



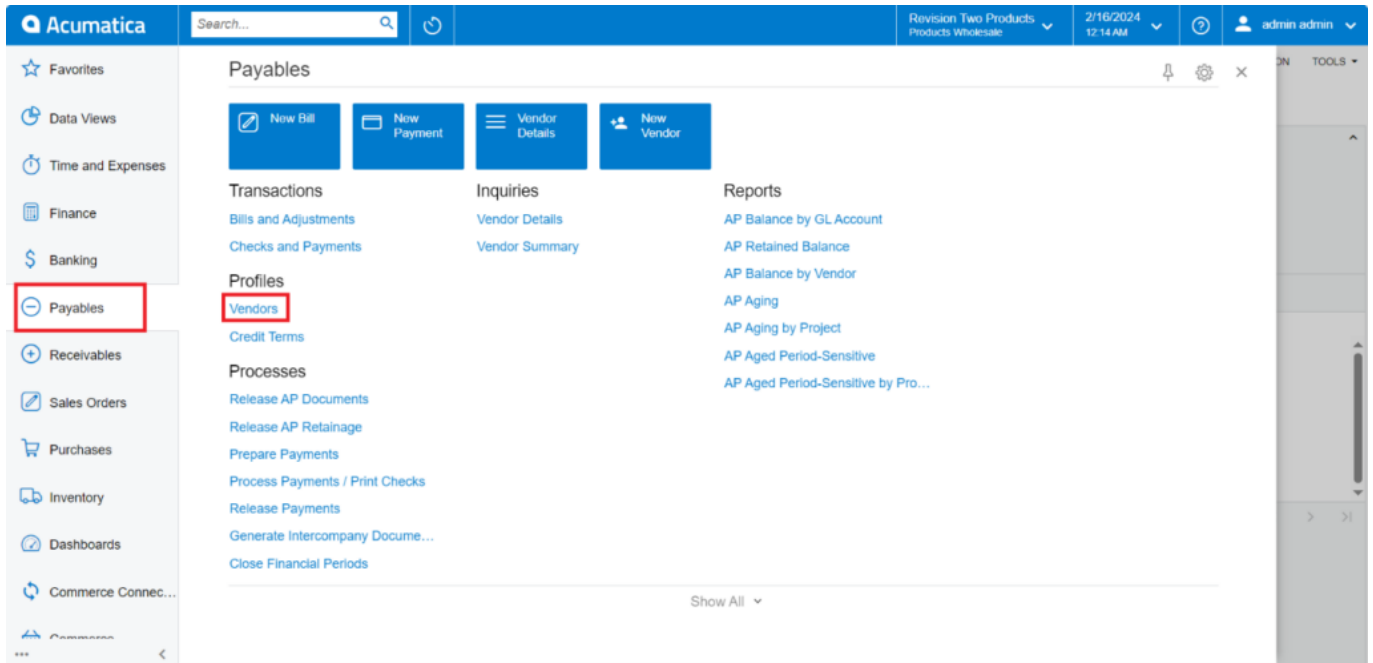
KENSIUM

Pay with Extend

Steps for Creation of Virtual Card



- **PAY BY AMEX** button will be enabled in the check and payments screen.
- **Vendors Screen:** Navigate to Vendor screen and create a new vendor.



Vendors

- Associate the AMEX payment method with the respective vendor, add the Payment method and Cash Account in Payment Tab.



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Pay with Extend

Acumatica

Search...

Revision Two Products
Products Wholesale

2/16/2024
12:18 AM

admin admin

Vendors

AAVENDOR - Goto Vendor Inc

Vendor ID: AAVENDOR - Goto Vendor Inc
Vendor Status: Active
Vendor Class: PRODUCT - Products Vendors

Balance: 0.00
Prepayment Balance: 0.00
Retained Balance: 0.00

GENERAL FINANCIAL **PAYMENT** PURCHASE SETTINGS ATTRIBUTES LOCATIONS CONTACTS ACTIVITIES GL ACCOUNTS MAILING & PRINTING

REMIT-TO ADDRESS

☐ Override

ADDRESS LOOKUP

Address Line 1: 8201 East 23 Street
Address Line 2:
City: Kansas City
State: MO - MISSOURI
Postal Code: 64129
Country: US - United States of America

REMIT-TO INFO

☐ Override

Account Name: Goto Vendor Inc
Attention:
Business 1: +1 (816) 222-0066
Business 2:
Fax:
Email: purchase@gotovend.com
Web:

DEFAULT PAYMENT SETTINGS

Payment Method: AMEXTND - Payment method used to
Cash Account:
Payment By: Discount Date
Payment Lead Time (D... 0
☐ Pay Separately
☐ Pay by Line
Prepayment Percent: 100.000000

