Understanding Data Sources for Email Templates

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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. You can access email templates by navigating from aACE Main Menu > System Admin > Email Integration > Email Templates.

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.

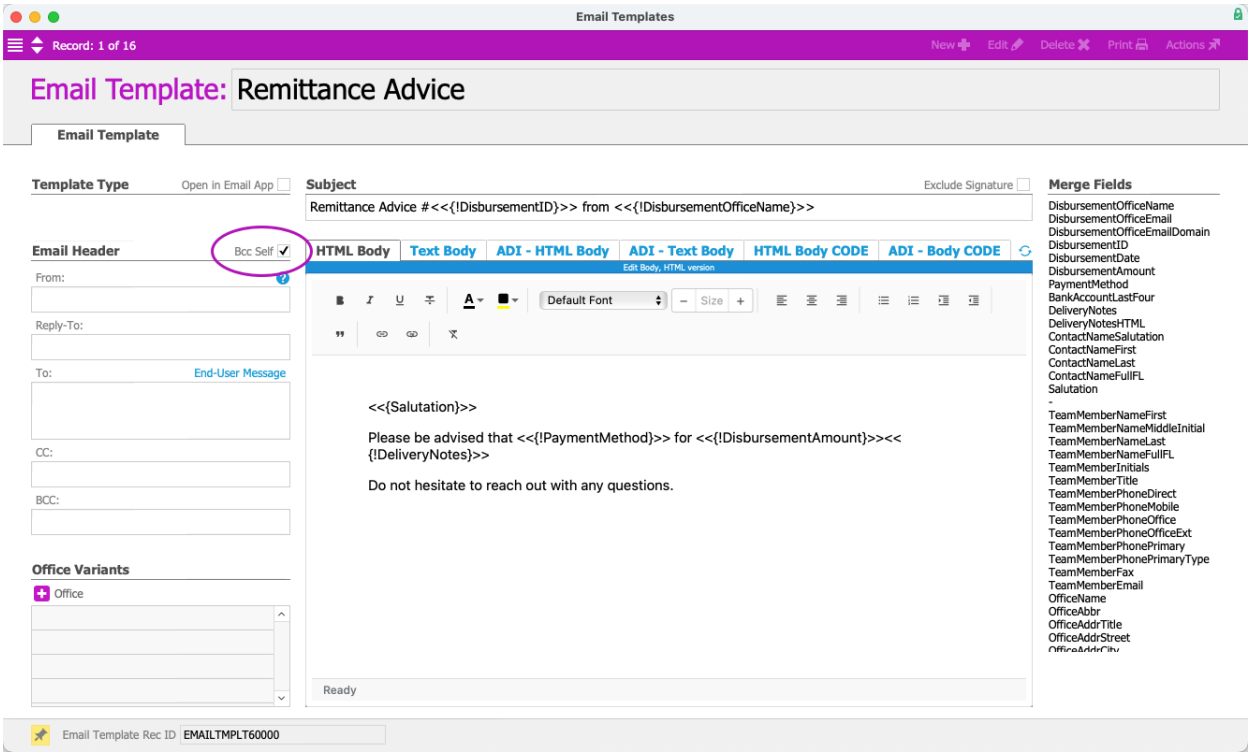
Passively sending emails refers to the aACE+ Mailgun integration features. For example, there is the "Auto-Email Record" option from the Print options list in the detail view. aACE automatically sends the email using the information specified in the corresponding email template. This option does not allow you to edit the email before sending it but allows sending batches of emails with standard text.

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Email Header 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.



From and Reply-To Fields Logic

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 by using a semicolon, comma, or paragraph to separate them. The aACE system adds both email template and default values to the email.

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.

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 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 contact email address, if it is not already included as a recipient. You can locate the bill-to company A/P email:

1. From the aACE Main Menu, select **CRM & Sales**.
2. Select **Companies**, then the desired company record.
3. Select the **Customer 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 orders 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 A/P email address, if it is not already included as a recipient. You can locate the bill-to company A/P 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.

