

# Customer Pay Now Workflow for Credit Card Payment

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## 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.*

Dear Matthew Pelfrey:

Invoice #60669 for Order #60152 has been created in our system.

You may view and pay the invoice here: [View and Pay](#)

Please do not hesitate to reach out with any questions.

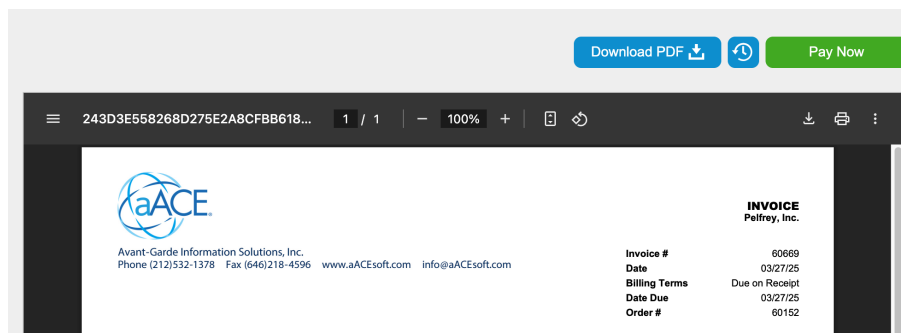
Thanks,

Matthew Pelfrey  
aACE Software


## The Customer's Workflow

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


By clicking the link 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. The selected method is the green button. She clicks on the Credit Card button to select that payment method.



Credit Card



ACH Transfer

Select a Credit Card


Add Credit Card

Invoice Balance	\$0.50
Convenience Fee	\$0.02
<hr/>	
Total	\$0.52


Back

Pay \$0.52 Now

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



Credit Card



ACH Transfer

Select a Credit Card

American Express - 2079 (01/29)

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

Card Number

XXXX XXXX XXXX XXXX

Expiration

MM

/

YY

CVV

CVV

Address


☒ 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

  
Credit Card

  
ACH Transfer

Select a Credit Card

American Express -

Add Credit Card

Invoice Balance	\$0.50
Convenience Fee	\$0.02
.....	
Total	\$0.52

Back

Pay \$0.52 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:

Customer@Business.com

Total	\$0.50
Amount Paid	\$0.50
.....	
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.

Invoice Balance	\$3,280.26
Discount	\$0.00
Convenience Fee	\$98.41
.....	
Total	\$3,378.67

Back

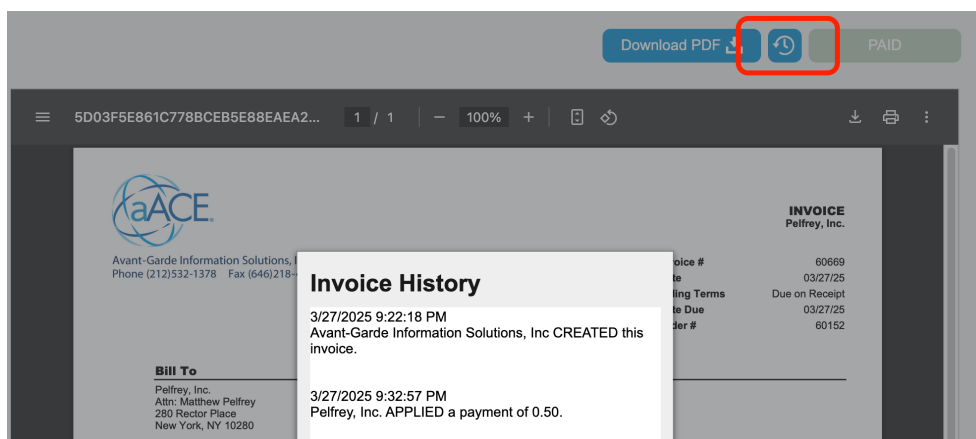
Pay \$3,378.67 Now

Once the Invoice is Paid, the Pay Now button is deactivated.



## History Button

Clicking the History Button at the top of the window displays an Invoice History window.



