Establishing an aACEsoft Managed Mailgun Account

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This guide explains how to set up and configure your aACE+ Mailgun integration. It is intended for system administrators.

The aACE+ Mailgun integration allows you to send and receive emails from within your aACE system using Mailgun, a leader in transactional email. It is the recommended email product due to its ease of setup, enhanced error capturing, and reliability.

Mailgun acts as an email handler that processes a database of incoming and outgoing emails. Rather than opening an email client, aACE creates a record in the Mailgun database and indicates that it is to be sent as an email. aACE periodically queries the Mailgun database for new records that have been created, then downloads them as incoming emails. This process enables emails to be sent from an email account other than a specific employee email address.

Within aACE, users initiate an email to be sent by the system either manually or automatically through automation schedules. Email templates (https://aace6.knowledgeowl.com/help/editing-email-templates) also assist with email automation. These emails can be sent from multiple modules within aACE.

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aACE Software Enterprise Mailgun Account

Mailgun accounts for aACE are managed by aACE Software in a single, enterprise Mailgun account. Your organization does not need to open a Mailgun account. However, if your organization would like to manage your own account, we can accommodate that.

The Mailgun Enterprise Level Account brings a host of benefits that go beyond what's

normally available with the "Foundation 50k" Account, the account type we previously recommended. Benefits include:

- **Dedicated IP Address** — Improve deliverability and stay off blocklists by isolating your sending reputation from other senders
- **Priority Support** — Gain access to top-tier support, instead of being routed through entry-level channels
- **Improved Delivery Rates** — Expert assistance in resolving ISP issues and delivery challenges
- **Industry and Compliance Updates** — Stay ahead of evolving email standards and legal requirements
- **Increased Service Level** — Optimized Mailgun service level and troubleshooting help
- **Extended Backup** — Seven days of emails backed up as opposed to three under a non-enterprise account

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Domain Transfer and Options

If your organization already has a Mailgun account and would prefer to be transferred to the aACE Software Mailgun enterprise account, we can help with that. The process is as follows:

1. We will request to add your Mailgun account as a sub-account under our enterprise plan.
2. You will receive a confirmation email from Mailgun.
3. Once confirmed, your account will be transferred seamlessly—with zero service disruption.
4. Mailgun will stop billing you directly and you have no further action.

If you do not already have a Mailgun account, you have two options for setting up your Mailgun subdomain and system address: full service or custom subdomain.

Your subdomain will be used for aACE-related incoming and outgoing emails. Your primary domain should not be used because it may interfere with your organization's normal incoming and outgoing emails. aACE and Mailgun will not need access to your email server, so your primary domain can remain unchanged.

Note: If technical limitations make it impossible to create a subdomain, you can create a separate domain instead (e.g. www.mycompany.org). This method would allow you to receive incoming emails into aACE but not reliably send outgoing emails. The messages

would originate from an unrecognized domain and would likely be categorized as spam.

Full Service

This is our recommended option. In the full service option, we, aACE Software, will manage the necessary accounts and connections. We collect your preferred email address and generate a new subdomain on our aACEsoft.email domain. This generally follows a specific format: @companyname.aACEsoft.email.

Monthly payments to Mailgun are not required, and support for this setup is non-billable.

Custom Subdomain

The custom subdomain option uses your organization's preferred subdomain. We will generate the subdomain in Mailgun. This generally follows a specific format: @aACEsoft.companyname.com.

For additional information on selecting a domain, refer to Mailgun's What domain name should I use with Mailgun? (https://help.mailgun.com/hc/en-us/articles/202256730-How-do-I-pick-a-domain-name-for-my-Mailgun-account-)

Although aACE is mentioned in the subdomain, your emails will not display as being from aACE. Instead, it will display the initiating team member or your preferred email for email templates. However, there are CC and BCC settings that can display the system email address occasionally. This system email address is also used by users to send and forward emails into your aACE system.

Monthly payments to Mailgun are not required, and the support for this setup is billable.

