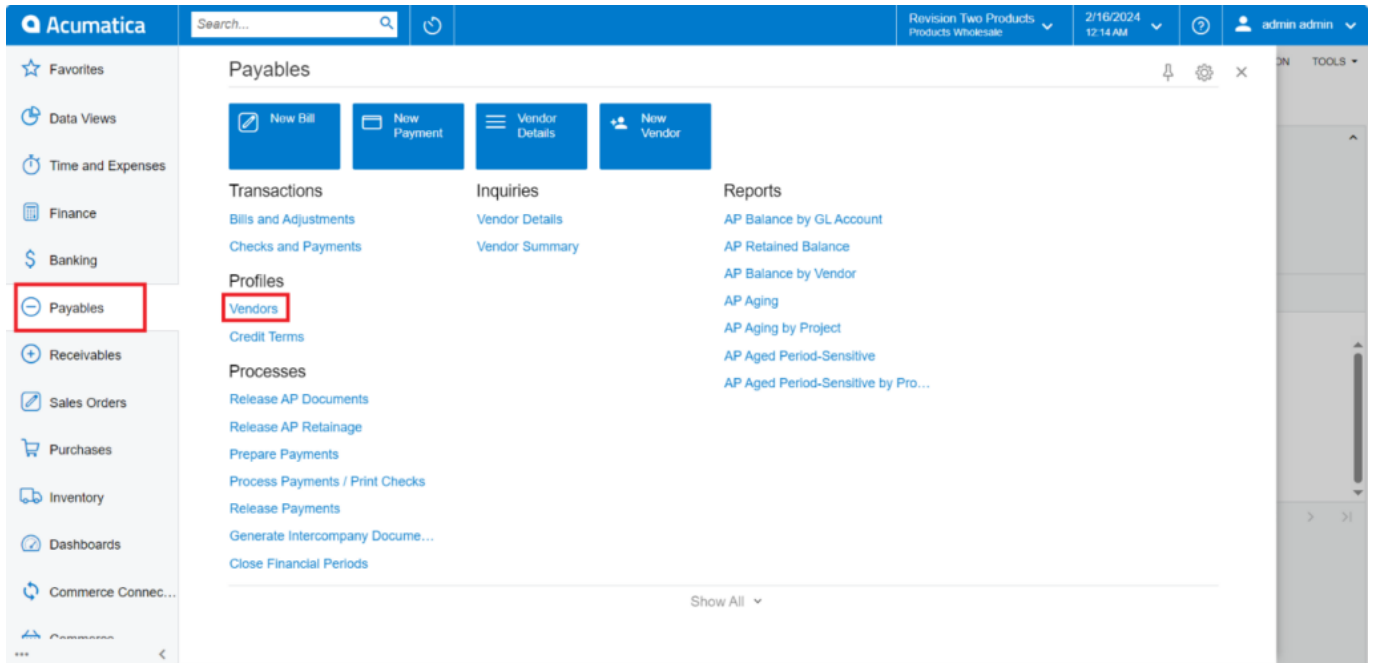


## Steps for Creation of Virtual Card

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



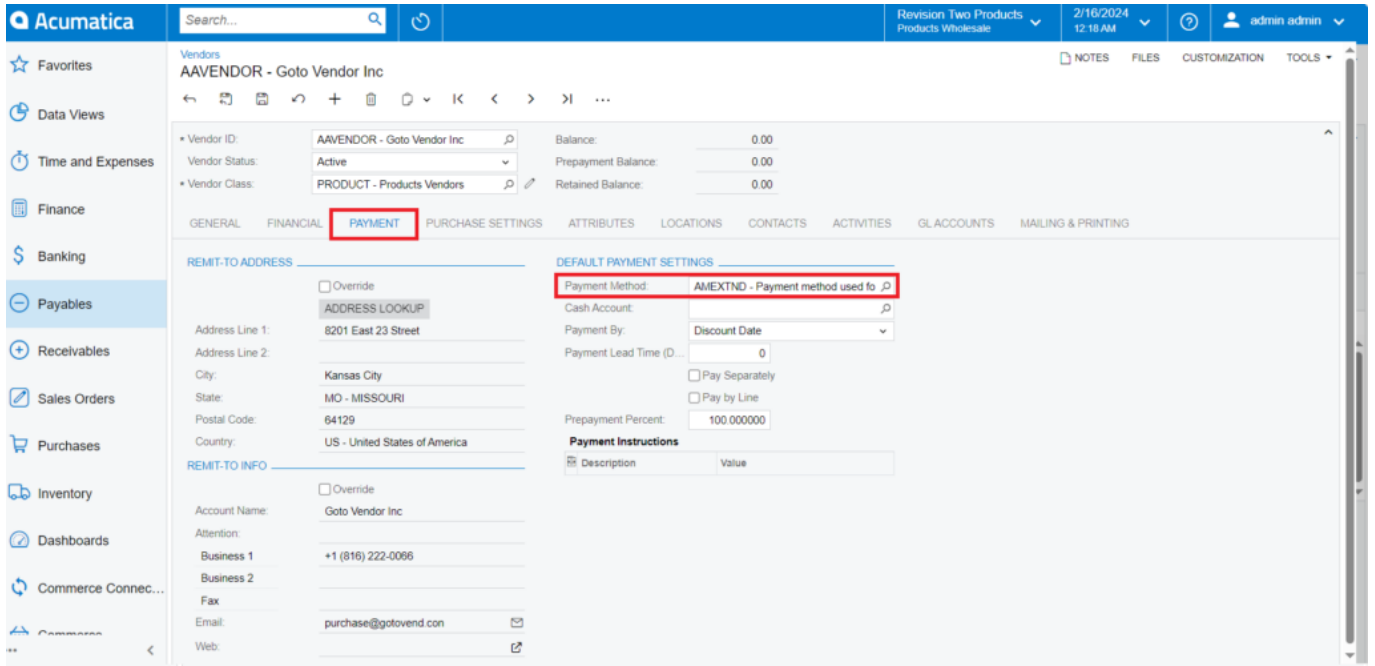
### Vendors

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



KENSIUM

Pay with Extend



## Vendors

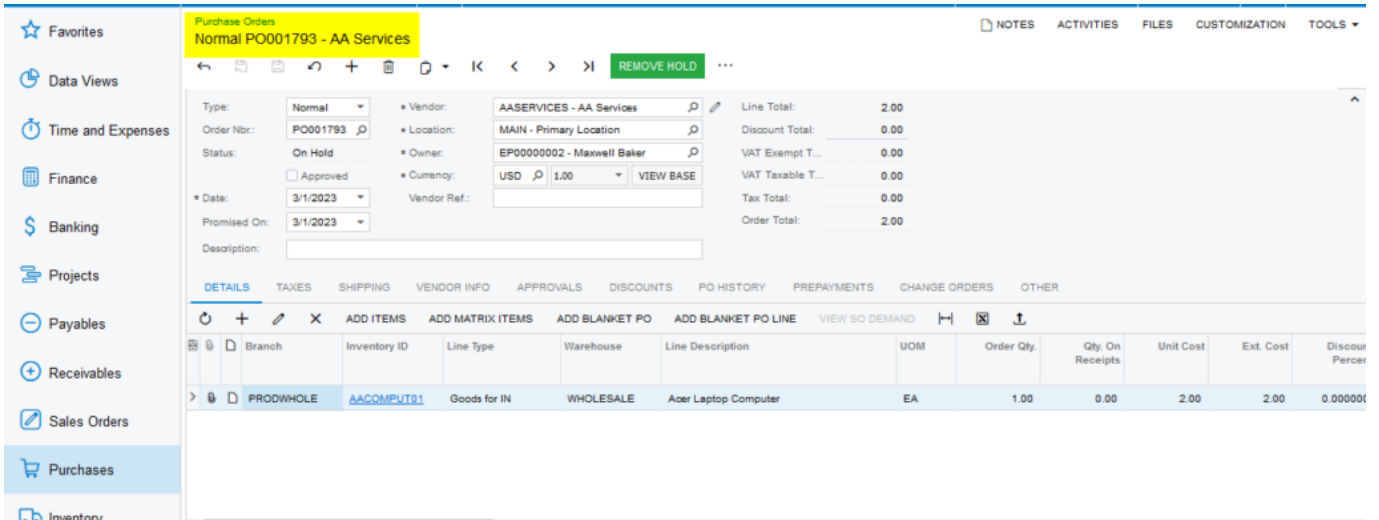
### Purchase Order Screen:

- 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

Normal PO001793 - AA Services

REMOVE HOLD

Type: Normal Vendor: AASERVICES - AA Services Line Total: 2.00  
 Order Nbr: PO001793 Location: MAIN - Primary Location Discount Total: 0.00  
 Status: On Hold Owner: EP00000002 - Maxwell Baker VAT Exempt T...: 0.00  
 Approved Currency: USD 1.00 VIEW BASE VAT Taxable T...: 0.00  
 Date: 3/1/2023 Vendor Ref.: Tax Total: 0.00  
 Promised On: 3/1/2023 Order Total: 2.00  
 Description:

DETAILS TAXES SHIPPING VENDOR INFO APPROVALS DISCOUNTS PO HISTORY PREPAYMENTS CHANGE ORDERS OTHER

Branch	Inventory ID	Line Type	Warehouse	Line Description	UOM	Order Qty.	Qty. On Receipts	Unit Cost	Ext. Cost	Discour. Percent
PRODWHOLE	AACOMPUT01	Goods for IN	WHOLESALE	Acer Laptop Computer	EA	1.00	0.00	2.00	2.00	0.000000

## 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.



KENSIUM

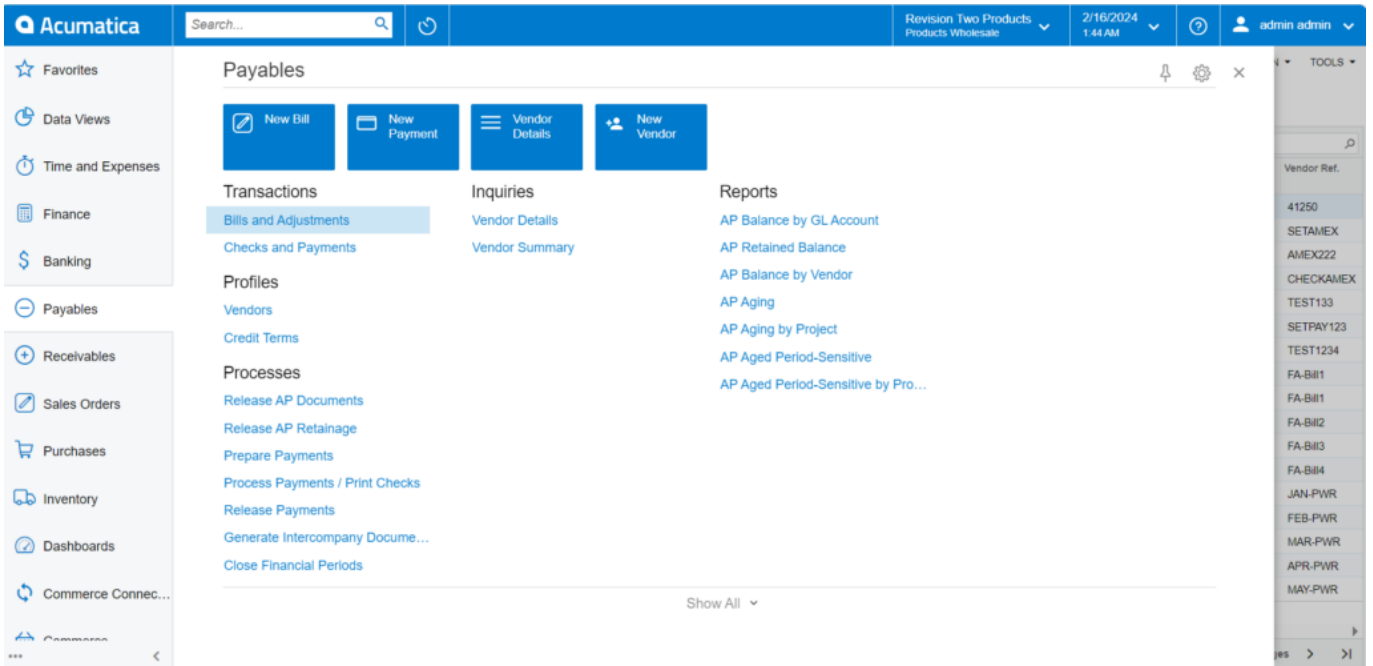
# Pay with Extend

The screenshot shows the Acumatica interface for the 'Bills and Adjustments' screen. The top navigation bar includes the Acumatica logo, a search bar, and user information (Revision Two Products, Products Wholesale, 2/19/2024 1:25 AM, 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 the details for 'Bill 003656 - AA Services'. It includes fields for Type (Bill), Reference Nbr (003656), Status (Balanced), Date (2/19/2024), Post Period (02-2024), Vendor Ref (852963), Vendor (AASERVICES - AA Services), Location (MAIN - Primary Location), Currency (USD 1.00), Terms (30D - 30 Days), Due Date (3/20/2024), and Cash Discount (3/20/2024). Summary statistics show a Detail Total of 250.00, Line Discounts of 0.00, Document Discou... of 0.00, Retained Amount of 0.00, Tax Total of 0.00, With Tax of 0.00, Balance of 250.00, and Cash Discount of 0.00. Below these details is a table with columns for Branch, Inventory ID, Transaction Descr., Quantity, UOM, Unit Cost, Ext. Cost, Discount Amount, Amount, Account, and Description. One row is visible: PRODWHOLE, AACOMPUT01, Acer Laptop Computer, 1.00, EA, 250.00, 250.00, 0.00, 250.00, 20100, Inventory Purchase Accrual. The bottom status bar indicates 'Your product is in trial mode. Only two concurrent users are allowed.' and an 'ACTIVATE' button.

