

Sending Customer Invoices

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Invoice generation can be a manual process or a highly automated one, depending on your company policies and your aACE system preferences. When an invoice is ready to send, based on your preferences, aACE updates the Tracking Status to To Be Sent.

To manually work with invoices, navigate to Menu > Accts Receivable > Invoices, then use the [Quick Search](#) bar to locate the To Be Sent record(s).

Note: Some of the following features use email functionality, which requires that your system administrator enable and configure [integration with Mailgun](#).

Invoice Detail View Options

Print > Print This View

Generates a printout of the current invoice, which you can print or save to PDF.

Print > Email Invoice

Saves the current invoice as a PDF and opens your mail client, creating a new email with the following information:

- **To:** Populated with the first available data, as follows:
 1. A/P Contact email address – from the Bill To company record, Customer Details tab, Billing Setup section
 2. Invoice Contact email address – from the Bill To section's contact record
 3. If both these fields are blank, then you must manually enter an address.
- **CC:** If the A/P Contact email was used for the To: field, then the Invoice Contact email address (if available) is populated here; otherwise, the field is left blank.
- **BCC:** Your aACE system email address (if available). This ensures a copy of this initial message is stored in aACE. If your system is *not* configured with integrated email, the field is left blank.
- **Subject:** Invoice #[Invoice ID]
- **Body:** Left empty except for a tag corresponding to the Invoice Record ID (e.g. “[INV12345]”). When you have an email showing a final resolution to the matter, you can forward it to your aACE system email address and this tag will identify

which record to attach the email to.

- **Attachment:** A PDF of the invoice

Invoice List View Options

From the list view, aACE only addresses records *currently displayed* in the list. It does not generate printouts that include *all* of a customer's open invoices. These options allow you to select and exclude invoices, organizing the printout as needed. Use the [Quick Search](#) bar to organize a list of customers who need to receive a copy of their invoice(s).

Print > Print Invoices in List

Generates a batch printout for all invoices currently displayed in the list.

After generating the printout, you can use the Print screen navigation to review each invoice page, print the invoices, or save them to PDF.

Print > Auto-Email Invoices in List

Emails a batch of invoices and updates the Tracking Status for each record.

Before you trigger this process, use the [Quick Search](#) bar to organize a list of customers who need to receive a statement. When you trigger this process, aACE filters your current found set to only include invoices that are in Open status. Then each invoice is emailed with the following content:

- **To:** Populated with the first available data, as follows:
 1. A/P Contact email address – from the Bill To company record, Customer Details tab, Billing Setup section
 2. Invoice Contact email address – from the Bill To section's contact record
 3. If both these fields are blank, then the invoice is left in To Be Sent status for you to update or send manually.
- **From:** Populated with the email address you assign (Menu > System Admin > Preferences > My aACE > Auto-Email Invoices and Client Statements From). This address may be a general account (e.g. "ar@yourdomain.com"), so anybody in the A/R department can send statements and view any replies.
- **BCC:** Populated with your email address from your Team Member record, if you have marked the BCC self flag next to Auto-Email Invoices and Client Statements

From.

- **Subject:** "Invoice #[Invoice ID]"
- **Body:**

Dear [A/P Contact name or Invoice Contact name],

Invoice #[Invoice ID] is attached.

Sincerely, [Your name]

- **Attachment:** A PDF of the invoice

After the invoice is sent, the Tracking Status is set to Sent via Email, then the record is removed from your current found set.

The resulting found set will show any invoices that are open, but do not have an email address specified. These must either be sent separately via regular mail or else be corrected for inclusion in another batch. "Correcting" the invoices means adding an A/P Contact email address. (Note: This is because open invoices *cannot* be edited to add a Contact email.)

Print > Print for Mail Invoices in List

Filters your current found set to Open invoices, then the system prompts you to specify a new Tracking Status. aACE generates a batch printout for all invoices still displayed in the list, and updates the Tracking Status of those invoices. (Note: You can enter status descriptions most accurate for your company policies.)

The batch printout includes all invoices from the filtered set. (You can work with the printout as described in "Print Invoices in List" above.)

Print > Deliver Invoices in List

Prepares a batch of invoices for both email and regular mail delivery.

The setting that controls the delivery method for a given invoice is found on the Bill To company record. On the Customer Details tab, the Billing Setup section includes the Deliver Invoice Via field, where you can specify either "Email" or "Mail". (Note: This setting also applies to statements and orders.)

When you trigger this process, aACE filters your current found set to Open invoices. Each invoice for a customer configured to Email delivery is emailed, using the content explained in "Auto-Email Invoices in List" above. Then those records are omitted from your found set. Invoices for customers that are configured to Mail delivery (if any) are left remaining. aACE prompts you to generate a printout for these remaining invoices and update their Tracking Status.
