# Working with Email Templates

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> 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. This saves users time composing emails and also ensures a common message and style throughout the organization.

There are many aACE modules that allow for records to be emailed directly from the Print menu. The resulting email text is populated by the assigned Email Template. For information on assigning and editing Email Templates to these Print functions, see the *Configure Email Templates* section of the article Setting Up Email Integration (https://aace6.knowledgeowl.com/help/setting-up-email-integration).

These **Print>Email 'record(s)'** processes include:

- Estimate or Quote
- Order
- Sales Order Invoice
- Invoice
- Customer Statement
- Receipt Notification
- Packing List
- Purchase Order
- RFQ
- Vendor Follow-Up
- Purchase Acknowledgment
- Remittance Advice
- Commission Statement

The current build of this module does not allow users to create a new template nor edit the template type. Only editing existing templates is currently allowed.
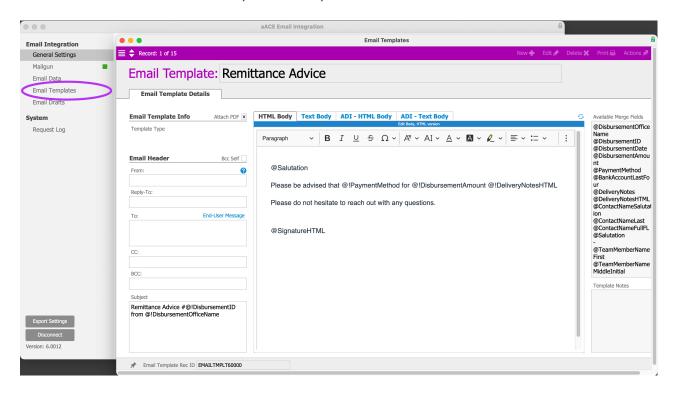
## Methods to Send Emails

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

You can edit preferences for your organization's aACE email templates by navigating from Main Menu > System Admin > Email Integration > Email Templates. The following information explains the different sections located on the Email Templates detail view. The information is the same for every email template.



## Email Template Info

The Attach PDF flag determines whether aACE incudes 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 Body Tabs

The body tabs 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.
- **ADI - HTML Body**—This portal shows the preview of your HTML body text as viewed in the ADI website.
- **ADI - Text Body**—This portal shows the preview of your HTML body text as viewed in the ADI website
- As you navigate from tab to tab, if the new tab does not immediately populate, click the **Refresh** button in the upper right of the tab window.

## Available Merge Fields

The available merge fields appear based on the Email Template Type that is assigned to the template. This list is provided for reference in building out the template.

## Template Notes

Free text field to add notes to the template for future users to understand more complicated elements as needed.

## Email Header

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

**BCC Self Flag:**—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.

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

write the subject.

Populating the **From:** and **Reply-To:** fields will override the default logic in following ways:

**From:**—If this is left blank, the current user's email address is used. Populating this field will override the default logic:

- In systems without the aACE Email Composer Upgrade: for active emails, the **From:** field is the account the email is sent from your mail client and this override preference is ignored.
- In systems with the aACE Email Composer Upgrade: for active emails, the **From:** field overrides the default logic of sending from the current user's email address.
- For passive emails, (in systems both with and without the aACE Email Composer Upgrade), if the **From:** field is blank the current user's email address is used.  Populating this field will override the default setting and the email will be shown sent from the populated email address.
- For emails sent via a schedule, or via automation "from the server" (in systems both with and without the aACE Email Composer Upgrade), if the **From:** field is blank the system email address is used. Populating the From: field in the template will override the default setting and the email will be shown sent from the populated email address. **It is recommended to override the default setting by populating this field with an appropriate address when automations are enabled.**
  - In order to avoid tripping up spam filters and blocked lists, it is best practice to have the **From:** be the same domain as your Mailgun account. The system email address connected to your Mailgun domain can be found in the Email Integration Module> System Email Address. This address will normally be something more generic like [admin@customer.aACEsoft.email](). In fact, you can use anything in front of the @ symbol when populating the **From:** override in the template. What is important is that everything AFTER the @ symbol matches. No new email accounts are required to be created. Mailgun sees the domain, but is not concerned with the non-domain elements of the address. So, you may enter [AP@customer.aACEsoft.email]() for your remittance advice template and [AR@customer.aACEsoft.email]() for your receipt notification template, etc. without actually creating these email addresses anywhere.

**Reply-To:**—If this is left blank, the current user's email address is used. Populating this field will override the default logic for setting the email address that a person's email reply will be sent to.

