# Understanding Email Automation in aACE

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

The [aACE Email Integration](https://aace6.knowledgeowl.com/help/understanding-aace-email-integration) (https://aace6.knowledgeowl.com/help/understanding-aace-email-integration) does not include complete email automation functionality. Every organization has different email automation expectations and requirements based on their workflows, so aACE does not have a default behavior. If email automation is a customization your organization is considering, there are a few things to keep in mind.

## Table of Contents

# Cautions

There are several general and technical reasons for caution about email automation. Users who are still learning the system may 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. When such mistakes are publicized, it could impact your organization's reputation.

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 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 automatically emailed from aACE could diminish the user experience.

[?Top](#)

# 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.

You can efficiently send manual emails using the Print and Actions menus. These features allow you to email all customers in the list view. 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), invoices (https://aace6.knowledgeowl.com/help/sending-customer-invoices), statements (https://aace6.knowledgeowl.com/help/sending-customer-statements), and other documents.

[?Top](#)

# Preconfigured Automation Options

Although there isn't complete email automation, aACE does have an automatic email option for two accounting-related notifications: remittance advice and receipts. These options are turned off by default, but the criteria for processing these two notifications is standard enough across customers.

Remittance advice is sent when you notify a vendor the invoice payment is complete. aACE offers preferences to automate your remittance advice processes. To understand this preference before activating the email option, refer to Automating Remittance Advice (https://aace6.knowledgeowl.com/help/automating-remittance-advice). Receipts can also be automated.

[?Top](#)

# Customizations

After you have considered the cautions of email automation and alternative methods, ensure you have approval from high-level stakeholders in your organization. To move forward with an email automation customization, please contact us at support@aacesoft.com ().

Developing your custom email automation feature is generally quick and affordable. To facilitate the development process, consider the details that account for all the conditions when email automation would be used, including:

- Sending emails only to customers with a balance or customers with any invoice activity during a specific period

- Email format, such as text only, HTML, or PDF attachments
- Sending emails with either order details or only a single line of order acknowledgement
- Sending emails with either shipping and tax or a note that shipping and tax will be calculated in the final bill
- Sending emails to a specific recipient or CC'ed to other team members
- Similar or different email signatures