

Testing Incoming and Outgoing Emails

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This guide provides instructions for testing your aACE Email and aACE+ Mailgun Integrations. It is intended for system administrators.

There are several kinds of email options throughout aACE. Some of these options use different aspects of the [aACE Email Composer](https://aace6.knowledgeowl.com/help/understanding-aace-email-integration) and are expected to perform certain ways.

After you have [installed and configured the aACE Email and the aACE+ Mailgun Integrations](https://aace6.knowledgeowl.com/help/setting-up-the-aace-email-integration), you must run testing to ensure your emails display, send, and receive as intended. These tests will also confirm various print options and parts of the aACE Email Composer function correctly.

Setting Your Test Email

Before testing your email integrations, ensure the Test Email is the correct email for testing. When you send test emails in aACE, this is the email that will receive them. You will need to set this email to confirm emails appear as intended in your email inbox.

You can set your test email by going from the aACE Main Menu > System Admin > Email Integration.

Print and Email Options Summaries

There are many print and email features and actions available to test. These are found in either the list view, detail view, or email composers within each module:

Feature or Action	Rich App Logic	Browser Version Logic
Send Records for List (List View)	Chooses email or single PDF output based on Send Docs Via field in the Companies module.	Same as Rich App.

Feature or Action	Rich App Logic	Browser Version Logic
Auto-Email Records for List (List View)	Sends separate emails with individual PDFs for each record. If sending fails, you'll be prompted to print or mail instead.	Same as Rich App.
Print to Mail Records for List or Print Records in List (List View)	Combines all record printouts into a single PDF for printing. Single-record lists open directly in FileMaker's print window.	Combines all record printouts into one PDF, imports into aACE, and opens the document record.
Email Record (Detail View)	Opens the aACE Email Composer with the relevant email template, if applicable, and record printout as an email attachment.	Same as Rich App.
Recipients: To, CC, and BCC (Email Composer)	Searches from internal contacts and addresses relevant to the current record, if for ADI-linked templates.	Same as Rich App.
Attachments (Email Composer)	Allows you to add files from your computer or existing aACE documents. View, download, or remove (unless uploaded to ADI).	Same as Rich App except there is no View option.
Open in Email Client (Email Composer)	Opens the draft in your default email app. HTML converts to plain text, so the formatting may change.	Opens the draft in your default email app without attachments.
Cancel (Email Composer)	Deletes the draft after confirmation.	Same as Rich App.
Send (Email Composer)	Creates a pending email record in aACE to be sent via automation schedule.	Same as Rich App.

Testing 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. 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


We recommend testing each of the email templates your organization chooses to use to ensure the content populates correctly. Email templates are located in the same place for both the Rich App and the Browser Version.

Detail View Print Actions

Email features in the Print options will open your Email Composer first. When reviewing these email features, ensure the template transfers to your Email Composer correctly and the attached documents appear as intended.

Module	Template Type	Navigation
Leads	Estimate or Quote	aACE Main Menu > CRM & Sales Leads > Lead Record > Print > Email as Options

Module	Template Type	Navigation
Leads	Estimate or Quote	aACE Main Menu > CRM & Sales Leads > Lead Record > Print > Email as Summary
Orders	Estimate or Quote	aACE Main Menu > Order Management > Orders > Pending Order > Print > Email Order
Orders	Order	aACE Main Menu > Order Management > Orders > Open Order > Print > Email Order
Orders	Sales Order Invoice	aACE Main Menu > Order Management > Orders > Open Sales Order > Print > Email Order
Invoices	Invoice	aACE Main Menu > Accts Receivable > Invoices > Open Invoice > Print > Email Invoice
Invoices	Customer Statement	aACE Main Menu > Accts Receivable > Invoices > Open Invoice > Print > Email Customer Statement
Receipts	Receipt Notification	aACE Main Menu > Accts Receivable > Receipts > Posted Receipt > Print > Email Receipt Notification
Shipping Log	Packing List	aACE Main Menu > Order Management > Shipping Log > Shipment Record > Print > Email Packing List
Purchase Orders	Purchase Order	aACE Main Menu > Accts Payable > Purchase Orders > Purchase Order Record > Print > Email Purchase Order

