Sending Customer Orders

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

aACE has several methods for printing and emailing orders. These methods can be manual or automated, depending on your organization policies and aACE system preferences.

To 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).

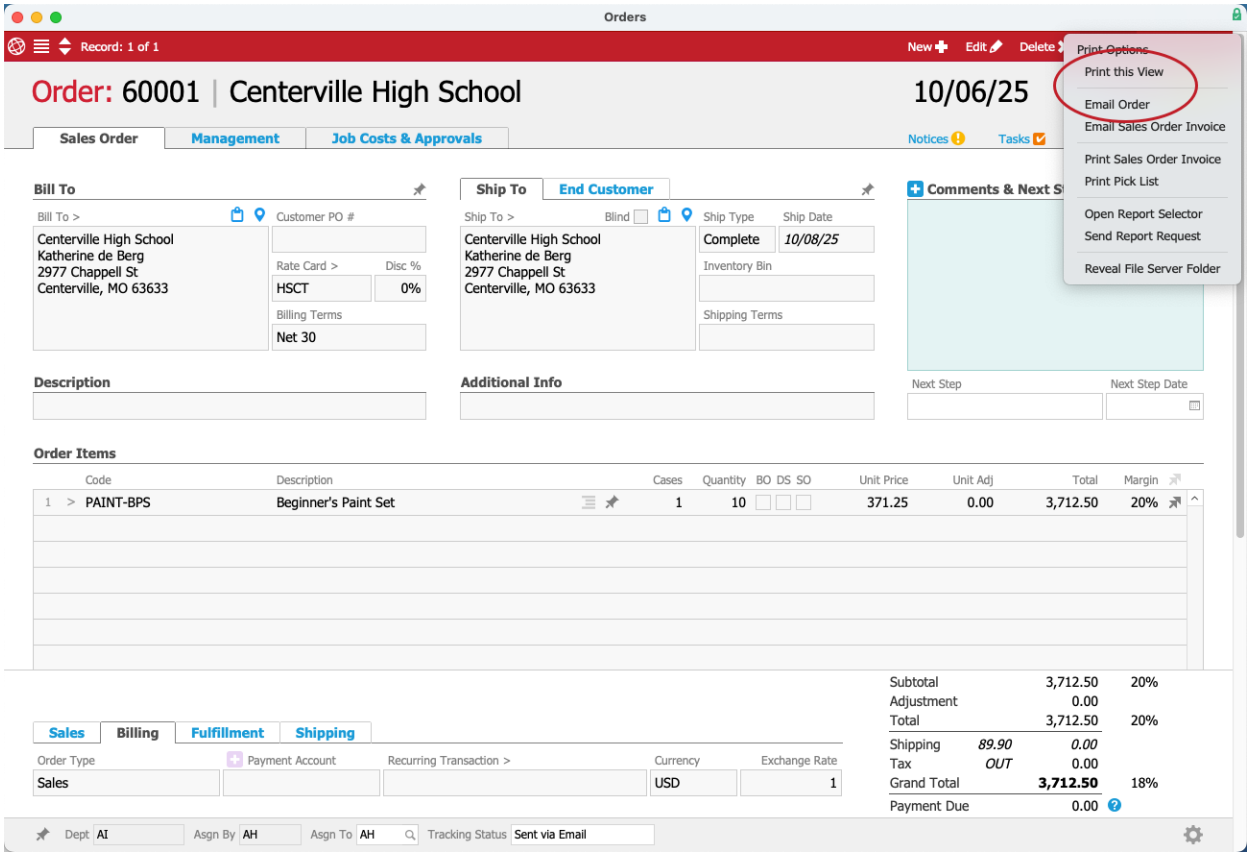
Note: Some of the following features use email functionality, which requires that your system administrator enable and configure our integration with Mailgun (https://aace6.knowledgeowl.com/help/setting-up-mailgun).

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Order Detail View Options

Options for an order detail view are different than options for the list view. The detail view has two print options for sending orders: Print This View and Email Order.



Print This View

Print This View generates a printout of the current order. You can print the order or save it as a PDF.

Email Order

Email Order saves the current order as a PDF and opens the aACE Email Composer, if you have the aACE Email Composer Upgrade (https://aace6.knowledgeowl.com/help/understanding-aace-email-integration), or your computer's default mail client (https://aace6.knowledgeowl.com/help/assigning-a-default-email-program-on-a-workstation). The Email Order action automatically creates a new email in either the aACE Email Composer or in your mail client.

The generated email will have information automatically entered, depending on the information in your aACE system. If your aACE system is using email templates, the default information may differ. For more information on email templates and default email information, refer to Working with Email Templates (https://aace6.knowledgeowl.com/help/working-with-email-template-preferences).

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Order List View Options

In the list view, aACE only includes records currently displayed in the list. The print options in the list view 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) bar to organize a list of customers who need to receive a copy of their order(s). The list view has four print options: Print Orders in List, Send Orders in List, Auto-Email Orders in List, and Print to Mail Orders in List.

