Configuring 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 going from the Main Menu to System Admin > Email Integration.

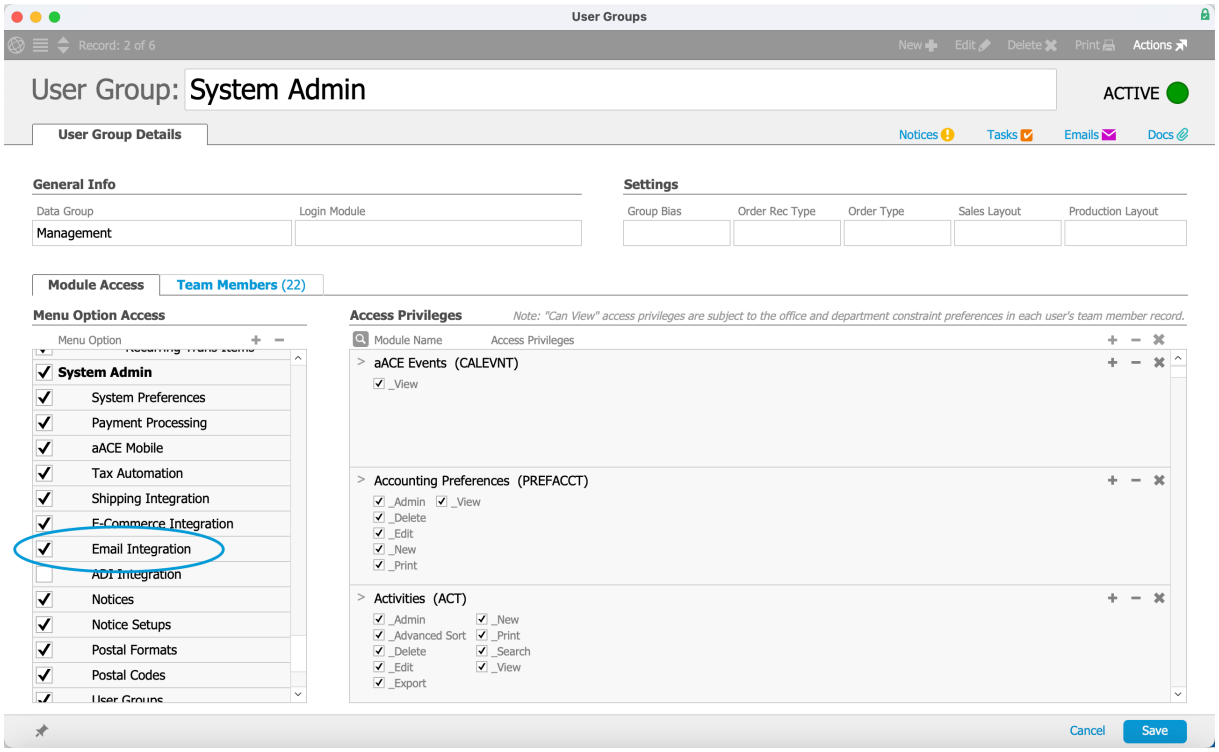
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Enabling Email Integration Menu Option

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. Select **Edit**.
4. In Menu Option Access, enable **Email Integration**.