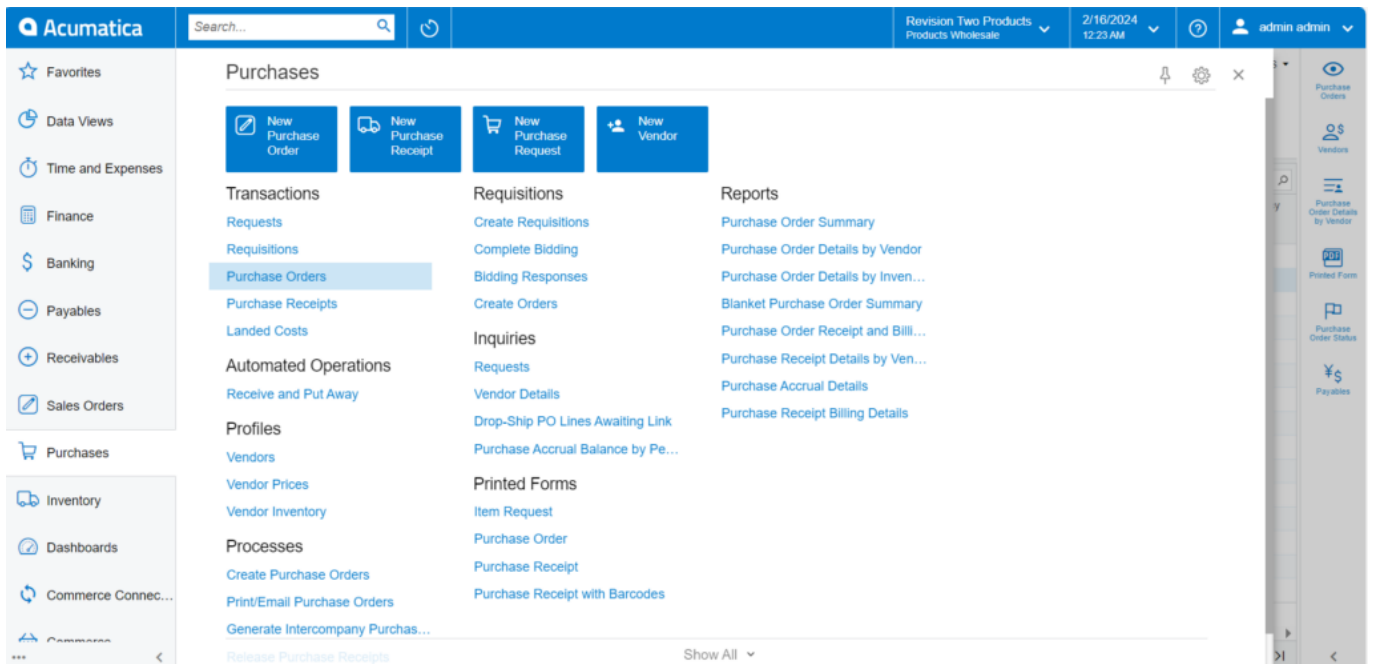
Payment Instructions

Description	Value
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Vendors

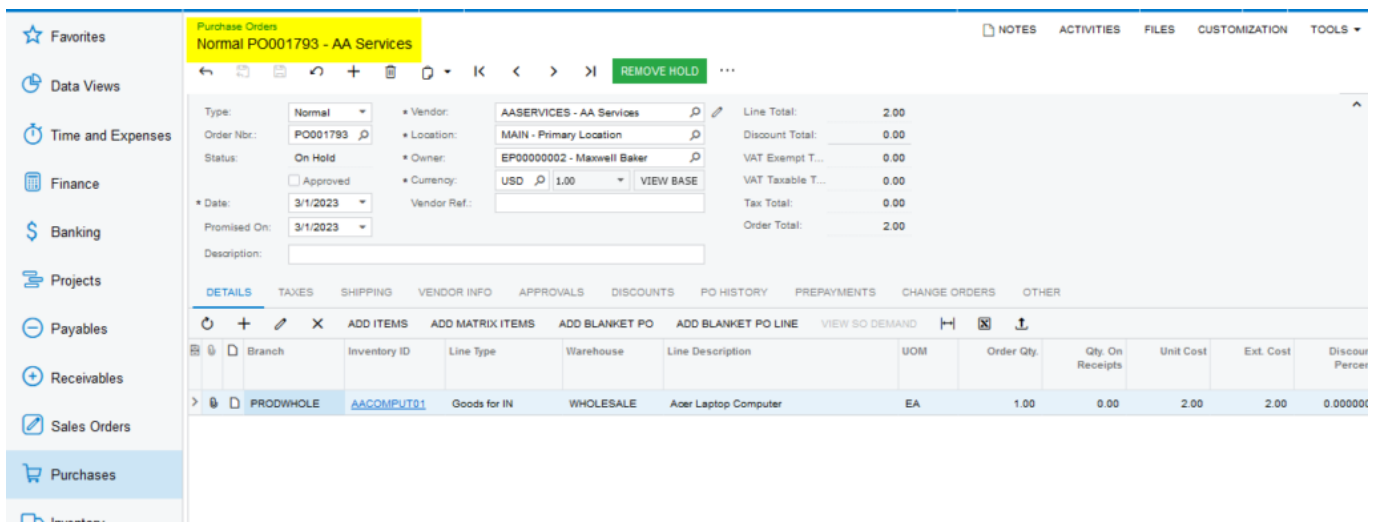
Purchase Order Screen:

- Navigate to Purchase order screen



Purchase Orders

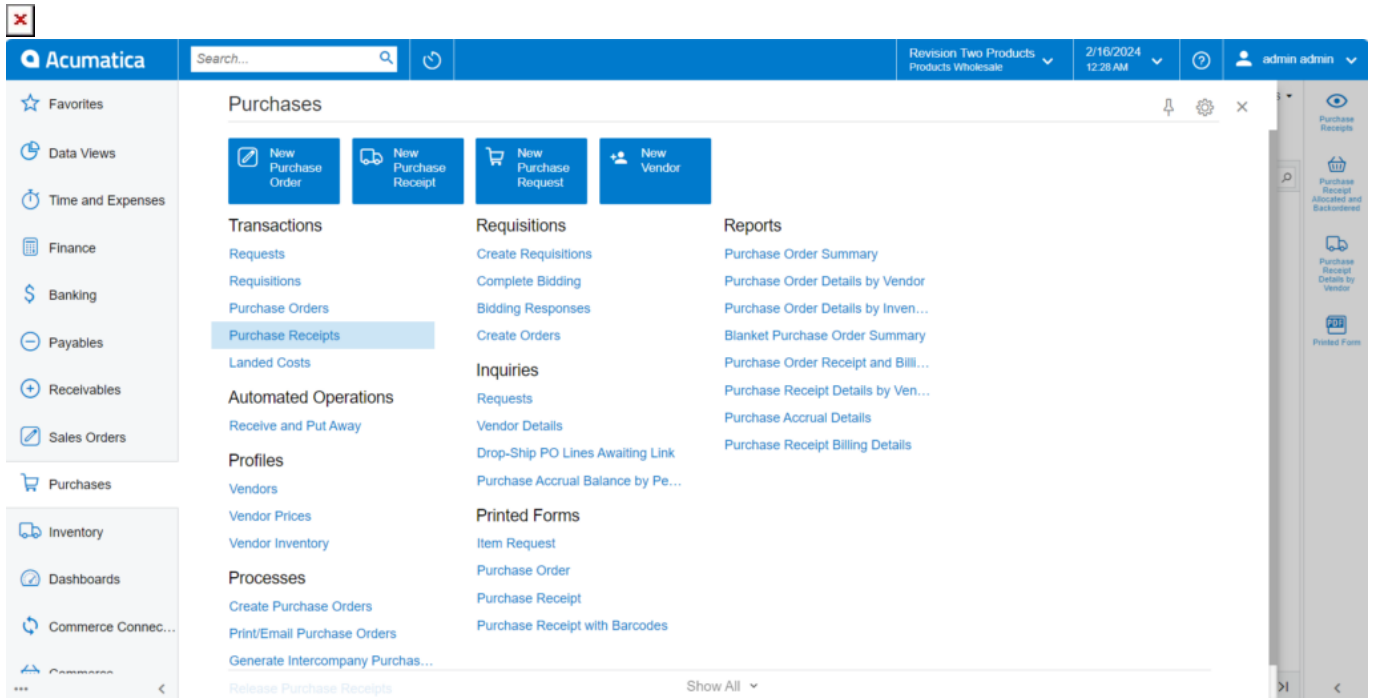
- Create a purchase order for the vendor AMEX payment method is associated.
- Add the Vendor and Inventory ID and Click on Save.



Purchase Orders

Purchase receipts screen:

- Navigate to Purchase receipts screen.



Purchase Receipts

- Create and purchase receipt and release the receipt for the same and create bill for the order.



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Search...

Revision Two Products
Products Wholesale

2/19/2024
1:25 AM

admin admin

Favorites

Data Views

Time and Expenses

Finance

Banking

Payables

Receivables

Sales Orders

Purchases

Inventory

Dashboards

Commerce Connec...

Bills and Adjustments

Bill 003656 - AA Services

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

PRE-RELEASE RELEASE

Type: Bill

Vendor: AASERVICES - AA Services

Detail Total: 250.00

Reference Nbr.: 003656

Location: MAIN - Primary Location

Line Discounts: 0.00

Status: Balanced

Currency: USD 1.00

Document Discou...: 0.00

Date: 2/19/2024

Terms: 30D - 30 Days

Retained Amount: 0.00

Post Period: 02-2024

Due Date: 3/20/2024

Tax Total: 0.00

Vendor Ref.: 852963

Cash Discount: 3/20/2024

With Tax: 0.00

Balance: 250.00

Cash Discount: 0.00

Description:

DETAILS

FINANCIAL

TAXES

APPROVALS

DISCOUNTS

APPLICATIONS

VIEW DEFERRALS

ADD PO RECEIPT

ADD PO RECEIPT LINE

ADD PO

ADD PO LINE

ADD LC

LINK LINE

Inventory ID

Transaction Descr.

Quantity

UOM

Unit Cost

Ext. Cost

Discount Amount

Amount

Account

Description

PRODWHOLE

AACOMPUT01

Acer Laptop Computer

1.00

EA

250.00

250.00

0.00

250.00

20100

Inventory Purchase Accrual

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

ACTIVATE

Purchase Receipts

Bills and Adjustments screen:

- Navigate to Bills and Adjustments screen.



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Pay with Extend

Acumatica

Search...