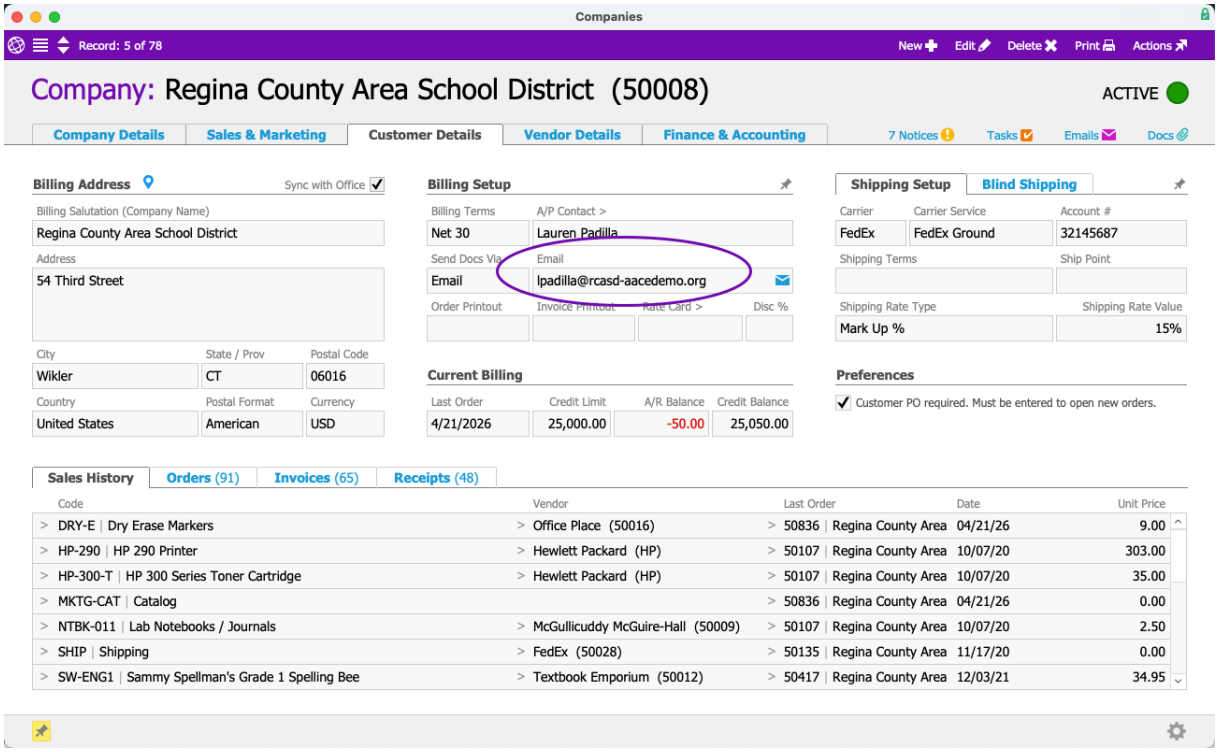
The CC field also uses the bill-to company A/P email address, if it is not already included as a recipient. You can locate the bill-to company A/P email:

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

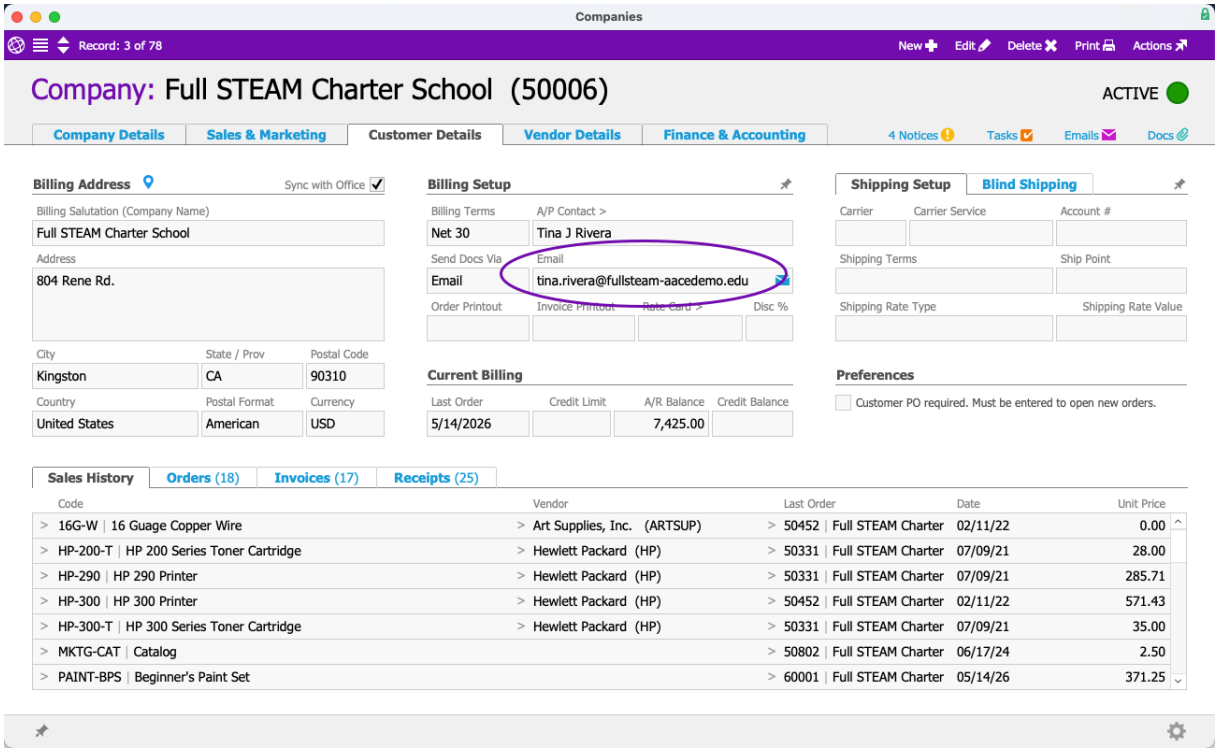
The To field for receipt notifications uses the email address for the bill-to company A/P. You can locate the bill-to company A/P email:

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

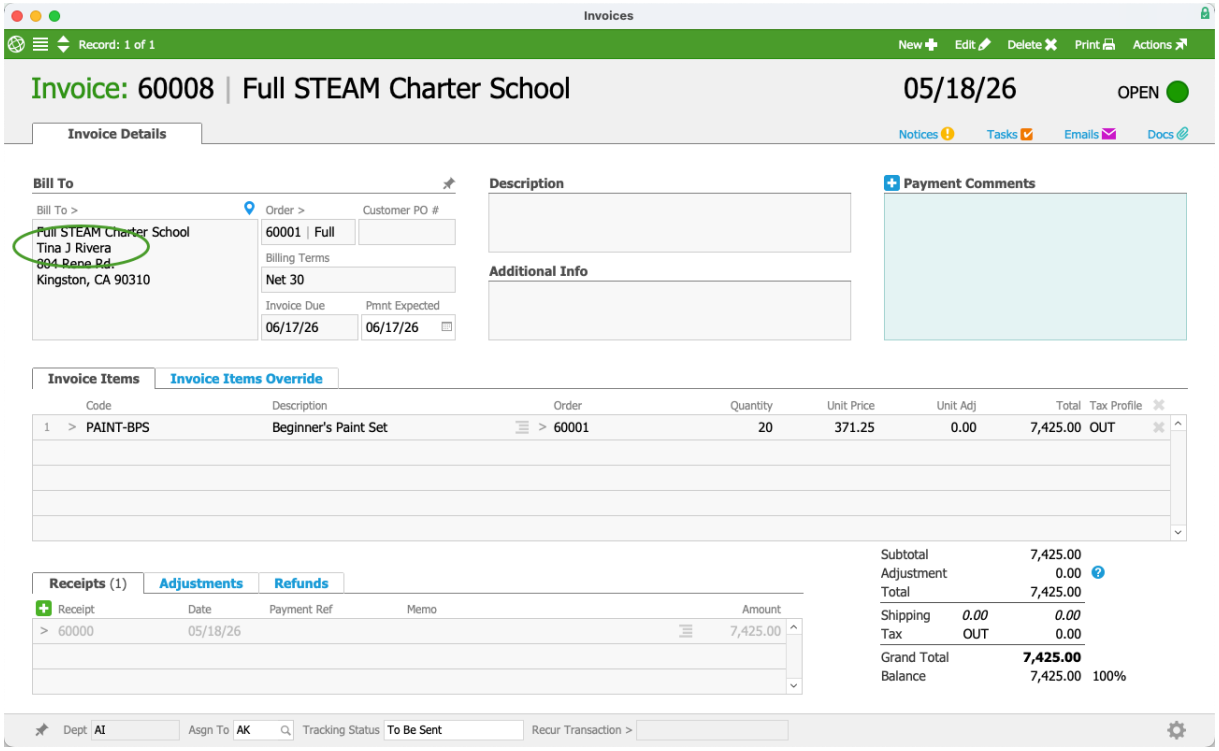


If there is no A/P email, aACE looks to specific sets of records. If there is no information found, it moves to the next set of records in the following order:

