Sending Customer Orders

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This guide explains how to send a customer order through various methods. It is intended for general users.

Order generation can be a manual process or a highly automated one, depending on your company policies and your aACE system preferences.

To manually work with orders, navigate from Main Menu > Order Management > Orders, then use the Quick Search (https://aace6.knowledgeowl.com/help/using-the-quick-search-bar) bar to locate the needed record(s).

Note: Some of the following features use email functionality, which requires that your system administrator enable and configure integration with Mailgun (https://aace6.knowledgeowl.com/help/setting-up-mailgun).

Order Detail View Options

Print > Print This View

Generates a printout of the current order. You can print the order or save it to PDF.

Print > Email Order

Saves the current order as a PDF and opens your mail client, creating a new email with the following information:

- **To**: Populated with the first available data, as follows:
    1. Order Contact email address — from the Bill To section's Contact field
    2. Customer Company general contact address — from the Company record Contact Info section
    3. If both these fields are blank, then you must manually enter an address.
- **BCC**: Your aACE system email address (if available). This ensures a copy of this initial message is stored in aACE. If your system is *not* configured with integrated email, the field is left blank.
- **Subject**: Sales Order #[Order ID]
- **Body**: Left empty except for a tag corresponding to the Order Record ID (e.g. "[ORD12345]"). When you have an email showing a final resolution to the matter, you can forward it to your aACE system email address and this tag will identify which record

to attach the email to.
- **Attachment**: A PDF of the order

Order List View Options

From the list view, aACE only addresses records *currently displayed* in the list. These options allow you to select and exclude orders, organizing the printout as needed.

Use the [Quick Search](https://aace6.knowledgeowl.com/help/using-the-quick-search-bar) (https://aace6.knowledgeowl.com/help/using-the-quick-search-bar) bar to organize a list of customers who need to receive a copy of their order(s).

### Print > Print Orders in List

Generates a batch printout for all orders currently displayed in the list. Note: The orders in the list must all have the same Record Type (e.g. Production, Sales, Service) because different types have different print layouts.

After generating the printout, you can use the Print screen navigation to review each order page, print the orders, or save them to PDF.

Print > Send Orders in List

Prepares a batch of orders for both email and regular mail delivery.

