Automating Receipt Notifications

Last Modified on 10/01/2025 11:02 pm EDT

This guide discusses aACE's receipt notification features. It is intended for system administrators.

aACE offers useful receipt notification features, including manually sending receipt notification emails, semi-automating the process, or fully automating it.

The Automated Receipt Notification Process

aACE offers preferences to automate your receipt notification processes. It is important to understand these preferences and the list of criteria for the automation to be triggered.

Automated Receipt Notification Process in aACE

Each night, aACE's receipt notification process will find all receipts that meet the following requirements:

- The related company's A/P Send Docs Via field in the Customer Details tab is set to "Email".
- The related company has a valid A/P email address in the Customer Details tab.
- The receipt notification status in the Payment Info section of a receipt is PENDING.
- The record status of a receipt is POSTED.

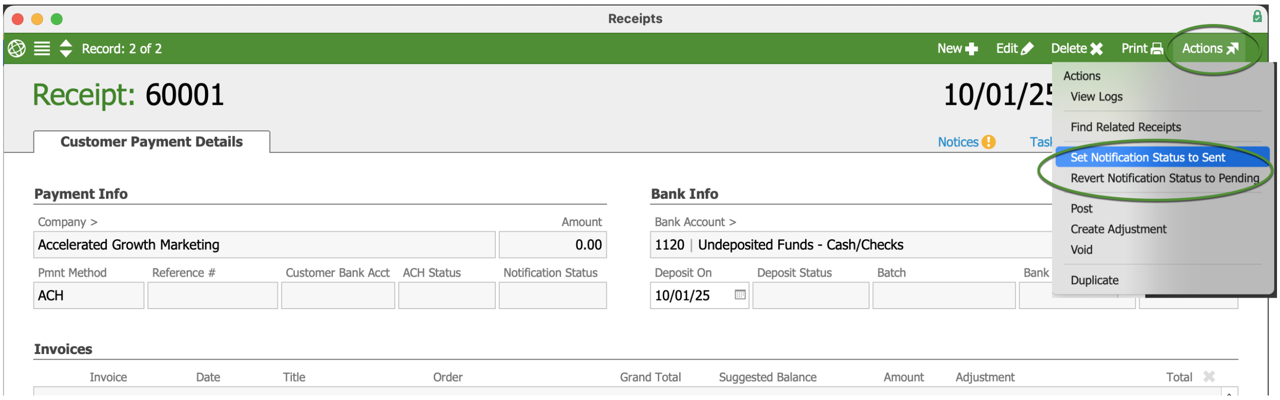
After the process collects these receipts, it emails the PDFs to their respective email addresses. The notification status for the sent receipts is then updated to SENT (Email).

Because the receipt notification process runs after hours rather than at the time of posting, you don't need to worry about potential mistakes that may occur throughout the day. For example, if a team member posts a receipt with an error on it, there is time to intercept the notification before the process runs that night.

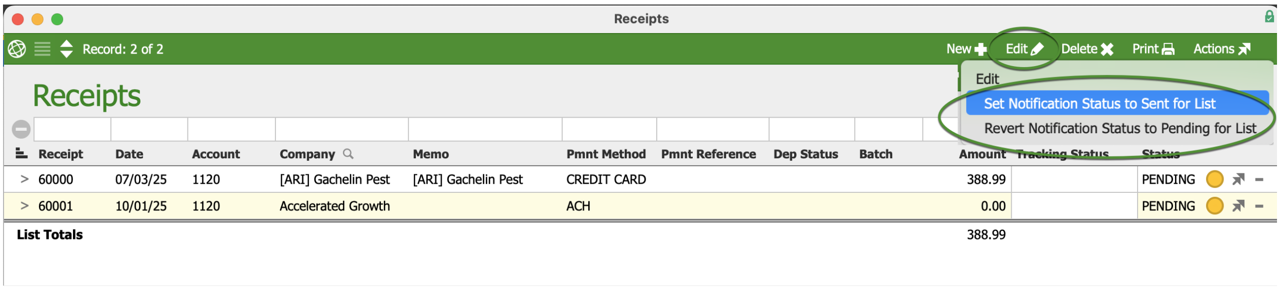
For customers who may need special handling, notification can still be run manually. Upon doing this, the notification status will be updated to SENT and will not be included in that night’s batch.

Manually Set the Notification Status

Manually set the Notification Status via the Actions dropdown menu.