Print Orders in List

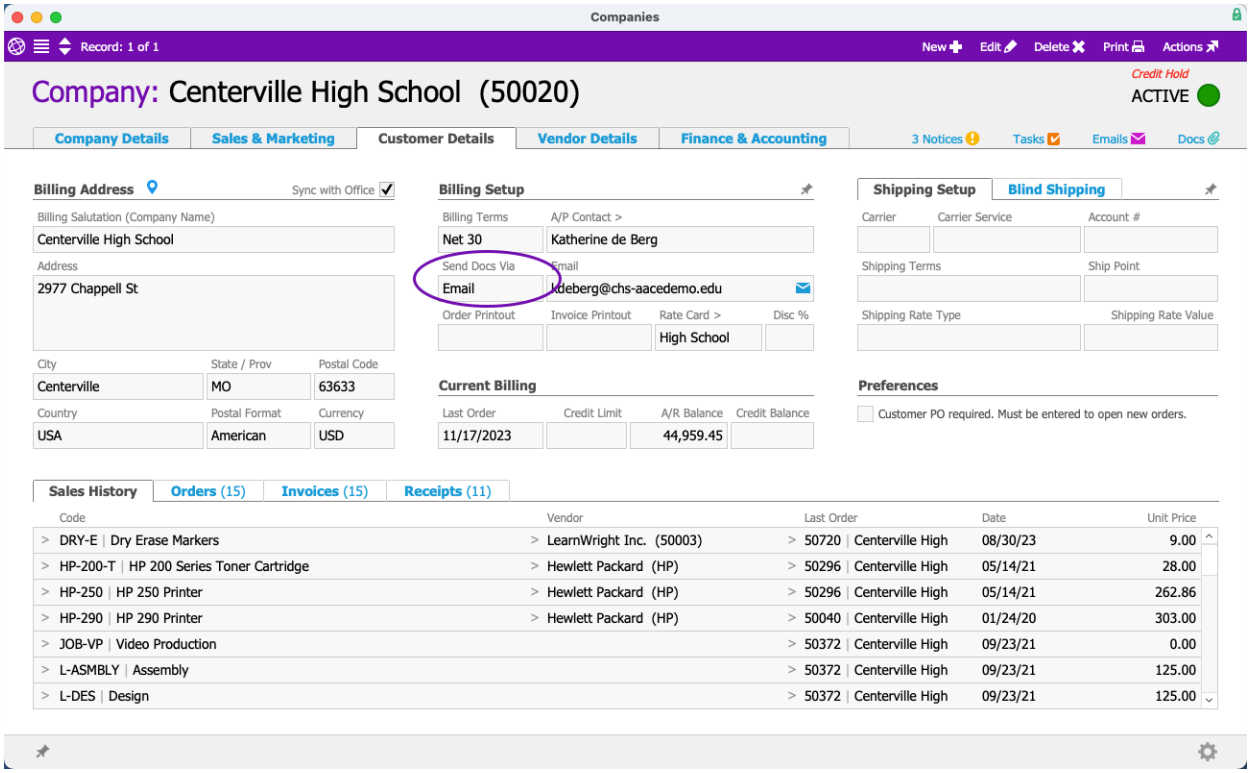
Print Orders in List generates a batch printout for all orders currently displayed in the list. The orders in the list must all have the same Record Type (e.g. Production, Sales, Service) because each order type has a different print layout.

After generating the printout, you can save it as a PDF.

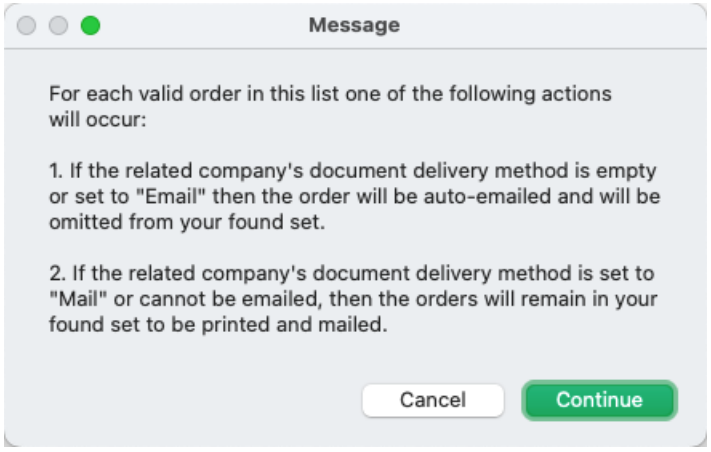
Send Orders in List

Send Orders in List prepares the list of orders for both email and regular mail delivery.

The preference that determines the delivery method for an order is found in the Bill To company record. At the company record, select the Customer Details tab and locate the Billing Setup section. This section includes the Send Docs Via field, where you can specify the value as either Email or Mail. This preference also applies when sending invoices (https://aace6.knowledgeowl.com/help/sending-customer-invoices) and statements (https://aace6.knowledgeowl.com/help/sending-customer-statements).



aACE also filters your current order list for open orders, then displays a dialog that explains the process of filtering and delivery.



aACE creates emails based on email templates for each customer configured for email delivery. After these emails are sent, records with email delivery are omitted from your order list. Orders for customers that are configured to mail delivery (if any) are left remaining. aACE then generates a printout for these remaining orders and automatically updates the order Tracking Status field to Sent via Mail.

Auto-Email Orders in List

Auto-Email Orders in List emails the list of orders and automatically updates the Tracking

Status for each record to Sent via Email. The process is the same as the Send Orders in List action.

However, any remaining orders in the list are orders that do not have a specified email address. These must either be sent separately through regular mail or have an email added for the next list of orders to email.

Print to Mail Orders in List

Print to Mail Orders in List creates a printout of all the orders in the list to send to companies through mail. The process is similar to Print Orders in List.