## Purchase Receipts

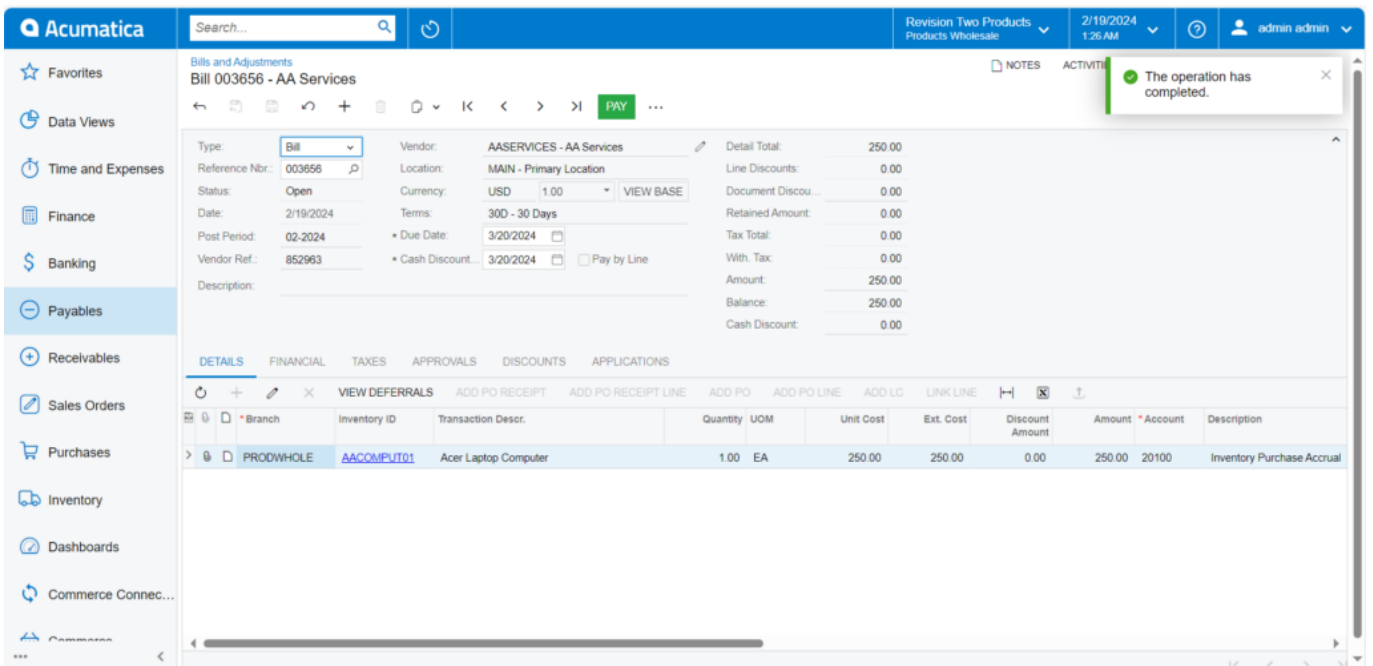
### Bills and Adjustments screen:

- Navigate to Bills and Adjustments screen.



The screenshot shows the Acumatica Payables dashboard. The top navigation bar includes the Acumatica logo, a search bar, a refresh button, and user information (Revision Two Products, Products Wholesale, 2/16/2024 1:44 AM, admin admin). The left sidebar contains navigation options: Favorites, Data Views, Time and Expenses, Finance, Banking, Payables (selected), Receivables, Sales Orders, Purchases, Inventory, Dashboards, and Commerce Connec... The main content area is titled 'Payables' and features four primary action buttons: 'New Bill', 'New Payment', 'Vendor Details', and 'New Vendor'. Below these are three columns of options: 'Transactions' (Bills and Adjustments, Checks and Payments), 'Inquiries' (Vendor Details, Vendor Summary), and '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...). A 'Show All' dropdown is located at the bottom of the main content area. On the right, a 'TOOLS' sidebar is visible with a search bar and a list of Vendor Ref. values including 41250, SETAMEX, AMEX222, CHECKAMEX, TEST133, SETPAY123, TEST1234, FA-Bill1, FA-Bill2, FA-Bill3, FA-Bill4, JAN-PWR, FEB-PWR, MAR-PWR, APR-PWR, and MAY-PWR.

