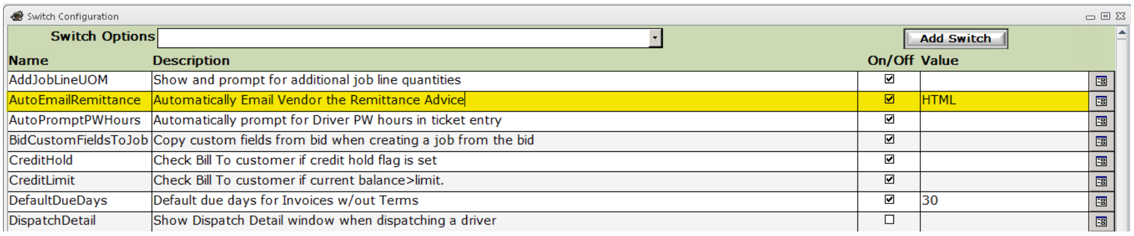
How do I setup my Vendor to receive a remittance automatically via email?

Category: Vendors | Created: March 21, 2026 | Updated: September 01, 2026

When paying AP Bills you can now email a Remittance Advice automatically. You need to configure the following:

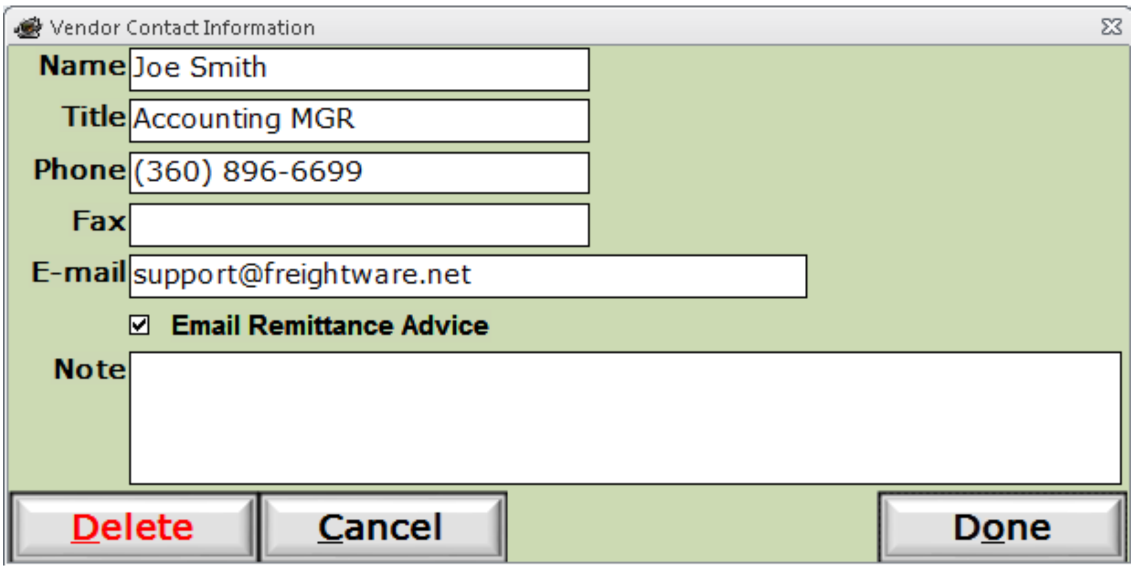

Switch Configuration

Switch Options | Add Switch

Name	Description	On/Off	Value
AddJobLineUOM	Show and prompt for additional job line quantities	☑	
AutoEmailRemittance	Automatically Email Vendor the Remittance Advice	☑	HTML
AutoPromptPWHours	Automatically prompt for Driver PW hours in ticket entry	☑	
BidCustomFieldsToJob	Copy custom fields from bid when creating a job from the bid	☑	
CreditHold	Check Bill To customer if credit hold flag is set	☑	
CreditLimit	Check Bill To customer if current balance>limit.	☑	
DefaultDueDays	Default due days for Invoices w/out Terms	☑	30
DispatchDetail	Show Dispatch Detail window when dispatching a driver	☐	

NOTE: Any value other than HTML (i.e. TEXT) will produce a plain-text email message.

1. On the Vendors Contact Information: Make sure they have a valid email address and the Email Remittance Advice is Checked.



You can modify the templates used for the email in: Setup > Custom Messages:

1. eRemittanceHeader
2. eRemittanceBody
3. eRemittanceFooter

Here is the list of Field Codes you can use in your templates:

1. {{CompanyName}} = Your Company Name
2. {{CompanySlogan}} = Your Company Logo
3. {{CompanyAddress}} = Your Company Address
4. {{CompanySuite}} = Your Company Suite Number
5. {{CompanyCityStateZip}} = Your Company City, State ZipCode
6. {{CompanyPhone}} = Your Company Phone Number
7. {{CompanyFax}} = Your Company Fax Number
8. {{CompanyEmail}} = Your Company Email Address
9. {{SupplierName}} = The Supplier's Name
10. {{Salutation}} = The Name of the Supplier Contact
11. {{SupplierAddress}} = The Supplier's Address
12. {{SupplierSuite}} = The Supplier's Suite Number
13. {{SupplierCity}} = The Supplier's City
14. {{SupplierState}} = The Supplier's State
15. {{SupplierZip}} = The Supplier's ZipCode
16. {{CheckNumber}} = The Check Number
17. {{TransType}} = Either Check or Adjustment Type i.e EFT
18. {{TransDate}} = Check or Adjustment Date
19. {{TransAmount}} = Check or Adjustment Amount
20. {{Payee}} = Check Payee Name
21. {{InvoiceDetails}} = A Table of What Was Paid (Invoice Number, Invoice Date, Due Date, and Paid Amount.