Revision Two Products
Products Wholesale

2/16/2024
1:44 AM

admin admin

Favorites

Data Views

Time and Expenses

Finance

Banking

Payables

Receivables

Sales Orders

Purchases

Inventory

Dashboards

Commerce Connec...

Payables

New Bill

New Payment

Vendor Details

New Vendor

Transactions

Bills and Adjustments

Checks and Payments

Profiles

Vendors

Credit Terms

Processes

Release AP Documents

Release AP Retainage

Prepare Payments

Process Payments / Print Checks

Release Payments

Generate Intercompany Docume...

Close Financial Periods

Inquiries

Vendor Details

Vendor Summary

Reports

AP Balance by GL Account

AP Retained Balance

AP Balance by Vendor

AP Aging

AP Aging by Project

AP Aged Period-Sensitive

AP Aged Period-Sensitive by Pro...

TOOLS

Vendor Ref.

41250

SETAMEX

AMEX222

CHECKAMEX

TEST133

SETPAY123

TEST1234

FA-Bill1

FA-Bill1

FA-Bill2

FA-Bill3

FA-Bill4

JAN-PWR

FEB-PWR

MAR-PWR

APR-PWR

MAY-PWR

Bills and Adjustments

Acumatica

Search...

Revision Two Products
Products Wholesale

2/19/2024
1:26 AM

admin admin

Favorites

Data Views

Time and Expenses

Finance

Banking

Payables

Receivables

Sales Orders

Purchases

Inventory

Dashboards

Commerce Connec...

Bills and Adjustments

Bill 003656 - AA Services

DETAILS

FINANCIAL

TAXES

APPROVALS

DISCOUNTS

APPLICATIONS

VIEW DEFERRALS

ADD PO RECEIPT

ADD PO RECEIPT LINE

ADD PO

ADD PO LINE

ADD LC

LINK LINE

Branch	Inventory ID	Transaction Descr.	Quantity	UOM	Unit Cost	Ext. Cost	Discount Amount	Amount	Account	Description
PRODWHOLE	AACOMPUT01	Acer Laptop Computer	1.00	EA	250.00	250.00	0.00	250.00	20100	Inventory Purchase Accrual

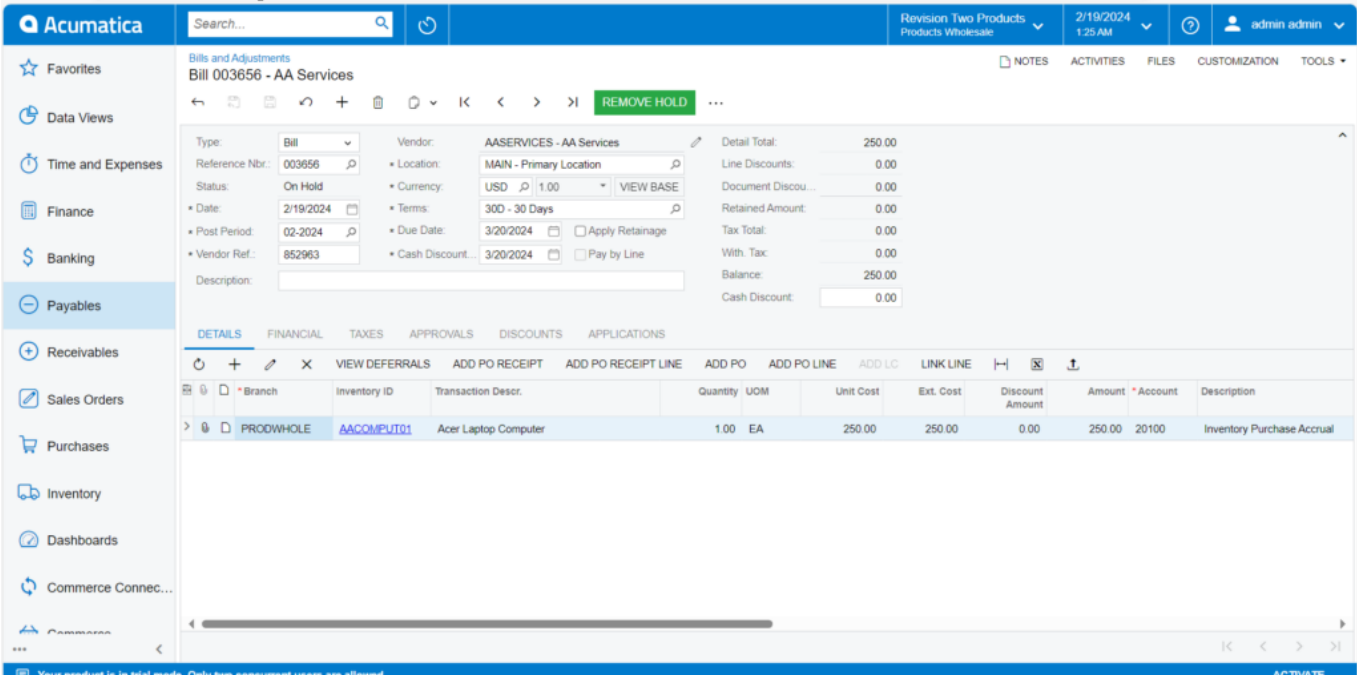
NOTES

ACTIVITY

The operation has completed.