Module	Template Type	Navigation
Purchase Orders	Vendor Follow-Up	aACE Main Menu > Accts Payable > Purchase Orders > Purchase Order Record > Print > Email Vendor Follow-Up
Purchase Orders	Requests for Quotes	aACE Main Menu > Accts Payable > Purchase Orders > Purchase Order Record > RFQ Management > Actions icon () > Email RFQ
Purchases	Purchase Acknowledgment	aACE Main Menu > Accts Payable > Purchases > Purchase Record > Print > Email Purchase Acknowledgement
Disbursements	Remittance Advice	aACE Main Menu > Accts Payable > Disbursements > Posted Disbursement Record > Print > Email Remittance Advice
Commission Statements	Commission Statement	aACE Main Menu > Accounting > Comm Statements > Statement Record > Print > Email Commission Statement

List View Print Actions

Email features in the Print options will automatically send without opening your Email Composer for editing first. When reviewing these email features, ensure the template transfers to your Email Composer correctly and the attached documents appear as intended.

Module	Template Type	Navigation
Leads	Estimate or Quote	aACE Main Menu > CRM & Sales Leads > List of leads > Print > Send List as Options

Module	Template Type	Navigation
Leads	Estimate or Quote	aACE Main Menu > CRM & Sales Leads > List of leads > Print > Auto-Email List as Options
Leads	Estimate or Quote	aACE Main Menu > CRM & Sales Leads > List of leads > Print > Send List as Summary
Leads	Estimate or Quote	aACE Main Menu > CRM & Sales Leads > List of leads > Print > Auto-Email List as Summary
Orders	Estimate or Quote	aACE Main Menu > Order Management > Orders > List of pending orders > Print > Send Orders in List
Orders	Estimate or Quote	aACE Main Menu > Order Management > Orders > List of pending orders > Print > Auto-Email Orders in List
Orders	Order	aACE Main Menu > Order Management > Orders > List of open orders > Print > Send Orders in List
Orders	Order	aACE Main Menu > Order Management > Orders > List of open orders > Print > Auto-Email Orders in List
Orders	Sales Order Invoice	aACE Main Menu > Order Management > Orders > List of open orders > Print > Send Sales Order Invoices in List
Orders	Sales Order Invoice	aACE Main Menu > Order Management > Orders > List of open orders > Print > Auto-Email Sales Order Invoices in List

Module	Template Type	Navigation
Invoices	Invoice	aACE Main Menu > Accts Receivable > Invoices > Small list of invoices > Print > Send List
Invoices	Invoice	aACE Main Menu > Accts Receivable > Invoices > Small list of invoices > Print > Auto-Email List
Invoices	Customer Statement	aACE Main Menu > Accts Receivable > Invoices > Small list of invoices > Print > Send Customer Statements in List
Invoices	Customer Statement	aACE Main Menu > Accts Receivable > Invoices > Small list of invoices > Print > Auto-Email Customer Statements in List
Receipts	Receipt Notification	aACE > Accts Receivable > Receipts > Small list of receipts > Print > Send Receipt Notifications in List
Receipts	Receipt Notification	aACE > Accts Receivable > Receipts > Small list of receipts > Print > Auto-Email Receipt Notifications for List
Shipping Log	Packing List	aACE Main Menu > Order Management > Shipping Log > Small list of shipments > Print > Email Packing Lists for List
Purchase Orders	Purchase Order	aACE Main Menu > Accts Payable > Purchase Orders > Small list of purchase orders > Print > Send Purchase Orders in List
Purchase Orders	Purchase Order	aACE Main Menu > Accts Payable > Purchase Orders > Small list of purchase orders > Print > Auto-Email Purchase Orders in List

Module	Template Type	Navigation
Vendor Follow-Up	Vendor Follow-Up	aACE Main Menu > Accts Payable > Vendor Follow-Up > Small list of purchase order items > Auto-Email Vendor Follow-Ups for List
Purchases	Purchase Acknowledgement	aACE Main Menu > Accts Payable > Purchases > Small list of purchases > Print > Email Purchase Acknowledgements in List
Disbursements	Remittance Advice	aACE Main Menu > Accts Payable > Disbursements > Small list of disbursements > Print > Send Remittance Advice for List
Disbursements	Remittance Advice	aACE Main Menu > Accts Payable > Disbursements > Small list of disbursements > Print > Auto-Email Remittance Advice for List
Commission Statements	Commission Statement	aACE Main Menu > Accounting > Comm Statements > Small list of commission statements > Print > Email Commission Statements in List