Understanding the aACE Email Integration

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This guide explains features of the aACE Email Integration. It is intended for general users.

The standard aACE Email Integration provides a simple way to compose outgoing emails with information from aACE. The aACE Email Integration links outgoing emails and their attachments directly to the relevant records anywhere in aACE. This feature works across all aACE modules.

For an overview of the aACE Email Integration, watch our video (https://www.youtube.com/watch?v=mEsd-P7bEsA&feature=youtu.be).

MailGun also provides extended email functionality for the aACE Email Integration.

Table of Contents

- Sending Email
- Receiving Email
- Storing Email
- Configuring Email Settings and Templates
- Extended Email Functionality with MailGun

Sending Email

You can create outgoing emails using several methods. With each of these methods, your aACE system email address is included as a BCC on the message.

When sending an email in aACE, you can link it directly to other records. A record tag for the current record is often included in the body text. This enables aACE to file the message with the related records as proof that it was sent at a specific date and time.

Email Icon

The Email icon ( ) is used throughout aACE. It is typically adjacent to an email address.

With the aACE Email Composer Upgrade, selecting this icon opens the aACE Email Composer. From there, you can draft and send your email as you would in your default email application. You can also select the Open Email Client button at the bottom of the window to use your workstation's default email application (e.g. Apple Mail, Microsoft Outlook, etc) instead.

If your company does not have the aACE Email Composer Upgrade, selecting the email icon ( ) opens a new email message in the default email application installed on your workstation.

You can also use the FileMaker keyboard shortcut. Press Cmd-I (Ctrl-I on PC) to generate an outgoing email.

aACE Email Viewer

From the header of any detail view, you can select the Emails link (Emails) to display the Email Viewer. This screen helps you easily review emails associated with the currently displayed record.

You can use the Email Viewer to compose outgoing email messages. Enter a subject and message text, then specify recipient(s) by selecting the recipient Search icon ( ). aACE automatically includes the starting record's ID in the message text. This links the new email to the starting record.

When you select Send Email, the new email record stays in Pending status until the server processes the message through the related automation schedule (http://aace6.knowledgeowl.com/help/configuring-automation-schedules).

aACE Print Menu

You can create outgoing emails from the Print menu at the detail view of many records. For example, from the detail view of an invoice, you can select Print, then Email Invoice or Email Customer Statement. If there is a To: email address associated with the current single record (e.g. a Bill To address in an order), it will be included in the outgoing email.

aACE also generates and attaches a PDF export of the current record. For example, creating the email from an invoice record would attach a PDF of that invoice to the email.

Similarly, the list view of Orders, Invoices, and Purchase Orders include Print options for

emailing a batch of records. For more information, review these guides:

- Sending Customer Statements (https://aace6.knowledgeowl.com/help/sending-customer-statements)
- Sending Customer Invoices (https://aace6.knowledgeowl.com/help/sending-customer-invoices)
- Understanding Email Automation in aACE (https://aace6.knowledgeowl.com/help/understanding-email-automation-in-aace)

Top

Receiving Email

Incoming email is automatically cataloged at the server. aACE checks this inbox according to the timing specified for the automation schedule. It scans incoming emails for two types of keywords:

- Email Addresses (in the To, From, CC, BCC fields, or in the body text) — If an email address matches with email addresses already present in aACE (e.g. team members, companies, contacts, etc), then aACE will link the email record to all these related records.
- Record IDs (in the Subject field or the body text) — If a record ID matches with an ID already present in aACE, then aACE will link the email record to the related record(s).

The record ID of the originating record is automatically included when you send email via the Email Viewer. You can also manually include other record IDs. Find the desired ID number using the Information icon ( ) or Actions > View Log. For example, the record ID for order might be #12345. You can add that ID in the email, enclosed in square brackets: [ORD12345].

Similarly, any files attached to the incoming email are cataloged in aACE as Document records, then linked to the incoming email record and to any related records.

If an incoming email contains *no* matching keywords, it is considered spam and automatically deleted.

Top

Storing Email

A good practice for archiving business email is to forward important messages from your personal inbox to the aACE inbox. Forwarded messages are stored and linked to other relevant aACE records. This makes customer communications accessible to all relevant team members.

Best Practices for Archiving Email in aACE

Do not forward each segment of the email chain to your aACE inbox. Instead, we recommend waiting for the conversation to conclude, then forwarding only the last email into aACE. This stores the entire thread as a single record in the Emails module.

Use the BCC field when you are forwarding a message to aACE. Lastly, add record IDs for all aACE records relevant to the email conversation.

Automatically Forwarding Emails to aACE

Your team members may forget to forward important business email to aACE. Unfortunately, aACE cannot manage external email practices. If your company policies require email to be archived, contact your IT administrator. They can help identify and implement methods to automatically forward or BCC your email messages to your aACE email address.

There may be possible side effects of this kind of automation, such as multiple versions of a single email chain to be archived in aACE. This can be confusing and may fill your storage space with redundant data.

Top

Configuring Email Settings and Templates

With the aACE Email Integration general settings, your system administrator can set up the standard email functionality. Navigate from Menu > System Admin > Preferences > Database Management.

Email templates (https://aace6.knowledgeowl.com/help/working-with-email-template-preferences) are standardized boilerplate text you configure for various emails sent from aACE. This saves users time composing emails and also ensures a common voice and style throughout the organization. You can access email templates by navigating from aACE Main Menu > System Admin > Email Integration > Email Templates.

When you email documents directly from an aACE module, the resulting email text is populated by the assigned email template. Different documents can be sent from aACE modules:

- Estimate or Quote

- Order
- Sales Order Invoice
- Invoice
- Customer Statement
- Receipt Notification
- Packing List
- Purchase Order
- Requests for Quotes (RFQs)
- Vendor Follow-Up
- Purchase Acknowledgment
- Remittance Advice
- Commission Statement

Top

Extended Email Functionality with MailGun

After your system administrator configures the Mailgun integration (https://aace6.knowledgeowl.com/help/setting-up-aace-mailgun), you will have a unique aACE email address for your aACE system (e.g. aACE@mg.[yourdomain].com). Emails and attachments received at this address will be downloaded into aACE each time aACE checks the inbox. aACE checks for new email according to the related automation schedule.

Using Mailgun with aACE provides you with several benefits:

- Dedicated IP Address — Improve deliverability and stay off blocklists by isolating your sending reputation from other senders
- Priority MailGun Support — Gain access to top-tier support instead of being routed through entry-level channels
- Improved Delivery Rates — Benefit from expert assistance in resolving ISP issues and delivery challenges
- Industry and Compliance Updates — Stay ahead of evolving email standards and legal requirements

See our Webinar on the subject at ShowMe aACE (https://showme.aacesoft.net/?id=10753).