Understanding Automated Emails in aACE

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This guide explains details and best practices of automated emails. It is intended for advanced users.

Every organization has different automated email expectations and requirements based on their workflows. The aACE Email Integration (https://aace6.knowledgeowl.com/help/understanding-aace-email-integration) includes several automated email features that your organization can use out-of-the-box.

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Understanding Automated Email Cautions

There are several general and technical reasons for caution about automated emails. Users who are still learning the system might accidentally trigger events that generate an automated email (e.g. marking a shipment as shipped or opening an order too soon). These emails cannot be unsent.

Additionally, aACE can manage orders from multiple sources (e.g. customers in your store, orders placed over the phone, or ecommerce orders). Each order source might require different email interactions. For example, customers leaving the store might have a receipt in hand, so they won't need an order confirmation. Similarly, your ecommerce solution might already send order confirmations, so a second confirmation automatically emailed from aACE could diminish the user experience.

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Using Semi-Automated Emails

The general aACE recommendation is that emails are sent manually. Manual emails allow you to track who sent the message, identify issues in message delivery, and easily communicate with replies.

However, you can send semi-automated emails using the auto-email Print options. This features allow you to email all customers in the list view without opening the aACE Email Composer for every record. This can help eliminate workflows that require the printing, scanning, and attaching of files. You can send batch emails with PDF attachments for orders (https://aace6.knowledgeowl.com/help/sending-customer-orders#auto-email-orders-in-list), invoices (https://aace6.knowledgeowl.com/help/sending-customer-invoices#auto-email-list), customer statements (https://aace6.knowledgeowl.com/help/sending-customer-statements#auto-email-customer-statements-in-list), and other documents.

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Using Automated Email Options

aACE has an automatic email option for two accounting-related notifications: remittance advice and receipts. These options are turned off by default, but you can enable them for your workflows.

- Remittance advice — Sent through the nightly schedule when a disbursement is posted to notify a vendor the invoice payment is complete
  - For system administrator configuration, refer to Automating Remittance Advice (https://aace6.knowledgeowl.com/help/automating-remittance-advice).
  - For using remittance advice notifications, refer to Working with Remittance Advice (https://aace6.knowledgeowl.com/help/working-with-remittance-advice).
- Receipt notifications — Sent through the nightly schedule when a receipt is posted to notify your customer of payment confirmation
  - For system administrator configuration, refer to Automating Receipt Notifications (https://aace6.knowledgeowl.com/help/automating-receipt-notification).
  - For using receipt notifications, refer to Emailing Receipt Notifications (https://aace6.knowledgeowl.com/help/emailing-receipt-notifications).