

Customer Pay Now Workflow

Last Modified on 07/29/2024 10:42 am EDT

Customer Payment Correspondence and Pay Now link

The aACE Data Interchange (ADI) is a set of data handshakes between an aACE system and external events.

The “Pay Now” capability is a Credit Card and ACH payment workflow added to Invoice correspondence. The email contains a link to a dedicated, secure payment processing site. Once completed, Receipts in aACE are auto generated and the authorization logged automatically.

For a more detailed demonstration of this capability, view our webinar on the subject [here](https://showme.aacesoft.net/?id=10751) (<https://showme.aacesoft.net/?id=10751>).

For a more full demonstration of a full range of email and ADI related capabilities, you can view the entire webinar at [ShowMe](https://showme.aacesoft.net/?id=10738) (<https://showme.aacesoft.net/?id=10738>).

Prerequisites for the 'Pay Now' feature

1. [Mailgun integration](https://aace6.knowledgeowl.com/help/setting-up-mailgun) (<https://aace6.knowledgeowl.com/help/setting-up-mailgun>) is a pre-requisite. Email integration is the primary vehicle through which ADI works.
2. [Payment Innovators](https://aace6.knowledgeowl.com/help/setting-up-payment-innovators) (<https://aace6.knowledgeowl.com/help/setting-up-payment-innovators>) must be set up as your Payment Processor.
3. The latest ADI Integration File must be installed onto your system. Contact us to get the file configured and installed.

The Workflow

Send the Invoice via Email

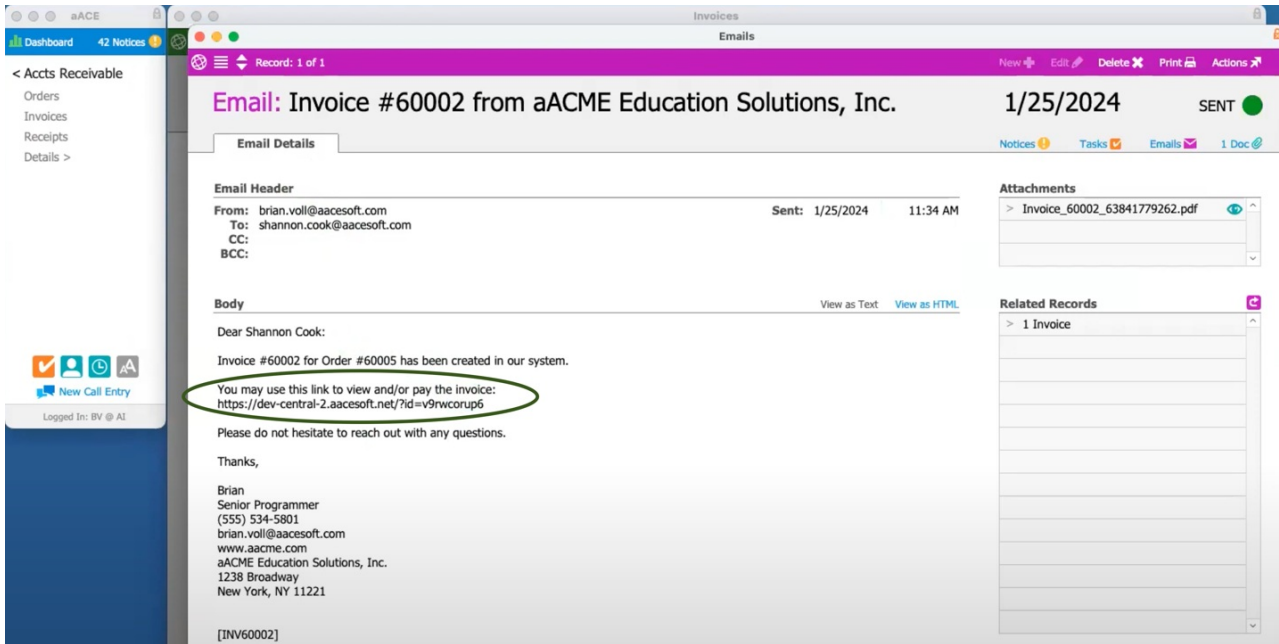
Navigate to the Invoices module, select the desired Invoice and enter the Detail View.