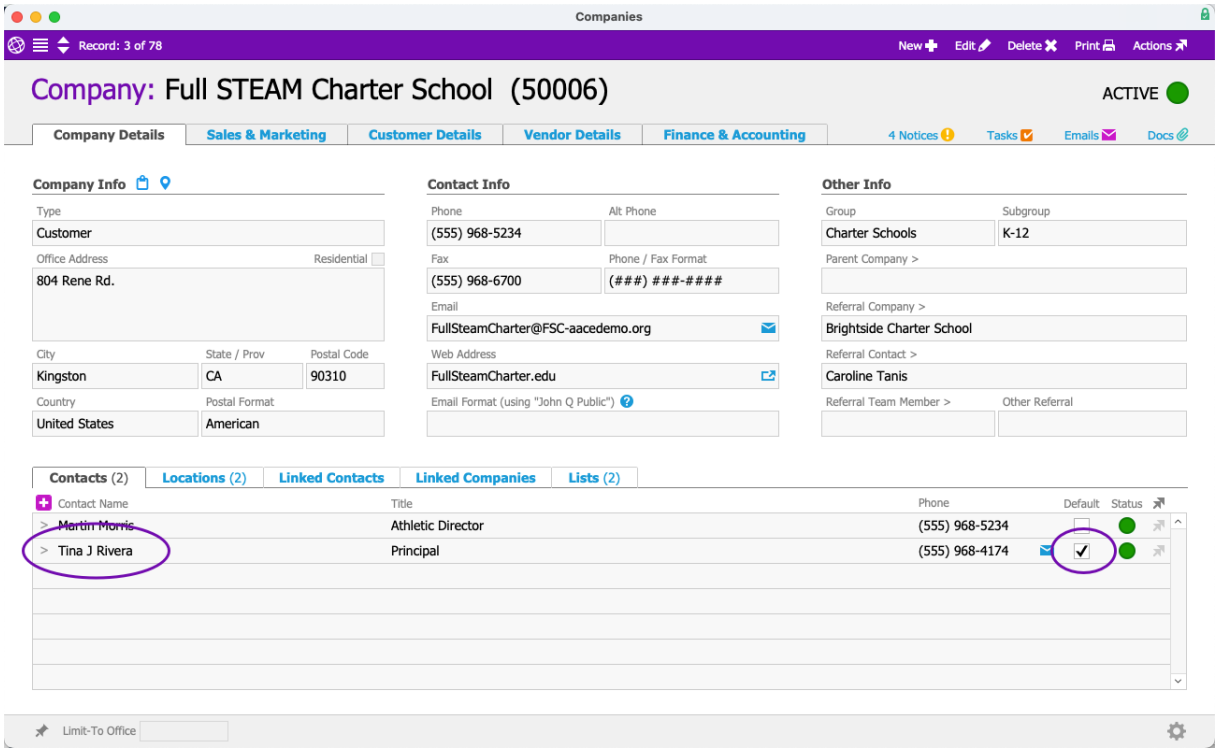
1. aACE looks to the invoices added to the Invoices section in the receipt. From the invoices, it looks to the invoice Customer record > A/P email.