The setting that controls the delivery method for a given order is found on the Bill To company record. On the Customer Details tab, the Billing Setup section includes the Send Docs Via field, where you can specify either "Email" or "Mail". This setting also applies when sending invoices and statements.
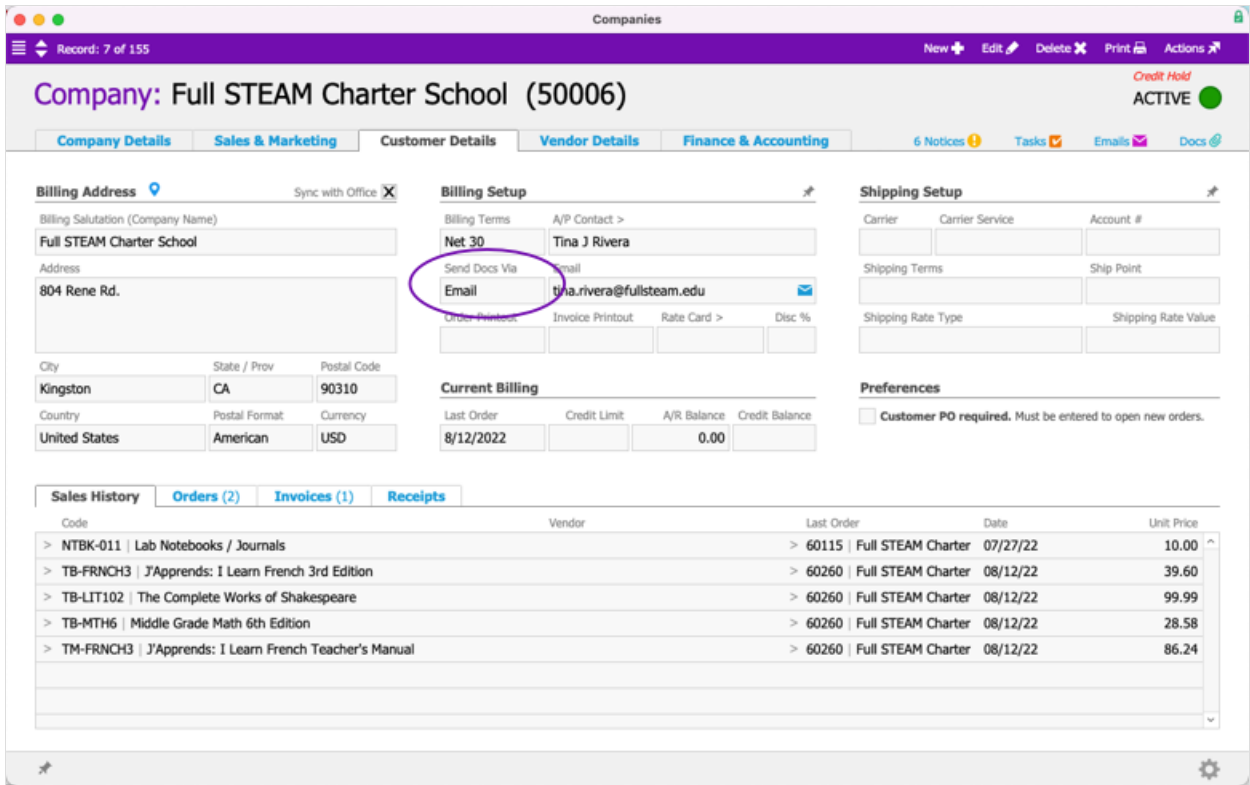
When you Send Orders in List, aACE filters your current found set for Open orders, then displays a dialog that explains the process of filtering and delivery:
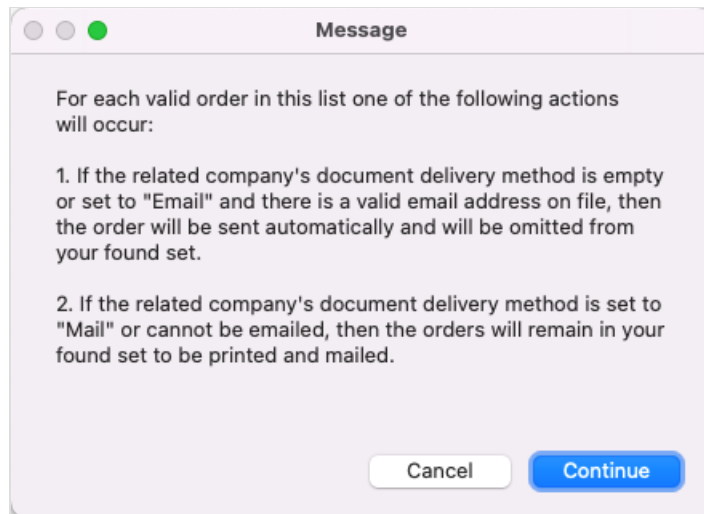
Each order for a customer configured to Email delivery is sent using the content from the email template (Main Menu > System Admin > Preferences > Database Management > Email Integration: Open Settings > Email Templates. These templates can be configured as part of setting up integration with Mailgun (https://aace5.knowledgeowl.com/help/setting-up-mailgun).) Template content can include:

- **To:** Populated with the first available data, as follows:
    1. A/P Contact email address — from the Bill To company record, Customer Details

       tab, Billing Setup section

    2. Order Contact email address — from the Bill To section's contact record

    3. If both these fields are blank, then the order is left in To Be Sent status for you to update or send manually.

- **From**: Populated with the current user's email address or the standard address on the template.
  Note: This address can be a general account (e.g. "customerservice@yourdomain.com"), so anybody in the A/R department can send statements and view any replies.
- **BCC**: Populated with your email address from your Team Member record or a standard from the template.
- **Subject**: "Order #[Order ID]"
- **Body**:

  Dear [A/P Contact name or Order Contact name],

  Order #[Order ID] is attached.

  Sincerely, [Your name]

- **Attachment**: A PDF of the order

After these emails are sent, records with Email delivery are omitted from your found set. Orders for customers that are configured to Mail delivery (if any) are left remaining. aACE then generates a printout for these remaining orders and updates the Tracking Status. Note: You can manually enter the Tracking Status most accurate for your company policies.

Print > Auto-Email Orders in List

Emails a batch of orders and updates the Tracking Status for each record.

When you trigger this process, aACE displays a dialog summarizing the emailing process. Then, each order is emailed with the content explained in "Send Orders in List" above. After the orders are sent, the Tracking Status for each is set to Sent via Email, then the record is removed from your current found set. Note: You can enter the Tracking Status most accurate for your company policies.

The resulting found set will show any remaining orders that do *not* have an email address specified. These must either be sent separately via regular mail or else be corrected for inclusion in another batch.

Print > Print to Mail Orders in List

Prints all Orders in the list to send to companies via mail.

When you trigger this process, aACE displays a dialog regarding valid orders. aACE then generates a batch printout for all orders displayed in the list, and updates the Tracking Status of those orders. Note: You can enter the Tracking Status most accurate for your company policies.

The batch printout includes all orders from the filtered set. You can work with the printout as described in "Print Orders in List" above.