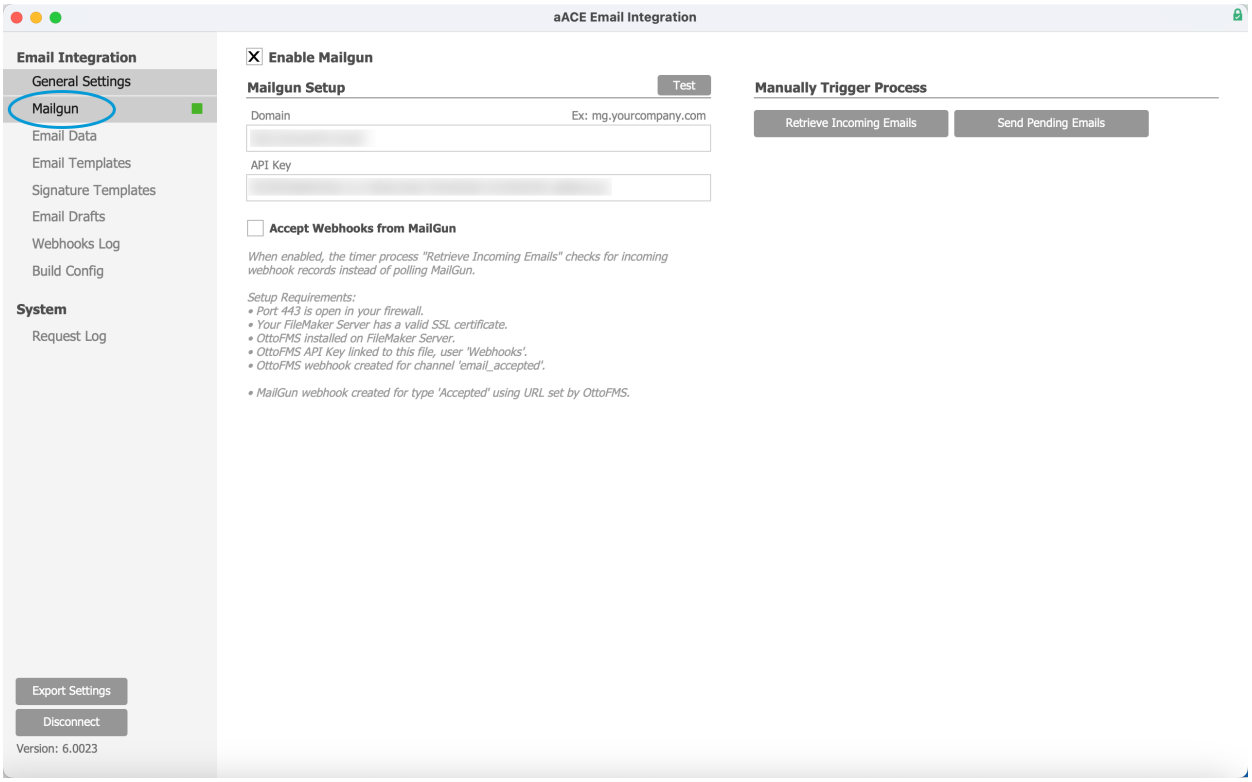
5. Select **Save**.

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 for your company email workflows.

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Enabling Mailgun

To enable Mailgun from the Main Menu, go to System Admin > Email Integration > Mailgun.



