

Understanding Email Automation in aACE

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This guide explains details and best practices of email automation. It is intended for intermediate users.

aACE out-of-the-box does not include auto-emailing functionality. We have found that client expectations about this feature are highly varied and we cannot assume any "default" behavior – identifying which processes trigger emails to which customers is rarely as simple as toggling a preference. Instead, when our clients ask about this feature, we approach it very carefully and deliberately to ensure the result is exactly what they expect.

Cautions

There are several general and technical reasons for caution about auto-emailing:

- Even the best-trained users sometimes make mistakes. Especially during the first few months after go-live, users who are still learning the system may erroneously trigger events that generate an automated email (e.g. marking a shipment as shipped, opening an order too soon, etc). These emails cannot be unsent. When such mistakes are publicized by auto-emailing, it could impact your organization's reputation.
- aACE can funnel orders from multiple sources (e.g. customers in your store, orders placed over the phone, ecommerce orders, etc). Each order source may require different email interactions. For example, customers leaving the store may have a receipt in hand, so they won't need an order confirmation; similarly, your ecommerce solution may already send order confirmations, so a second confirmation auto-emailed from aACE could diminish the user experience.

Semi-Automated Email Processes

Our general recommendation is that emails be sent manually. Benefits of this method include clear tracking of who sent the message, quick awareness about problems in delivering a message, and easier communication from replying directly to the person who sent the message.

You can efficiently send emails using the Print and Actions menus. These features allow you to email all customers in the list view with just a few clicks, eliminating workflows that require printing-scanning-attaching files. You can send batch emails with PDF attachments for

orders, invoices, statements, purchase orders, and other documents:

- [Sending Customer Orders](https://aace5.knowledgeowl.com/help/sending-customer-orders) (https://aace5.knowledgeowl.com/help/sending-customer-orders)
- [Sending Customer Invoices](http://aace5.knowledgeowl.com/help/sending-customer-invoices) (http://aace5.knowledgeowl.com/help/sending-customer-invoices)
- [Sending Customer Statements](http://aace5.knowledgeowl.com/help/sending-customer-statements) (http://aace5.knowledgeowl.com/help/sending-customer-statements)

Additional Settings

System administrators can change settings to auto-generate invoices, purchase orders, shipments, and other records: Main Menu > System Admin > Preferences > Order Management.

Users with access to the My aACE tools can also personalize email messaging: Main Menu > System Admin > Preferences > My aACE. The fields here allow you to set your email signature (including merge fields). You can also specify which email addresses should be used when you send printouts of orders, statements, invoices, and purchase orders. You can enter multiple addresses, separated by commas.

Customizations

After you have considered the cautions and alternative methods, if you still see a valuable benefit from an auto-emailing customization, we recommend that you get approval from high-level stakeholders in your organization. The worst way for your CEO to find out about auto-emailing is from a complaint that your organization is "spamming" customers.

To move forward with an auto-emailing customization, please [consult your aACE partner](https://www.aacesoft.com/partners) (https://www.aacesoft.com/partners). Developing your custom feature is generally quick and affordable. To facilitate the development process, consider the details that account for all the conditions when auto-emailing would be used, including:

- Should relevant emails be sent only to customers with a balance or to customers with any invoice activity in a period?
- Should the email format be text only, HTML, or PDF attachments?
- Should it include order details or only a single line indicating order acknowledgement?
- Should it include shipping and tax (oftentimes estimates at certain points) or a note indicating that shipping and tax will be calculated for the final bill?
- Should emails be sent only to a specific recipient or be CC'ed to other team members?
- Should the same signature message be attached to all auto-emailing messages or a different signature for each type?