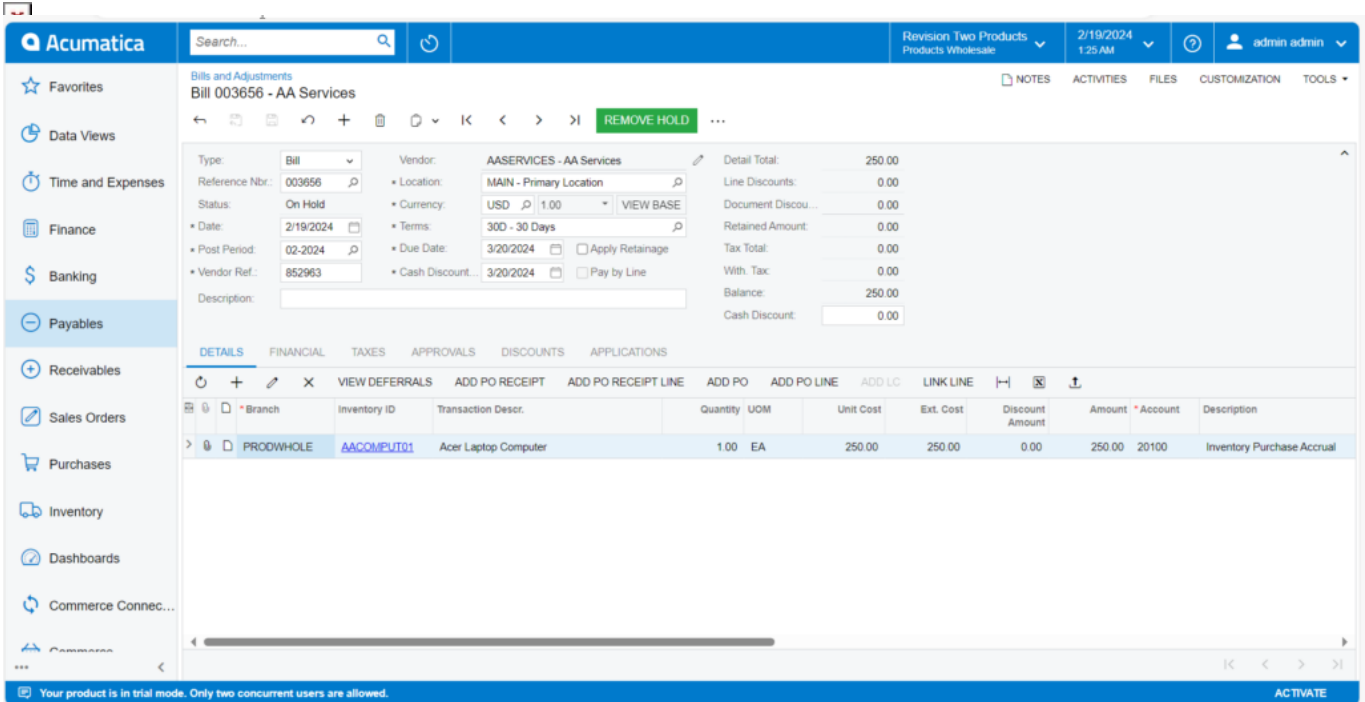
### Bills and Adjustments



The screenshot displays the 'Bills and Adjustments' detail view for Bill 003656 - AA Services. The top navigation bar is identical to the previous screenshot. The left sidebar is also consistent. The main content area shows the bill details: Type: Bill, Vendor: AASERVICES - AA Services, Reference Nbr: 003656, Location: MAIN - Primary Location, Status: Open, Currency: USD, Date: 2/19/2024, Terms: 30D - 30 Days, Post Period: 02-2024, Due Date: 3/20/2024, Vendor Ref: 852963, and Cash Discount: 3/20/2024. A summary table on the right shows: Detail Total: 250.00, Line Discounts: 0.00, Document Discou...: 0.00, Retained Amount: 0.00, Tax Total: 0.00, With Tax: 0.00, Amount: 250.00, Balance: 250.00, and Cash Discount: 0.00. A notification box at the top right states 'The operation has completed.' Below the details are tabs for DETAILS, FINANCIAL, TAXES, APPROVALS, DISCOUNTS, and APPLICATIONS. The 'DETAILS' tab is active, showing a table with columns: Branch, Inventory ID, Transaction Descr., Quantity, UOM, Unit Cost, Ext. Cost, Discount Amount, Amount, Account, and Description. The table contains one row: Branch: PRODWHOLE, Inventory ID: AACOMPUT01, Transaction Descr.: Acer Laptop Computer, Quantity: 1.00, UOM: EA, Unit Cost: 250.00, Ext. Cost: 250.00, Discount Amount: 0.00, Amount: 250.00, Account: 20100, and Description: Inventory Purchase Accrual.

