

Invoice Sync in Acumatica

This section will show you how the Invoices are getting synced.

Steps to be followed:

Step 1: You need to click on the option for [Create Shipment] from the Sales Order Screen.

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Material Requireme	Sales Orders SO SO007646 - IPL IND	DIA			,		7				NOTES	ACTIVITIES	FLI	ES CUSTOMIZATION	TOOLS .	
Time and Expenses	5 II II S 4		< >	M QUICK PF	ROCESS	CREATE SHIPMEN	HOLD									Uencs
Finance	Order Type: SO Order Nbr.: SO007646	Customer: Location:	C000000287 - MAIN - Primary	IPL INDIA y Location	р / р /	Ordered Qty.: Discount Total:	1.00								^	Customer Details
\$ Banking	Status: Open • Date: 11/22/2023	Contact: Currency:	shreyas lyer USD ,0 1.00	VIEW 8	₽ Ø BASE	VAT Exempt T VAT Taxable T	0.00									
Payables	Requested On: 11/22/2023 Customer Or	Project:	X - Non-Project	t Code.	p /	Tax Total: Order Total:	47.50 547.50									
Receivables	External Ref 423 - 8282	3R Description:	B2B23R1 Ord	der: 423 Status: A	waiting Pa	syment										
Sales Orders	DETAILS TAKES CO	OMMISSIONS FINAM	ICIAL SHIPPI	ING ADDRES	SES C	DISCOUNTS SHIP	MENTS PAYMENTS	RELATIONS	TOTALS							
-	O + X CREATE	PAYMENT CREATE	PREPAYMENT	CAPTURE V	DID CARD	PAYMENT IMPOR	T CARD PAYMENT	×		Active		*	V	Not Released:	547.50	
R ChannelAdvisor	B B D Doc. Type	* Reference Nbr.	Applied To	Transferred	Belance	Status	Payment Ref.	Payment Method	Cash Account	Payment Cu	Payment Currency Pr	Proc. Status		Authorized:	0.00	
7			Crow	to invoice		0	Photo and a			Amount				Released:	0.00	
Purchases	Prepayment	204532	547.50	0.00	0.00	Open	PMT04245	CASH	10100	547.50 U	SD			Total Paid:	547.50	
linventory														Total Transfer	0.00	
0.0														Unpaid Balan	0.00	
Dashboards														Choired bala	041.00	
Commerce Connec																
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Click on the Create Shipment

Step 2: Upon clicking the Create Shipment you will get the following screen.





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Waterial Requireme	Sales Orders SO S0007646 - IPL INDIA	NOTES	ACTIVITIES	FLES	CUSTOMIZATION	TOOLS -	
Time and Expenses	← III III III III III IIII IIII IIII I						Lience .
Finance	Order Type: SO ρ Costomer: C000000257 - IPL INDIA ρ d Ordered City:: 1.00 Order Nor: S0007645 ρ - Location: MAIN - Primary Location ρ d Discount Total: 0.00					î	Customer Details
\$ Banking	Status: Open Contact: shreyss lyer ρ # Wit Exempt T. 0.00 • Date: 11/22/2023 v Currency: USD ρ 1.00 v VIEW BASE Wit Taxable T. 0.00						
Payables	Regulated On: 11/22/2023 - Project: X - Non-Project Code. ρ σ ² Tax Total: 47.50 Customer On. Order Total: 547.50						
Receivables	External Ref., 423 - 82823R Description: 82823R1 Order: 423 Status: Awaiting Payment						
Sales Orders	DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISC						
	O + X CREATE PRYMENT CREATE PREPAYMENT CAPTURE VOID CARD RD Specify Shipment Parameters X	Active		7	Not Released:	547.50	1
E ChannelAdvisor	O Doc. Type *Reference Nor. Applied To Transformed Beames Bits - Shoment Date [11/21/2023 - Cash Account	Payment Currency	Proc. Status		Authorized:	0.00	
~	Order to Involte +Warehouse ID: WHOLESALE - Wholesale Warehou ,0	Amount			Released:	0.00	
Purchases	6 D. Prepayment 004530 547.50 0.00 0.00 0.00 10100	547.50 USD			fotal Paid:	547.50	
linventory					lotal Transfer	0.00	
					Unpaid Balan	0.00	
Dashboards					Unbilled Bala	547.50	
Commerce Connec							
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Kensium License							
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Specify the Shipment Parameters

Step 3: This will enable the [Confirm Shipment] button.

