Customer Pay Now Workflow

Last Modified on 12/06/2024 11:13 am EST

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).

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).

Prerequisites for the 'Pay Now' feature

1. Mailgun integration (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) 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.
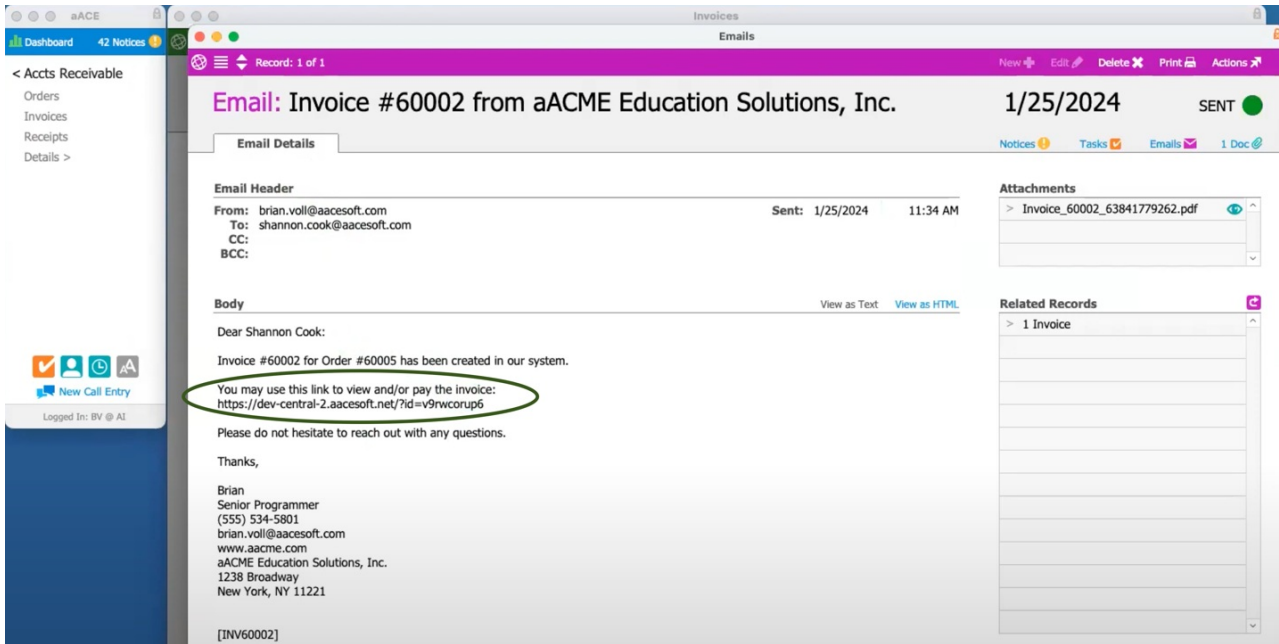

The Customer's Workflow

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.
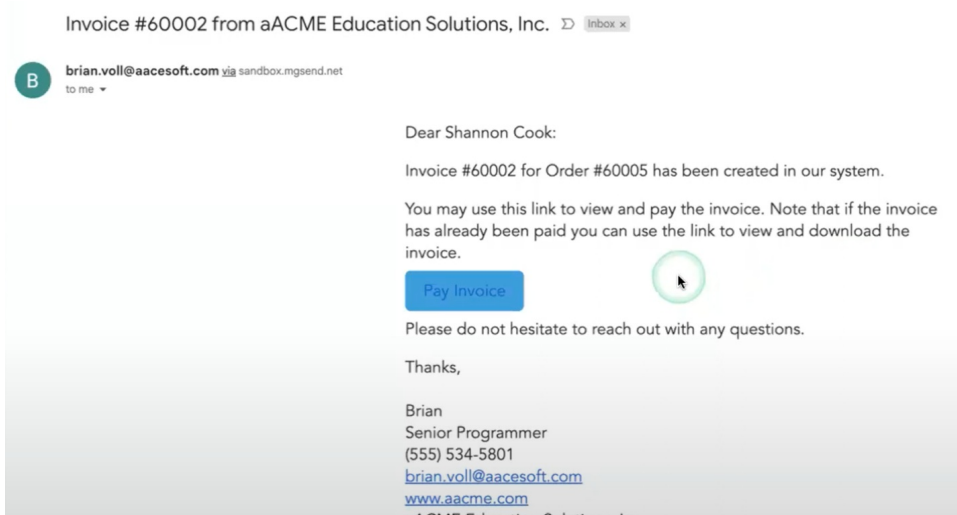

