

Customer Pay Now Workflow for ACH 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.
4. To allow ACH Processing, Payment Innovators needs to activate that functionality. Once activated, contact us to get the file configured accordingly.

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.

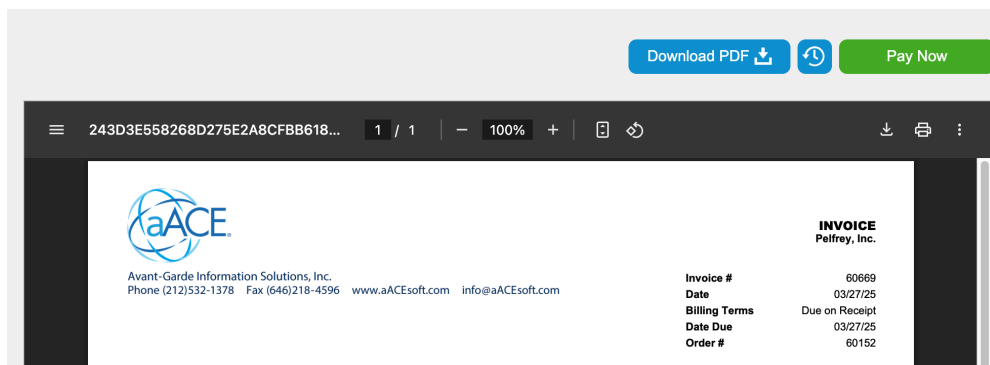
Thanks,

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 ACH Transfer button to select that payment method.

Payment Details



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 Bank Account** drop down list.

Payment Details



Credit Card



ACH Transfer

Selected Bank Account

Add Bank Account

If no card is on file or a new card needs to be entered, the user will click the **Add Bank Account** button. A **Bank Details** window appears. Once the information is filled in, the user clicks the **Add/Update Payment Method** button.

Edit Bank Details

Bank Details

Bank Name

☒ Checking ☐ Savings

21000021

Account Number

Address

Street

City St Zip


☒ Save For Future Use

Back


Update 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

Selected Bank Account

JPMorgan Chase Bank N.A. - Checking

Add Bank Account

Invoice Balance	\$0.50
Convenience Fee	\$0.00
<hr/>	
Total	\$0.50

Back

Pay \$0.50 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

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

Download PDF ↕ ↻ PAID

64288DCCC1A2DE685C83C627AF7... 1 / 1 100% +



Avant-Garde Information Solutions, Inc.

INVOICE

Pelfrey, Inc.

Invoice # 60669

The customer immediately receives an email detailing the ACH *REQUEST*. This is NOT a Receipt. *The Receipt is not generated until the ACH transaction clears.*

Powered by aACE | 5



noreply@mg.aacesoft.com
to me ▾

Mon, Apr 7, 6:47 PM (15 hours ago)



Your payment request for \$0.25 towards Invoice #60702 from Avant-Garde Information Solutions, Inc has been submitted for processing. You will receive a notification once your payment has been processed.

Please note that ACH payments can take up to 3–5 business days to clear, depending on your financial institution.

Your submission number: 80360823
Date: 2025-04-07 22:47:29 (UTC)
Name: John Smith
Bank account ending in: x871
Payment amount: \$0.25

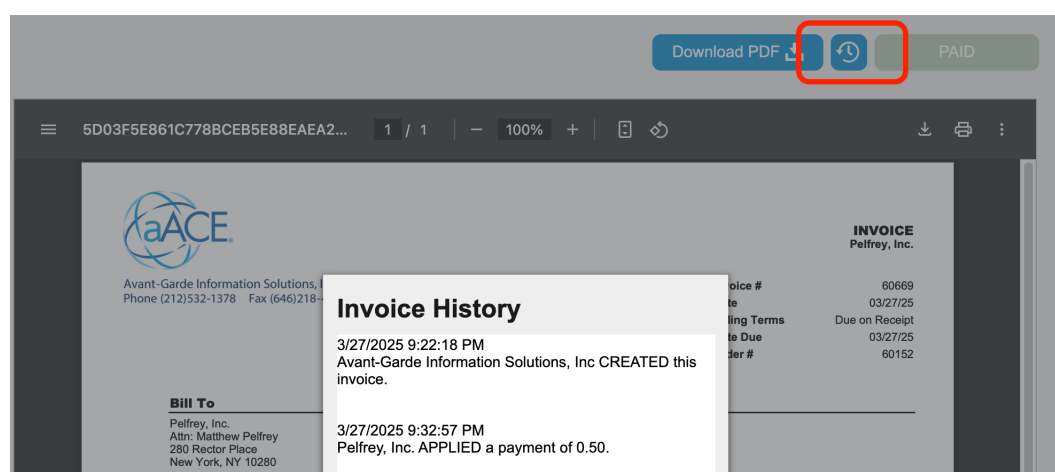
Please do not reply, as this email address is not monitored.