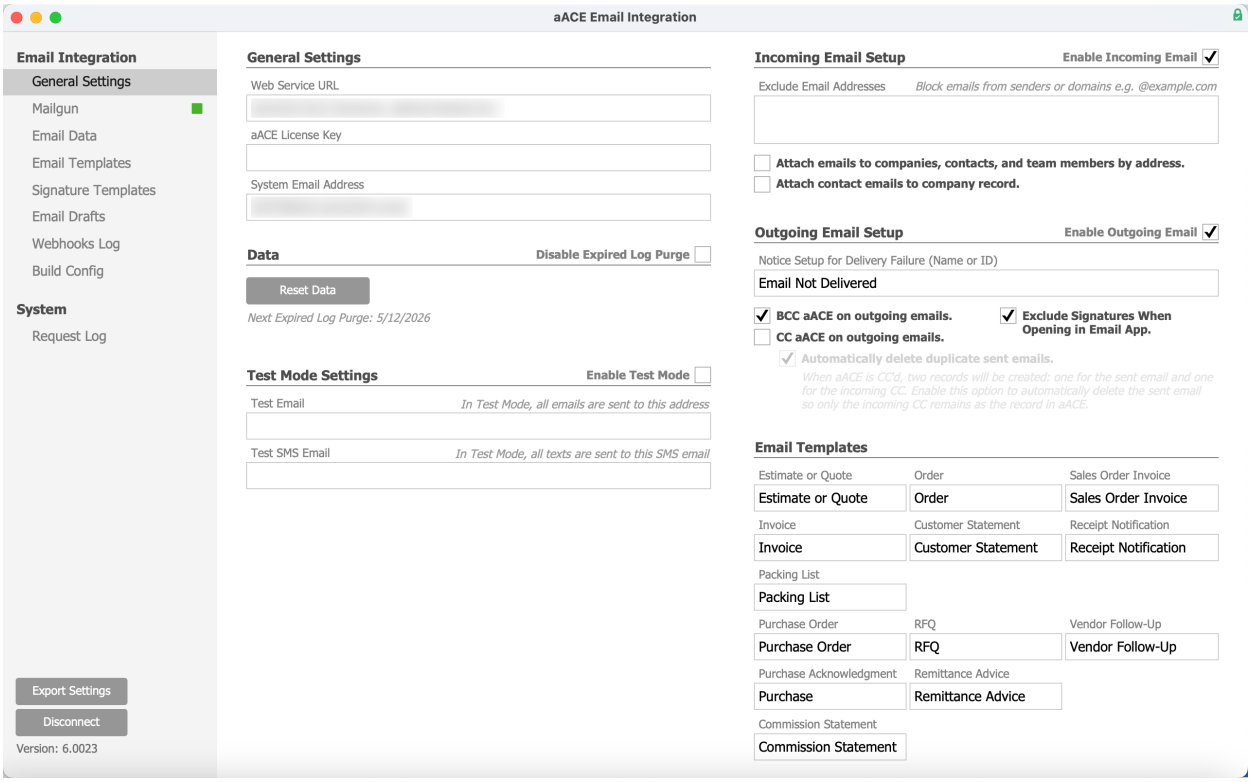
Before enabling Mailgun, you must enter the Domain and API Key. Additionally, we recommend temporarily enabling Test Mode to ensure incoming and outgoing emails send and receive correctly.

See Setting Up an aACEsoft Managed Mailgun Account (https://aace6.knowledgeowl.com/help/setting-up-aace-mailgun) for detailed instructions on obtaining credentials and connecting with aACE. Once tested and ready to enable, selecting Enable Mailgun will enable the integration.

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Understanding General Settings for Email

General settings, data, and test mode settings continue the setup process for the aACE Email Integration. From the Main Menu, go to System Admin > Email Integration.