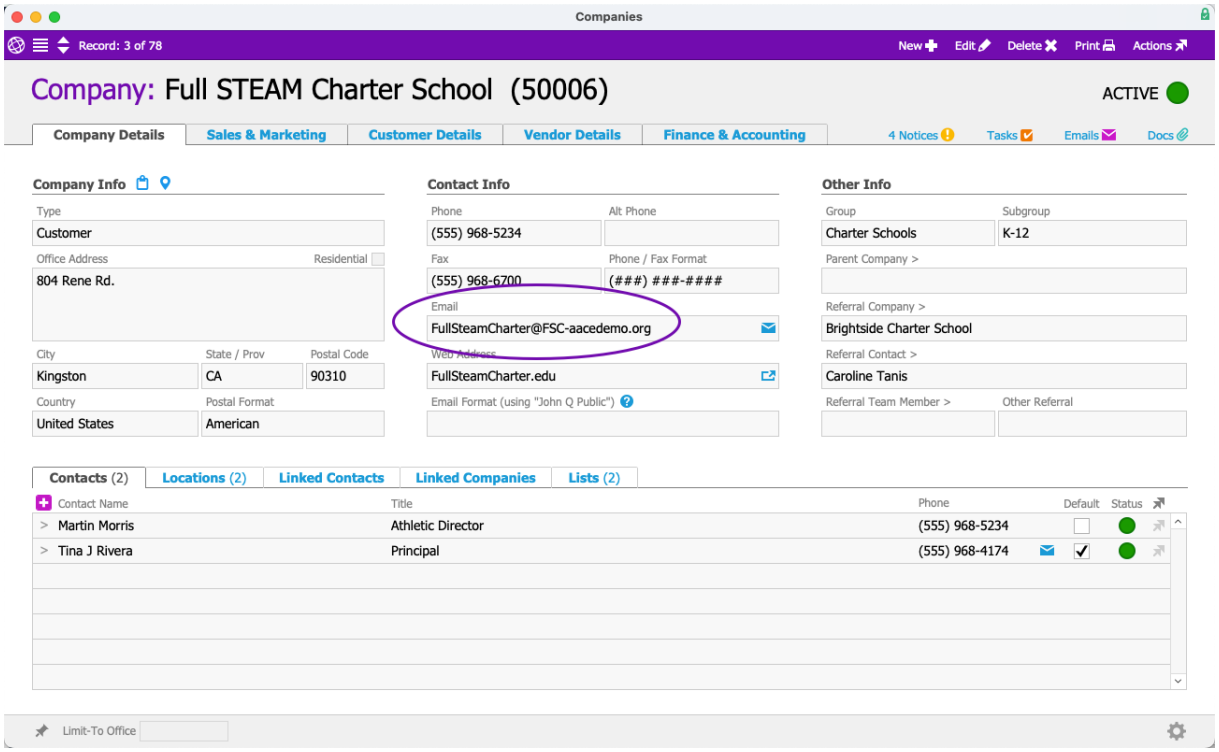
2. aACE looks to the invoices added to the Invoices section in the receipt. From the invoices, it looks to the invoice customer Contact record > contact email.



3. aACE looks to the invoices added to the Invoices section in the receipt. From the invoice, it looks to the invoice Customer record > Default contact > contact email.



4. aACE looks to the invoices added to the Invoices section in the receipt. From the invoices, it looks to the invoice Customer record > company email.



Customer Statement

The To field for customer statements 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 contact email address, if it is not already included as a recipient. You can locate the bill-to company A/P email:

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

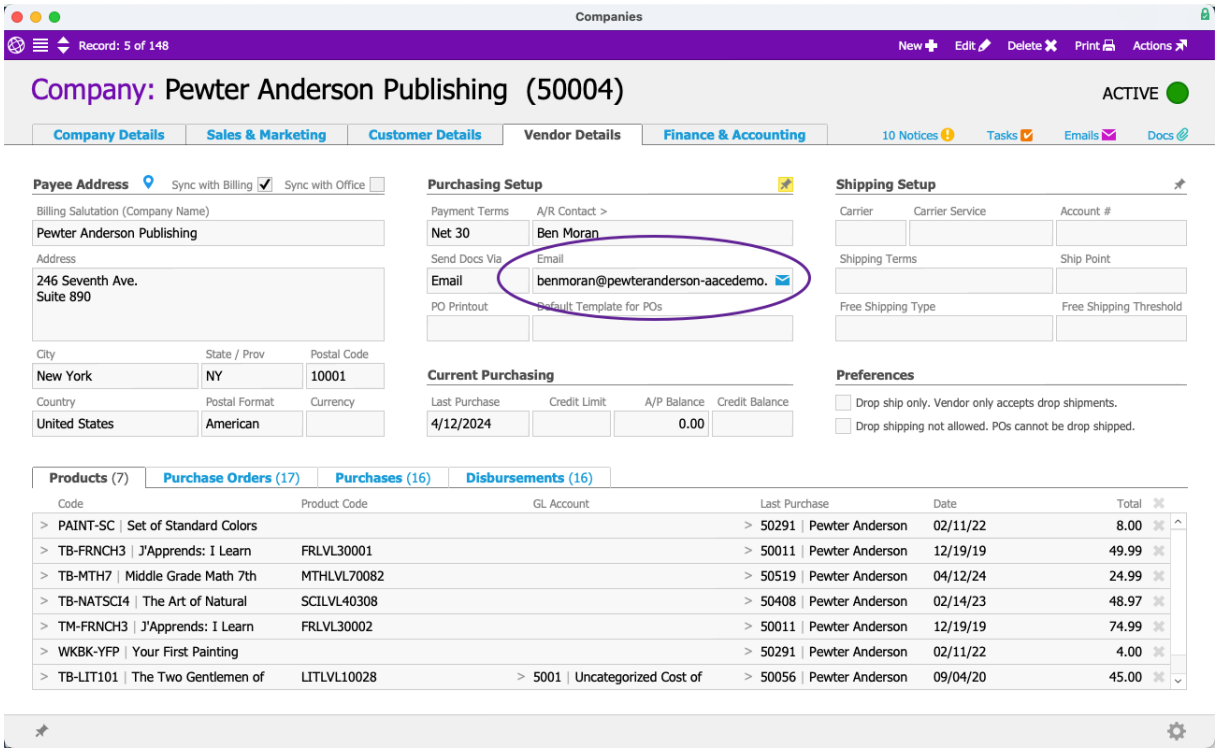
The CC field also uses the vendor company A/R email address, if it is not already included as a recipient. You can locate the vendor company A/R email:

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

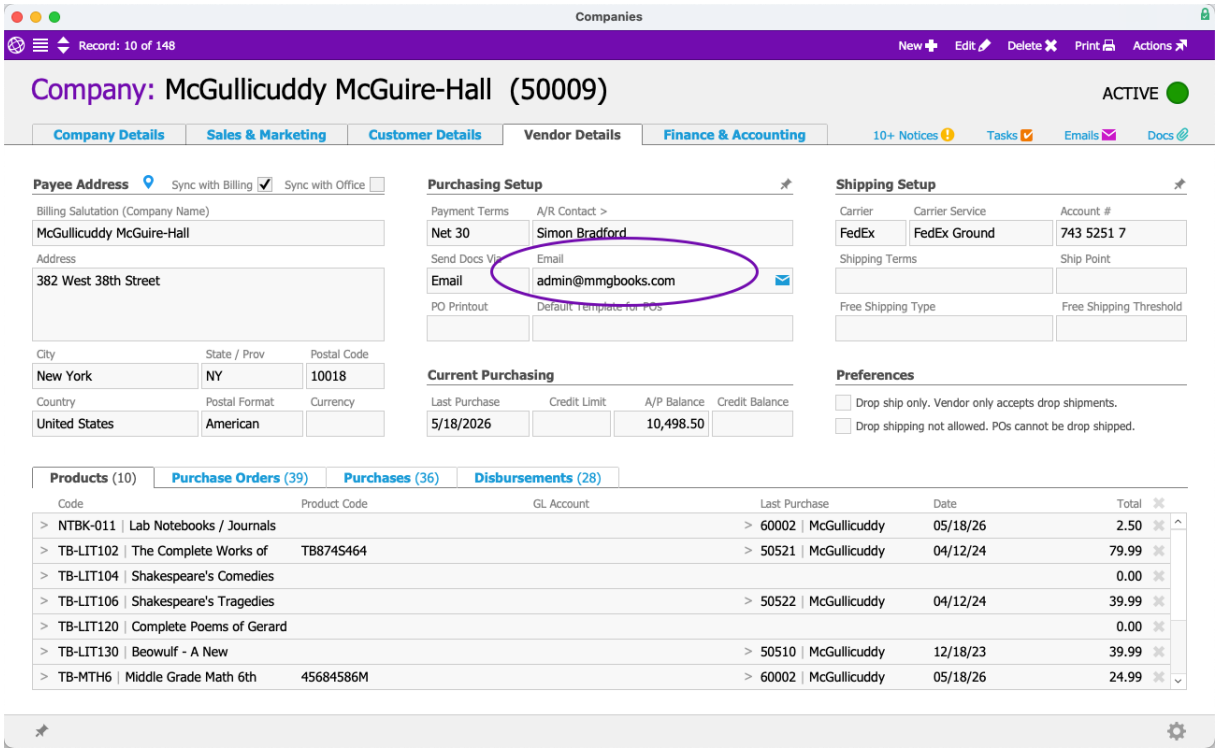
The To field for remittance advice first looks for the email address for the payee company A/R. You can locate the payee company A/R email:

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

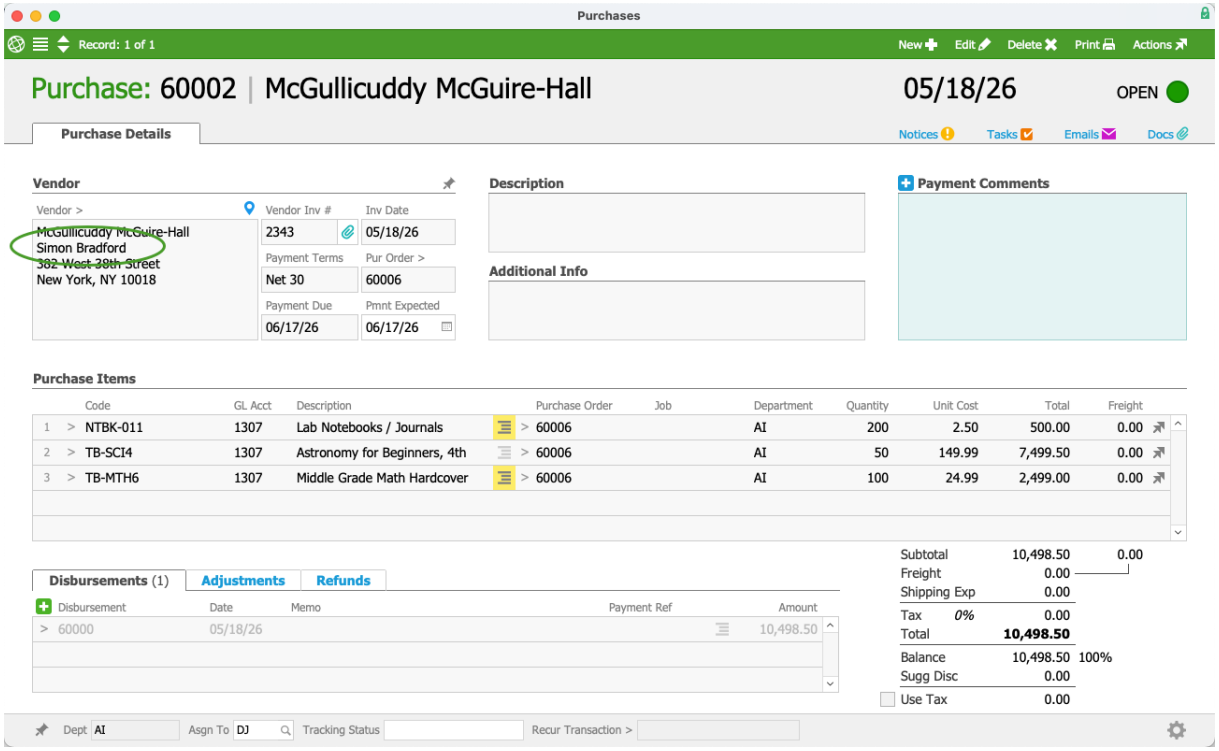


If there is no A/R email, aACE looks to specific sets of records. If there is no information found, it moves to the next set of records in the following order:

1. aACE looks to the purchases added to the Purchases section in the disbursement. From the purchases, it looks to the purchase Vendor record > A/R email.

