Sending Customer Statements

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

Sending customer statements in aACE is easy and flexible. These methods can be manual or automated, depending on your organization policies and aACE system preferences.

To work with customer statements, navigate from the Main Menu > Accts Receivable > Invoices, then use the Quick Search (https://aace6.knowledgeowl.com/help/using-the-quick-search-bar) bar to locate the needed record(s). Customer statements are built using open invoices, so if a customer has no balance or no open invoices, then a customer statement will not be sent to that customer.

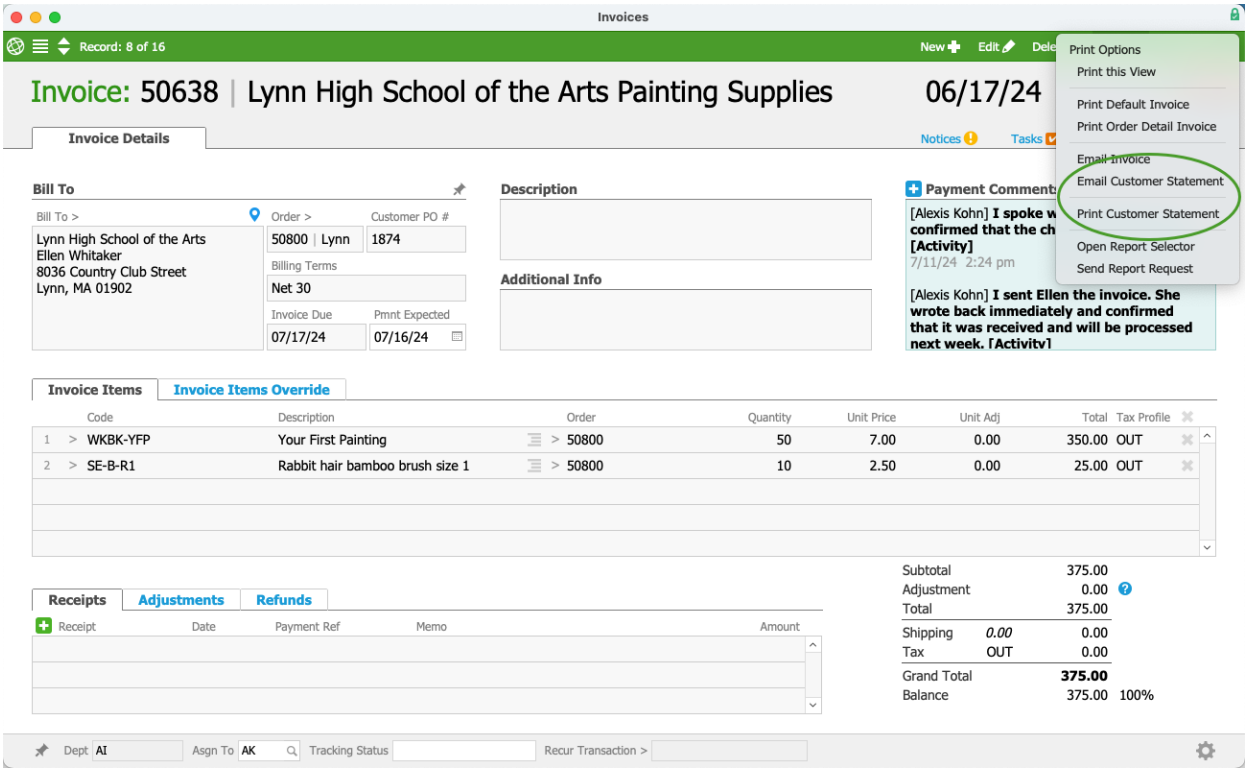
Note: Some of the following features use email functionality, which requires that your system administrator enable and configure our integration with Mailgun (https://aace6.knowledgeowl.com/help/setting-up-mailgun).

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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 customer statements: Email Customer Statement and Print Customer Statement.



Email Customer Statement

Email Customer Statement generates a PDF that lists all the customer's invoices that are Open, then 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 Customer Statement 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).

Print Customer Statement

Print Customer Statement generates a printout with all the customer's invoices that are Open. This does not include adjustments. of the current order. The aging table on the printout is calculated by days past due.

You can print the statement or save it as a PDF.

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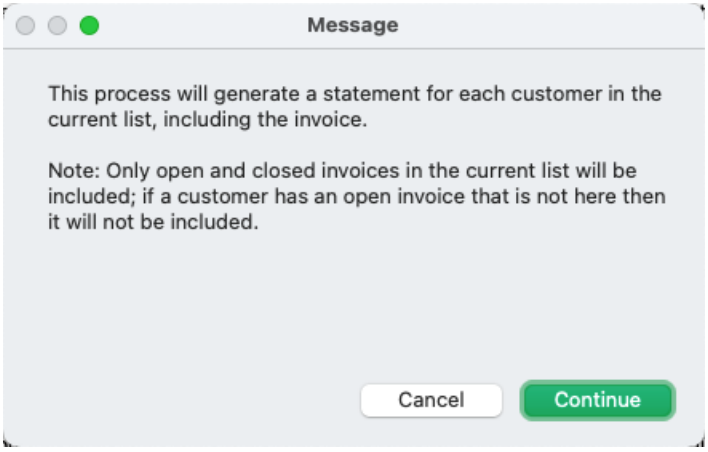
Invoice List View Options

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 open invoices, 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 customer statement(s). The list view has three print options: Print Customer Statements in List, Send Customer Statements in List, Auto-Email Customer Statements in List.

