Sending Customer Invoices

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This guide explains how to send a customer invoice through various aACE print and email methods. It is intended for general users.

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 from Main Menu > Accts Receivable > Invoices, then use the Quick Search (http://aace6.knowledgeowl.com/help/using-the-quick-search-bar) bar to locate the invoices with the To Be Sent Tracking Status.

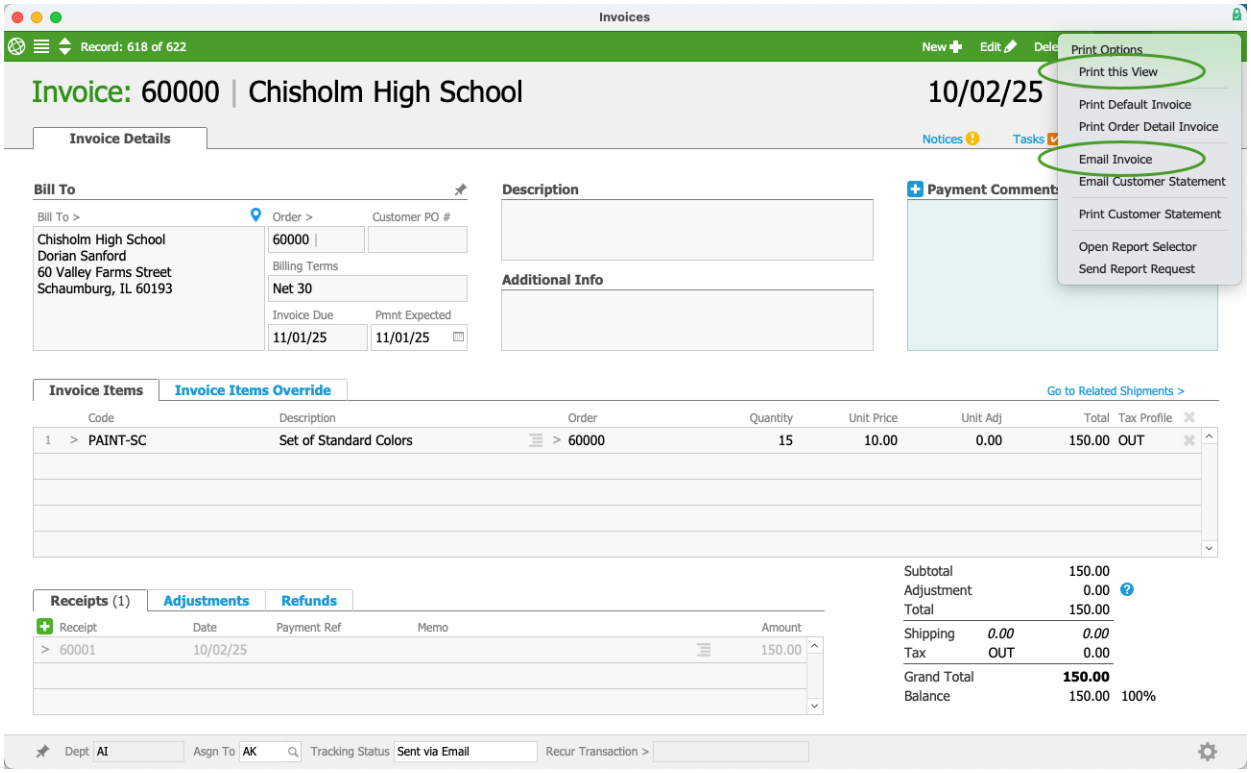
Note: Some of the following features require email integration. To use them, your system administrator must enable and configure our integration with Mailgun (http://aace6.knowledgeowl.com/help/configuring-mailgun).

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Invoice Detail View Options

Options in an invoice detail view are different than options for the list view. The detail view has two print options for sending invoices: Print This View and Email Invoice.



Print This View Action

Print This View generates a printout of the current order. You can print the invoice or save it as a PDF.

Email Invoice Action

Email Invoice saves the current order as a PDF and opens the aACE Email Composer, if you have the aACE Email Composer Upgrade (https://aace6.knowledgeowl.com/help/understanding-aace-email-integration), or your computer's default mail client (https://aace6.knowledgeowl.com/help/assigning-a-default-email-program-on-a-workstation). The Email Invoice action automatically creates a new email in either the aACE Email Composer or in your mail client.

The generated email will have information automatically entered, depending on the information in your aACE system. If your aACE system is using email templates, the default information may differ. For more information on email templates and default email information, refer to Working with Email Templates (https://aace6.knowledgeowl.com/help/working-with-email-template-preferences).

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Invoice List View Options

In the list view, aACE only includes records currently displayed in the list. The print options in the list view allow you to select and exclude orders, organizing the printout as needed.

Use the Quick Search (https://aace6.knowledgeowl.com/help/using-the-quick-search-bar) bar to organize a list of customers who need to receive a copy of their order(s). The list view has four print options: Print List, Send Invoices in List, Auto-Email Invoices in List, and Print to Mail Invoices in List.