This is a fully-automated message sent using [aACE software](#).

[INV60702]

History Button

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



In aACE

Once paid by ACH, the Invoice now has a related Receipt, *but the Receipt has a **Pending Status*** while the ACH request processes (usually 3-5 days) and is displayed in grey text in the Invoice's Receipts tab. (Note: Credit Card Payments have a different workflow. See [here](https://aace6.knowledgeowl.com/help/payment-innovators-customer-pay-now-workflow) (<https://aace6.knowledgeowl.com/help/payment-innovators-customer-pay-now-workflow>) to review Credit Card Payment workflows.)

Record: 616 of 617

Invoice: 50647 | St. Catherine High School 07/09/24 OPEN

Invoice Details

Bill To

St. Catherine High School
Therese Bongiovanni
81 Olive Rd.
Grove City, OH 43123

Order > 50792 | St. 3941
Billing Terms
Net 30
Invoice Due 08/08/24
Print Expected 08/08/24

Description

Additional Info
Thank you for your business!

Payment Comments
[Alexis Kohn] I sent Therese the invoice via email. I'll follow up with her next week.
[Activity]
7/11/24 2:24 pm

Invoice Items

Code	Description	Order	Quantity	Unit Price	Unit Adj	Total	Tax Profile
1 > TECH-002	Electronic Whiteboard, Mounted	> 50792	6	5,700.00	0.00	34,200.00	OUT

Subtotal 34,200.00
Adjustment 0.00
Total 34,200.00
Shipping 0.00
Tax OUT 0.00
Grand Total 34,200.00
Balance 34,200.00 100%

Receipts (1)

Receipt	Date	Payment Ref	Memo	Amount
> 60001	04/01/25	7878787		34,200.00

Once the ACH request is **Cleared**, the invoice is automatically Closed and the Receipt is then displayed in black text. The Receipt is Posted/**Closed**, no longer Pending.

Additional Information about ACH Request Processing

While a Receipt is in a Pending status due to a currently processing ACH transaction, there are some validations that are activated. The Receipt should no longer be edited, nor posted. A warning appears when either of these actions is attempted.

If a Receipt receives a RETURNED ACH Status, the Receipt remains in a Pending state. Refer to [this article](https://aace6.knowledgeowl.com/help/ach-return-code-explanations) (https://aace6.knowledgeowl.com/help/ach-return-code-explanations) to review Return Codes. Depending on your next steps, you may wish to edit details and re-submit the ACH, or you may wish to post the Receipt without further processing. Alternatively, you may also wish to delete the transaction. Deleting is not allowed. Instead, you may Post it and then Void it. This maintains the transaction data.

See the article: [I've Received an ACH Return Code Notice, What Do I Do Now?](https://aace6.knowledgeowl.com/help/ach-returned) (https://aace6.knowledgeowl.com/help/ach-returned)

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 >

Chisholm High School

Pmnt Method

ACH

Reference #

7878787878

Customer Bank Acct

JPMorgan Chase

ACH Status

Notification Status

PENDING

Amount

31,587.08

Bank Info

Bank Account >

1120 | Undeposite

Deposit On

04/01/25

D

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, 1/25/2024

SENT

Email Details

Notices Tasks Emails 1 Doc

Email Header

From: brian.voll@aacessoft.com

To: shannon.cook@aacessoft.com

CC:

BCC:

Sent: 1/25/2024 11:38 AM

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.

Attachments

> Receipt

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