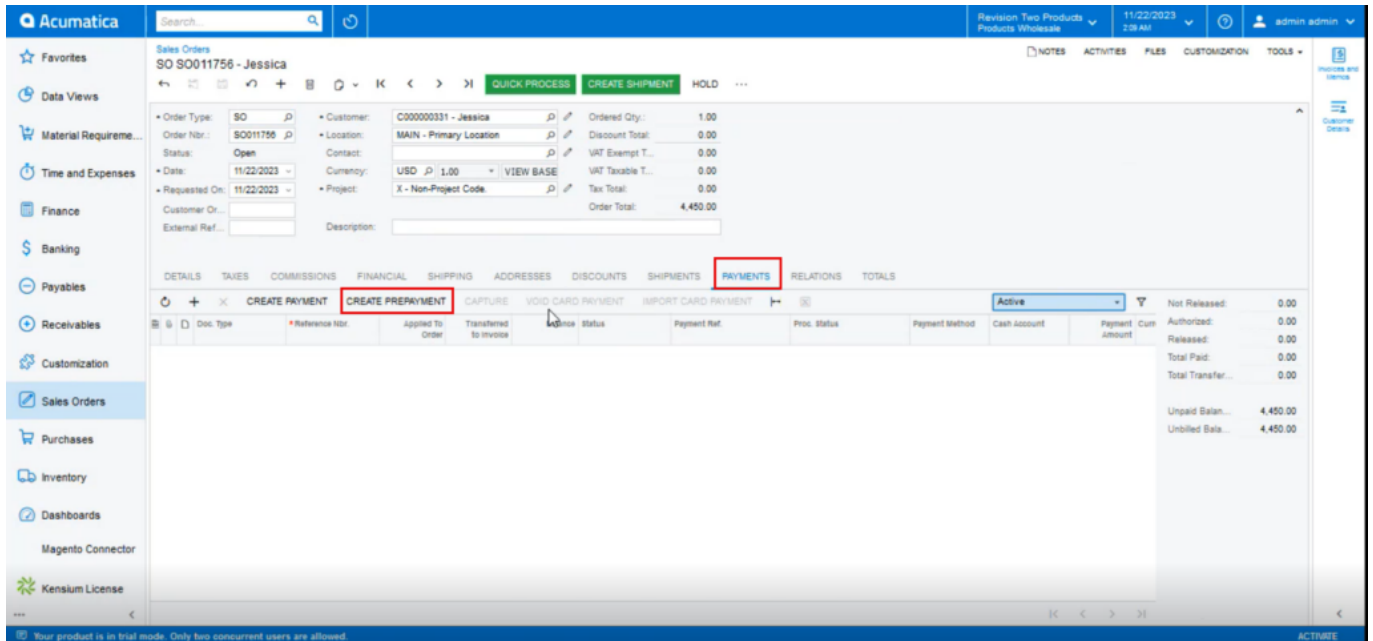


Proceed with Shipment

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

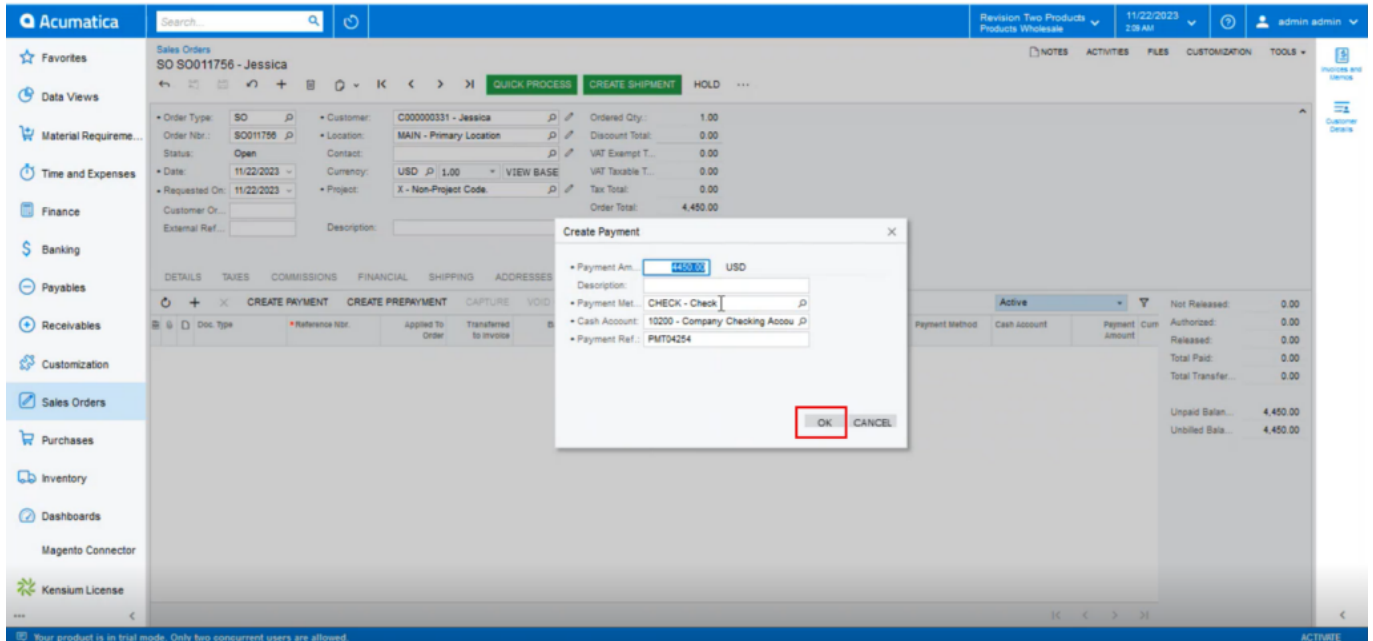
- You need to click on the **[Payments]** tab in Sales Orders, then click on **[Create Prepayment]**.



The screenshot shows the Acumatica Sales Order interface for order SO0011756. The 'PAYMENTS' tab is selected, and the 'CREATE PREPAYMENT' button is highlighted. The interface includes a sidebar with navigation options like Favorites, Data Views, Material Requirements, Time and Expenses, Finance, Banking, Payables, Receivables, Customization, Sales Orders, Purchases, Inventory, Dashboards, and Magento Connector. The main area displays order details such as Order Type, Order Number, Customer, Location, Status, Date, Requested On, Customer On, External Ref., Description, Ordered Qty, Discount Total, VAT Exempt T., VAT Taxable T., Tax Total, and Order Total. The 'PAYMENTS' section shows a table with columns for Reference No., Applied To Order, Transferred to Invoice, Balance, Status, Payment Ref., Proc. Status, Payment Method, Cash Account, Payment Amount, and Cum. Amount. The 'TOTALS' section shows a summary of payments, including Not Released, Authorized, Released, Total Paid, Total Transfer, Unpaid Balan., and Unbilled Balan.

