

Email Payment Receipts with CRM

Last Modified on 03/12/2024 11:02 am CDT

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.

The screenshot shows the 'Payment on Accounts' window with the following details:

- Date: 03/12/2024
- Payment Number: 120339
- <Customer ID>: AndBa
- Customer Name: Barry Anderson
- Payment Amount: 3625.00
- Surcharge Amount: 0.00
- Payment Collected: 3625.00
- Discount Amount: [Empty]
- Total Credit: 3625.00
- <Disc Acct>: 4100000-00
- Control #: [Empty]
- Sort Invoices by: Standard
- Use U/A Cash: [Unchecked]
- Auto Apply: [Button]
- Clear Locks: [Button]
- Table 1 (Payment Methods):

	Pay Method	Ref #	Pay Amount	Surcharge	Apply S
1	Check		3625.00	0.00	[]
2					[]
- Table 2 (Invoices):

	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	
- Totals: 0.00 / 3625.00
- Buttons: Apply, Untag All, Print Form, View Invoices, Save, Cancel
- Options: Email This, [Show Email Addresses](#), Print on Save, Issue Check