

Working with Email Templates

Last Modified on 10/17/2024 9:33 am EDT

This guide tours email template preferences and customizations. It is intended for system administrators.

Email templates allow you to configure standardized boilerplate text for various emails that are sent from aACE. A few examples include invoices and customer statements, purchase orders to vendors, remittance advice, etc. This saves users time composing emails and also ensures a common message and style throughout the organization.

You can edit preferences for your organization's aACE email templates by navigating from Main Menu > System Admin > Email Integration > Email Templates.

Methods to Send Emails

There are two methods for sending emails within aACE: active and passive.

Actively sending emails means selecting the "Email Record" option from the Print options list. aACE will open your mail client and present the email text before you send the email. You can make changes as needed then manually send the email.

Passively sending emails refers to aACE's "Auto-Email Record" options from the Print options list. aACE automatically sends the email using the information specified in the corresponding email template. This option does not allow you to edit the email before sending it but allows sending batches of emails with standard text.

Email Templates Module

The following information explains the different sections located on the Email Templates detail view. The information is the same for every email template.

Record: 1 of 16 New Edit Delete Print Actions

Email Template: Remittance Advice

Email Template Details

Email Template Info Attach PDF

Template Type
Standard

Email Header

From: Populate to override current user's email address.
ap@aacessoft.com

Reply-To:

To: [End-User Message](#)
Disbursements|
Companies__PayeeCompanyRecID__CompanyRecID::
ARCompanyEmail

CC:

BCC: Bcc Self

Subject
Remittance Advice # <<DisbursementID>> from
<<OfficeName>>

Text Body [HTML Body](#) [Let Statement](#) [HTML Preview](#)

<<Salutation>>

Please be advised that a <<PaymentMethod>> for <<DisbursementAmount>> <<DeliveryNotes>>

Do not hesitate to reach out with any questions.

<<Signature>>

<<RecordTags>>

✦ Email Template Rec ID: EMAILTMPLT60000

Email Template Info

The Attach PDF flag determines whether aACE includes a PDF of the record in the email or not. Note: ADI-enabled email templates will include the PDF in the web browser for the recipient to view. You might disable the PDF attachment to encourage recipients towards automation such as paying their invoice online rather than mailing a check.

Email Header

The Email Header section is used to enter details relating to the email.

- **From:**—For active emails, the From is the account the email is sent from your mail client and this preference is ignored. For passive emails, the email is sent From this email address, e.g. customerservice@yourdomain.com . If this is left blank, the current user's email address is used.
- **Reply-To:**—The email address that a person's email reply will be sent to.
- **To:**—Establishes who aACE should send the email to.
Note: This field is written using logical statements. If you do not understand how to write and edit logical statements, please contact your aACE representative.
- **CC:**—Determines who aACE should copy on the email.
Note: This field is written using logical statements. If you do not understand how to write and edit logical statements, please contact your aACE representative.

- **BCC:**—Specifies who aACE should blind copy on the email. It can be useful to BCC yourself or another team member on automated emails to ensure they're being sent correctly. After a time, that can be removed.

Note: This field is written using logical statements. If you do not understand how to write and edit logical statements, please contact your aACE representative.

- **Subject**—The title of the email. You can use merge fields and normal text to write the subject.

aACE does not automatically copy the user when they send an email. Marking the Bcc Self flag means the user will receive a copy of the email they send in aACE for their own records. The Bcc Self flag is beneficial for testing the email template initially, but can also be used in other situations.

Additional Preferences Tabs

The additional preferences for an email template allow for the configuration of the email's body.

- **Text Body**—The Text Body tab is the main part of your email. You can utilize programmed merge fields and other text to compose your text body template.
Note: If you need a merge field that is unavailable, please contact your aACE representative.
 - **HTML Body**—aACE converts the email template's body text from the Text Body tab into HTML. You can view and edit it as needed in the HTML Body tab.
 - **HTML Preview**—This portal shows the preview of your HTML body text.
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