Select Print > Email Invoice.

The email is populated with all the usual data.

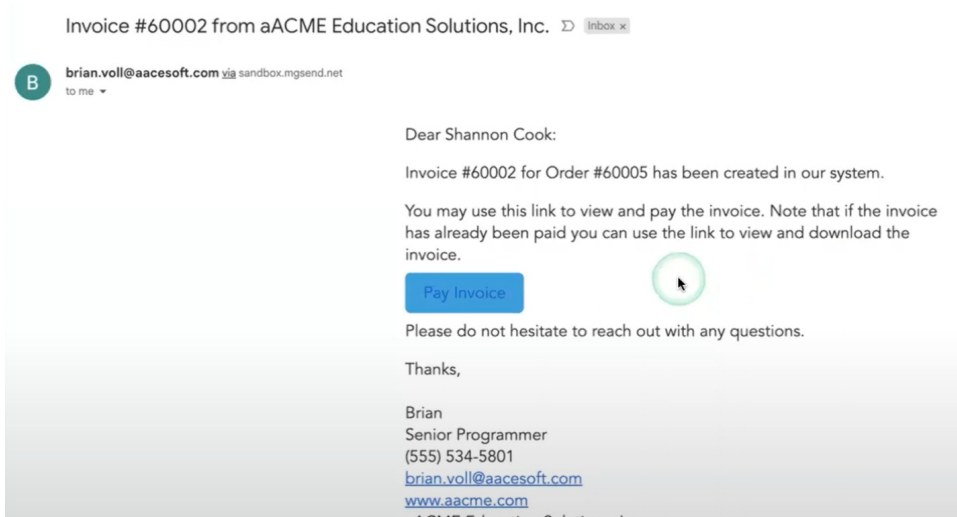
But now there's a link.

What this link represents is an opportunity for the customer to pay his Invoice without either of us picking up the phone, or her needing to log in to a site, cut a check, post a letter, etc.



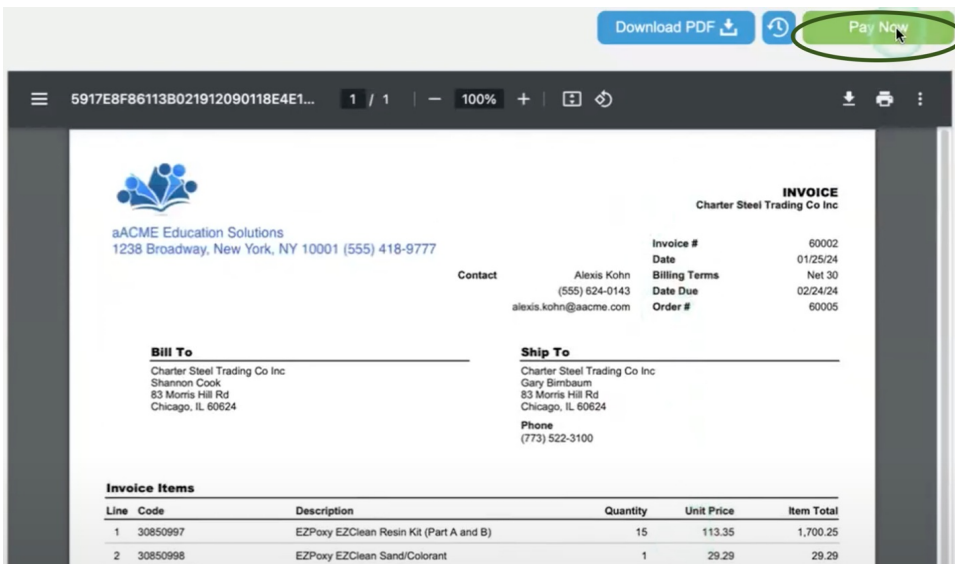
The Customer's Workflow

The customer receives the email with a copy of the Invoice and a **Pay Invoice** button. The customer may pay using their traditional methods or by simply clicking the button.