### 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 a bill. The bill is titled "Bill 003656 - AA Services" and is currently "On Hold". A green "REMOVE HOLD" button is visible. 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: 30D - 30 Days
- Due Date: 3/20/2024
- Cash Discount: 3/20/2024

The summary table shows a Detail Total of 250.00, with various discounts and taxes at 0.00. The balance is 250.00.

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

## Bills and Adjustments

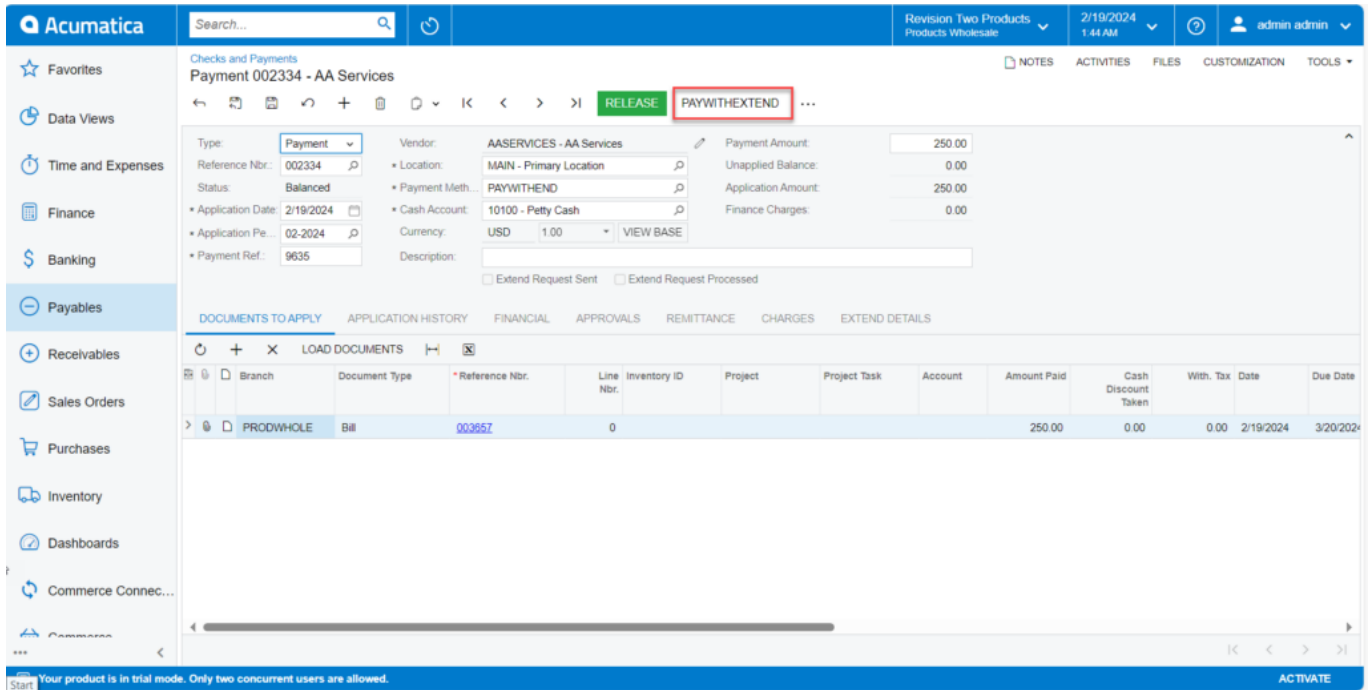
### Checks and Payments screen:

- Navigate to Checks and Payments screen.