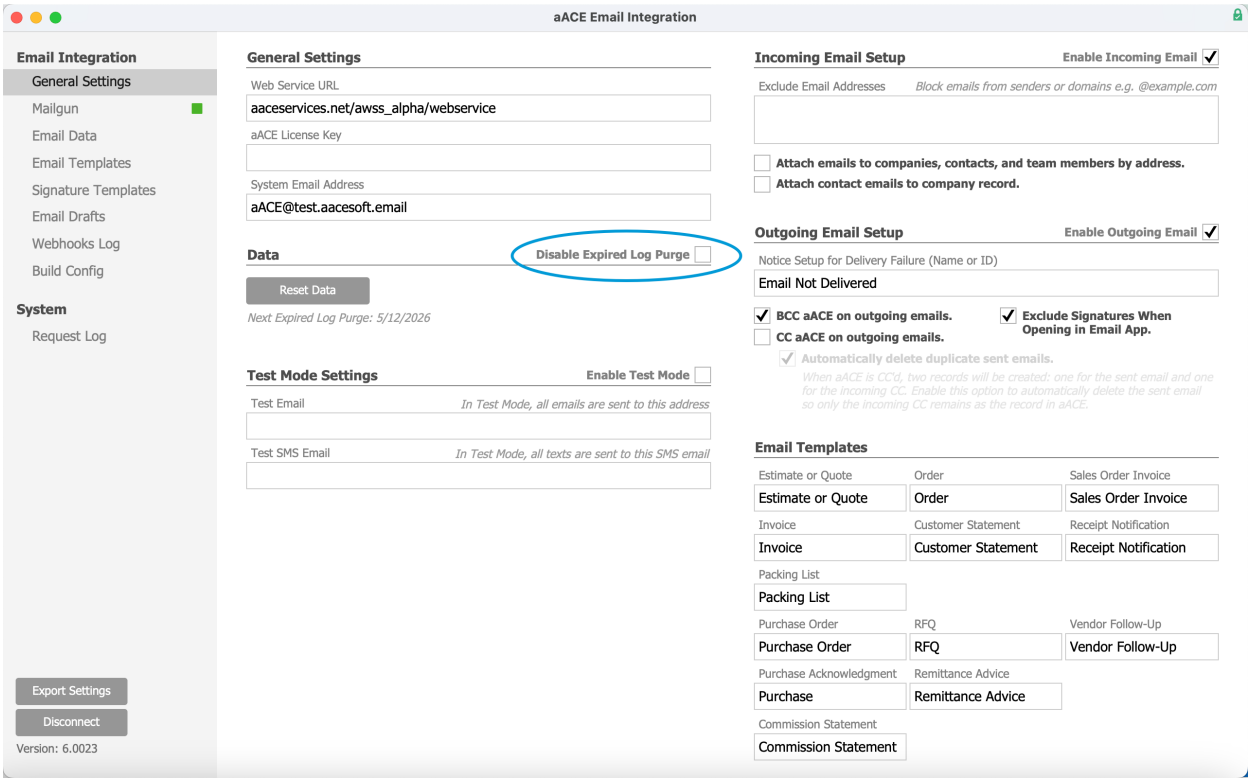


You can access most of the configuration for the aACE Email Integration in General Settings. Contact your aACE Support Representative to provide:

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

Understanding Email Data

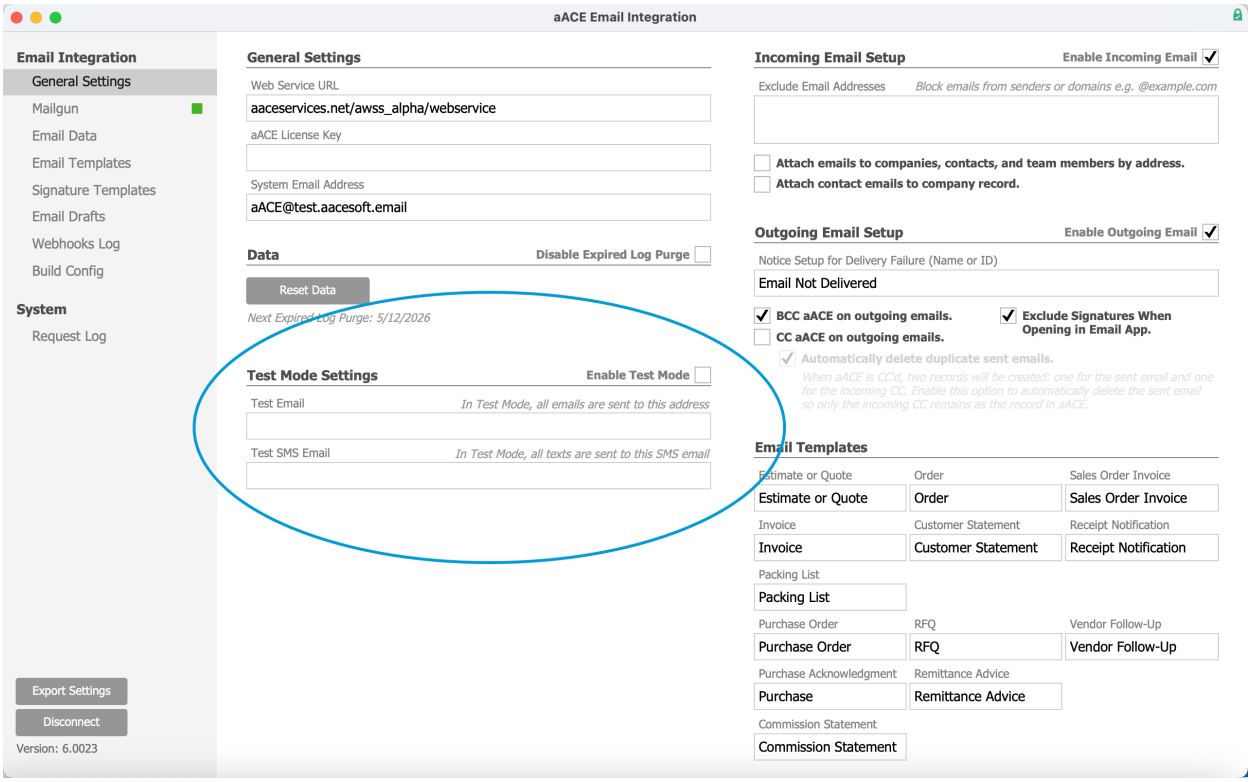
aACE creates logs for email activity. Email activity logs are periodically deleted by aACE. If you want to disable this deletion process, enable the Disable Expired Log Purge preference in General Settings.



