Cash Sales

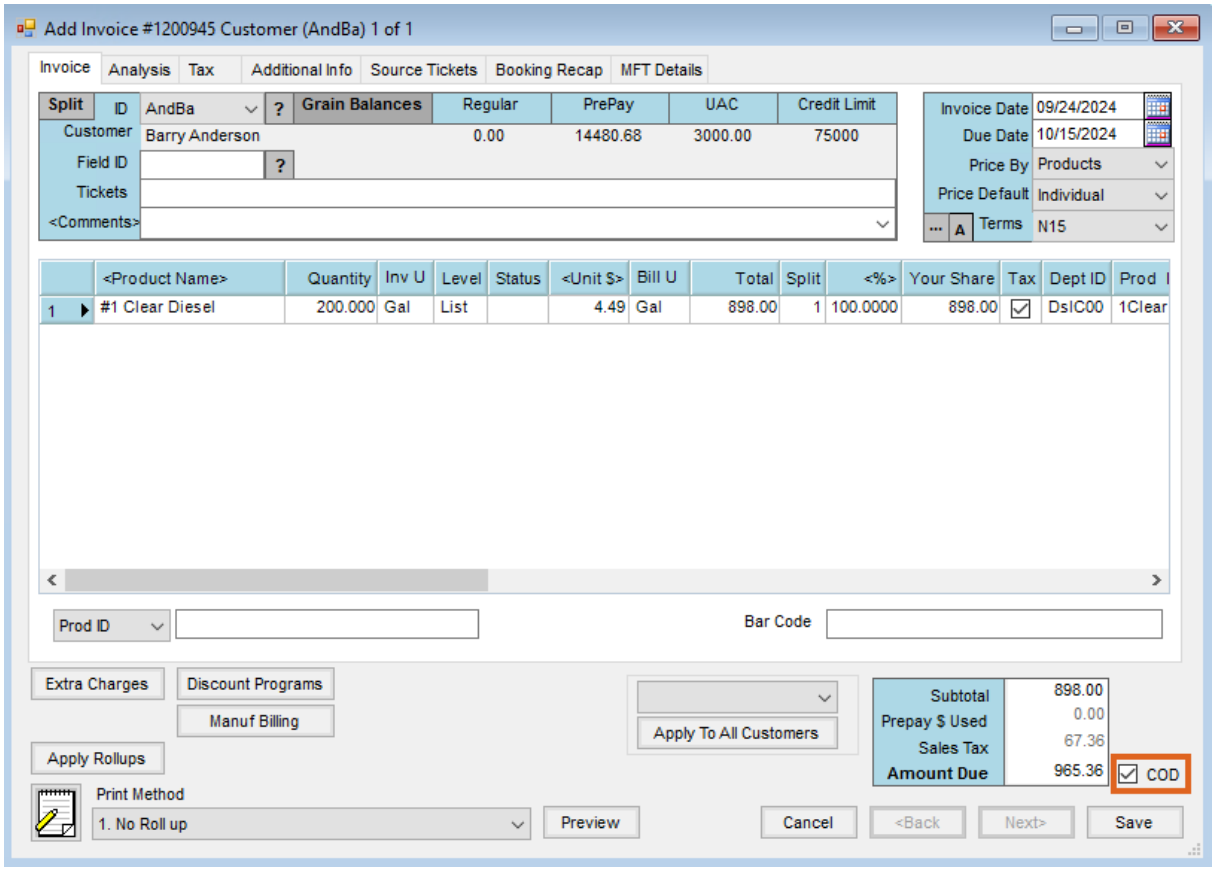
Last Modified on 10/12/2026 9:03 am CDT

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:

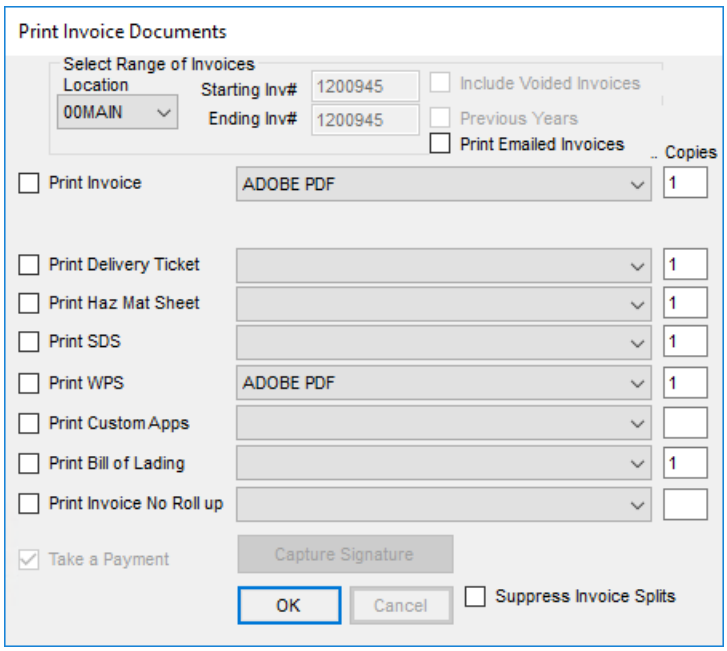
- Sales that are considered incidental for which tracking the sales activity by Customer is not necessary. A generic Customer called Cash Sale or something similar can be set up for these kinds of sales.
- Sales by Customers whose activity should be tracked. This procedure may be used on Invoices with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

