Automated System Emails

Title	What is it?	When is it sent?	Who is it sent to?	Suggested Default Setting
Add Order	Confirmation that a new order has been added to the eWS system via the "Add Order" feature	When the new order is created	Bill-To Customer	OFF
Allocation Order Confirmation	Confirmation of order placed through the allocation shopping cart	After order is submitted via the website for an allocation	Bill-To Customer, Winery Personel (user defined)	OFF
Cancel Order	Confirmation that an order was cancelled w/in eWinery Admin Panel. (Does not confirm a refund or shipping cancelation)	Winery personel cancels an order via Admin Panel	Bill-To Customer, Winery Personel (user defined)	OFF
Club Membership Change	Confirmation of a change in a wine club membership	Customer changes any aspect of wine club membership (club level if allowed, Gift, Shipping address, # of bottles, etc) OR clicks "Submit" without actually changing any info at all.	Bill-To Customer, Winery Personel (user defined)	ON *(if you have a Wine Club)*
Club Membership Confirmation	Confirmation of wine club membership.	Customer signs up for wine club and provides billing, shipping, and payment information.	Bill-To Customer, Winery Personel (user defined)	ON (if you have a Wine Club)
Club Shipment Confirmation	Confirmation email of a completed Club order	As soon as a club order is processed and is given a Completed status within a club batch	bill to club member, winery personel	ON (if you have a Wine Club)
Copy Order	Alert that an exact copy of a previous order has been created.	Winery personel creates an exact copy of a members previous order via the "Functions" tab and "Copy" button within a customer's order history.	Bill-To Customer, Winery Personel (user defined)	Optional
Edit Order	Indication that an existing order has been edited.	Winery personel alteres an existing order in some way.	Bill-To Customer, Winery Personel (user defined)	OFF
Grant Additional Allocation	Confirmation that additional QTY has been added to an existing allocation	Winery personel alters exisiting open allocation by adding more bottles/units.	Bill-To Customer	ON (If you have Allocations)
Mailing List Subscribe	Confirmation of request to be added to mailing list/newsletter. Does not create an account on winerys website	Customer provides first and last name and email address via a system generated POD/Form.	Admin Email listed in the site master	ON
New Member Sign-Up	**Confirmation that an account has been created.** Purpose of this email can vary depending on how the New Member form is being used.	Customer creates username and password and supplies billing information.	Bill-To Customer	ON
Order Confirmation	Confirmation that an order has been entered/submitted and received. Does not necessarily confirm any tranfer of funds, compliance, or shipment.	Order is submitted by customer on website. Orders placed in the OMS do not automatically trigger this email	Bill-To Customer, Winery Personel (user defined)	ON
Password Recovery	Email that includes the link to the password reset for the email provided. Email provided is matched to the bill to email on accoutn to verify the customer.	Customer submits email address via the "Forgot Password" link	Whoever owns the email address submitted for recovery.	ON
Pending Club Order	Email that is sent to a club member whose order has been attempted to process but has been declined and now has a status of Pending	While in the club batch a user can opt to send this email to all members with Pending club orders. This email is located within the Automated System emails	bill to Club member, winery personel	ON (If you have Wine Club)
Process Allocation Order	Confirmation that allocation order has been charged and will be shipped.	Sends when you batch process Allocation Orders	Bill-To Customer	Optional for Allocation clients
Process Held Order	If an allocation order is placed on hold, this email sends when the order moves from Held status to Completed	Applies only to allocation order that go to hold status	Bill-To Customer	OFF
Process Store Order	If an order is placed in the store and the orders are set to go to Accepted status, this email is used.	Sends when a store order is moved from order status "Accepted" to order Status Completed, IF the order is at all changed from who it was originally submitted.	Bill-To Customer	OFF
Refund Order	Reciept when an order is refunded/returned via the eWS admin	Sends when refund order completes	Bill-To Customer	ON
Split Order	Notification that an order has been split	When order is split in admin panel	Bill To Customer, winery Personel (user defined)	Optional
Tasting Room Order Confirmation	Emails sent for orers placed via RMS	When RMS orders come up to eWS	Bill-To Customer	OFF
Updated Credit Card Information	Confirmation that the credit card kept on file for a Club Membership or a Gift Subscription has been updated.	Customer uses the "Edit Credit Card" link to change credit card info OR clicks "Submit" without actually changing any info at all.	Bill-To Customer, Winery Personel (user defined)	ON
Update Personal Information	Confirmation that changes have been made to a customer's account information	Customer uses the "Edit Profile" link to change Billing info, username/password OR clicks "Submit" without actually changing any info at all.	Bill-To Customer, Winery Personel (user defined)	ON
Weblink Member Welcome	This email is no longer valid and should be set to "OFF"			OFF (unless you have WebLink)