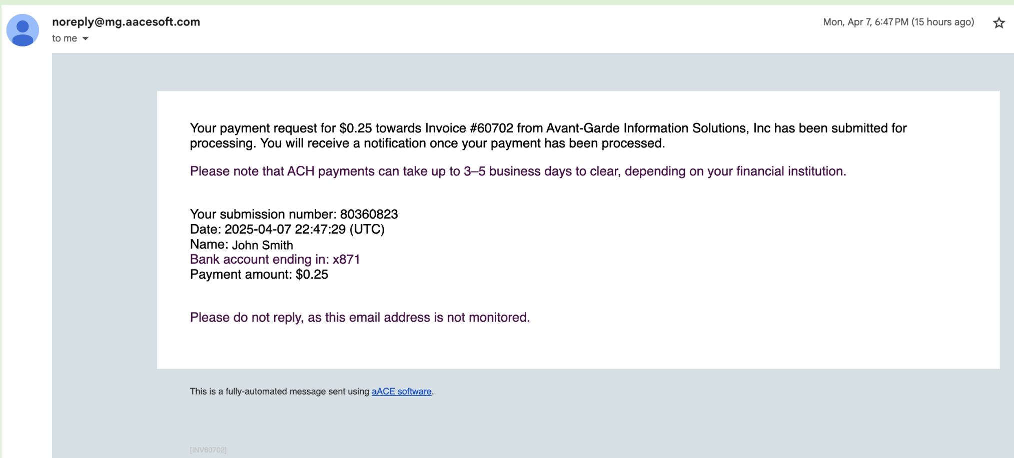


You may also manually set the notification status field in the Receipts List view via the Edit dropdown menu.



If ACH is enabled, Receipt Notification Automation is Required

When a customer makes a [Payment by ACH via the Pay Now link](https://aace6.knowledgeowl.com/help/customer-pay-now-workflow-for-ach) (https://aace6.knowledgeowl.com/help/customer-pay-now-workflow-for-ach), an “ACH request” email is generated immediately. It is noted that this is NOT a Receipt.


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.

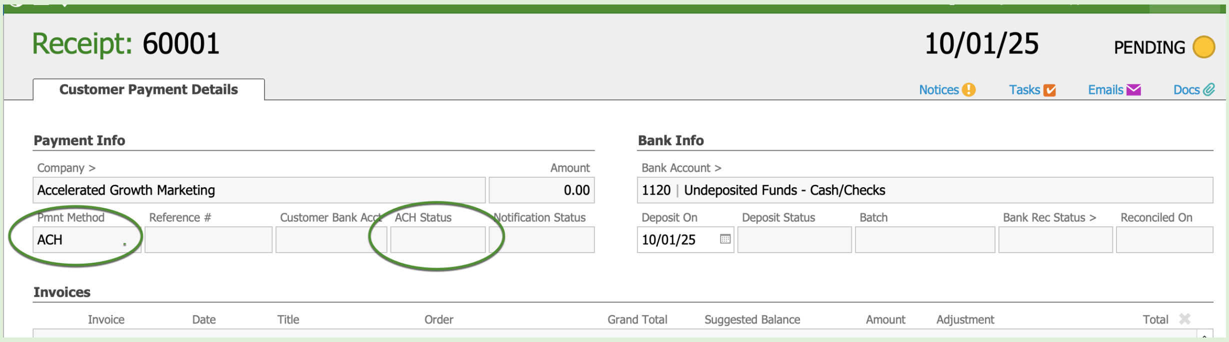
Please note that ACH payments can take up to 3–5 business days to clear, depending on your financial institution.

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.

The actual receipt notice is not generated until the ACH transaction clears, the Receipt's ACH Status field is populated CLEARED and the Receipt is Posted. But, receipt email automation must be enabled for these ACH receipt notifications to be generated and sent. Otherwise, ACH Receipts created from the PayNow Link will need to be sent manually.



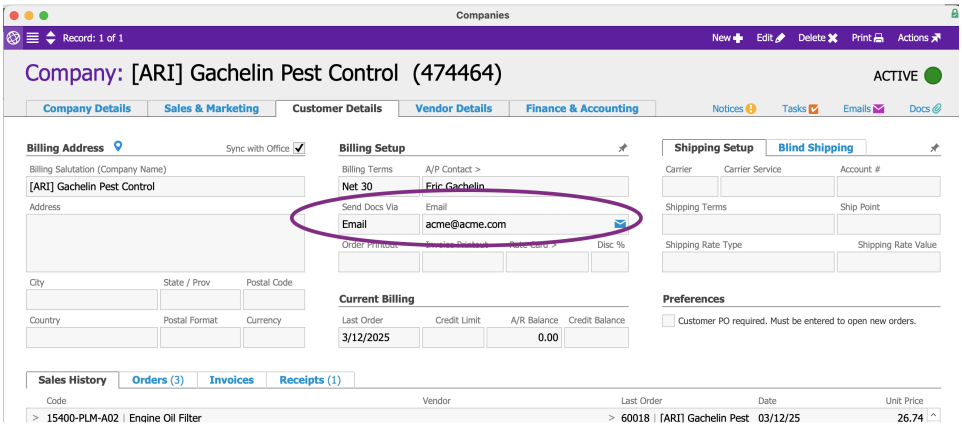
Enabling aACE Automated Receipt Notification