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Waterial Requireme	Signatus 005175 - IPL INDIA	C NOTES ACTWIT C Executing. Press to abort
Time and Expenses	す III III マ + III K K > XI CONFIGNISHIPHENT HOLD …	CANCEL
Finance	Shipment Nbr. 005175 D Customer: C00000287 - IPL INDIA IP Shipped Qua 1.00 Type: Shipment Location: MAIN - Primary Location Shipped Weig 2.720000	
\$ Banking	Status: Open Warehouse ID: WHOLESALE - Wholesale Warehouse Shipped Volu 3.000000 Operation: Issue Workgroup: ,0 Packages: 1	
Payables	Shipment Date: 11/21/2023 - Owner: , , , , P. Package Wei, 2.750000 Description: 82823R1 Order: 423 Status: Asabing Payment	
Receivables	DETAILS ORDERS SHIPPING PACKAGES	
Sales Orders	Contraction of the second	Packed Qty Lot/Seral Nbr. Expiration Reason Code Description Date
E ChannelAdvisor	0 D 50 S0007549 AACOMPUTD1 WHOLESALE R1S1 EA 1.00 1.00 0.00 0.00	0.00 Aper Laptop Co
Purchases		
linventory		
Dashboards		
Commerce Connec		
Commerce		
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III More items	<	>
<	On Hand \$70.00 EA, Available \$62.00 EA, Available for Shipping \$62.00 EA	

Click on Confirm Shipment





Step 4: Acumatica will start [Preparing Invoice].

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Material Requireme	Signants 005175 - IPL INDIA	C NOTES	ACTIVIT C Executing. Press to abort										
Time and Expenses			00:00:01 CANCEL										
Finance	Shipment Nbr.: 005175 () Customer: C000000257 - IPL INDIA / Shipped Qua												
\$ Banking	Status: Confirmed Warehouse ID: WHOLESALE - Wholesale Warehouse Shipped Weig . 2,720000												
Pavables	Shipment Date: 11/21/2023 Owner: I Packages: 1 Exclose May 2 24000												
Receivables	Description: B2B23R1 Order: 423 Status: Awaiting Payment												
C Sales Orders	Coder Nor. Inventory ID Free Proventouse Location *LOBL Sngped Dty Ondersd Dty Open Dty Proved Dty Proventouse	ked Gity Lot/Serial Nor.	Expiration Reason Code Description										
ChannelAdvisor	O SO <u>S0007545</u> <u>AACOMPUT01</u> WHOLESALE R151 EA 1.00 1.00 0.00 0.00	0.00	Acer Laptop Co										
Purchases													
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III More items	<		>										
<	On Hand 970.00 EA, Available 862.00 EA, Available for Shipping 862.00 EA		< < > >										

Preparing Invoice

Step 5: Release the Invoice.