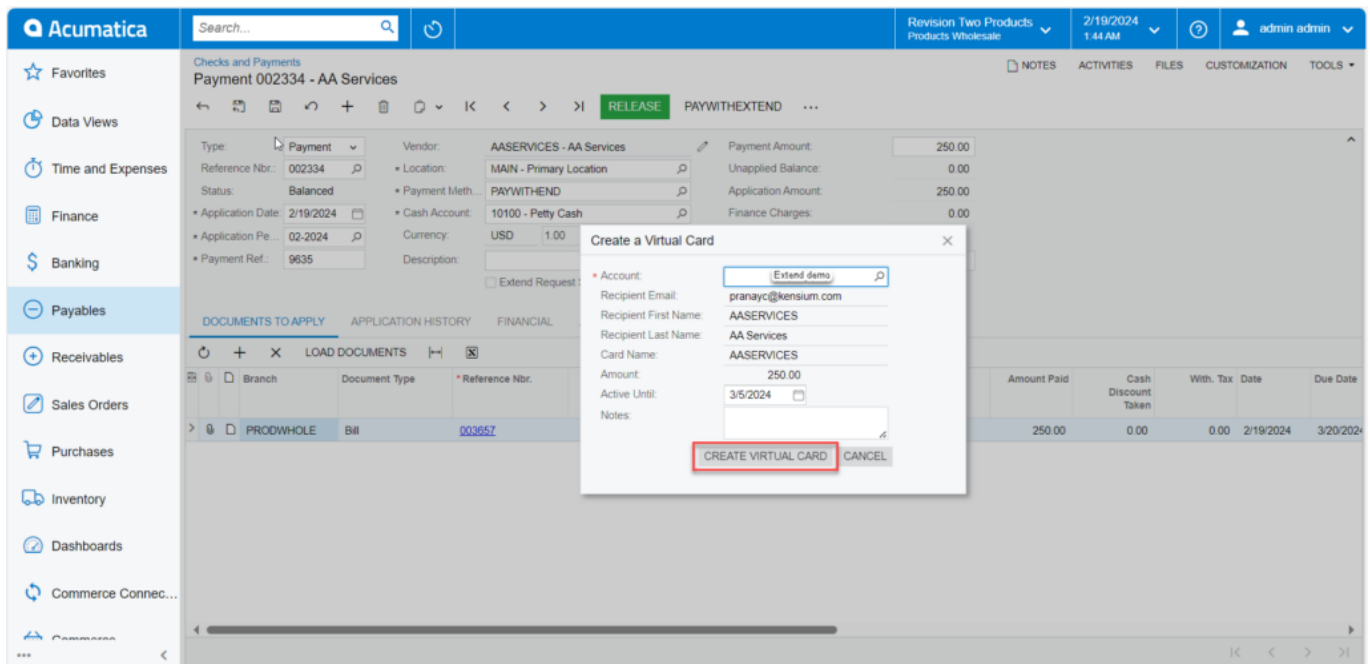
## Checks and Payments

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



The screenshot shows the Acumatica interface for a payment entry. The top navigation bar includes the Acumatica logo, a search bar, and user information (Revision Two Products, Products Wholesale, 2/19/2024 1:44 AM, admin admin). The left sidebar contains navigation options like Favorites, Data Views, Time and Expenses, Finance, Banking, Payables, Receivables, Sales Orders, Purchases, Inventory, Dashboards, and Commerce Connections. The main content area is titled 'Checks and Payments' and 'Payment 002334 - AA Services'. It features a 'RELEASE' button and a 'PAYWITHEXTEND' button, the latter of which is highlighted with a red box. Below this, there are tabs for 'DOCUMENTS TO APPLY', 'APPLICATION HISTORY', 'FINANCIAL', 'APPROVALS', 'REMITTANCE', 'CHARGES', and 'EXTEND DETAILS'. A table below shows a single document entry for 'PRODWHOLE' with a reference number of 003657, an amount paid of 250.00, and a due date of 3/20/2024. A status bar at the bottom indicates 'Your product is in trial mode. Only two concurrent users are allowed.' and an 'ACTIVATE' button.

