aACE+Mailgun Email Advanced Functionality

Last Modified on 07/29/2024 11:18 am EDT

aACE's [core email capabilities](https://aace6.knowledgeowl.com/help/core-email-functionality) (https://aace6.knowledgeowl.com/help/core-email-functionality) represent tremendous time savings accumulated over even short periods, but that is just the start!

[Mailgun setup](https://aace6.knowledgeowl.com/help/setting-up-mailgun) (https://aace6.knowledgeowl.com/help/setting-up-mailgun) and integration allows aACE to send and receive email messages and record and organize those emails and documents. *But, more than these tremendous time-saving capabilities, enabling Mailgun and the aACE + Email Integration opens up a long list of new and enhanced capabilities in workflows throughout the system.*

Activating a Mailgun integration unlocks these capabilities and automations, among others:

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

Automatic Organization of Related Incoming Email

Incoming email is cataloged automatically at the server once you've set up a *special email address* for use only by aACE. aACE automatically checks this inbox for incoming emails. It then files these emails with the relevant records in aACE by scanning the incoming email for matching keywords, such as email addresses and *record IDs*. If an incoming email contains zero matches, it is considered spam and deleted.

Where do I find the Record ID?

In every detail view throughout the system, selecting View Log from the Actions drop-down menu will reveal the Log Viewer popover, which includes the record's ID at the bottom.

Attach Emails to aACE Records by Simple Forwarding

If at any point you feel that a particular email from outside the system needs to be filed in aACE, all you have to do is forward or BCC the email to the *special address* with the *record ID* [in brackets] in the body of the email. Simply include this ID in the message body of your email, enclosed in brackets, BCC the special email address, and aACE will make sure that email is filed with the desired record.

These could be responses to outgoing emails (ie. a PO Acknowledgement) or new emails forwarded by a user to the aACE system (ie. Communications with a sales lead).

Example in Action:

Let's say before we send an invoice out to the client, we would also like to CC an additional contact, as well as file this email with the Invoice record as proof that the email was sent at this date and time. Notice that when the email is composed, it automatically BCC'd the *special email address*, as well as included the invoice's *record ID* in brackets.

When we hit send, the email goes to everyone listed on the To and CC lines, as well as to the aACE mailbox. Within a few minutes, aACE will retrieve it and create a new **Email** record, along with an attached **Document** record containing any attachments from the email.

Both the Email and Document will be filed with the associated records, which could be the related company(ies), contacts, this Invoice, or internal Team Members. This means that any user with access to these records can view the email right from within aACE. With aACE's email integration feature, your users have everything they need right at their fingertips.

Record All Communication with a Sales Lead in One Place

Create and send emails to a contact in the CRM. If emails are created from aACE, all communication for a contact will populate the emails link associated to that contact. Anyone with access privileges to that contact, whether a customer, vendor or sales lead can quickly be brought up to speed with the most current history. Holes in CRM updates can quickly be plugged, and relationships kept on course- automatically.

Notices sent by to Email Addresses

Notices of events (opening a new order, creating a receipt, etc.) can be sent to email addresses as well as the Notices module List View, bringing personnel into the workflow more immediately while in the field or away from their desks.

Notices sent by SMS to Mobile Phones

With Email Integration activated, notices of events (opening a new order, creating a receipt, etc.) can not only be sent to email addresses, but also to mobile phones via SMS text messaging.

Build Sophisticated Automation triggered by Email Activity

The transactional aspect of Mailgun allows for some sophisticated use cases. In our documentation, we summarize email functionality by saying that emails sent to "aACE@mg.yourdomain.com" will download into aACE. This is a simplification. In fact, an email sent to *any* address on the sub-domain (e.g. newinvoice@mg.yourdomain.com) will download into aACE.

This provides the foundation for a fairly powerful customization: the local-part of the email (i.e. the part before the @ symbol) can be programmed to trigger an event in aACE (e.g. neworder@mg.yourdomain.com or newexpense@mg.yourdomain.com). The local-part can tell aACE what action to perform, while the body of the email can provide the content for that action.

Automate Emails based on Preconfigured Triggers

Email Automation can be configured for workflows to trigger specific email events, with little or no interaction by a user. This can especially be helpful for Disbursement and Receipt remittance. (Note: In general, we recommend a Semi-Automated approach – have the system pre-build the message, but a user reviews it before sending. We caution the use of fully automatic email triggers. But for some specific instances (like automated remittance advice), they are very handy. You can read more about this in our Knowledgebase site at: https://aace6.knowledgeowl.com/help/understanding-email-automation-in-aace)

But, that's not all! (https://aace6.knowledgeowl.com/help/adi-email-functionality)