Once you choose to move forward with enabling automated receipt notification, you will need perform this list of setup activities:

1. Set up your Customers' A/P Email Address and Send Doc Via Preference
2. Configure the Receipt Email Template
3. Clean up old Receipts
4. Configure Notice Setup
5. Activate Automated Schedule

1. Set up your Customers' A/P Email Address and Send Doc Via Preference

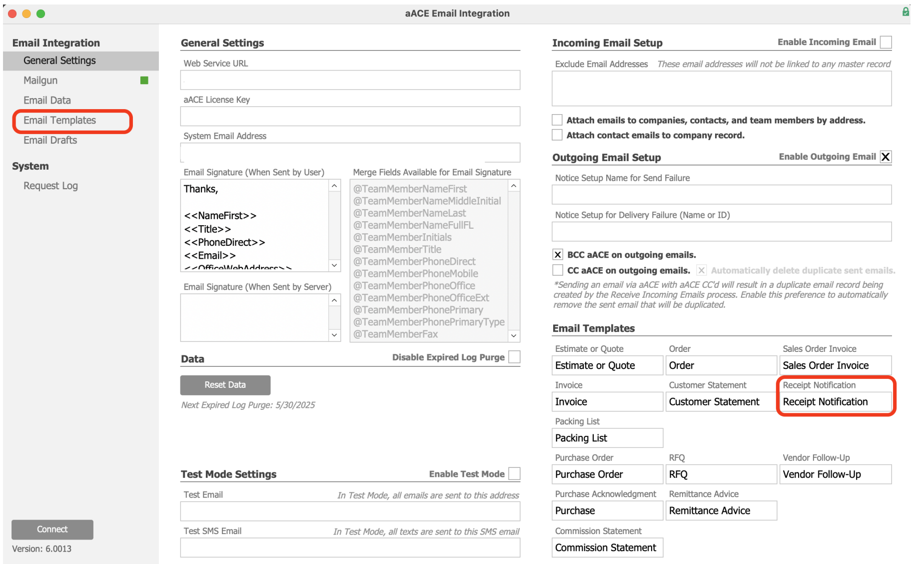
You can choose just a few customers or set them all up at once. For a vendor to qualify for automated remittance advice, their company record must have an email in the Vendor Details tab Email field, and the Send Docs Via field must be set to "Email."



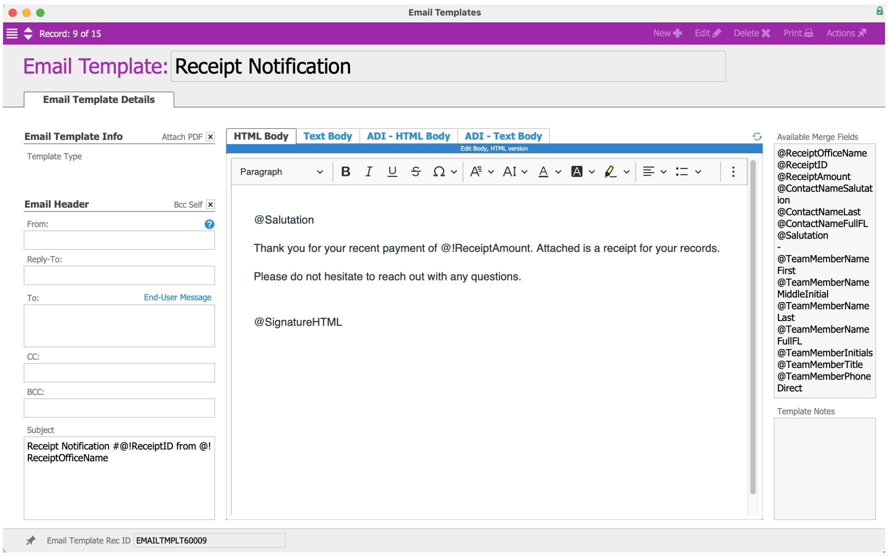
2. Configure the Remittance Advice Email Template