## In aACE

Once paid by credit card, the invoice is automatically closed. (Note: ACH Payment have a different workflow. See [here](https://aace6.knowledgeowl.com/help/customer-pay-now-workflow-for-ach) (<https://aace6.knowledgeowl.com/help/customer-pay-now-workflow-for-ach>) to review ACH Payment workflows.)

**Invoice: 60002 | Charter Steel Trading Co Inc** 01/25/24 CLOSED

Invoice Details

Bill To: Charter Steel Trading Co Inc  
Shannon Cook  
83 Morris Hill Rd  
Chicago, IL 60624

Order #: 60005  
Billing Terms: Net 30  
Invoice Due: 02/24/24  
Print Expected: 02/24/24

Description: Additional Info

Payment Comments

Invoice Items

Code	Description	Order	Quantity	Unit Price	Unit Adj	Total	Tax Profile
1 > 30850997	EZPox EZClean Resin Kit (Part A and B)	> 60005	15	113.35	0.00	1,700.25	OUT
2 > 30850998	EZPox EZClean Sand/Colorant	> 60005	1	29.29	0.00	29.29	OUT
3 > 30851079	Hydroment Dry Tile Grout	> 60005	1	24.22	0.00	24.22	OUT
4 > 30850784	Big Tile and Stone	> 60005	1	24.00	0.00	24.00	OUT
5 > 30850754	Large Format Floor	> 60005	1	16.62	0.00	16.62	OUT

Subtotal: 3,280.26  
Adjustment: 0.00  
Total: 3,280.26  
Shipping: 0.00  
Tax: 0.00  
Grand Total: 3,280.26  
Balance: 0.00 0%

Receipts (2)

Receipt	Date	Payment Ref	Memo	Amount
> 60002	01/25/24	AXS721		3,280.26
> 60002	01/25/24	AXS721		0.00

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

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

Customer Payment Details

Payment Info

Company: Charter Steel Trading Co Inc  
Amount: 3,378.67  
Payment Method: CREDIT CARD  
Approval Code: AXS721  
Customer Credit Card: Amex 1004 (12/25)  
Notification Status: SENT (Email)

Bank Info

Bank Account: 1121 | Undeposited Funds - MC/Visa  
Deposit On: 01/25/24  
Deposit Status: PENDING  
Batch: PENDING  
Bank Rec Status: PENDING  
Reconciled On:

Invoices

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

Total Allocated: 3,378.67  
Out of Balance: 0.00

### 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>

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

### Notification Status and Emails

If Receipt Notification Automation is not activated in your system, The Receipt's Notification Status field will display PENDING. A Notification email can be sent manually by selecting Print > Email Receipt Notification from the Print Actions menu.

Record: 1 of 1

Receipt: 60000 | Chisholm High School

Customer Payment Details

Payment Info

Company >		Amount	
Chisholm High School		31,587.08	
Pmnt Method	Reference #	Customer Bank Acct	ACH Status
ACH	7878787878	JPMorgan Chase	Notification Status
			PENDING

Bank Info

Bank Account >	
1120	Undeposite
Deposit On	D
04/01/25	P

New +

Edit

Delete

Print

Actions

Print Options

Print this View

Email Receipt Notification

Open Report Selector

Send Report Request

Once the email is sent, the Receipt's Notification Status filed displays SENT (Email).

Notification Status

SENT (Email)

If Receipt Notification Automation is activated in your system, the Receipt notification email is sent automatically, according to the automation schedule set, when the ACH Request is Cleared and the Receipt is Posted. The email is attached to the Receipt in Emails. 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, 1/25/2024SENT

Email DetailsNoticesTasksEmails1 Doc

Email Header

From: brian.voll@aacessoft.com

To: shannon.cook@aacessoft.com

CC:

BCC:

Sent: 1/25/2024 11:38 AM

Attachments

> Receipt

Body

View as TextView 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

Date01/25/24

Payment MethodCREDIT CARD

Approval CodeAXS721

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	60005	98.41	-98.41	0.00	0.00
Payment Processing Convenience Fee							
				3,378.67			