Core Email Functionality

Last Modified on 07/29/2024 11:17 am EDT

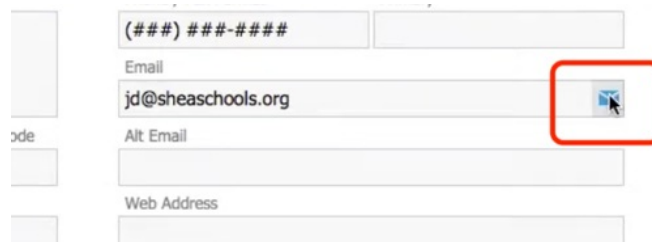> This guide provides an overview of aACE's Email related capabilities. It is intended for general users.

aACE's core email integration connects to the user's native mail client. The below features spare users from time-consuming data entry by linking outgoing emails and their attachments directly to the relevant records anywhere in aACE. This feature works across all aACE modules, so whether a message is about a contact, a project, an order, or more, you can organize your emails directly in your aACE solution. The email integration offers a simple way to compose outgoing emails with information from aACE.

- Compose Outgoing Emails More Efficiently
- Compose Outgoing Emails Containing Newly Generated Documents

Compose Outgoing Emails More Efficiently

Composing an outgoing email is done through the user's local email application, such as Microsoft Outlook or Apple Mail.

Send documents, reports, and statements directly from the relevant record, using a pre-arranged templated message. (Rather than creating the pdf document, saving it to the user's desktop, opening the email application, then attaching the file and drafting the message.) – This is a tremendous savings of time by itself, considering the frequency of this workflow across your workforce.
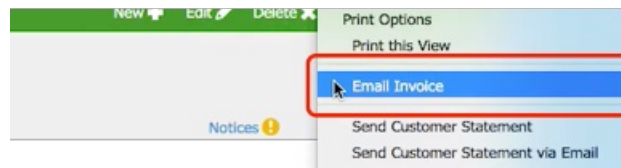

In many locations throughout the system, wherever an email address is present, there will also be an **email icon**. Clicking it will generate a new email for that address.

Compose Outgoing Emails Containing Newly Generated Documents

Various modules will contain an option to send an outgoing email via the Print Options

menu. For example, to send an invoice to a client, navigate to any invoice record and select **Print > Email Invoice**. aACE will command the user's email application to create a new email message, along with a PDF attachment of the invoice.

Emails (and related documents) sent from a record are attached to that record. (Rather than needing to look for pdf versions on a user's desktop, or file system, and scrolling through sent messages in an individual's sent messages folder in email. If a manager needs to know if "Jane sent the PO to Vendor A on Monday", all he needs to do is pull up that PO record. The Email, Document, and Log links automatically contain all needed information.) – This is another tremendous time-saving automation, especially when employee turnover is a concern.

These capabilities represent tremendous time savings accumulated over even short periods, but that is just the start!

aACE+Mailgun

Activating a Mailgun (https://aace6.knowledgeowl.com/help/setting-up-mailgun) integration unlocks additional capabilities (https://aace6.knowledgeowl.com/help/aacemailgun-email-functionality) and several automations including the aACE Data Interchange (https://aace6.knowledgeowl.com/help/adi-email-functionality).

- Automatic Organization of Related Incoming Email
- File Emails to aACE Records by Simple Forwarding
- Record All Communication with a Sales Lead in One Place
- Notices sent by to Email Addresses
- Notices sent by SMS to Mobile Phones
- Build Sophisticated Automation triggered by Email Activity
- Automate Emails based on Preconfigured Triggers

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