

# Email Payment Receipts with CRM

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Email payment receipts to Customers through Agvance CRM by selecting the *Email This* option on the *Payment on Account* window.

In Accounting, choose the **Add a Payment on Account** icon or go to *Accounting / A/R / Payments* and select **Add**.

Choose a Customer and **Select**. Complete the payment details on the *Payment on Accounts* window.

To email a receipt, select the *Email This* option located in the lower left of the screen. Choose **Show Email Addresses** to review the email address on file. To provide the Customer with a printed receipt in addition to the email, select the option *Print on Save*.

Upon selecting **Save**, the receipt is emailed to the Customer.

**Note:** The *Email This* option is only available for Customers set up to receive CRM documents.

**Payment on Accounts**

Date: 03/12/2024 | Payment Number: 120339

<Customer ID>: AndBa | Barry Anderson

Payment Amount: 3625.00 | Regular

Surcharge Amount: 0.00

Payment Collected: 3625.00

Discount Amount: | <Disc Acct>: 4100000-00

Total Credit: 3625.00 | Control #: |

	Regular	Prepay	U/A Cash	Budget
Before	3625.00	14659.25	747.50	0.00
After	0.00	14659.25	0.00	0.00

Clear Locks

Description: |

Sort Invoices by: Standard

Use U/A Cash

Auto Apply

	Pay Method	Ref #	Pay Amount	Surcharge	Apply S
1	Check		3625.00	0.00	
2					

	Date	Invoice #	Due	Gross	Unpaid Amt	Disc Date	<Discount>	Payment	Invoice Terms	Cor
1	08/29/2023	1200888	09/15/2023	3225.00	3225.00	Expired	0.00	3225.00	N15	
2	03/06/2024	1200900	04/15/2024	400.00	400.00	Expired	0.00	400.00	N15	

Apply | Untag All | Print Form

Totals: 0.00 | 3625.00

Email This  
[Show Email Addresses](#)

Print on Save |  Issue Check

Save | Cancel