

Sending Customer Invoices

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This guide explains how to send customer invoices. 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 To Be Sent record(s).

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

Invoice Detail View Options

Print > Print This View

Generates a printout of the current invoice, which you can send to a printer or save as a 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 company record > Contact Info section
 3. If both these fields are blank, 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:** Populated based on the relevant email template that your system administrator has configured. Will always include 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 aACE record to attach the email to.
- **Attachment:** The PDF of the invoice

Invoice List View Options

From the list view, aACE will not generate printouts that include *all* of a customer’s open invoices. Instead you must select and exclude invoices, organizing the printout as needed. You can 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. Paid invoices will be marked with as such.

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 > Send Invoices in List

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

The delivery method for a given invoice is controlled by the Bill To company's settings. On the company record Customer Details tab, the Billing Setup section includes the Send Docs Via field. You can specify here whether Email or Mail should be used. (Note: This setting also applies to sending 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 above. The Tracking Status for those records is then updated to Sent via Email, and they are omitted from your found set. Invoices for customers that are configured to Mail delivery (if any) are left remaining. aACE generates a PDF of these remaining invoices for you to print and send out, then updates their Tracking Status.

Print > Auto-Email Invoices in List

Emails a batch of the currently displayed invoices and updates the Tracking Status for each

record.

Use the Quick Search bar to organize a list of customers who need to receive an invoice. When you trigger this process, aACE filters your current found set to only include invoices that are in Open status. Then each of those invoices is emailed with content specified at the relevant email template, including:

- **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 company record > Contact Info section
 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 assigned on the email template. This address can be a general account (e.g. “ar@yourdomain.com”), enabling anybody in the A/R department to 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:** Populated from the email template, often including:

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, and 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 be updated (e.g. change the Send Docs Via field or A/P Contact) so they can be included in another email batch. (Note: Open invoices *cannot* be edited to add a Contact email.)

Print > Print to Mail Invoices in List

Filters your current found set to Open invoices, and generates a batch printout for these invoices. aACE then updates the Tracking Status of those invoices to Sent via Mail.

The batch printout includes all invoices from the filtered set. You can work with the printout as described above.
