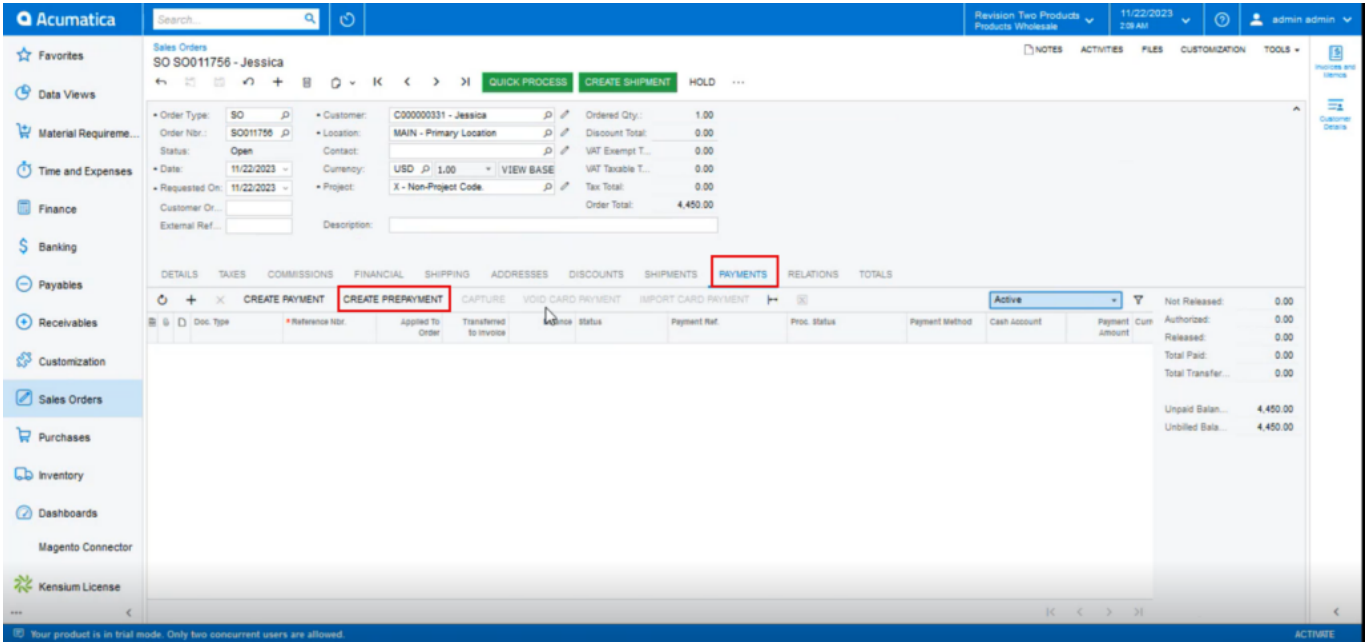


Proceed with Shipment

✖ Before proceeding to shipment enable both the check boxes in **[Credit terms]** and **[Customer Classes]**.

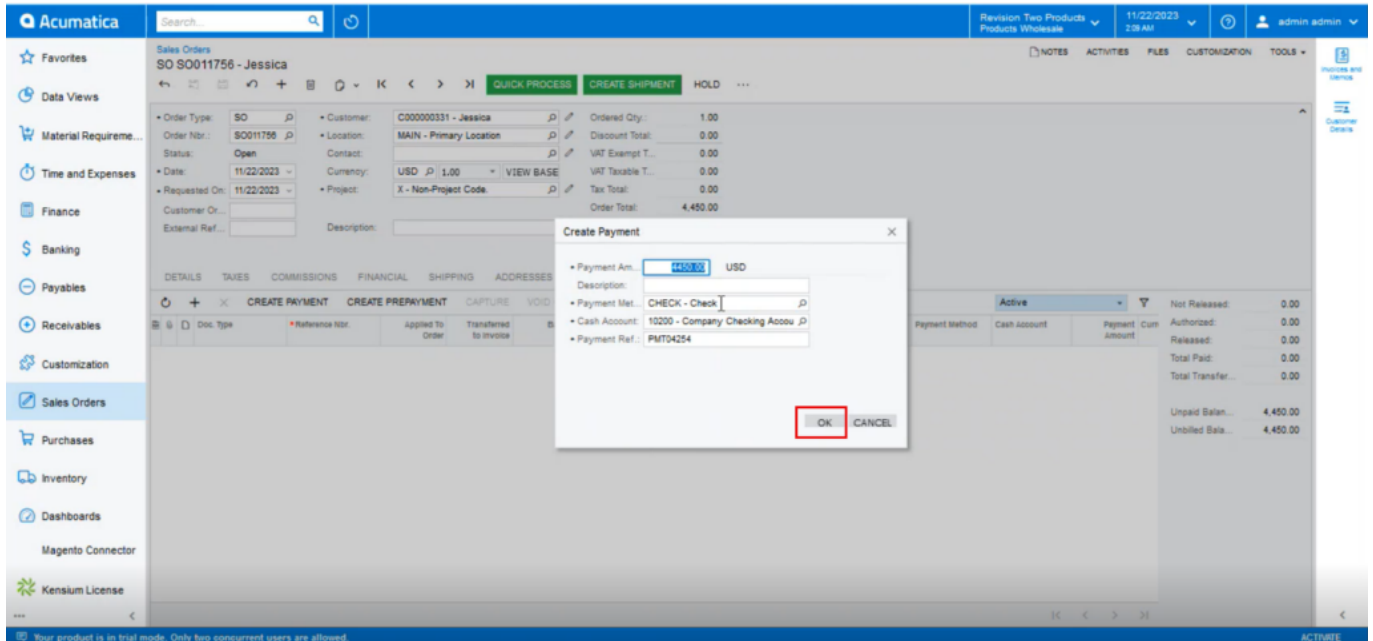
- You need to click on the **[Payments]** tab in Sales Orders, then click on **[Create Prepayment]**.