Bills and Adjustments

- Create payment for the bill and click on **[Remove Hold]** then click on Pay Action
- status for the payment which will change to balanced status



The screenshot shows the Acumatica interface for 'Bills and Adjustments'. The main header includes a search bar, a refresh icon, and user information (admin admin). The left sidebar lists various modules like Favorites, Data Views, Time and Expenses, Finance, Banking, Payables, Receivables, Sales Orders, Purchases, Inventory, Dashboards, and Commerce Connections. The main content area displays a bill for 'AA Services' with a 'REMOVE HOLD' button. The bill details include:

- Type: Bill
- Reference Nbr.: 003656
- Status: On Hold
- Date: 2/19/2024
- Post Period: 02-2024
- Vendor Ref.: 852963
- Vendor: AASERVICES - AA Services
- Location: MAIN - Primary Location
- Currency: USD 1.00
- Terms: 300 - 30 Days
- Due Date: 3/20/2024
- Cash Discount: 3/20/2024
- Detail Total: 250.00
- Line Discounts: 0.00
- Document Discou...: 0.00
- Retained Amount: 0.00
- Tax Total: 0.00
- With Tax: 0.00
- Balance: 250.00
- Cash Discount: 0.00

Below the bill details, there is a table with columns: Branch, Inventory ID, Transaction Descr., Quantity, UOM, Unit Cost, Ext. Cost, Discount Amount, Amount, Account, and Description. The table shows one line item for 'Acer Laptop Computer' with a quantity of 1.00 and a unit cost of 250.00.

Bills and Adjustments

Checks and Payments screen:

- Navigate to Checks and Payments screen.

Acumatica Search... Revision Two Products Products Wholesale 2/16/2024 1:46 AM admin admin

Payables

New Bill New Payment Vendor Details New Vendor

Transactions Bills and Adjustments Checks and Payments

Inquiries Vendor Details Vendor Summary

Reports AP Balance by GL Account AP Retained Balance AP Balance by Vendor AP Aging AP Aging by Project AP Aged Period-Sensitive AP Aged Period-Sensitive by Pro...

Profiles Vendors Credit Terms

Processes Release AP Documents Release AP Retainage Prepare Payments Process Payments / Print Checks Release Payments Generate Intercompany Docume... Close Financial Periods

Show All

Payment Ref. 542241 634541 524241 41234 PRE012 586987 965754444 0298

Checks and Payments

- In Checks and Payments screen click on Pay by Amex Action



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Pay with Extend

Acumatica

Search...

Revision Two Products
Products Wholesale

2/19/2024
1:44 AM

admin admin

Checks and Payments

Payment 002334 - AA Services

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

RELEASE PAYWITHEXTEND

Type: Payment

Reference Nbr.: 002334

Status: Balanced

Application Date: 2/19/2024

Application Pe...: 02-2024

Payment Ref.: 9635

Vendor: AASERVICES - AA Services

Location: MAIN - Primary Location

Payment Meth...: PAYWITHEXTEND

Cash Account: 10100 - Petty Cash

Currency: USD 1.00

Description:

Payment Amount: 250.00

Unapplied Balance: 0.00

Application Amount: 250.00

Finance Charges: 0.00

Extend Request Sent

Extend Request Processed

DOCUMENTS TO APPLY APPLICATION HISTORY FINANCIAL APPROVALS REMITTANCE CHARGES EXTEND DETAILS

LOAD DOCUMENTS

Branch	Document Type	Reference Nbr.	Line Nbr.	Inventory ID	Project	Project Task	Account	Amount Paid	Cash Discount Taken	With. Tax	Date	Due Date
PRODWHOLE	Bill	003657	0					250.00	0.00	0.00	2/19/2024	3/20/2024

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

ACTIVATE

Checks and Payments

Acumatica

Search...

Revision Two Products
Products Wholesale

2/19/2024
1:44 AM

admin admin

Checks and Payments

Payment 002334 - AA Services

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

RELEASE PAYWITHEXTEND

Type: Payment

Reference Nbr.: 002334

Status: Balanced

Application Date: 2/19/2024

Application Pe...: 02-2024

Payment Ref.: 9635

Vendor: AASERVICES - AA Services

Location: MAIN - Primary Location

Payment Meth...: PAYWITHEXTEND

Cash Account: 10100 - Petty Cash

Currency: USD 1.00

Description:

Payment Amount: 250.00

Unapplied Balance: 0.00

Application Amount: 250.00

Finance Charges: 0.00

Extend Request Sent

Extend Request Processed

DOCUMENTS TO APPLY APPLICATION HISTORY FINANCIAL

LOAD DOCUMENTS

Branch	Document Type	Reference Nbr.	Line Nbr.	Inventory ID	Project	Project Task	Account	Amount Paid	Cash Discount Taken	With. Tax	Date	Due Date
PRODWHOLE	Bill	003657						250.00	0.00	0.00	2/19/2024	3/20/2024