Acumatica	Search	Revision Two Products Products Wholesale	11/21/2023 🗸 🕐 💄 admin admin 🗸
Material Requireme	Invoices Invoice AR0000160 - IPL INDIA	C NOTES	ACTIVITIES FILES OUSTOMIZATION TOOLS -
Time and Expenses			
Finance	Type: Invoice Costomer: Costomer: Costomer Costomer Detail Total 500.00 Reference N. AR000015C.pl + Location MAIN - Primary Location p Discourt Total 0.00		^
\$ Banking	Status: Balanced - Currency: USD /P 1.00 V IEW BASE VAT Taxable T. 0.00 - Date: 11/21/2023 - * Terms: 300 - 30 Dava /P WE Dewent T. 0.00		
Payables	Post Period: 11-2023 μ Post Date: 12/21/2022 - Tax Total: 51.25 Continner Dr Cash Discour. 12/21/2022 - Write-Off Total: 0.00		
Receivables	Project Contr X - Non-Project Code. Project Code. Powersteine R092181 (Order: 421 (Status: Assetting Payment Cash Discount 0.00		
Sales Orders	and a second		
📃 ChannelAdvisor	DETAILS TAKES COMMISSIONS FREIGHT FINANCIAL ADDRESSES DISCOUNTS APPLICATIONS O + X LOAD DOCUMENTS AUTO APPLY CREATE PRVMENT CARTURE VOID CARD REVIEWT UNFORT CARD REVIEWT H		Not Released: 0.00
Purchases	B 0 D . *Doc. Type *Reference NDC. Amount Paid Cash Description B 0 D *Doc. Type *Reference NDC. Amount Paid Cash Description Currency	Payment Payment Rat. Period	Custo Authorized: 0.00 Released: 547.50
linventory	C D D Prepayment 204530 547.50 0.0000 0.00 11/22/2023 0.00 B2B23R1 Payment Method: COD (OF USD	11-2023 PMT04245	C0000002 Total Paid: 547.50
Dashboards			Unpaid Balan 3.75
Commerce Connec			
Commerce			
Kensium License			
III More tems	¢		>
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Releasing the Invoice

Step 6: After [Release] the invoice is going to sync with the B2B app. Go to the Logs under the Report section of Acumatica.

Acumatica	Search	۵ ۵							Revision Two Products Products Wholesale	11/21/3 11:05 PM	2023 🗸	0 🔺	admin a	idmin 🗸
Favorites	Logs											CUSTOM	ZATION	TOOLS .
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Waterial Requireme	Action Type: Level:		v v	From Date: To Date:		 From Time: To Time: 		u u						î
Time and Expenses	Message:													
Finance	B 0 D Level	Action Type	Message			Endpoint Uri		Description		Login User	Log Date	Log Time		
	> @ D INFO	Invoice Sync	['acu_invoice_num	nber":"AR0000160","compan	y_id::3	https://betterb2b.ken	siumcommerce.com/	Invoice is created/updated successful	ly.	admin	11/21/2023	11:05 PM	1	
S Banking	D INFO	Customer Sync	('company_name'	"TCS", "company_phone": "(582) 59	https://betterb2b.ken	siumcommerce.com/	Customer(s) created/updated success	fully in Commerce.	admin	11/21/2023	10:58 PM	1	
	D INFO	Customer Conta	('email':'sachin@r	mailnator.com","job_title":nul	l,'first	https://betterb2b.ken	siumcommerce.com/	Customer Contact is created/updated	successfully.	admin	11/21/2023	10:57 PM		
Payables	D INFO	Customer Conta	['email':'sanchaya	an@test.com","job_title":null	"first_n	https://betterb2b.ken	siumcommerce.com/	Customer Contact is created/updated	successfully.	admin	11/21/2023	10:57 PM		
	D INFO	Customer Locati	['address_label':'F	Primary Location", "first_nam	e": TCS	https://betterb2b.ken	siumcommerce.com/	Customer Location is created/updated	successfully.	admin	11/21/2023	10:53 PM		
Receivables	INFO	Customer Conta	['email':'sanchaya	an@test.com","job_title":null	"first_n	https://betterb2b.ken	siumcommerce.com/	Customer Contact is created/updated	successfully.	admin	11/21/2023	10:53 PM		
_	D INFO	BeamerToken	RefreshToken			KN.CF.52.00		Token Generated succesfully		admin	11/21/2023	10:49 PM		
Sales Orders	D INFO	Customer Conta	{'email':'sachin@r	mailnator.com","job_title":nul	I, first	https://betterb2b.ken	siumcommerce.com/	Customer Contact is created/updated	successfully.	admin	11/21/2023	10:47 PM		
-	D INFO	Customer Sync	['company_name'	"TCS", "company_phone": "(582) 59	https://betterb2b.ken	siumcommerce.com/	Customer(s) created/updated success	fully in Commerce.	admin	11/21/2023	10:47 PM		
H ChannelAdvisor	D INFO	Customer Locati	{"address_label":"F	Primary Location", "first_nam	e": TCS	https://betterb2b.ken	siumcommerce.com/	Customer Location is created/updated	successfully.	admin	11/21/2023	10:47 PM		
-	D INFO	Customer Sync	{'company_name'	"Facebook", "company_pho	ne":"87	https://betterb2b.ken	siumcommerce.com/	Customer(s) created/updated success	fully in Commerce.	admin	11/21/2023	10:43 PM		
Purchases	D INFO	Customer Sync	['company_name'	"Facebook", "company_pho	ne":"67	https://betterb2b.ken	siumcommerce.com/	Customer(s) created/updated success	fully in Commerce.	admin	11/21/2023	10:42 PM		
-	D INFO	Customer Conta	['email':'markz@t	est.com","job_title":null,"first	t_name'	https://betterb2b.ken	siumcommerce.com/	Customer Contact is created/updated	successfully.	admin	11/21/2023	10:42 PM		
b Inventory	D INFO	Customer Conta	('email':'markz@t	est.com","job_title":null,"first	t_name'	https://betterb2b.ken	siumcommerce.com/	Customer Contact is created/updated	successfully.	admin	11/21/2023	10:39 PM		
0	D INFO	Customer Conta	('email':'markz@t	est.com","job_title":null,"first	t_name'	https://betterb2b.ken	siumcommerce.com/	Customer Contact is created/updated	successfully.	admin	11/21/2023	10:39 PM		
Dashboards	INFQ	Customer Locati	{"address_label":"F	Primary Location", "first_nam	e":"Fac	https://betterb2b.ken	siumcommerce.com/	Customer Location is created/updated	successfully.	admin	11/21/2023	10:38 PM		
	D INFO	Customer Locati	['address_label':'F	Primary Location", "first_nam	e":"Fac	https://betterb2b.ken	siumcommerce.com/	Customer Location is created/updated	successfully.	admin	11/21/2023	10:38 PM		
Commerce Connec	D INFO	Customer Sync	['company_name'	"Facebook", "company_pho	ne":"67	https://betterb2b.ken	siumcommerce.com/	Customer data is created/updated suc	cessfully.	admin	11/21/2023	10:36 PM		
Commerce	INFO	Customer Sync	{'company_name'	"Facebook", "company_pho	ne":"67	https://betterb2b.ken	siumcommerce.com/	Customer(s) created/updated success	fully in Commerce.	admin	11/21/2023	10:36 PM		
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Log shows the Invoice is synced

