Working with Email Templates

Last Modified on 07/04/2025 1:06 am EDT

This guide explains email templates, preferences, and sending logic. It is intended for system administrators.

Email templates (https://aace6.knowledgeowl.com/help/working-with-email-template-preferences) are standardized boilerplate text you configure for various emails sent from aACE. This saves users time composing emails and also ensures a common voice and style throughout the organization.

When you email documents directly from an aACE module, the resulting email text is populated by the assigned email template. Different documents can be sent from aACE modules:

- Estimate or Quote
- Order
- Sales Order Invoice
- Invoice
- Customer Statement
- Receipt Notification
- Packing List
- Purchase Order
- Requests for Quotes (RFQs)
- Vendor Follow-Up
- Purchase Acknowledgment
- Remittance Advice
- Commission Statement

To create or edit email templates, contact your aACE Support Representative.

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Methods to Send Emails

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

You can actively send an email from a record detail view. For example, you can use the "Email Record" option from the Print options list on a record. aACE will present the email text before you send the email. You can make changes as needed then manually send the email by selecting Send or Open in Email Client.

Passively sending emails refers to the aACE+ Mailgun integration features. For example, there is the "Auto-Email Record" option from the Print options list in the detail view. 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.

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Email Templates Module

You can edit preferences for your organization's aACE email templates:

1. From the aACE Main Menu, go to **System Admin**.
2. Select **Email Integration**.
3. Select **Email Templates**.

Merge Fields

By using merge fields, you can edit your email templates to use information provided on other aACE records. Merge fields can be used in any part of your email template. For example, to automatically provide your team member's name in the email when they manually send an email, you can use the TeamMemberNameFirst merge field in the email body. aACE populates the user's first name based on their team member record.

aACE provides a list of available merge fields for each email template. If you need a merge field that is unavailable, please contact your aACE Support Representative.

There are different merge field conventions for body and subject than there are for email address fields. Body and subject merge fields have two types of tags: @MergeTag and @!RequiredMergeTag.

@MergeTag Tag

Using the @MergeTag indicates to aACE the value is not required. If the value is not found when aACE populates the email, the system will create the email draft with no value for the tag. The email will be sent normally. The email can also be sent automatically without the value being populated.

@!RequiredMergeTag Tag

Using the @!RequiredMergeTag indicates to aACE the value is required. If the value is not found when aACE populates the email, the system will display an error. The email will not be sent, and the user must make edits before sending the email. The email also cannot be sent automatically without the value being populated.

Email Address Fields

Merge fields used in email address fields (e.g. From, Reply-To, To, CC, and BCC) should use double chevrons surrounding the merge field. For example, if the TeamMemberEmail should be CC'ed on every email, then the merge field would be <<TeamMemberEmail>>. These merge fields cannot be distinguished as required or not required.

Email Header and Default Logic

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

aACE does not automatically copy the user when they send an email. Marking the Bcc Self preference means the user will receive a copy of the email they send in aACE for their own records. Users will receive a copy of the email regardless of if the email was sent passively or manually. The Bcc Self preference is beneficial for testing the email template initially but can also be used in other situations.

If the From and Reply-To fields are blank, the current user's email address is used. Similarly, automated emails sent by the server will use the system email address (https://aace6.knowledgeowl.com/help/setting-up-the-aace-email-integration) if these fields are blank. When email automation is enabled, we recommend populating these fields with the appropriate email addresses to prevent the system email address from being used.

Populating the From and Reply-To Fields

When you populate the From field, use the same domain as your Mailgun account to avoid spam filters and blocked lists. This domain can be found by signing in to aACE and selecting System Admin, then Email Integration. Select System Email Address. This email address will be something generic. The most important part of the email address is the information after the at sign (@). You do not need to create any new email addresses. For example, you can enter AP@customer.aACEsoft.email () for your remittance advice template without creating the email address.

If you populate the From field with a custom email from Mailgun, you must also populate the Reply-To field with a registered email address. If the Mailgun account domain is used for the Reply-To field, any replies to that email will go back to an unmonitored inbox.

The To, CC, and BCC fields are active values and are added to the underlying default logic if populated. For example, if a user adds an email address to the CC field while drafting an email, this email address will be added to the email alongside the email template's defined CC email addresses if applicable. Additionally, the To, CC, and BCC fields allow many values. The aACE system adds both email template and default values to the email.

The From and Reply-To fields only allow a single value for each field. Values entered at the email template are prioritized over default values. If a change to a email template's default logic is required for these settings, contact your aACE Support Representative.

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aACE Data Sources for To and CC Fields

It is important to understand what aACE email fields the email templates are using to populate outgoing emails. This will help you ensure there is appropriate, relevant, and correct data available in your aACE records to generate emails.

Commission Statement

The To field for commission statements uses the email addresses for the related team member or company. You can locate the team member email:

1. From the aACE Main Menu, select **Internal**, then **Team Members**.
2. Select your desired team member record.
3. Select the **Member Details** tab.

Additionally, you can locate the company email:

1. From the aACE Main Menu, select **CRM & Sales**.
2. Select **Companies**, then the desired company record.
3. Select the **Company Details** tab.

Invoice

The To field for invoices uses the email addresses for the bill-to company AP or bill-to contact. You can locate the bill-to company AP email:

1. From the aACE Main Menu, select **CRM & Sales**.
2. Select **Companies**, then the desired company record.
3. Select the **Customer Details** tab.