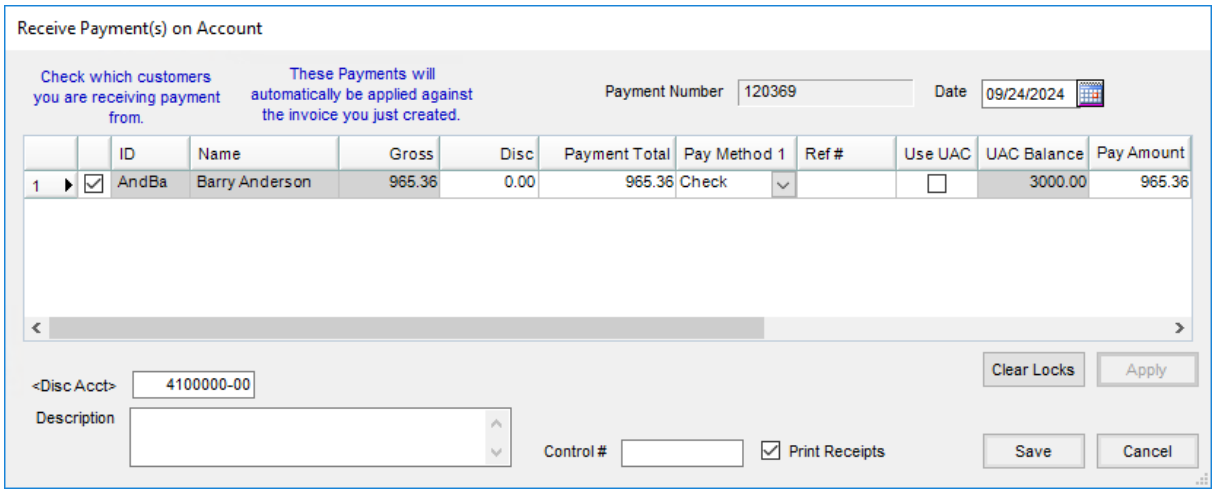


3. This automatically defaults the *Take a Payment* option as selected on the *Print Invoice Documents* window. Make the appropriate selections and choose **OK**.

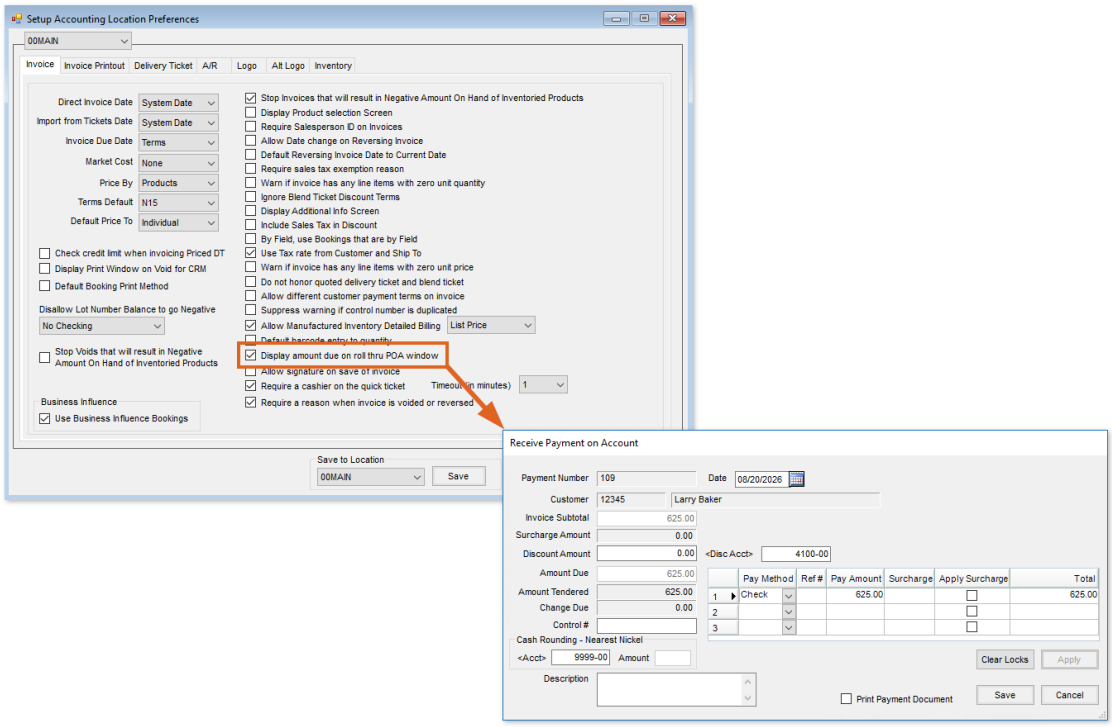


4. On the *Receive Payment(s) on Account* window, enter the *Date*, *Disc*, *Payment Total*, *Pay Method(s)*, and *Pay Amount(s)*. The total of the *Pay Amount(s)* must equal the *Payment Total*. Select *Use UAC* to apply Unapplied Cash toward the Invoice.