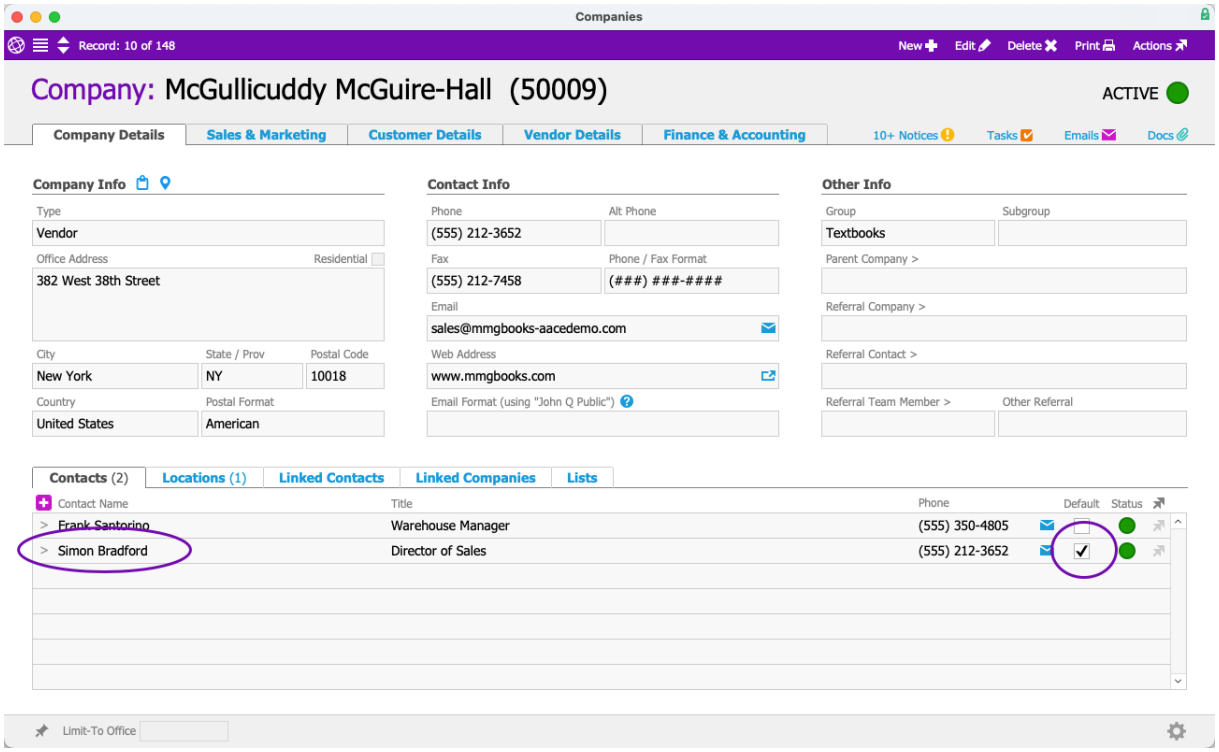


2. aACE looks to the purchases added to the Purchases section in the disbursement. From the purchases, it looks to the purchase vendor Contact record > contact email.

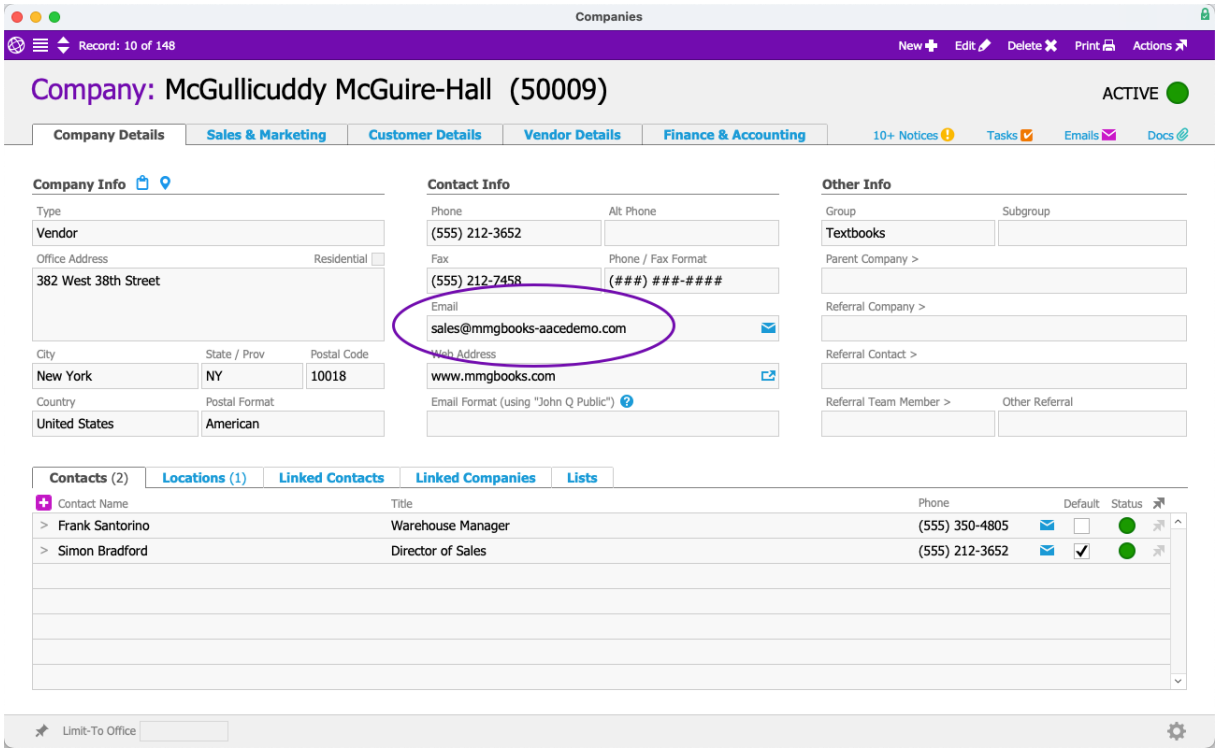


3. aACE looks to the purchases added to the Purchases section in the disbursement. From

the purchases, it looks to the purchase Vendor record > Default contact > contact email.



4. aACE looks to the purchases added to the Purchases section in the disbursement. From the purchases, it looks to the purchase Vendor record > company email.



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 A/R. You can locate the vendor company A/R 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.

The CC field also uses the bill-to company A/R email address, if it is not already included as a recipient.

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