Note that, all the statuses will be supported, like Balan, Closed etc.





Acumatica	Search	۹ ಲ								Revision Products	n Two Products 🗸 Wholesale	11/21/2023 11:08 PM	0 🛓 🛛	dmin admin 🐱
Waterial Requireme	Invoices										NOTES		e operation has	×
Time and Expenses	5 ≅ 5 +	8 0 - к	< > >I	-lm								co	mpleted.	
Finance	Type: Invoice ~ Reference N AR0000160 ,p	Customer: Location:	C000000287 - IPL II MAIN - Primary Loo	NDIA	1	Detail Total: Discount Total:	500.00							^
\$ Banking	Status: Open Date: 11/21/2023	Currency: Terms:	USD 1.00 30D - 30 Days	 VIEW BAS 	E	AT Taxable T AT Exempt T	0.00							
Payables	Post Period: 11-2023 Customer Or	Due Date: Cash Discou	12/21/2023 ~ 12/21/2023 ~		1	ax Total: Vrite-Off Total:	51.25 0.00							
Receivables	Project/Contr X - Non-Project Description: B2823R1 Orde	Code. r: 423 Status: Await	ing Payment		1	alance: imount:	3.75 551.25							
Sales Orders	DETAILS TAXES COMM	SSIONS FREIGH	T FINANCIAL	ADDRESSES	DISC	Cash Discount:	0.00							
R ChannelAdvisor		MENTS AUTO A	PPLY CREATE PA	YMENT CAPT	URE	OID CARD PA	MENT IMP	ORT CARD PRYMENT H					Not Released:	0.00
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linventory	> 0 D Prepayment	004530	547.50	0.0000	0.00	11/22/2023	0.00	B2B23R1 Payment Method: COD (C	F USD	11-2023	PMT04245	C0000002	Total Paid:	547.50
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Commerce														
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Figure Status in Invoice