You also need to configure the receipt notification [email template](https://aace6.knowledgeowl.com/help/working-with-email-template-preferences) (https://aace6.knowledgeowl.com/help/working-with-email-template-preferences) with a "from" email address (e.g. ap@yourdomain.com). Complete the following steps:

1. Navigate from **Main Menu** > **System Admin** > **Email Integration** > **Email Templates**.



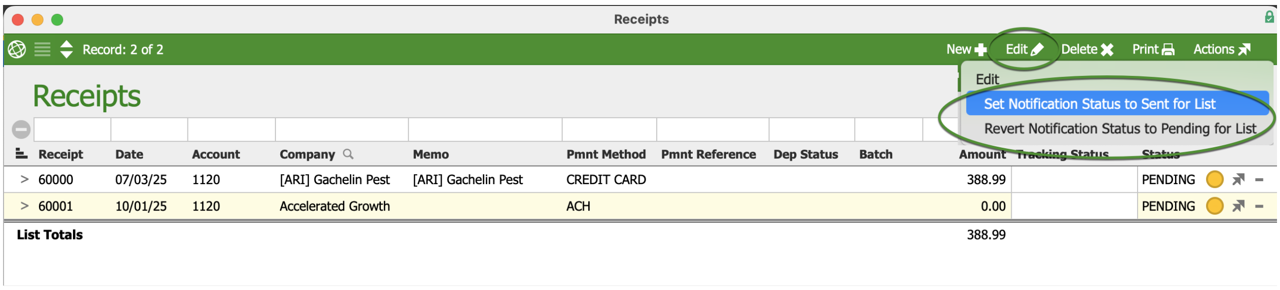
2. Find the Receipt Notification email template.
3. Include a "from" email address (e.g. ap@yourdomain.com) in the designated field.
4. You may also modify other details on the email template, such as the "subject" and "body". Consult with an aACE representative for more advanced help in [editing templates](https://aace6.knowledgeowl.com/help/editing-email-templates) (https://aace6.knowledgeowl.com/help/editing-email-templates).



3. Clean up old Receipts

Once you have configured a "from" email address, you can prevent aACE from auto-sending remittance advice for old receipts.

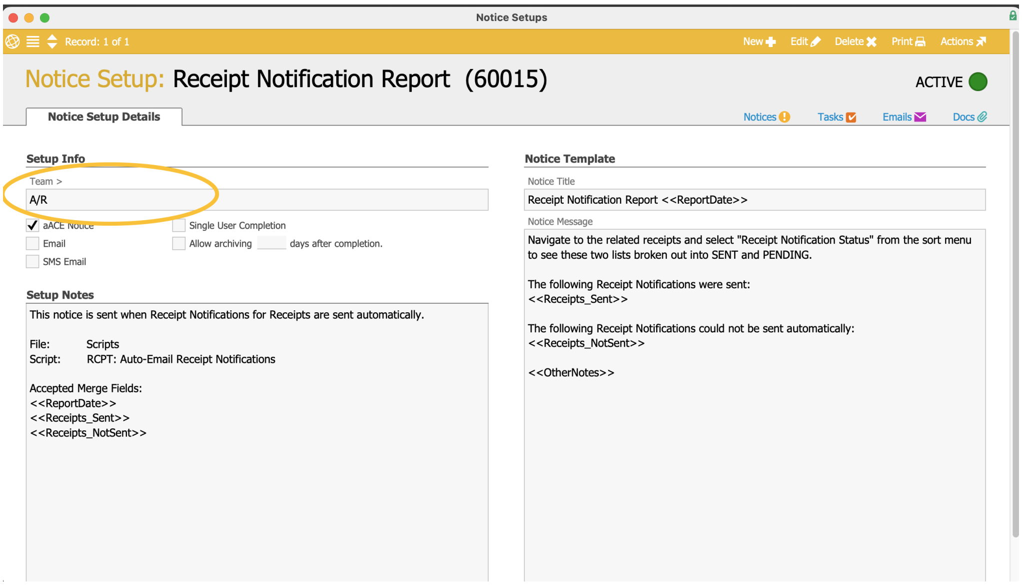
1. Navigate from **Main Menu** > **Accts Receivable> Receipts.**
2. In the Quick Search links at the bottom of the module, click **Find Pending Receipt Notifications**.
3. Navigate to **Edit** > **Set Notification Status to Sent for List**. This will prevent the automated remittance advice process from sending remittance advice on old disbursements.
   Note: You can also select Revert Remittance Advice Status for List to Pending if a Sent disbursement needs to be changed back to Pending.



