

Understanding aACE Email Integration

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This guide explains how to work effectively when downloading, forwarding, or sending email. It is intended for general users.

For a quick overview of aACE email integration, [watch our video](https://www.youtube.com/watch?v=mEsd-P7bEsA&feature=youtu.be) (<https://www.youtube.com/watch?v=mEsd-P7bEsA&feature=youtu.be>) or [read our feature highlight](https://www.aacesoft.com/resources/keep-track-of-your-correspondence-with-aace-email-integration) (<https://www.aacesoft.com/resources/keep-track-of-your-correspondence-with-aace-email-integration>).

After your system administrator [configures the Mailgun integration](http://aace5.knowledgeowl.com/help/configuring-mailgun) (<http://aace5.knowledgeowl.com/help/configuring-mailgun>), you will have a unique aACE email address for your aACE system (i.e. aACE@mg.[yourdomain].com). Emails and attachments received at this address will be downloaded into aACE each time aACE checks the inbox. aACE checks for new email according to the timing your system administrator specifies on the related [automation schedule](http://aace5.knowledgeowl.com/help/configuring-automation-schedules) (<http://aace5.knowledgeowl.com/help/configuring-automation-schedules>).

Linking Emails to aACE Records

When aACE downloads an email, it will associate the email record with other aACE records:

- Email addresses in the To / From / CC fields or the body text are used to link the email record to team member, company, and contact records.
- aACE record tags (e.g. [ORD12345]) in the Subject field or the body text are used to link the email record to the tagged record.

Note: You can manually add a record tag. In aACE, find the Record ID by clicking the record's Information icon [] or by clicking Actions > View Log. Then type that ID inside square brackets (e.g. [ORD67890]) in the email.

Forwarding Emails

A common practice is to forward an email from your inbox to the aACE inbox, where it can be stored and linked to its corresponding aACE records. This makes the customer communications accessible to all relevant team members.

However, email communications often include multiple exchanges. Rather than forward each segment of the email chain as it happens, we recommend waiting for the conversation to conclude, then forwarding *only the last email* into aACE. This ensures the entire thread is stored in aACE as a single record in the Email module.

Sending Email from aACE

When you send an email with any of the methods listed below, aACE adds identifying content. This is a record tag for the current record. As noted above, including this tag in the email body text enables aACE to link the email record to the tagged record.

Launch an Email Client

The email icon (✉) can be found throughout aACE, typically adjacent to an email address. Clicking this icon opens a new email message in the default email software application installed on your workstation (e.g. Apple Mail, Microsoft Outlook, etc).

FileMaker shortcut keys can also be used from any record in the system. Press Cmd-I (Ctrl-I on PC) to generate an outgoing email in the default email software program. If there is a To: email address associated with the current record (e.g. a Bill To address in an order), that address will be included in the outgoing email.

aACE Email Viewer

From the header of any detail view, you can click the Emails link (✉) to display the Email Viewer. This screen helps you easily review email records associated with the currently displayed record.

You can also prepare outgoing email messages related to the current record. Enter a Subject and Message text. aACE will automatically append the record ID to the email message text. Click the recipient Search icon (🔍) to locate and select the desired recipient(s). After you prepare a message, you can open it in your default email client (e.g. to change formatting, include an attachment, etc) or send it directly from aACE.

When you click Send Email, the new email record appears in the email list with grayed out letters. This shows that the message is still in Pending status. When the [automation schedule](http://aace5.knowledgeowl.com/help/configuring-automation-schedules) (<http://aace5.knowledgeowl.com/help/configuring-automation-schedules>) runs and the server processes the message, the letters change to black.

aACE Print Menu

From the detail view of many aACE modules, you can quickly generate an outgoing email from the Print menu. For example, from the detail view of an invoice, you can click Print > Email Invoice or Email Customer Statement. These actions generate an outgoing email in the

default email software program installed on your workstation. If there is a To: email address associated with the current single record (e.g. a Bill To address in an order), it will be included in the outgoing email.

In addition, the list view of Orders, Invoices, and Purchase Orders include Print options for emailing a batch of records. Review these guides for more information:

- [Sending Customer Statements](http://aace5.knowledgeowl.com/help/sending-customer-statements) (<http://aace5.knowledgeowl.com/help/sending-customer-statements>)
 - [Sending Customer Invoices](http://aace5.knowledgeowl.com/help/sending-customer-invoices) (<http://aace5.knowledgeowl.com/help/sending-customer-invoices>)
 - [Understanding Email Automation in aACE](http://aace5.knowledgeowl.com/help/understanding-email-automation-in-aace) (<http://aace5.knowledgeowl.com/help/understanding-email-automation-in-aace>)
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