Create a Virtual Card

Account: Extend demo

Recipient Email: pranayc@kensium.com

Recipient First Name: AASERVICES

Recipient Last Name: AA Services

Card Name: AASERVICES

Amount: 250.00

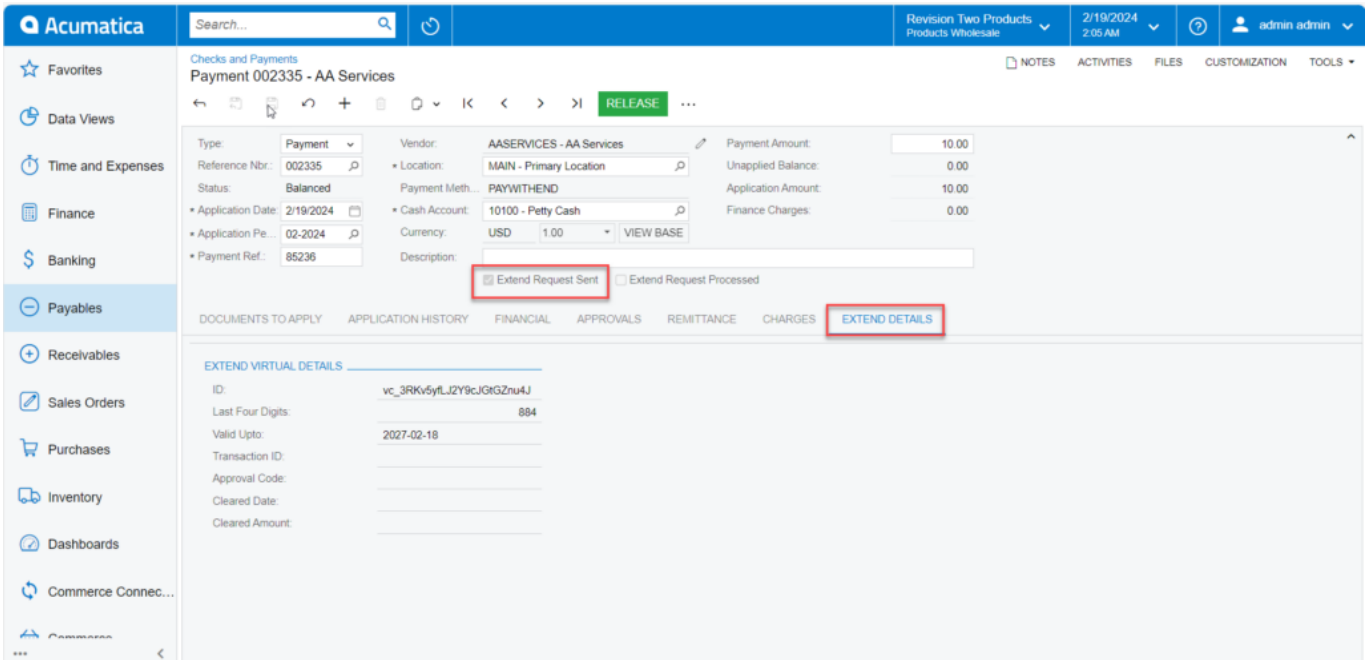
Active Until: 3/5/2024

Notes:

CREATE VIRTUAL CARD CANCEL

Checks and Payments

- ✖ To pay with Extend, click the button. A pop-up page with a virtual card will appear. Select the account and verify the vendor's details.
- Create a virtual card and receive an automatic email from the extended support team.
- A new tab titled "Extend details" will appear on the Checks & Payments screen, displaying virtual card info.
- Click on the view virtual card link in the email from the extend support team.
- After creating a virtual card, click on Generate code to receive an email containing the code.



Acumatica Search... Revision Two Products Products Wholesale 2/19/2024 2:05 AM admin admin

Checks and Payments
Payment 002335 - AA Services

RELEASE

Type: Payment Vendor: AASERVICES - AA Services Payment Amount: 10.00
 Reference Nbr.: 002335 Location: MAIN - Primary Location Unapplied Balance: 0.00
 Status: Balanced Payment Meth.: PAYWITHEND Application Amount: 10.00
 Application Date: 2/19/2024 Cash Account: 10100 - Petty Cash Finance Charges: 0.00
 Application Pe.: 02-2024 Currency: USD 1.00 VIEW BASE
 Payment Ref.: 85236 Description:

☒ Extend Request Sent ☐ Extend Request Processed

DOCUMENTS TO APPLY APPLICATION HISTORY FINANCIAL APPROVALS REMITTANCE CHARGES **EXTEND DETAILS**

EXTEND VIRTUAL DETAILS

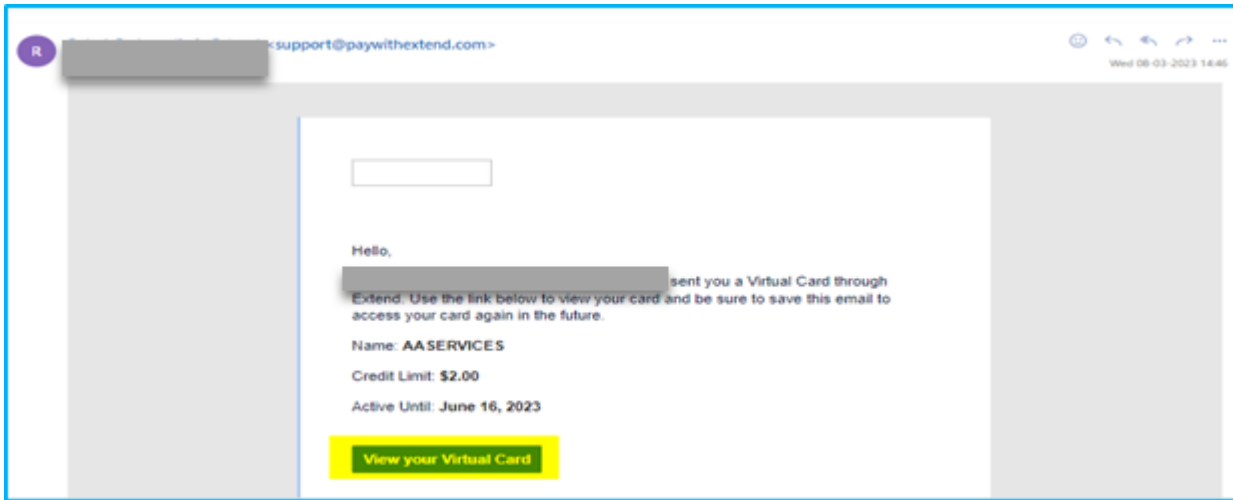
ID: vc_3RKv5ytlJ2Y9cjGkGZnu4J
 Last Four Digits: 884
 Valid Upto: 2027-02-18
 Transaction ID:
 Approval Code:
 Cleared Date:
 Cleared Amount:

Checks and Payments



KENSIUM

Pay with Extend



View your virtual card

You received a Virtual Card for **\$2!**

1 To access your card, generate a temporary code via email

It will be sent to s*****m@k*****m.com

Generate Code

2 Submit the code and view your card

This code will work for 1 hour

Submit and View Card



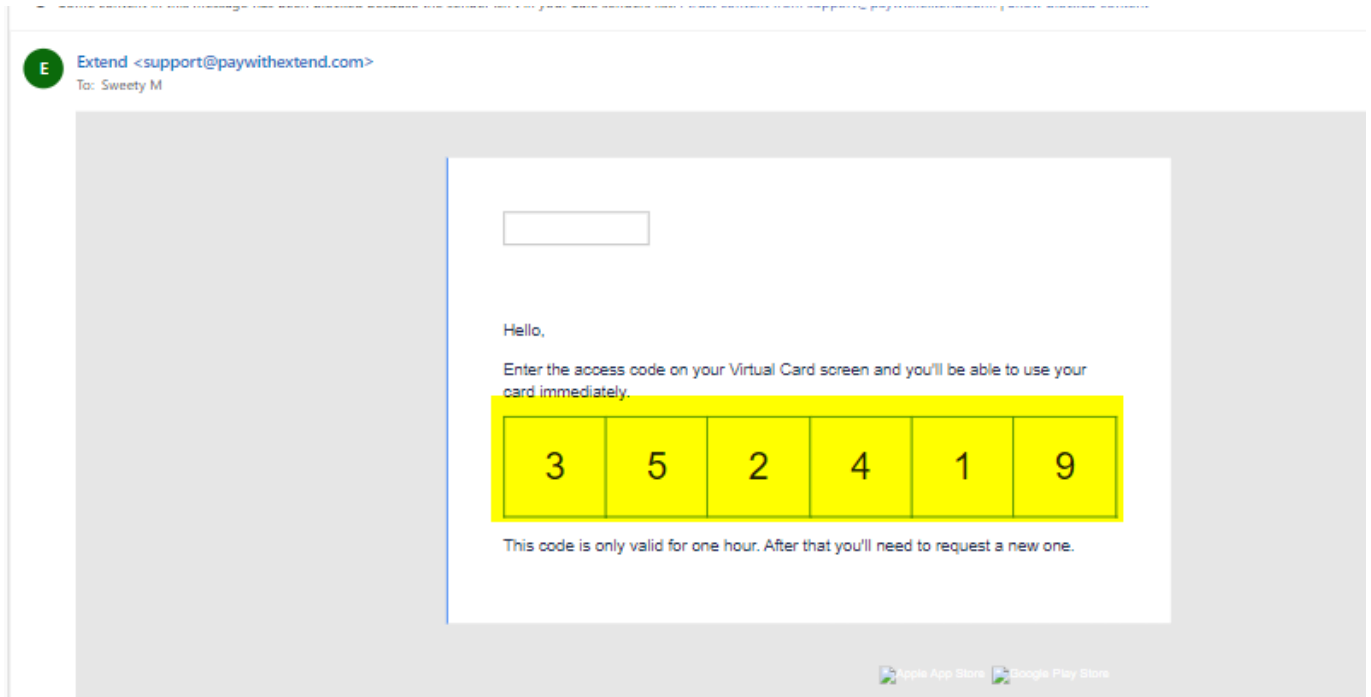
KENSIUM

Pay with Extend

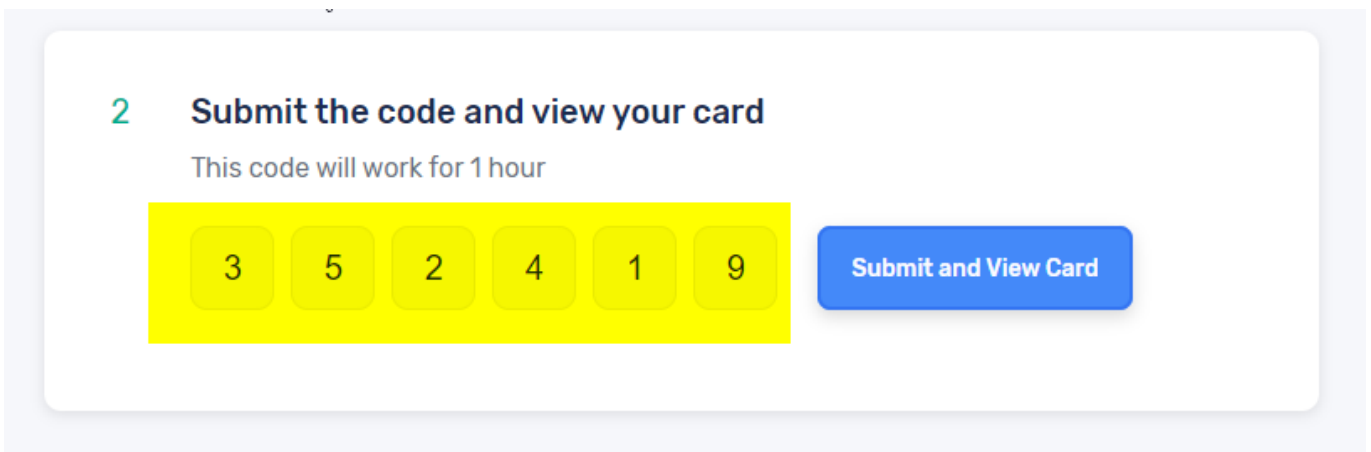
Generate Code



- Enter the code and click submit to view the virtual card.



Code

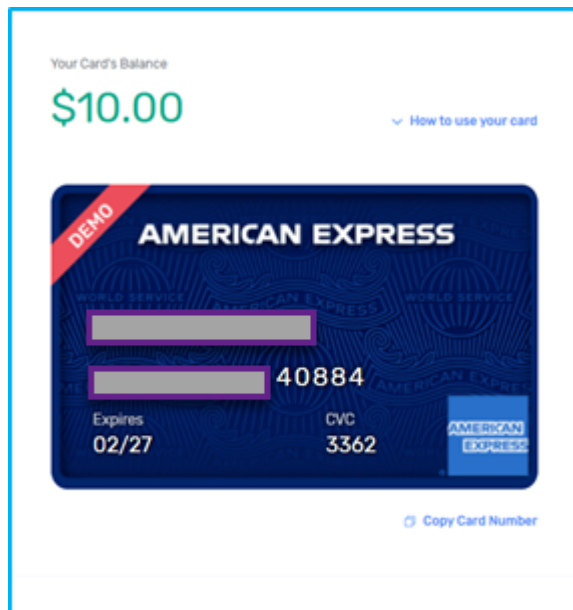


Submit and View Card

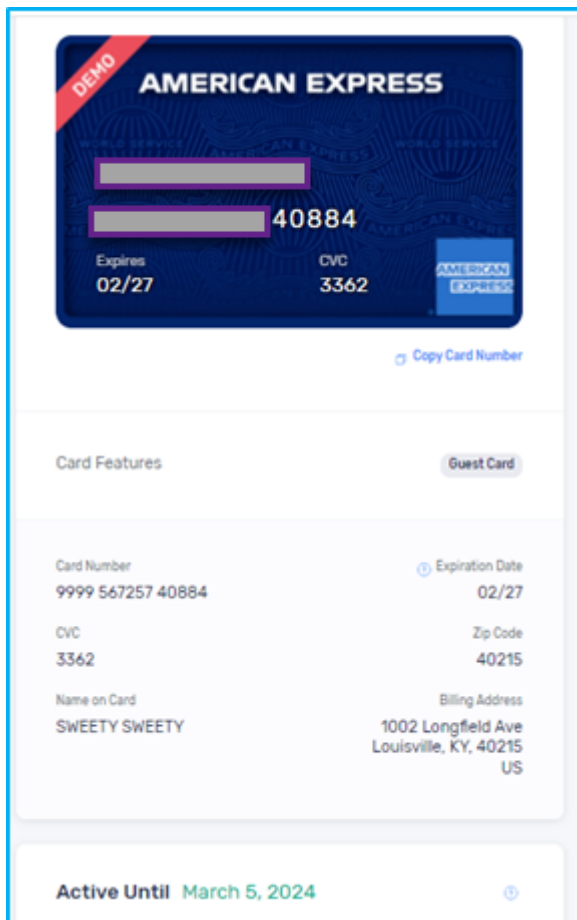


KENSIUM

Pay with Extend



Card



Card

Note: If the payment method is EXTEND, the user will not be able to release the payment, and an alert message will appear.