4. Internal Notices for Automated Remittance Advice

After the email template is configured, you can configure the notice setup that will notify specific team members of any receipt notification that was sent and which could not be sent automatically:

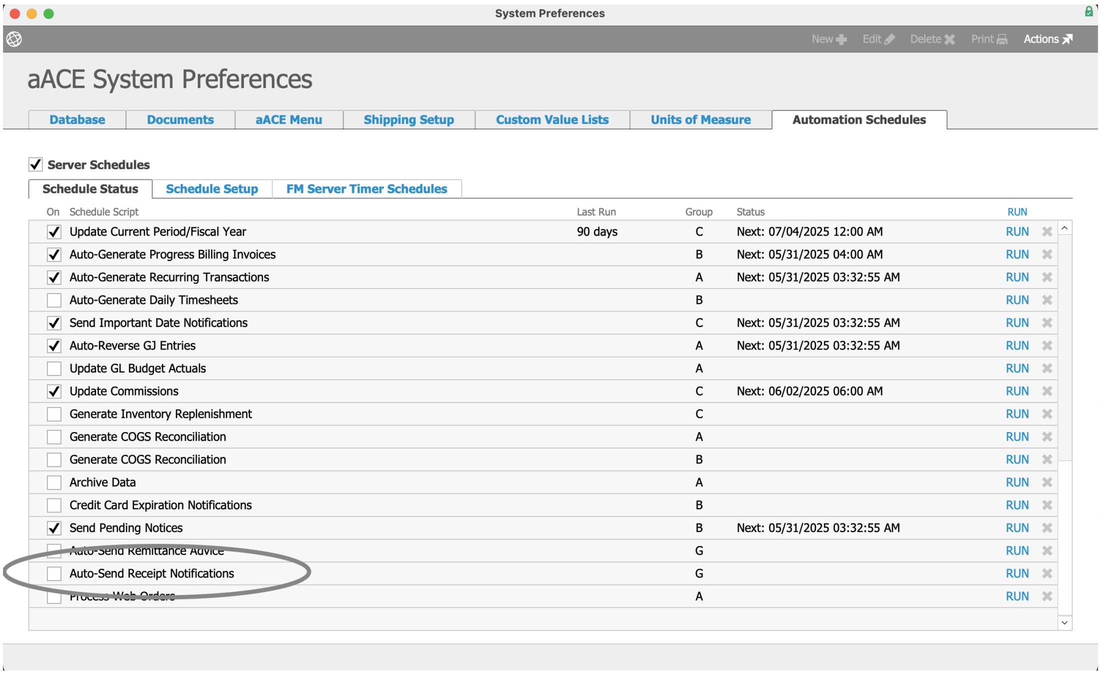
1. Navigate from **Main Menu** > **System Admin** > **Notice Setups** > **Receipt Notification Report**.
2. In the module header bar, click **Edit**.
3. In the Setup Info section, specify the team who needs to receive these notices in the Team field.



4. Click **Save**.

5. Activate Automated Schedule

The last step is to check the checkbox to activate the Auto-Send Receipt Notifications script schedule. Navigate from **Main Menu** > **System Admin > System Preferences > Automation Schedules.** Scroll toward the bottom of the list in the Schedule Status sub tab. Check the checkbox next to **Auto-Send Receipt Notifications**. Close the window.


System Preferences
New Edit Delete Print Actions
aACE System Preferences
Database
Documents
aACE Menu
Shipping Setup
Custom Value Lists
Units of Measure
Automation Schedules
Server Schedules
Schedule Status
Schedule Setup
FM Server Timer Schedules
On Schedule Script Last Run Group Status RUN
Update Current Period/Fiscal Year 90 days C Next: 07/04/2025 12:00 AM RUN
Auto-Generate Progress Billing Invoices B Next: 05/31/2025 04:00 AM RUN
Auto-Generate Recurring Transactions A Next: 05/31/2025 03:32:55 AM RUN
Auto-Generate Daily Timesheets B RUN
Send Important Date Notifications C Next: 05/31/2025 03:32:55 AM RUN
Auto-Reverse GJ Entries A Next: 05/31/2025 03:32:55 AM RUN
Update GL Budget Actuals A RUN
Update Commissions C Next: 06/02/2025 06:00 AM RUN
Generate Inventory Replenishment C RUN
Generate COGS Reconciliation A RUN
Generate COGS Reconciliation B RUN
Archive Data A RUN
Credit Card Expiration Notifications B RUN
Send Pending Notices B Next: 05/31/2025 03:32:55 AM RUN
Auto-Send Remittance Advice G RUN
Auto-Send Receipt Notifications G RUN
Process Web Orders A RUN