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.

Understanding Test Mode Settings

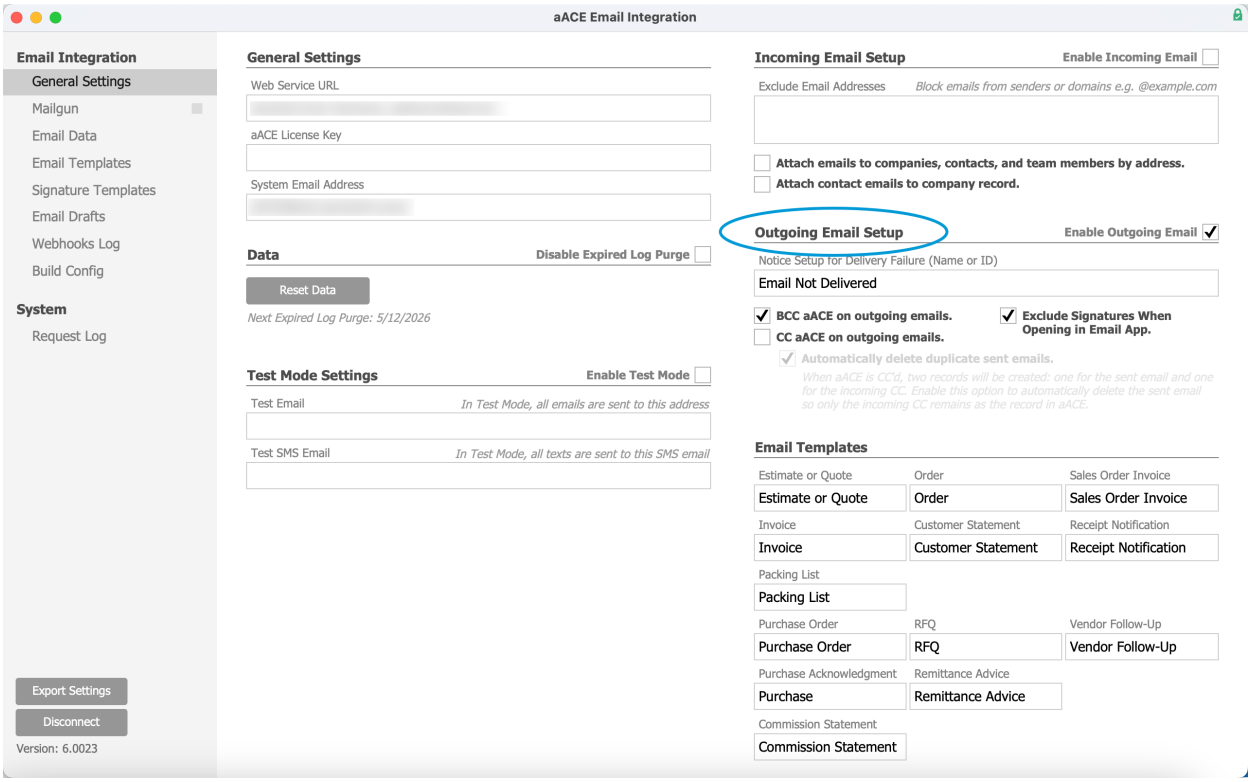
In Test Mode, aACE sends all emails to the email address in the Test Email field and sends all SMS texts to the email address in the Test SMS Email field. You can enable Test Mode by entering an email address in these fields and enabling the Enable Test Mode preference. We recommend using Test Mode temporarily before enabling actual incoming or outgoing emails for the first time.