Print Customer Statements in List

Print Customer Statements in List generates a batch printout for all invoices currently displayed in the list. aACE displays a dialog that explains the process of filtering and delivery.



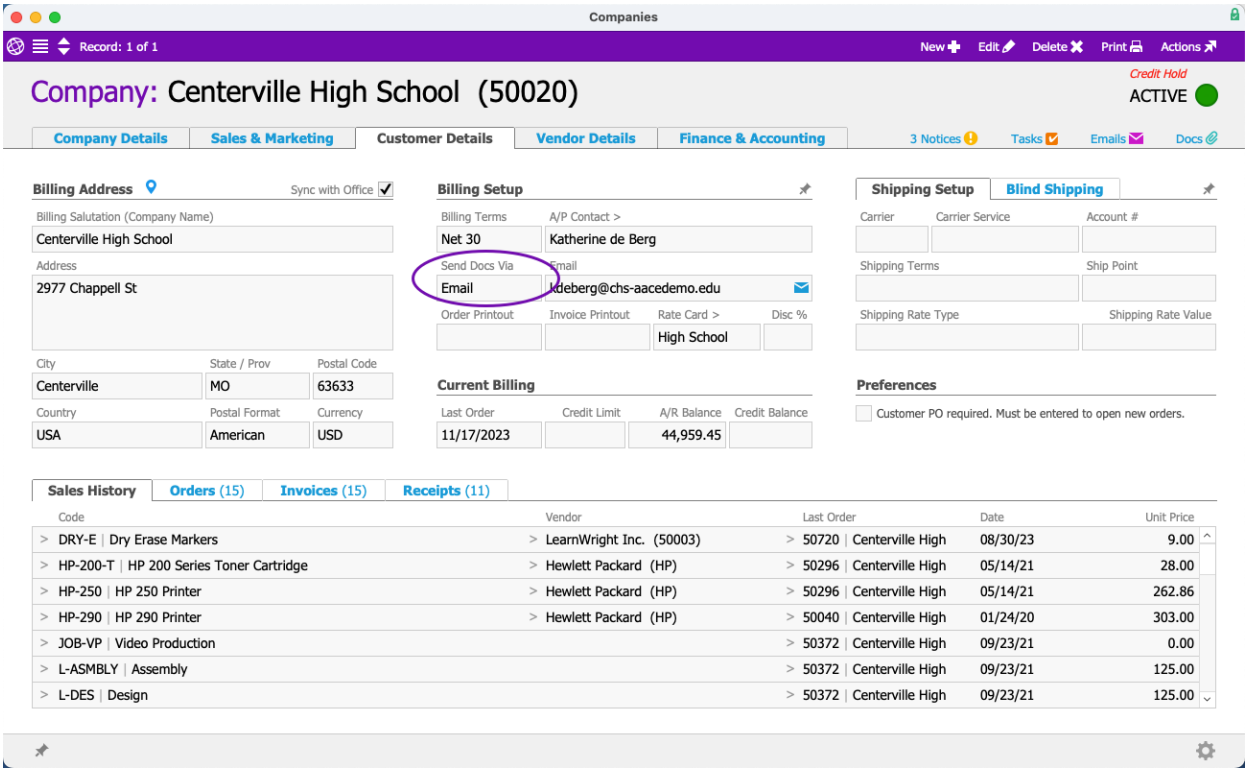
After generating the printout, you can save it as a PDF.

Send Customer Statements in List

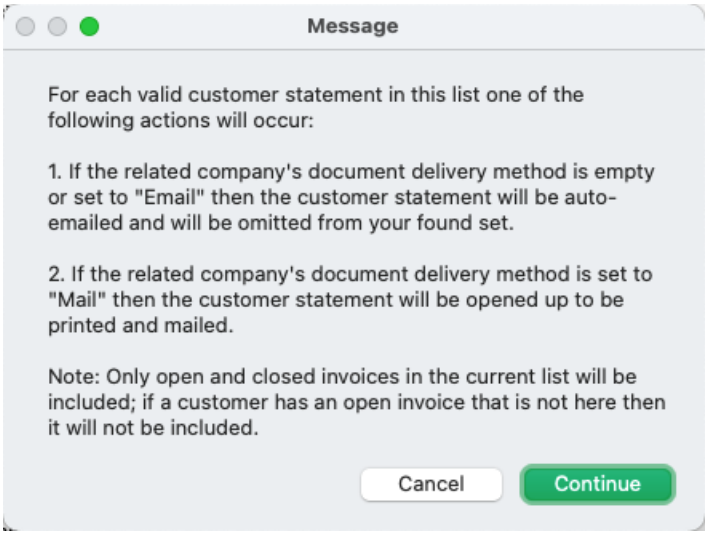
Send Customer Statements in List prepares the list of orders for both email and regular mail delivery.

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 and closed invoices, then displays a dialog that explains the process of filtering and delivery.



Each statement for a customer configured to Email delivery is emailed using the same logic as the Email Customer Statement action. After these emails are sent, records with email delivery are omitted from your invoice list. Customer statements that are configured to mail

delivery (if any) are left remaining. aACE then generates a printout for these remaining customer statements and automatically updates the overall invoice Tracking Status field to Sent via Mail.

Auto-Email Customer Statements in List

Auto-Email Customer Statements in List emails the list of open invoice customer statements and automatically updates the Tracking Status for each record to Sent via Email. The process is the same as the Send Customer Statements in List action.

However, any remaining invoices in the list are open invoices that do not have a specified email address. These customer statements 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.