

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**.

The screenshot displays the 'User Groups' management interface for the 'System Admin' user group. The interface includes a top navigation bar with options like 'New', 'Edit', 'Delete', 'Print', and 'Actions'. Below the header, there are tabs for 'User Group Details', 'Settings', and 'Team Members (22)'. The 'Menu Option Access' section on the left lists various system modules with checkboxes. 'Email Integration' is checked and highlighted with a red circle. The 'Access Privileges' section on the right shows a table of permissions for different modules, including 'aACE Events (CALEVNT)', 'Accounting Preferences (PREFACCT)', and 'Activities (ACT)'. Each module has a list of specific actions (like _View, _Admin, _Delete, _Edit, _New, _Print, _Advanced Sort, _Search, _Export) that can be enabled or disabled.

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 [Setting Up Mailgun](https://aace6.knowledgeowl.com/help/setting-up-mailgun) (<https://aace6.knowledgeowl.com/help/setting-up-mailgun>) 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**.

aACE Email Integration

Email Integration

- General Settings
- Mailgun
- Email Data
- Email Templates
- Email Drafts
- System
- Request Log

General Settings

Web Service URL
aaceservices.net/awss_alpha/webservice

aACE License Key

System Email Address
aACE@sandbox50f2cce6b64b4655a6b612e30c121773.mailgun.org

Email Signature (When Sent by User)
Thanks,
@TeamMemberNameFirst
@TeamMemberTitle
@TeamMemberPhoneDirect
@TeamMemberEmail
@TeamMemberAddress

Email Signature (When Sent by Server)

Merge Fields Available for Email Signature

- @TeamMemberNameFirst
- @TeamMemberNameMiddleInitial
- @TeamMemberNameLast
- @TeamMemberNameFullFL
- @TeamMemberInitials
- @TeamMemberTitle
- @TeamMemberPhoneDirect
- @TeamMemberPhoneMobile
- @TeamMemberPhoneOffice
- @TeamMemberPhoneOfficeExt
- @TeamMemberPhonePrimary
- @TeamMemberPhonePrimaryType
- @TeamMemberFax

Data

Disable Expired Log Purge

Reset Data

Next Expired Log Purge: 4/28/2025

Test Mode Settings

Enable Test Mode

Test Email
brian.sanchez@aacessoft.com

Test SMS Email

Incoming Email Setup

Enable Incoming Email

Exclude Email Addresses These email addresses will not be linked to any master record

Attach emails to companies, contacts, and team members by address.

Attach contact emails to company record.

Outgoing Email Setup

Enable Outgoing Email

Notice Setup Name for Send Failure

Notice Setup for Delivery Failure (Name or ID)

Email Not Delivered

BCC aACE on outgoing emails.

CC aACE on outgoing emails. Automatically delete duplicate sent emails.

*Sending an email via aACE with aACE CC'd will result in a duplicate email record being created by the Receive Incoming Emails process. Enable this preference to automatically remove the sent email that will be duplicated.

Email Templates

| | | |
|-------------------------|--------------------|----------------------|
| Estimate or Quote | Order | Sales Order Invoice |
| Estimate or Quote | Order | Sales Order Invoice |
| Invoice | Customer Statement | Receipt Notification |
| Invoice | Customer Statement | Receipt Notification |
| Packing List | | |
| Packing List | | |
| Purchase Order | RFQ | Vendor Follow-Up |
| Purchase Order | RFQ | Vendor Follow-Up |
| Purchase Acknowledgment | Remittance Advice | |
| Purchase | Remittance Advice | |
| Commission Statement | | |
| Commission Statement | | |

Export Settings

Disconnect

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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**.

aACE Email Integration

Email Integration

- General Settings**
- Mailgun
- Email Data
- Email Templates
- Email Drafts

System

- Request Log

General Settings

Web Service URL: aaceservices.net/awss_alpha/webservice

aACE License Key: [Empty]

System Email Address: aACE@sandbox50f2cce6b64b4655a6b612e30c121773.mailgun.org

Email Signature (When Sent by User): Thanks, [Dropdown]

Merge Fields Available for Email Signature: [Dropdown]

Email Signature (When Sent by Server): [Empty]

Data

Disable Expired Log Purge: [Checkbox]

Reset Data

Next Expired Log Purge: 4/28/2025

Test Mode Settings

Enable Test Mode: [Checkbox]

Test Email: brian.sanchez@acesoft.com

Test SMS Email: [Empty]

Incoming Email Setup

Enable Incoming Email: [X]

Exclude Email Addresses: These email addresses will not be linked to any master record

[Empty]

☐ Attach emails to companies, contacts, and team members by address.

☐ Attach contact emails to company record.

Outgoing Email Setup

Enable Outgoing Email: [X]

Notice Setup Name for Send Failure: [Empty]

Notice Setup for Delivery Failure (Name or ID): [Empty]

Email Not Delivered

☒ BCC aACE on outgoing emails.

☐ CC aACE on outgoing emails. ☒ Automatically delete duplicate sent emails.

**Sending an email via aACE with aACE CC'd will result in a duplicate email record being created by the Receive Incoming Emails process. Enable this preference to automatically remove the sent email that will be duplicated.*

Email Templates

| Estimate or Quote | Order | Sales Order Invoice |
|-------------------------|--------------------|----------------------|
| Estimate or Quote | Order | Sales Order Invoice |
| Invoice | Customer Statement | Receipt Notification |
| Invoice | Customer Statement | Receipt Notification |
| Packing List | | |
| Packing List | | |
| Purchase Order | RFQ | Vendor Follow-Up |
| Purchase Order | RFQ | Vendor Follow-Up |
| Purchase Acknowledgment | Remittance Advice | |
| Purchase | Remittance Advice | |
| Commission Statement | | |
| Commission Statement | | |

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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 [Overview of Notice Setups](https://aace6.knowledgeowl.com/help/overview-of-notice-setups) (<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

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

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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