By clicking the **Pay Invoice** button in the email, the customer is brought to a dedicated, secure payment processing site where he can view the PDF, download the PDF, view an activity log, or (the primary workflow) Pay the Invoice.
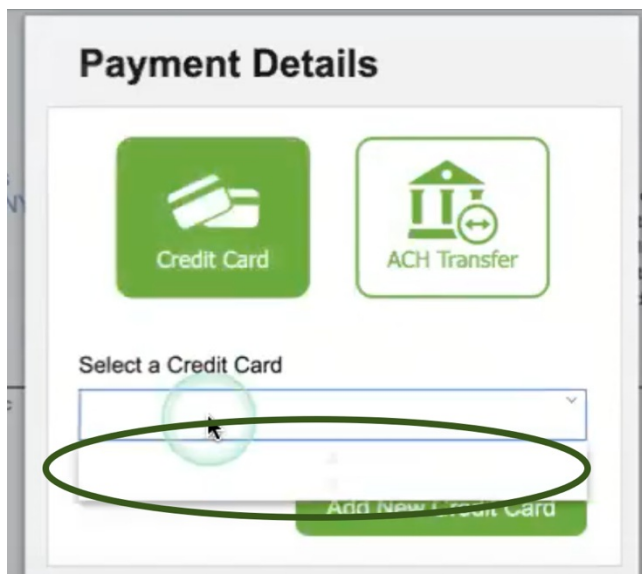
Once the customer clicks the **Pay Now** button, a **Payment Details** window appears.
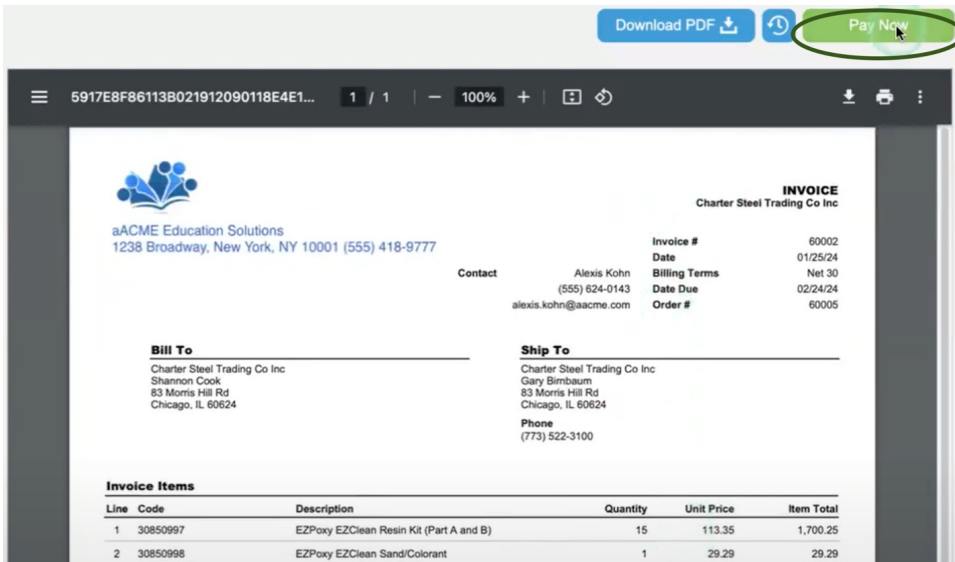
She has two options in the **Payment Details** window. Depending on your system configuration she can pay by credit card or by ACH.
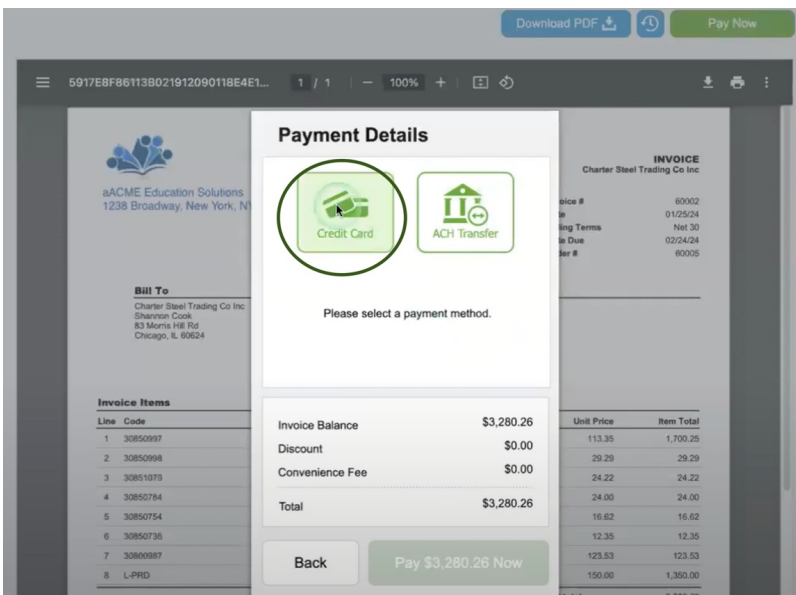
If she has made a payment in the past and her card on file would show in the **Select Credit Card** drop down list.

aACE Software

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.

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.