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aACE+ Mailgun Integration Process

The steps for setting up the aACE+ Mailgun Integration depend on your chosen domain option: full service or custom subdomain. If you had your previous Mailgun account transferred to our enterprise account, you do not need to take any further action.

Step 1: Subdomain in Mailgun

We will create your subdomain based on your chosen subdomain option. There is no action required from you.

Step 2: Adding the Subdomain to Mailgun

We add your new subdomain to the enterprise account. There is no action required from you.

Step 3: Adding DNS Records

If you selected the full service option, we will handle this step in its entirety. If you selected the custom subdomain option:

You must add TXT and MX records to your new subdomain. We will receive a series of DNS records from Mailgun that we will provide your organization. Please consult with your IT administrator to complete this step after we provide your credentials and records. For additional information on verifying your domain, refer to Mailgun's DNS frequently asked questions (https://help.mailgun.com/hc/en-us/articles/360011565514).

Note: The Mailgun control panel indicates that MX records may be optional, depending on your implementation. To fully utilize the aACE+ Mailgun integration, both TXT and MX records are required.

Step 4: Creating a Route

We will configure an optional “Forward” route to relay all emails to an external email address that you manage (e.g. aace@yourcompany.com). Because Mailgun only stores seven days of emails, this email address functions as a backup. If the automatic process stops temporarily, emails may be lost unless you have a backup.

You will need to let us know your preferred email address for this route.

Step 5: Configuring the aACE Email Integration

After the aACE integration file is installed and connected, your aACE Support Representative will proceed with configuration steps. You can find the administrative tools to perform these configurations in Setting Up the aACE Email Integration (https://aace6.knowledgeowl.com/help/setting-up-the-aace-email-integration).

Step 6: Using Test Mode

To properly test your aACE Email Integration, you must enable Test Mode. For instructions on enabling Test Mode for the aACE Email Integration, refer to Setting Up the aACE Email Integration (https://aace6.knowledgeowl.com/help/setting-up-the-aace-email-integration#TestModeSettings). Ensure the email address you are testing with is present in aACE, whether it is a personal email address or one specifically designated for Test Mode. If the email address is not found in aACE, the message will be treated as junk mail. The email address can be included on a contact, team member, or company record.

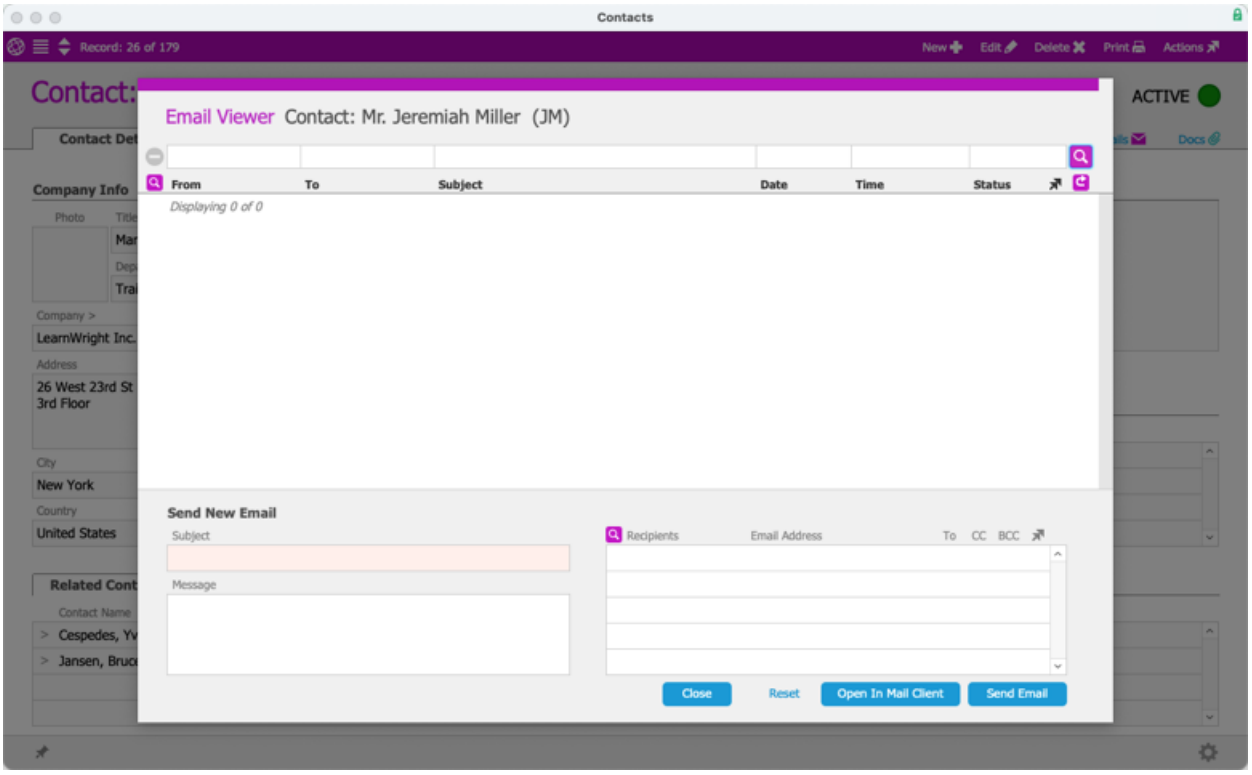
Additionally, refer to Testing the aACE Email Integration and aACE+ Mailgun Integration (https://aace6.knowledgeowl.com/help/testing-the-aace-email-and-mailgun-integrations) for a list of specific email actions.

