Setting Up the aACE Email Integration

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This guide explains the steps to configure your aACE system for the aACE Email Integration. It is intended for system administrators.

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 more information, see Understanding aACE Email Integration

(https://aace6.knowledgeowl.com/help/understanding-aace-email-integration).

To install the aACE Email Integration, contact aACE Support for the integration file. Once you have installed the integration file, the Email Integration module is found by navigating to System Admin.

If the Email Integration module is not visible, enable module access:

- 1. From the aACE Main Menu, go to **System Admin** then **User Groups**.
- 2. Using the Quick Search bar, locate your user group for system administrators.
- 3. In Menu Option Access, select the preference for **Email Integration**.

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In addition to installing the aACE Email Integration, ensure each of your team members have email addresses in their team member records. Once you have completed these steps, you can begin to configure the integration to fit your company's email workflows.

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Enable Mailgun

To enable Mailgun, sign in to aACE and go to System Admin, then Email Integration. See <u>Setting Up Mailgun (https://aace6.knowledgeowl.com/help/setting-up-mailgun)</u> and for detailed instructions on obtaining credentials and connecting with aACE.

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General Settings

General settings, data, and test mode settings continue the setup process for the aACE Email Integration:

- 1. From the aACE Main Menu, go to System Admin.
- 2. Select Email Integration.
- 3. Select General Settings.

You can access most of the configuration for the aACE Email Integration in the General Settings section. Contact your aACE support representative to provide:

- Web Service URL
- aACE License Key
- System Email Address

Data

aACE creates logs for email activity. Email activity logs are periodically purged by aACE

through the enabled preference. To locate and enable or disable this preference, sign in to aACE, then go to System Admin. Select System Preferences, then select the Automation Schedules tab.

Consult with your aACE support representative if you believe your system would benefit from resetting your email integration data. Do not reset data on your own.

Test Mode Settings

In Test Mode, aACE sends all emails to the email address populating the Test Email field and sends all SMS texts to the email address populating the Test SMS Email field. You can enable Test Mode by selecting the Enable Test Mode preference. It is recommended to have Test Mode enabled temporarily before enabling actual incoming or outgoing emails for the first time.

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Email Delivery and Email Signatures

Email delivery and signature settings are found in General Settings:

- 1. From the aACE Main Menu, go to System Admin.
- 2. Select Email Integration.
- 3. Select General Settings.

Incoming and Outgoing Emails

Incoming and outgoing email capabilities can be enabled by selecting the Enabled preference. It is recommended to temporarily use Test Mode to ensure your emails send correctly before enabling incoming or outgoing emails for the first time.

There are many settings for incoming and outgoing emails that could benefit your aACE system. However, some of these settings could cause excess emails. Only enable or disable email settings that will work best for your workflows.

In addition to these settings, you can configure notice setups for outgoing emails to track if an email fails to send or deliver. For more information on setting up and editing notice setups, see <u>Overview of Notice Setups</u> (https://aace6.knowledgeowl.com/help/overview-of-notice-setups).

Email Signatures

You can edit aACE email signatures using merge fields. There are two types of email signatures: for user-initiated emails and for server-sent emails. You can set two different signatures for these emails in their associated text fields.

aACE also provides a list of merge fields you can use in your email signatures. These merge fields use data store in the team member's office and team member records. By populating a merge field into the email signature, that field's contents will populate the signature text block.

It is important to note that if data from a team member's record is missing, the related merge field will insert a blank line in the email signature.

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Email Templates

<u>Email templates (https://aace6.knowledgeowl.com/help/working-with-email-template-preferences</u>) 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

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