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@aacesoft.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.
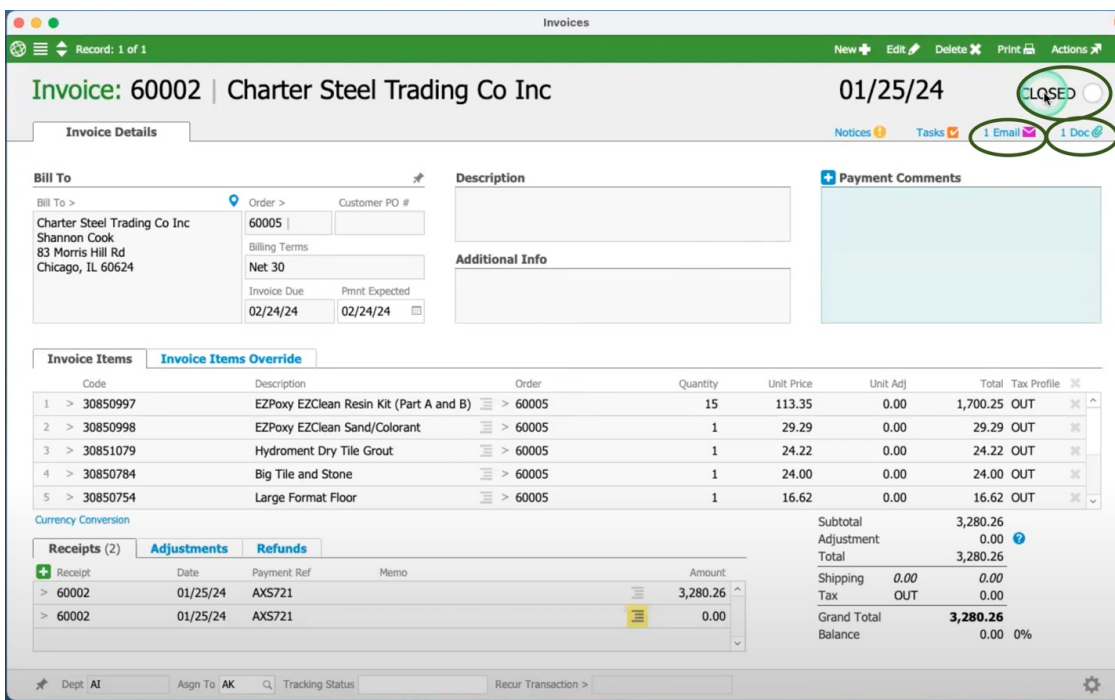
In this case we've set the fee to 3%, which is common, but an administrator can set this as desired. If you don't want to pass on that fee to the customer, the fee can be set to 0%.
The fee is automatically calculated and displayed above the Total.
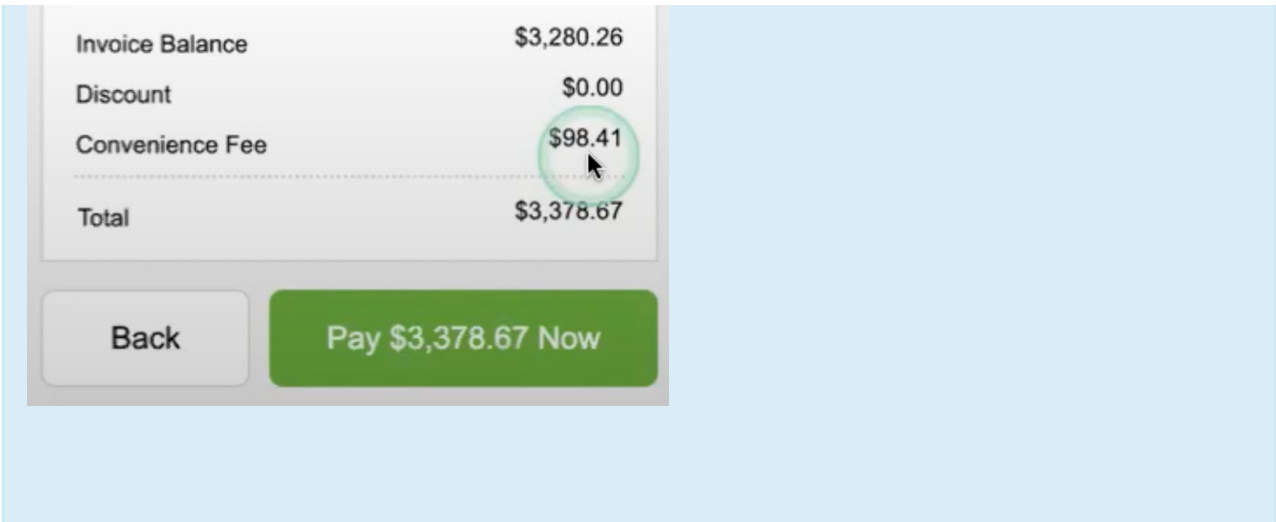
In aACE

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.

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.

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)

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

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

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/charging-a-fee-for-customer-payments-made-with-a-credit-card)