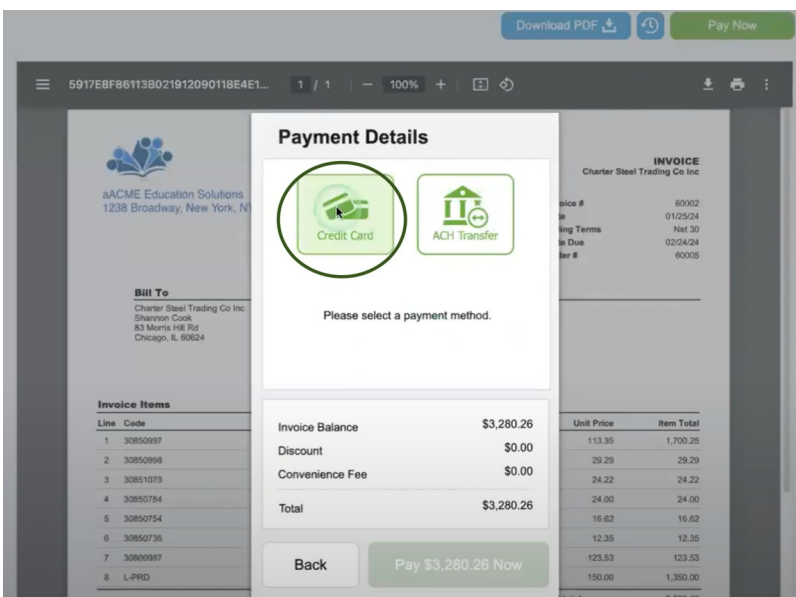


By clicking the **Pay Invoice** button in the email, the customer is brought to a dedicated, secure payment processing site where he can view the PDF, download the PDF, view an activity log, or (the primary workflow) Pay the Invoice.

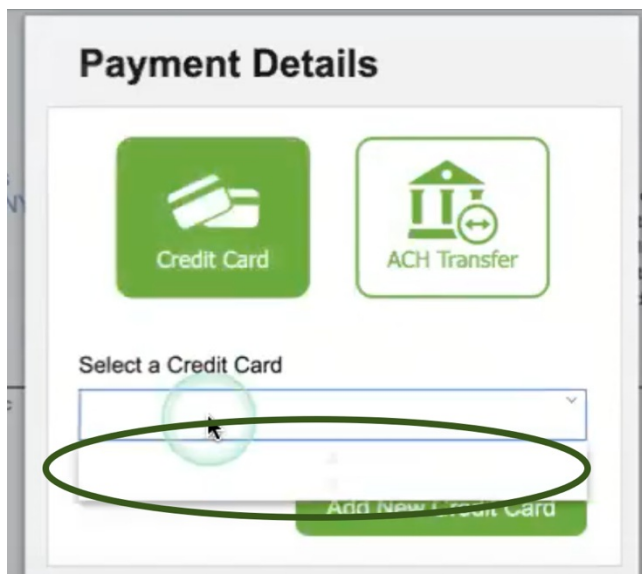
Once the customer clicks the **Pay Now** button, a **Payment Details** window appears.



She has two options in the **Payment Details** window. Depending on your system configuration she can pay by credit card or by ACH.



If she has made a payment in the past and her card on file would show in the **Select Credit Card** drop down list.



If no card is on file or a new card needs to be entered, the user will click the **Add Credit Card** button. An **Add New Card** window appears. Once the information is filled in, the user clicks the **Add Payment Method** button.

Add New Card

Name on Card

First Name	Last Name
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Card Number

XXXX XXXX XXXX XXXX

Expiration

MM	/	YY
----	---	----

CVV

CVV

Address

Street



City	St	Zip
------	----	-----

Save For Future Use

Back Add Payment Method

Now the card is displayed in the drop-down list. The customer reviews the information one last time then selects the **Pay Amount Now** button.

Payment Details



Select a Credit Card

American Express - 1004 (12/25) ▾

Add New Credit Card

Invoice Balance	\$3,280.26
Discount	\$0.00
Convenience Fee	\$98.41
<hr/>	
Total	\$3,378.67

Back **Pay \$3,378.67 Now**

Once payment is processed, a **Payment Complete** window appears. The customer clicks **Done**.

Payment Complete

Thank you for your payment!