Test Incoming Email

In an email client other than the aACE Email Composer, send a test email to your system email address. Your aACE system will create an email record when the Retrieve Incoming Emails automation schedule runs.

Test Outgoing Email via Email Viewer

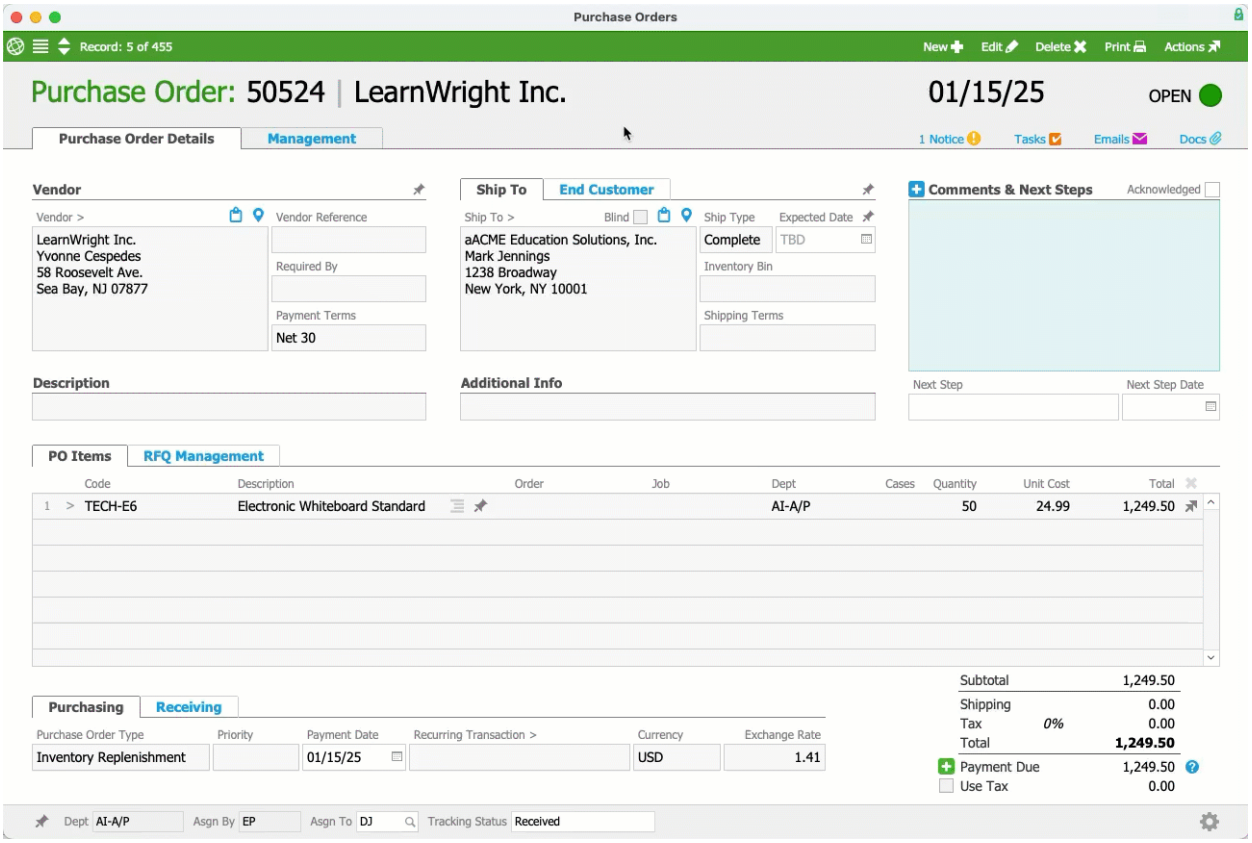
From any aACE module, select Emails to open the Email Viewer (https://aace6.knowledgeowl.com/help/understanding-aace-email-integration#EmailViewerSection). Enter text in the Subject and Message fields. In Recipients, add a recipient contact you know is present in aACE. Select Send Email. This creates an outgoing email record for the server to send. Your aACE system will create an email record when the Send Outgoing Emails automation schedule runs. Email processing may take a few minutes to complete and send your email.