The screenshot displays the Acumatica Sales Order interface for order SO SO011756 - Jessica. The interface includes a navigation sidebar on the left with categories like Favorites, Data Views, Material Requirements, Time and Expenses, Finance, Banking, Payables, Receivables, Customization, Sales Orders, Purchases, Inventory, Dashboards, Magento Connector, and Kensium License. The main content area shows order details such as Order Type (SO), Order Nbr. (SO011756), Customer (C00000331 - Jessica), Location (MAIN - Primary Location), Status (Open), Date (11/22/2023), Requested On (11/22/2023), Currency (USD 1.00), and Project (X - Non-Project Code). The Order Total is 4,450.00. Below the details, there are tabs for DETAILS, TAXES, COMMISSIONS, FINANCIAL, SHIPPING, ADDRESSES, DISCOUNTS, SHIPMENTS, PAYMENTS, RELATIONS, and TOTALS. The PAYMENTS tab is active, showing a table with columns for Doc. Type, Reference Nbr., Applied To, Transferred to Invoice, Invoice Status, Payment Ref., Proc. Status, Payment Method, Cash Account, Payment Amount, and Cum. Amount. The 'CREATE PREPAYMENT' button is highlighted with a red box. On the right side, a summary table shows financial totals: Not Released (0.00), Authorized (0.00), Released (0.00), Total Paid (0.00), Total Transfer (0.00), Unpaid Balan. (4,450.00), and Unbilled Balan. (4,450.00).

Create Payment

- You can view a pop-up with create payment and check for the **[Payment Am..]** and click on **[OK]**.



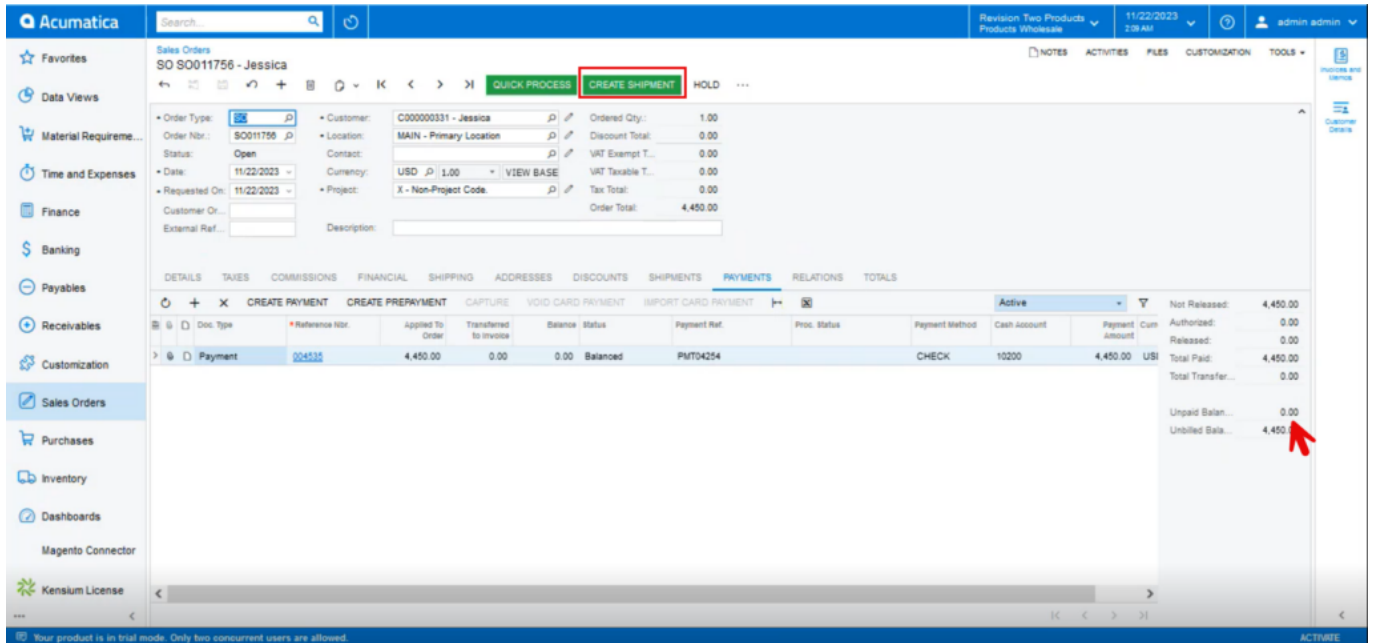
The screenshot shows the Acumatica software interface. The main window displays a 'Sales Orders' screen for order SO SO011756 - Jessica. A 'Create Payment' dialog box is open in the foreground, with the 'OK' button highlighted by a red box. The dialog box contains the following information:

- Payment Am: 4450.00 USD
- Description:
- Payment Met: CHECK - Check
- Cash Account: 10200 - Company Checking Accou
- Payment Ref: PMT04254

The background screen shows the order details, including the order type (SO), order number (SO011756), status (Open), date (11/22/2023), and order total (4,450.00). The 'OK' button in the dialog box is highlighted with a red box.

Click on OK

- Once the payment is done, you can see that **[Unpaid Balance]** as **[Zero]** then click on **[Create Shipment]**.



Acumatica

Revision Two Products
Products Wholesale

11/22/2023
1:29 AM

admin admin

Sales Orders
SO SO011756 - Jessica

QUICK PROCESS CREATE SHIPMENT HOLD

Order Type: SO Order Nbr.: SO011756 Status: Open Date: 11/22/2023 Requested On: 11/22/2023

Customer: C00000331 - Jessica Location: MAIN - Primary Location Contact: Currency: USD 1.00 Project: X - Non-Project Code

Ordered Qty: 1.00 Discount Total: 0.00 VAT Exempt T...: 0.00 VAT Taxable T...: 0.00 Tax Total: 0.00 Order Total: 4,450.00

DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS RELATIONS TOTALS

Doc. Type	Reference Nbr.	Applied To Order	Transferred to Invoice	Balance	Status	Payment Ref.	Proc. Status	Payment Method	Cash Account	Payment Amount	Cum Amount	Not Released	Authorized	Released	Total Paid	Total Transfer...	Unpaid Balan...	Unbilled Balan...
Payment	004535	4,450.00	0.00	0.00	Balanced	PMT04254		CHECK	10200	4,450.00	USI	4,450.00	0.00	0.00	4,450.00	0.00	0.00	4,450.00

Not Released: 4,450.00
Authorized: 0.00
Released: 0.00
Total Paid: 4,450.00
Total Transfer...: 0.00
Unpaid Balan...: 0.00
Unbilled Balan...: 4,450.00

Your product is in trial mode. Only two concurrent users are allowed.

ACTIVEE

Click on Create Shipment

- Upon selecting **[Confirm Shipment]**, you can **[Prepare Invoice]**, completing the shipment process.



Acumatica

Search

Revision Two Products Wholesale 11/22/2023 2:10 AM admin admin

Shipments
005314 - Jessica

PREPARE INVOICE UPDATE IN ...

Shipment Nbr: 005314 Customer: C000000331 - Jessica Shipped Qua... 1.00
Type: Shipment Location: MAIN - Primary Location Control Quan... 1.00
Status: Confirmed Warehouse ID: WHOLESALE - Wholesale Warehouse Shipped Weig... 27.200000
Operation: Issue Workgroup: Shipped Volu... 30.000000
Shipment Date: 11/22/2023 Owner: Packages: 2
Package Wei... 27.280000

Description:

DETAILS ORDERS SHIPPING PACKAGES

Order Type	Order Nbr.	Inventory ID	Free Item	Warehouse	Location	UOM	Shipped Qty	Ordered Qty	Open Qty	Picked Qty	Packed Qty	Lot/Serial Nbr.	Expiration Date	Reason Code	Description
SO	80011758	AACOMPLT01		WHOLESALE	R151	PACK	1.00	1.00	0.00	0.00	0.00				Acer La

On Hand 189.50 PRCK, Available 164.00 PRCK, Available for Shipping 164.00 PRCK

Your product is in trial mode. Only two concurrent users are allowed.

ACTIVE

Invoice