A receipt will be emailed to:
shannon.cook@acesoft.com

Total	\$3,378.67
Amount Paid	\$3,378.67

Balance Due	\$0.00

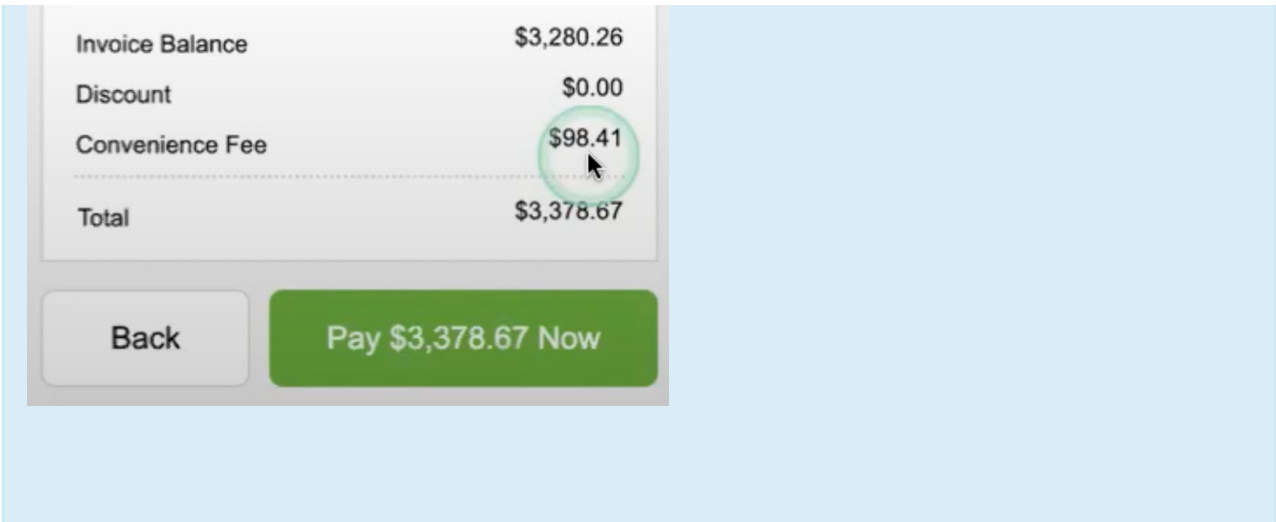
Done

The Convenience Fee

Here you can offset the fees levied by your credit card processor by configuring a percentage of the balance.

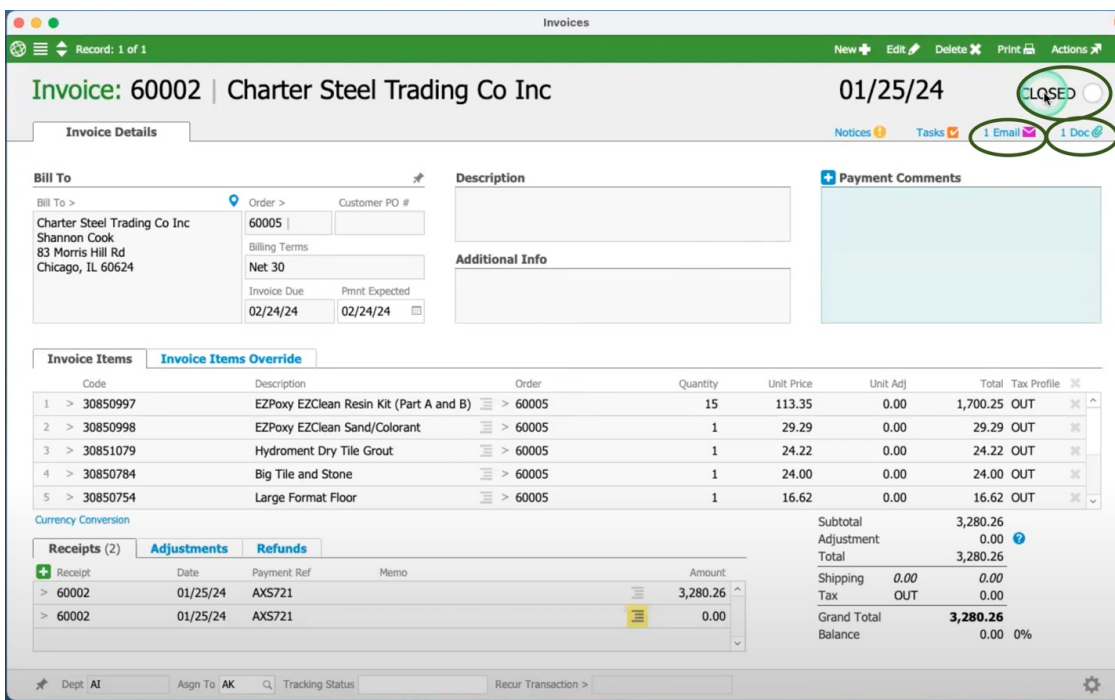
In this case we've set the fee to 3%, which is common, but an administrator can set this as desired. If you don't want to pass on that fee to the customer, the fee can be set to 0%.