Print List

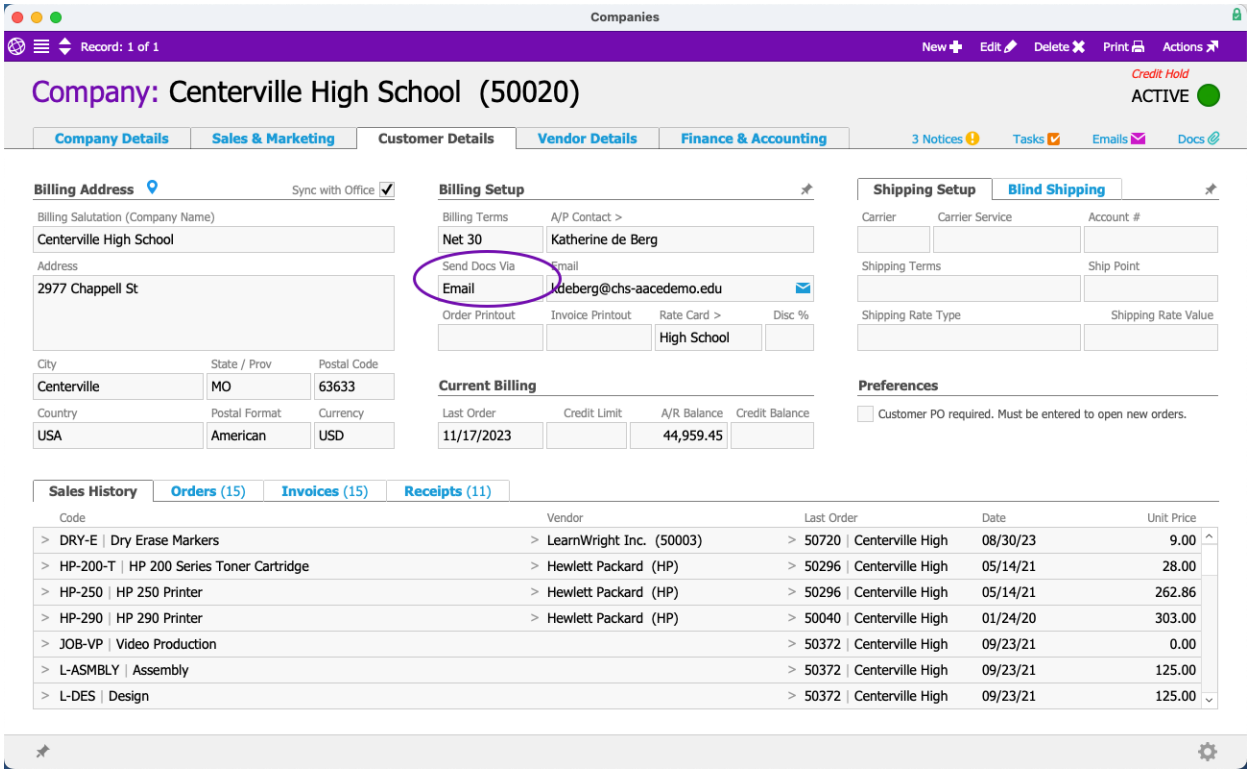
Print Invoices in List generates a batch printout for all invoices currently displayed in the list. Paid invoices are differentiated by the PAID status at the top of each invoice..

After generating the printout, you can save it as a PDF.

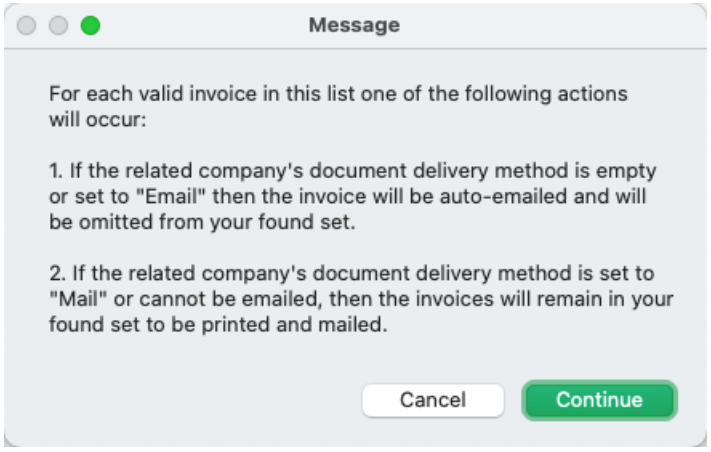
Send List

Send List prepares the list of invoices for both email and regular mail delivery.

The preference that determines the delivery method for an invoice is found in the Bill To company record. At the company record, select the Customer Details tab and locate the Billing Setup section. This section includes the Send Docs Via field, where you can specify the value as either Email or Mail. This preference also applies when sending orders (https://aace6.knowledgeowl.com/help/sending-customer-orders) and statements (https://aace6.knowledgeowl.com/help/sending-customer-statements).



aACE also filters your current invoice list for open invoices, then displays a dialog that explains the process of filtering and delivery.



aACE creates emails based on email templates for each customer configured for email delivery. After these emails are sent, records with email delivery are omitted from your invoice list. Invoices for customers that are configured to mail delivery (if any) are left remaining. aACE then generates a printout for these remaining invoices and automatically updates the invoice Tracking Status field to Sent via Mail.

Auto-Email List

Auto-Email List emails the list of open invoices and automatically updates the Tracking

Status for each record to Sent via Email. The process is the same as the Send List action.

However, any remaining invoices in the list are open invoices that do not have a specified email address. These must either be sent separately through regular mail or have an email added for the next list of orders to email. Note that open invoices cannot be edited to add a contact email.

Print to Mail List

Print to Mail List creates a printout of all the open invoices in the list to send to companies through mail. The process is similar to Print List.