Create Payment

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



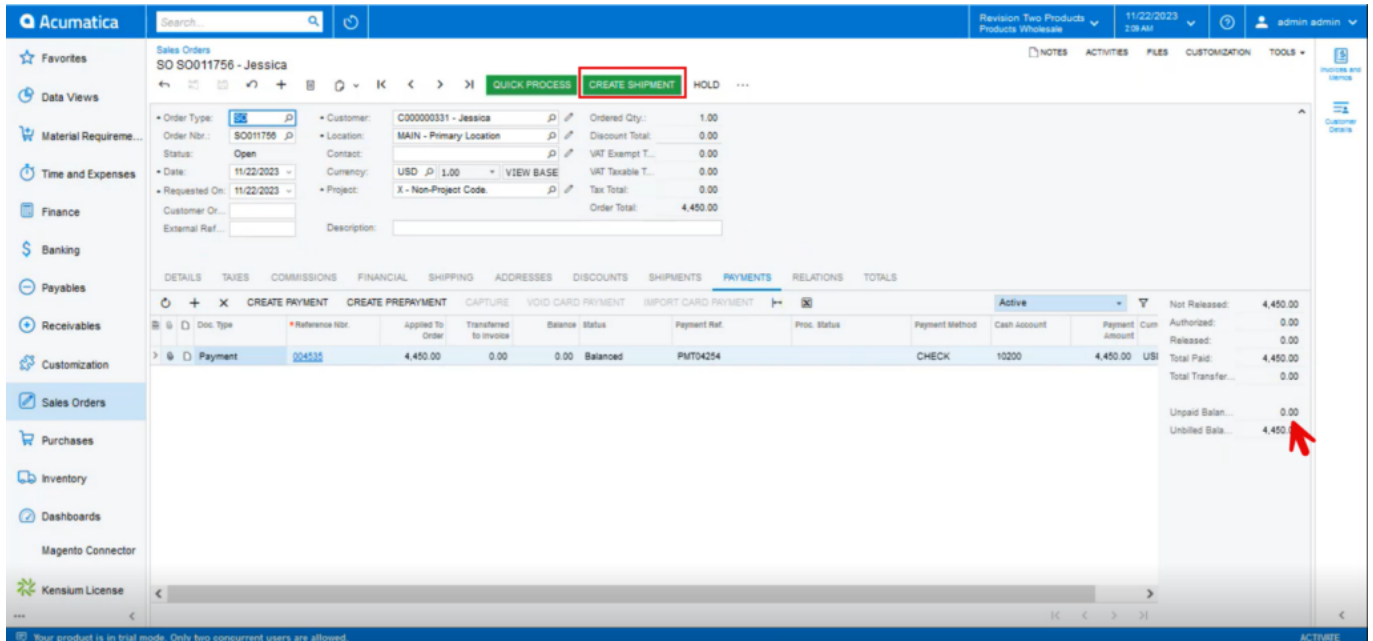
The screenshot shows the Acumatica CommercePro interface. A 'Create Payment' dialog box is open, allowing the user to create a payment for a sales order. The dialog box contains the following fields:

- Payment Am.: 4450.00
- Currency: USD
- Payment Method: CHECK - Check
- Cash Account: 10200 - Company Checking Acct
- Payment Ref: PMT04254

The 'OK' button is highlighted with a red box, indicating the next step in the process.

Click on OK

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



Acumatica

Search

Revision Two Products
Products Wholesale

11/22/2023
1:09 AM

admin admin

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

Sales Orders
SO SO0011756 - Jessica

QUICK PROCESS CREATE SHIPMENT HOLD

Order Type: SO Order Nbr.: SO0011756 Status: Open Date: 11/22/2023 Requested On: 11/22/2023 Customer Cr.: External Ref.: Description:

Customer: C000000331 - 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

CREATE PAYMENT CREATE PREPAYMENT CAPTURE VOID CARD PAYMENT IMPORT CARD PAYMENT

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 Sala...
Payment	004535	4,450.00	0.00	0.00	Balanced	PMT04254		CHECK	10200	4,450.00	US\$	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 Sala...: 4,450.00

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

ACTIVITIES

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 2:16 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

LINE DETAILS ADD ORDER INVENTORY SUMMARY

Order Nbr	Inventory ID	Free Item	Warehouse	Location	UCM	Shipped Qty	Ordered Qty	Open Qty	Picked Qty	Packed Qty	Lot/Serial Nbr	Expiration Date	Reason Code	Description
SO 00011758	AACOMPVT21		WHOLESALE	R1S1	PACK	1.00	1.00	0.00	0.00	0.00				Acce Lay

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

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

ACTIVE

The operation has completed.

Invoice