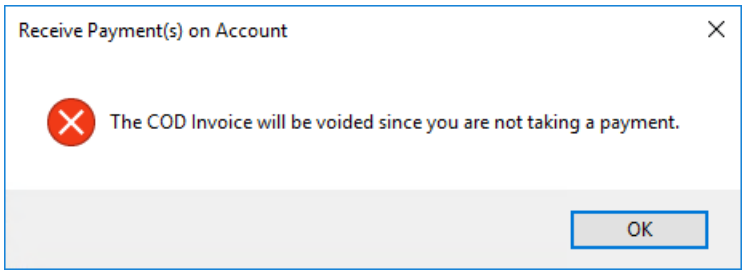
   Note: The *Cash Round Acct* and *Amount Rounded* columns default from the **Cash Rounding Default** set on the Location if the Pay Method(s) being used is *Cash*.



   - If the *Display amount due on roll thru POA window* preference is checked at *Accounting / Setup / Location Preferences*, the *Receive Payment on Account* window will display as the following:



5. 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:

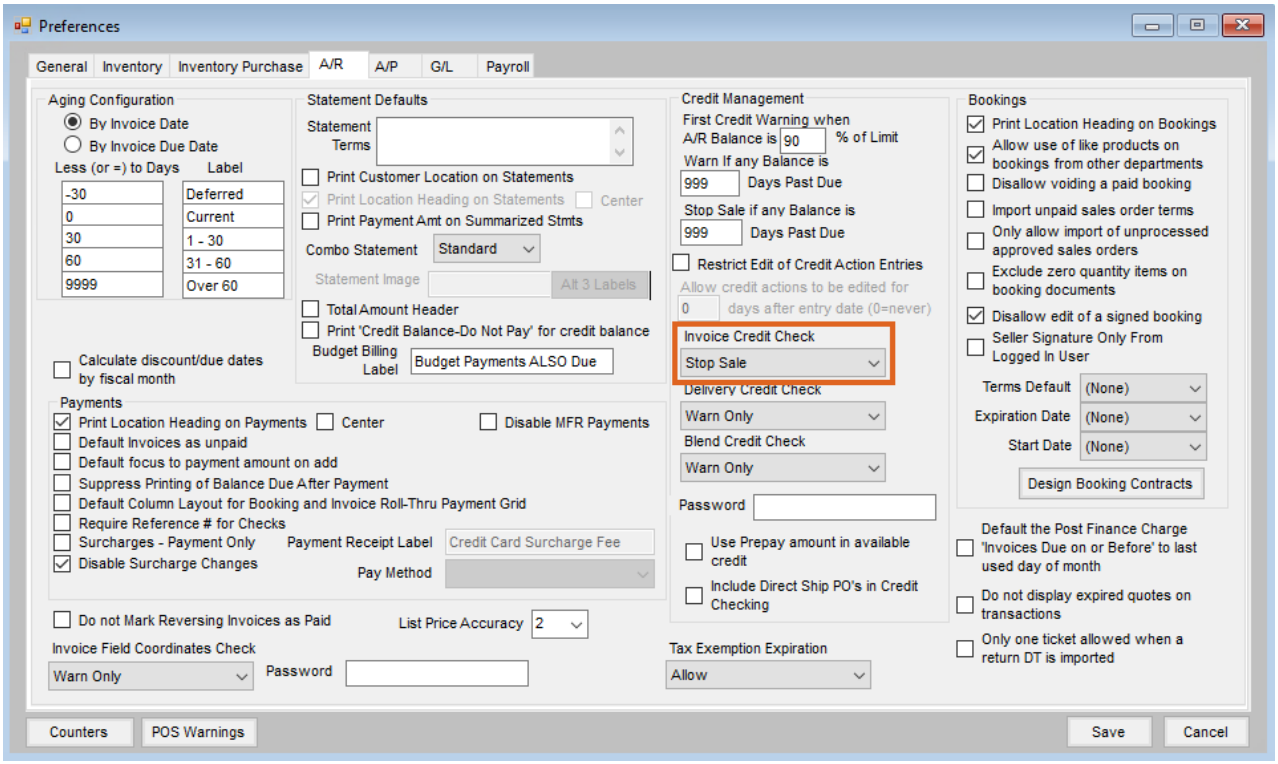


6. Choose the *Print Receipts* option to print a payment receipt.
7. Select **Save** to finish the transaction.

To reprint a COD invoice, go to *Accounting / A/R / Invoice*. Highlight the invoice and select **Reprint**.

COD Invoices require a payment immediately upon saving the Invoice. If a COD Invoice is canceled on the *Print Invoice Documents* window, the Invoice is voided and, therefore, cannot be reprinted by editing and saving.

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.