianelli] Finalize [Activity] 7/1/22 2:49 pm

Activities & Comments (3)

- [Mara Harvey] Called to let them know about our tablet sale. It has been a couple years since they purchased tablets from us. [Activity] 8/7/23 5:20 pm
- [Mara Harvey] Sent customer appreciation postcard. [Activity] 4/8/22 3:53 pm

Leads (5) (4)

Title	Priority	Goal	Wellhood	Est Close	Next Step	Next Step Date	Status
> New Start Academy Charter School	Normal	6,000.00	10%	07/01/22	Follow-up		
> New Start Academy Charter School	Normal	12,000.00	99%	01/21/22	Finalize		
> New Start Academy Charter School	Normal	10,000.00	99%	11/05/21	Finalize		
> New Start Academy Charter School	Normal	0.00	10%	04/09/21			
> New Start Academy Charter School	Normal	0.00	10%	03/05/21			

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) (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/) (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.

Companies

Record: 1 of 2

Company: New Start Academy Charter School (50005) **ACTIVE**

Billing Address (1) Sync with Office ☒

Billing Salutation (Company Name)
New Start Academy Charter School

Address
80 David Street

City
North River

State / Prov
NJ

Postal Code
08882

Country
United States

Postal Format
American

Currency
USD

Billing Setup (2)

Billing Terms
Net 30

A/P Contact >
Tony Conforto

Send Docs Via
Email

Email
conforto@newstartacademy-aacedemo.e

Order Printout
Invoice Printout
Rate Card >
Disc %

Current Billing

Last Order
7/19/2022

Credit Limit
50,000.00

A/R Balance
0.00

Credit Balance
50,000.00

Shipping Setup (3) **Blind Shipping**

Carrier
Carrier Service
Account #

Shipping Terms
Ship Point

Shipping Rate Type
Shipping Rate Value

Margin %
10%

Preferences

☐ Customer PO required. Must be entered to open new orders.

Sales History (4)

Code	Vendor	Last Order	Date	Unit Price
> HP-200-T HP 200 Series Toner Cartridge	> Hewlett Packard (HP)	> 50303	New Start Academy 05/21/21	0.00
> HP-250 HP 250 Printer	> Hewlett Packard (HP)	> 50303	New Start Academy 05/21/21	262.86
> HP-290 HP 290 Printer	> Hewlett Packard (HP)	> 50562	New Start Academy 07/19/22	285.71
> HP-300 HP 300 Printer	> Hewlett Packard (HP)	> 50146	New Start Academy 11/12/20	403.00
> NTBK-011 Lab Notebooks / Journals	> McGullicuddy McGuire-Hall (50009)	> 50146	New Start Academy 11/12/20	0.00
> PEN-SPF Honorific Pen Gift Set - Sailor Pro Fountain Pen	> PenCo (50098)	> 50146	New Start Academy 11/12/20	0.00
> SE-B-G4 Goat hair bamboo brush size 4	> China Brushworks International (CB-I)	> 50332	New Start Academy 07/09/21	0.00

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.

Companies

Record: 1 of 2

New Edit Delete Print Actions

Company: New Start Academy Charter School (50005)

Vendor Not Approved ACTIVE

Company DetailsSales & MarketingCustomer DetailsVendor DetailsFinance & Accounting

NoticesTasksEmailsDocs

Payee Address

Sync with Billing

Sync with Office

Billing Salutation (Company Name)
New Start Academy Charter School

Address
80 David Street

CityNorth River

State / ProvNJ

Postal Code08882

CountryUnited States

Postal FormatAmerican

Currency

Purchasing Setup

Payment TermsNet 30

A/R Contact >

Send Docs ViaEmail

Email

PO Printout

Default Template for POs

Current Purchasing

Last Purchase

Credit Limit

A/P Balance0.00

Credit Balance

Shipping Setup

Carrier

Carrier Service

Account #

Shipping Terms

Ship Point

Free Shipping Type

Free Shipping Threshold

Preferences

☐ Drop ship only. Vendor only accepts drop shipments.

☐ Drop shipping not allowed. POs cannot be drop shipped.

ProductsPurchase OrdersPurchasesDisbursements (1)

Code	Product Code	GL Account	Last Purchase	Date	Total

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.

Company: New Start Academy Charter School (50005) ACTIVE

Tax Details 1

Use Tax ☐ 1099 ☐ Box ☐

Tax ID W-9 W-9 Exp Date Tax Profile

Exemption No Cert Cert Exp Date Exemption Code

Customer Setup 2

Billing Terms Shipping Rate Type Rate Value

Net 30 Margin % 10%

Rate Card Disc %

New Start Academy Charter School

Vendor Setup 3

Payment Terms Free Shipping Type Threshold

Net 30

Default Template for POs

Payment Defaults 4

Payment Method Disbursement Memo (e.g. Account #)

ACH Setup 5

Bank Name

Routing Number Account Number

Account Type Class

Customer Finance

Finance Charge Credit Limit A/R Balance Credit Balance

50,000.00 0.00 50,000.00

Vendor Finance

Finance Charge Credit Limit A/P Balance Credit Balance

0.00

Payment Accounts 6

Type	Last 4 Digits	Exp Date	Name on Account	Office	Preferred
Mastercard	4111	12/12	New Start Academy Charter School		<input checked="" type="checkbox"/>

Finance & Accounting Additional Info 7

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.