- Importantly, If you specify a custom email **From:**, it has to match the Mailgun domain. BUT, you must then populate the **Reply-To:** override with a "real" email address- ie. AP@aACEsoft.com ⓘ, AR@aACEsoft.com ⓘ, etc. If the Mailgun account domain is used for the **Reply-To:**, those replies will go back to the database where no one would be monitoring an inbox.

The **To:**, **CC:**, and **BCC: override fields are inactive and will not affect the underlying default logic if populated.** These settings are written using logical statements. If a change to a template's default logic is required for these settings, contact your aACE representative.

**To:**—Establishes who aACE should send the email to.

**CC:**—Determines who aACE should copy on the email.

**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.

## FAQ: A Map of **To:** and **CC:** Data Sources by Template
QUESTION:

Could you possibly direct me to a Map of where the templated emails pull addresses from so that I can work on our rolodex data to specify the appropriate contact email addresses are populated?

ANSWER:
It is important to know what fields in aACE specific templates are using to populate outgoing emails. A map of those fields follows. Knowing which fields aACE is looking for will inform you on making sure there is appropriate, relevant, and correct data available in your contact, company, vendor, and customer records to generate the email.

**Commission Statement**
**To:** - Either the related team members's email address, or the related company's email address.
*Location: Team Member> Member Details tab> Contact Info section: Email*
*Location: Company> Company Details tab> Contact Info section: Email*

### Invoice

**To:** - Either the bill-to company's AP email address, or the bill-to contact's email address.

*Location: Company> Customer Details tab> Billing Setup section: Email*

*Location: Contact module> Contact Details tab> Contact Info section> Email*

**CC:** - The bill-to contact's email if they aren't already the recipient.

*Location: Contact module> Contact Details tab> Contact Info section> Email*

### Estimate or Quote

**To:** - Either the bill-to contact's email, or the bill-to company's email address.

*Location: Contact module> Contact Details tab> Contact Info section> Email*

*Location: Company> Customer Details tab> Billing Setup section: Email*

### Order

**To:** - The bill-to contact's email address.

*Location: Contact module> Contact Details tab> Contact Info section> Email*

**CC:** - The bill-to company's AP email address if it's not already the recipient.

*Location: Company> Customer Details tab> Billing Setup section: Email*

### Sales Order Invoice

**To:** - The bill-to contact's email address.

*Location: Contact module> Contact Details tab> Contact Info section> Email*

**CC:** - The bill-to company's AP email address if it's not already the recipient.

*Location: Company> Customer Details tab> Billing Setup section: Email*

### Receipt Notification

**To:** - The payer company's AP email address.

*Location: Company> Customer Details tab> Billing Setup section: Email*

### Customer Statement

**To:** - Either the bill-to company's AP email address, or the bill-to contact's email address.

*Location: Company> Customer Details tab> Billing Setup section: Email*

*Location: Contact module> Contact Details tab> Contact Info section> Email*

### Packing List

**To:** - Either the ship-to contact's email address, or the ship-to company's email address.

*Location: Contact module> Contact Details tab> Contact Info section> Email*

*Location: Company module> Company Details tab> Contact Info section> Email*

### Request For Quote

**To:** -  Either the vendor contact's email, or the vendor company's email address.

*Location: Contact module> Contact Details tab> Contact Info section> Email*

*Location: Company module> Company Details tab> Contact Info section> Email*

### Purchase Acknowledgment

**To:** -  The vendor contact's email address.

*Location: Contact module> Contact Details tab> Contact Info section> Email*

**CC:** - The vendor company's AR email address if they aren't already the recipient.

*Location: Company>Vendor Details tab>Purchasing Setup sction: Email*

### Remittance Advice

**To:** - The payee company's AR email address.

*Location: Company>Vendor Details tab>Purchasing Setup section: Email*

### Vendor Follow-Up

**To:** -  The purchase order's vendor contact's email address.

*Location: Contact module> Contact Details tab> Contact Info section> Email*

### Purchase Order

**To:** - Either the vendor company's AR email address, or the vendor contact's email address.

*Location: Company>Vendor Details tab>Purchasing Setup section: Email*

*Location: Contact module> Contact Details tab> Contact Info section> Email*

### Purchase Order Acknowledgment Confirmation — ADI

**Note that this email is not sent by users, but by the *aACE Data Interchange* engine after a PO has been acknowledged.

**To:** -  The person/address who acknowledged the PO.

**CC:** - The original recipient address, the person/address who initiated the request, and any other CC'ed addresses that were included.

**ReplyTo:** - The person/address who originally sent the PO.