Test Outgoing Email via Email Composer

To test outgoing email, you must open an aACE module with the Email print option (e.g. Orders, Purchase Orders). Select a specific record and select Print> Email Record.

For example, in a purchase order detail view, select Print > Email Purchase Order.



aACE then displays the Email Composer. Confirm the appropriate To, CC, and BCC email addresses are populated. For configuration options, refer to Working with Email Templates (https://aace6.knowledgeowl.com/help/working-with-email-template-preferences).

Select the PDF attachment(s) to review the document. Then, select Send. This creates an outgoing email record for the server to send. Email processing may take a few minutes to complete and send your email.

Before enabling email, a thorough battery of tests should be performed making sure not only the composer but also the email templates are working and appearing correctly in all their various flavors. See the article: Email Testing Checklist for First-Time Setup (https://aace6.knowledgeowl.com/help/email-testing-checklist-for-first-time-setup) for full instructions.

Step 7: Verifying Email Results

After testing incoming and outgoing emails, ensure your emails do not present an error message. Additionally, navigate to the Emails module from Main Menu > CRM & Sales > Emails. Confirm your test emails are displayed in the Emails module within five minutes of

sending. You may need to use the Quick Search (https://aace6.knowledgeowl.com/help/using-aaces-quick-search-features) features to display your recent emails.

If any of your test emails do not show up in Mailgun or aACE as expected, verify that the email addresses are correct. If a test email still does not show up as expected, contact your aACE Support Representative for assistance.

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Customization with Mailgun

The transactional aspect of Mailgun allows for some sophisticated use cases. While we summarize and simplify email functionality, an email sent to any address on your subdomain will download into aACE.

The complexity of Mailgun subdomains provide the foundation for a powerful customization. The local part of the email (i.e. text before the @ symbol) can be programmed to trigger an event in aACE. For example, neworder@mg.yourdomain.com () could generate a new order if programmed.

Although we do not recommend automatically sending emails (http://aace6.knowledgeowl.com/help/understanding-email-automation-in-aace), you can pursue a feature set that includes an emailing component using Mailgun.