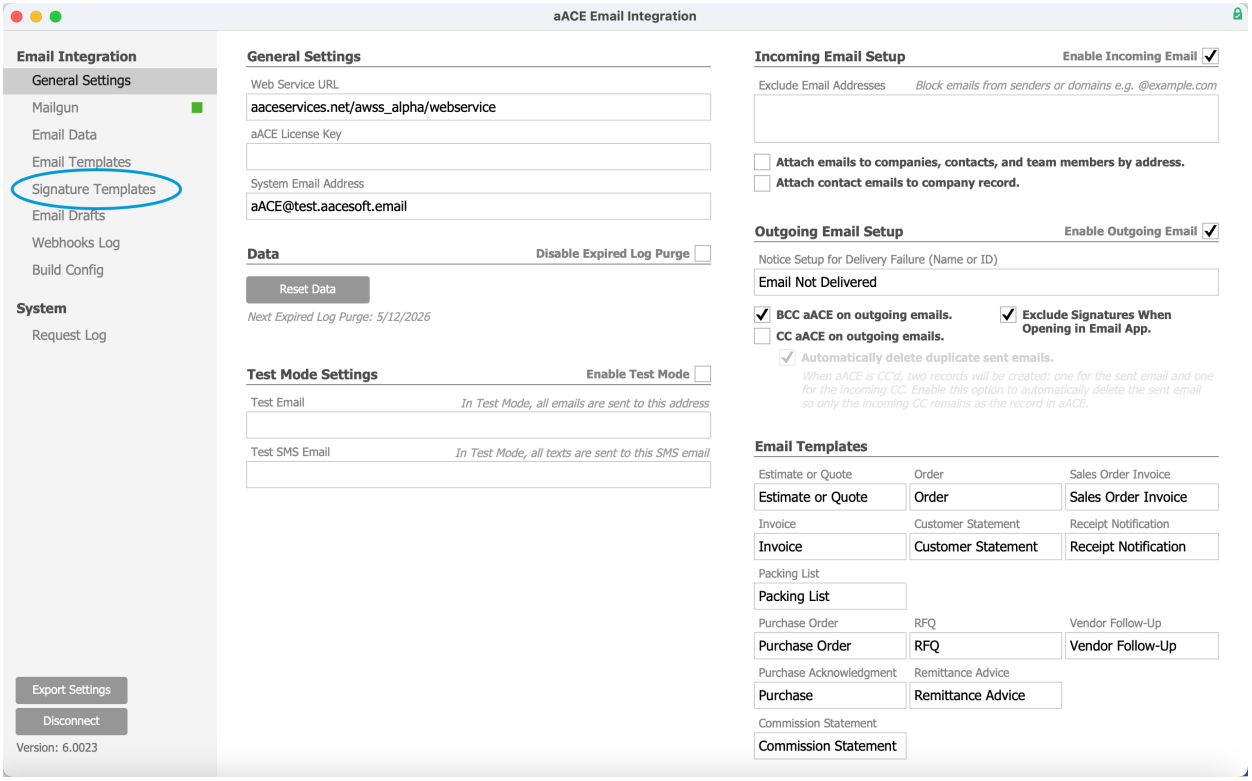
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Understanding Email Delivery and Email Signatures

Email delivery settings are located in System Admin > Email Integration > General Settings:



Email signature templates and settings are located in System Admin > Email Integration > Signature Templates.