The fee is automatically calculated and displayed above the Total.



In aACE

Once paid, the invoice is automatically closed.



The Invoice now has a related receipt, including a separate entry to record the convenience fee, if applicable.

Record: 1 of 1 New Edit Delete Print Actions

Receipt: 60002 | Charter Steel Trading Co Inc 01/25/24 POSTED

Customer Payment Details Notices Tasks Emails 1 Doc

Payment Info				Bank Info			
Company >			Amount	Bank Account >			
Charter Steel Trading Co Inc			3,378.67	1121 Undeposited Funds - MC/Visa			
Prmt Method	Approval Code	Customer Credit Card	Notification Status	Deposit On	Deposit Status	Batch	Bank Rec Status >
CREDIT CARD	AXS721	Amex 1004 (12/25)	SENT (Email)	01/25/24	PENDING		PENDING

Invoice	Date	Title	Order	Grand Total	Suggested Balance	Amount	Adjustment	Total
1 >	60002	01/25/24	Charter Steel > 60005	3,280.26	0.00	3,280.26	0.00	3,280.26
2 >	60002	01/25/24	Charter Steel > 60005	3,280.26	0.00	98.41	-98.41 BANK	0.00

Currency Conversion Total Allocated 3,378.67
Out of Balance 0.00

The Receipt notification email is attached in Emails, and the Receipt itself can be viewed from the Email or Docs folder attached to the record.

Record: 1 of 1 New Edit Delete Print Actions

Email: Receipt Notification #60002 from aACME Education Solutions, 1/25/2024 SENT

Email Details Notices Tasks Emails 1 Doc

Email Header			Attachments
From: brian.voll@aacessoft.com	Sent: 1/25/2024	11:38 AM	> Receipt
To: shannon.cook@aacessoft.com			
CC:			
BCC:			

Body View as Text View as HTML

Dear Shannon Cook:

Thank you for your recent payment of \$3,378.67. Attached is a receipt for your records.

Please do not hesitate to reach out with any questions.

[RCPT60002]

Please note that this is a fully automated message sent using aACE software.

Related Records
> 1 Receipt



aACME Education Solutions
1238 Broadway, New York, NY 10001 (555) 418-9777

Paid By:

Charter Steel Trading Co Inc
83 Morris Hill Rd
Chicago, IL 60624

RECEIPT
Charter Steel Trading Co Inc
Customer Payment

Receipt # 60002
Date 01/25/24
Payment Method CREDIT CARD
Approval Code AXS721
Amex 1004 (12/25)

Invoices

Invoice	Date	Title	Order	Amount	Adjustment	Total	Balance
60002	01/25/24	Charter Steel Trading Co Inc	60005	3,280.26	0.00	3,280.26	0.00
60002	01/25/24	Charter Steel Trading Co Inc <i>Payment Processing Convenience Fee</i>	60005	98.41	-98.41	0.00	0.00
				3,378.67			

Additional Information on Credit Card Convenience Fee Recovery

If you are planning to use the 'Pay Now' link and wish to add a Credit Card fee recovery, let the representatives at Payment Innovators and aACE Software know- so your account will be configured appropriately. You will need to have a GL Account assigned for recording these items on your Invoices and Receipts.

[Read More about Managing your Credit Card Processor Fees.](https://aace6.knowledgeowl.com/help/managing-your-credit-card-processor-fees)

(<https://aace6.knowledgeowl.com/help/managing-your-credit-card-processor-fees>)

[Read More about Charging Fees for Customer Payments.](https://aace6.knowledgeowl.com/help/charging-a-fee-for-customer-payments-made-with-a-credit-card)

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