The CC field also uses the bill-to contact email address, if it is not already included as a recipient. You can locate the bill-to contact email:

1. From the aACE Main Menu, select **CRM & Sales**.
2. Select **Contacts**, then the desired contact record.
3. Select the **Contact Details** tab.

Estimate or Quote

The To field for estimates or quotes uses the email addresses for the bill-to company or bill-to contact. You can locate the bill-to company email:

1. From the aACE Main Menu, select **CRM & Sales**.
2. Select **Companies**, then the desired company record.
3. Select the **Company Details** tab.

Additionally, you can locate the bill-to contact email:

1. From the aACE Main Menu, select **CRM & Sales**.
2. Select **Contacts**, then the desired contact record.
3. Select the **Contact Details** tab.

Order

The To field for invoices uses the email address for the bill-to contact. You can locate the bill-to contact email:

1. From the aACE Main Menu, select **CRM & Sales**.
2. Select **Contacts**, then the desired contact record.
3. Select the **Contact Details** tab.

The CC field also uses the bill-to company AP email address, if it is not already included as a recipient. You can locate the bill-to company AP email:

1. From the aACE Main Menu, select **CRM & Sales**.
2. Select **Companies**, then the desired company record.
3. Select the **Customer Details** tab.

Sales Order Invoice

The To field for sales order invoices uses the email address for the bill-to contact. You can locate the bill-to contact email:

1. From the aACE Main Menu, select **CRM & Sales**.
2. Select **Contacts**, then the desired contact record.
3. Select the **Contact Details** tab.

The CC field also uses the bill-to company AP email address, if it is not already included as a recipient. You can locate the bill-to company AP email:

1. From the aACE Main Menu, select **CRM & Sales**.
2. Select **Companies**, then the desired company record.
3. Select the **Customer Details** tab.

Receipt Notification

The To field for receipt notifications uses the email address for the bill-to company AP. You can locate the bill-to company AP email:

1. From the aACE Main Menu, select **CRM & Sales**.
2. Select **Companies**, then the desired company record.
3. Select the **Customer Details** tab.

Customer Statement

The To field for customer statements uses the email addresses for the bill-to company AP or bill-to contact. You can locate the bill-to company AP email:

1. From the aACE Main Menu, select **CRM & Sales**.
2. Select **Companies**, then the desired company record.
3. Select the **Customer Details** tab.

Additionally, you can locate the bill-to contact email:

1. From the aACE Main Menu, select **CRM & Sales**.
2. Select **Contacts**, then the desired contact record.
3. Select the **Contact Details** tab.

Packing List

The To field for packing lists uses the email addresses for the ship-to company or ship-to contact. You can locate the ship-to company email:

1. From the aACE Main Menu, select **CRM & Sales**.
2. Select **Companies**, then the desired company record.
3. Select the **Company Details** tab.

Additionally, you can locate the ship-to contact email:

1. From the aACE Main Menu, select **CRM & Sales**.
2. Select **Contacts**, then the desired contact record.
3. Select the **Contact Details** tab.

Request for Quote

The To field for requests for quotes uses the email addresses for the vendor company or vendor contact. You can locate the vendor company email:

1. From the aACE Main Menu, select **CRM & Sales**.
2. Select **Companies**, then the desired company record.
3. Select the **Company Details** tab.

Additionally, you can locate the vendor contact email:

1. From the aACE Main Menu, select **CRM & Sales**.
2. Select **Contacts**, then the desired contact record.
3. Select the **Contact Details** tab.

Purchase Acknowledgement

The To field for purchase acknowledgements uses the email address for the vendor contact. You can locate the vendor contact email:

1. From the aACE Main Menu, select **CRM & Sales**.
2. Select **Contacts**, then the desired contact record.
3. Select the **Contact Details** tab.

The CC field also uses the vendor company AR email address, if it is not already included as a recipient. You can locate the vendor company AR email:

1. From the aACE Main Menu, select **CRM & Sales**.
2. Select **Companies**, then the desired company record.
3. Select the **Vendor Details** tab.

Remittance Advice

The To field for remittance advice uses the email address for the payee company AR. You can locate the payee company AR email:

1. From the aACE Main Menu, select **CRM & Sales**.
2. Select **Companies**, then the desired company record.
3. Select the **Vendor Details** tab.

Vendor Follow-Up

The To field for vendor follow-up uses the email address for the purchase order's vendor contact. You can locate the purchase order's vendor contact email:

1. From the aACE Main Menu, select **CRM & Sales**.
2. Select **Contacts**, then the desired contact record.
3. Select the **Contact Details** tab.

Purchase Order

The To field for purchase orders uses the email address for the vendor contact or vendor company AR. You can locate the vendor company AR email:

1. From the aACE Main Menu, select **CRM & Sales**.
2. Select **Companies**, then the desired company record.
3. Select the **Vendor Details** tab.

Additionally, you can locate the vendor contact email:

1. From the aACE Main Menu, select **CRM & Sales**.
2. Select **Contacts**, then the desired contact record.
3. Select the **Contact Details** tab.

Purchase Order Acknowledgement Confirmation (ADI)

This email is sent by the aACE Data Interchange (https://aace6.knowledgeowl.com/help/aace-data-interchange-overview) engine after a purchase order has been acknowledged.

- To field—Email address that acknowledged the purchase order
- CC field—Original recipient, the email address that initiated the request, and other CC'ed email addresses
- ReplyTo field—Email address that originally sent the purchase order