Cash Sales

Last Modified on 09/25/2024 7:22 am CDT

Agvance does not distinguish between cash and charge sales. A cash sale in Agvance charges the Customer and then takes a payment for the sale. There are two types of cash sales:

- Sales that are considered incidental for which tracking the sales activity by Customer is not necessary. A generic Customer called Cash Sale or something similar can be set up for these kinds of sales.
- Sales by Customers whose activity should be tracked. This procedure may be used on Invoices with multiple Customers even if some are paying now and the others are later.

How to Enter a Cash Sale/Cash Invoice

1. Go to *Accounting / A/R / Invoice* or choose the **Add an Invoice** icon and fill out the Invoice as normal.
2. Choose the *COD* option on the *Add Invoice* window and select **Save**.

3. This automatically defaults the *Take a Payment* option as selected on the *Print Invoice Documents* window. Make the appropriate selections and choose **OK**.

Print Invoice Documents

Select Range of Invoices
Location: 00MAIN
Starting Inv# 1200945
Ending Inv# 1200945
☐ Include Voided Invoices
☐ Previous Years
☐ Print Emailed Invoices   .. Copies

☐ Print Invoice   ADOBE PDF   1

☐ Print Delivery Ticket   1
☐ Print Haz Mat Sheet   1
☐ Print SDS   1
☐ Print WPS   ADOBE PDF   1
☐ Print Custom Apps
☐ Print Bill of Lading   1
☐ Print Invoice No Roll up

☑ Take a Payment   Capture Signature

OK   Cancel   ☐ Suppress Invoice Splits

4. On the *Receive Payment(s) on Account* window, enter the *Date, Disc, Payment Total, Pay Method(s)*, and *Pay Amount(s)*. The total of the *Pay Amount(s)* must equal the *Payment Total*. Select *Use UAC* to apply Unapplied Cash toward the Invoice.

Receive Payment(s) on Account

Check which customers you are receiving payment from.   These Payments will automatically be applied against the invoice you just created.

Payment Number 120369   Date 09/24/2024

		ID	Name	Gross	Disc	Payment Total	Pay Method 1	Ref #	Use UAC	UAC Balance	Pay Amount
1	▶ ☑	AndBa	Barry Anderson	965.36	0.00	965.36	Check		☐	3000.00	965.36

<Disc Acct>   4100000-00

Description

Control #   ☑ Print Receipts

Clear Locks   Apply
Save   Cancel

Note: If the payment is cancelled at the roll-through payment screen, the Invoice will automatically be voided. A COD sale can only be completed if the entire transaction, including the payment, is completed. If the payment is cancelled, the following message displays:

Receive Payment(s) on Account   ✕

❌ The COD Invoice will be voided since you are not taking a payment.

OK

5. Choose the *Print Receipts* option to print a payment receipt.

6. Select **Save** to finish the transaction.

If a Customer has reached the credit limit and the *Invoice Credit Check* preference is set to *Stop Sale* on the *A/R* tab at *Accounting / Setup / Preferences* and the Customer would like to pay cash, select the *COD* option.
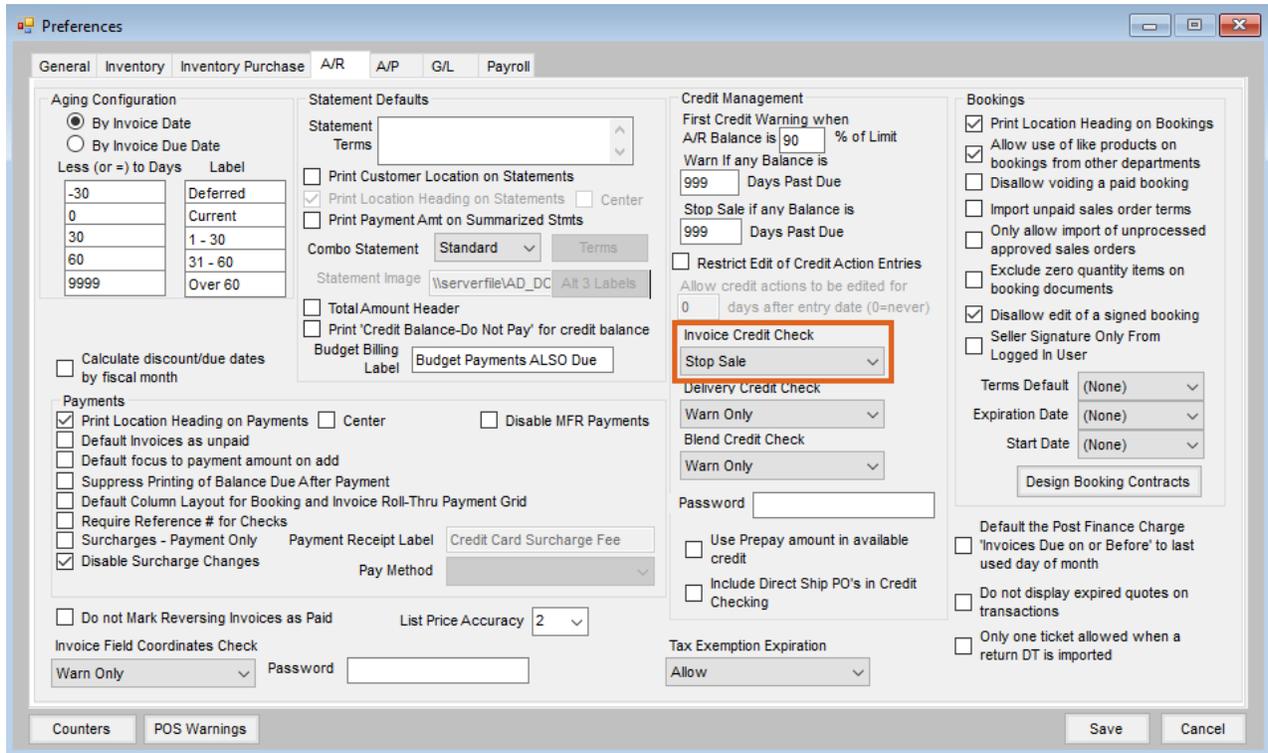
By using the *COD* option, the sale will be allowed to continue to a roll-through *Payment on Account* screen.