Incoming and Outgoing Emails

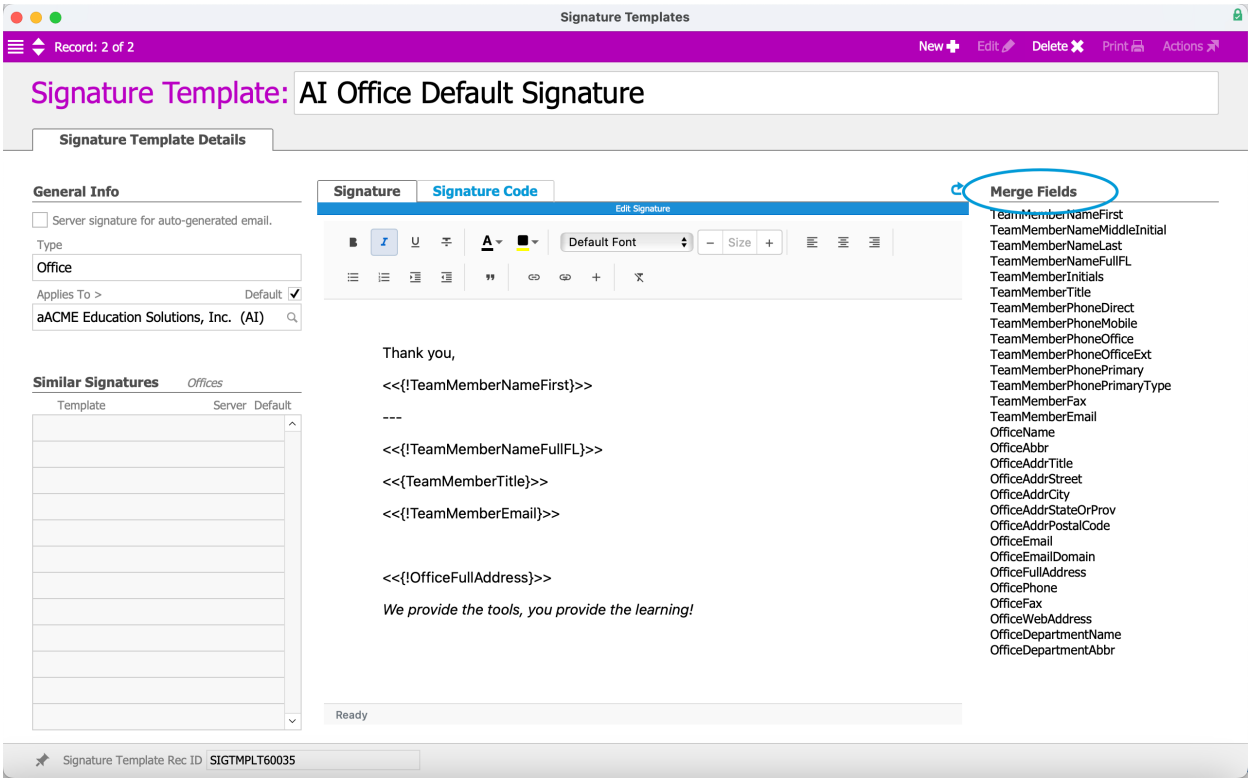
Incoming and outgoing email features can be enabled through the respective Enable Incoming Email and Enable Outgoing Email preferences. In addition to these settings, you can configure notice setups for outgoing emails to track if an email fails to send or deliver. For more information on setting up and editing notice setups, refer to Overview of Notice Setups (https://aace6.knowledgeowl.com/help/overview-of-notice-setups).

You must also populate the Email Address field on team member records for incoming and outgoing emails to work correctly. For example, the Email Address field in a team member record is used as the default From email address when generating ADI links, such as the Pay Now link (https://aace6.knowledgeowl.com/help/customer-pay-now-workflow). Without an email address in the Email Address field, the Pay Now links might not work as intended.

Email Signatures

You can edit aACE email signature templates (https://aace6.knowledgeowl.com/help/editing-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 using the email signature template preferences.

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, the field contents will populate the signature text block.



If required data from a team member record or office setup is missing, the related merge field will insert an error. If the data is not required, aACE inserts a blank line in the email signature.

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Understanding Email Templates

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

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Understanding Automated Emails

Activating and deactivating Email functionality can be done through the respective automation schedules. From the Main Menu, go to System Admin > System Preferences > Automation Schedules. Select the Schedule Status tab to locate the desired Schedule Script.

For more information on how aACE handles automated emails, refer to Understanding Automated Emails in aACE (https://aace6.knowledgeowl.com/help/understanding-email-automation-in-aace).