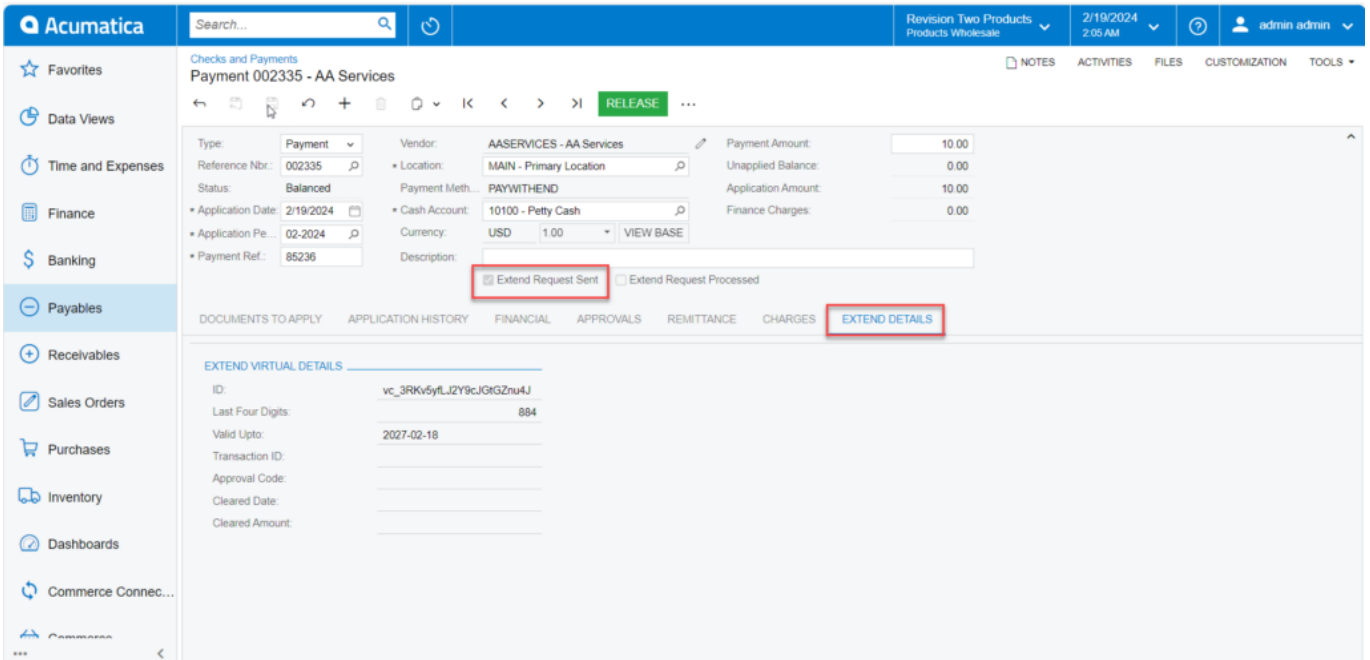
### Checks and Payments



This screenshot shows the same Acumatica interface as above, but with a 'Create a Virtual Card' dialog box open in the foreground. The dialog box contains the following fields: Account (Extend demo), Recipient Email (pranayc@kensium.com), Recipient First Name (AASERVICES), Recipient Last Name (AA Services), Card Name (AASERVICES), Amount (250.00), and Active Until (3/5/2024). There is a 'Notes' field at the bottom. At the bottom of the dialog, there are two buttons: 'CREATE VIRTUAL CARD' (highlighted with a red box) and 'CANCEL'. The background payment entry details are visible but slightly dimmed.

## 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.



The screenshot shows the Acumatica interface for a payment entry. The main area displays the 'Payment 002335 - AA Services' details. The 'Extend Request Sent' checkbox is checked and highlighted with a red box. Below the payment details, the 'EXTEND VIRTUAL DETAILS' section is visible, showing the following information:

EXTEND VIRTUAL DETAILS	
ID:	vc_3RKv5ytlJ2Y9cjJGznu4J
Last Four Digits:	884
Valid Up to:	2027-02-18
Transaction ID:	
Approval Code:	
Cleared Date:	
Cleared Amount:	

The 'EXTEND DETAILS' tab is also highlighted with a red box in the navigation menu.

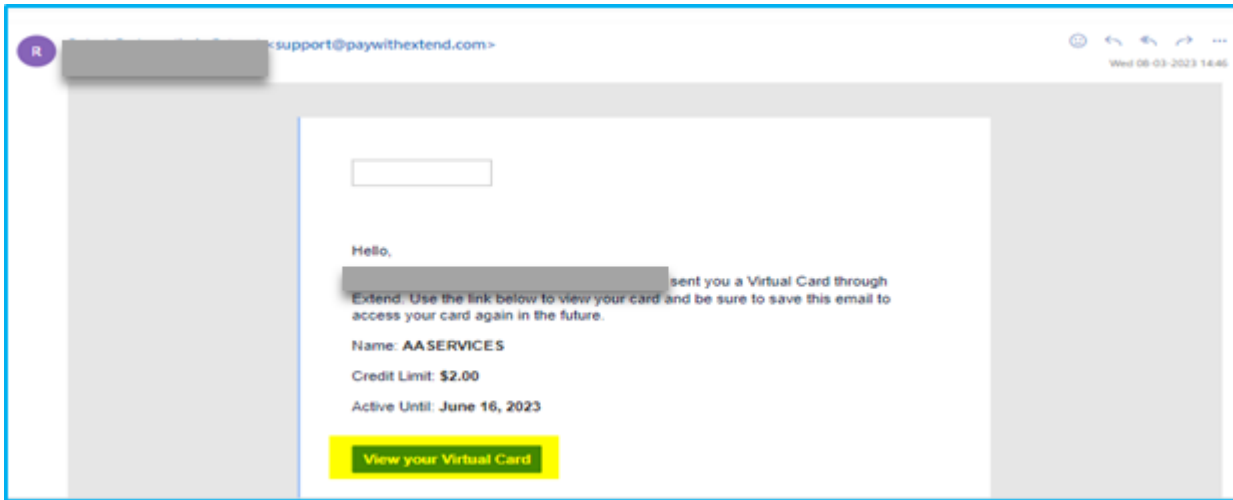
## Checks and Payments





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](#)



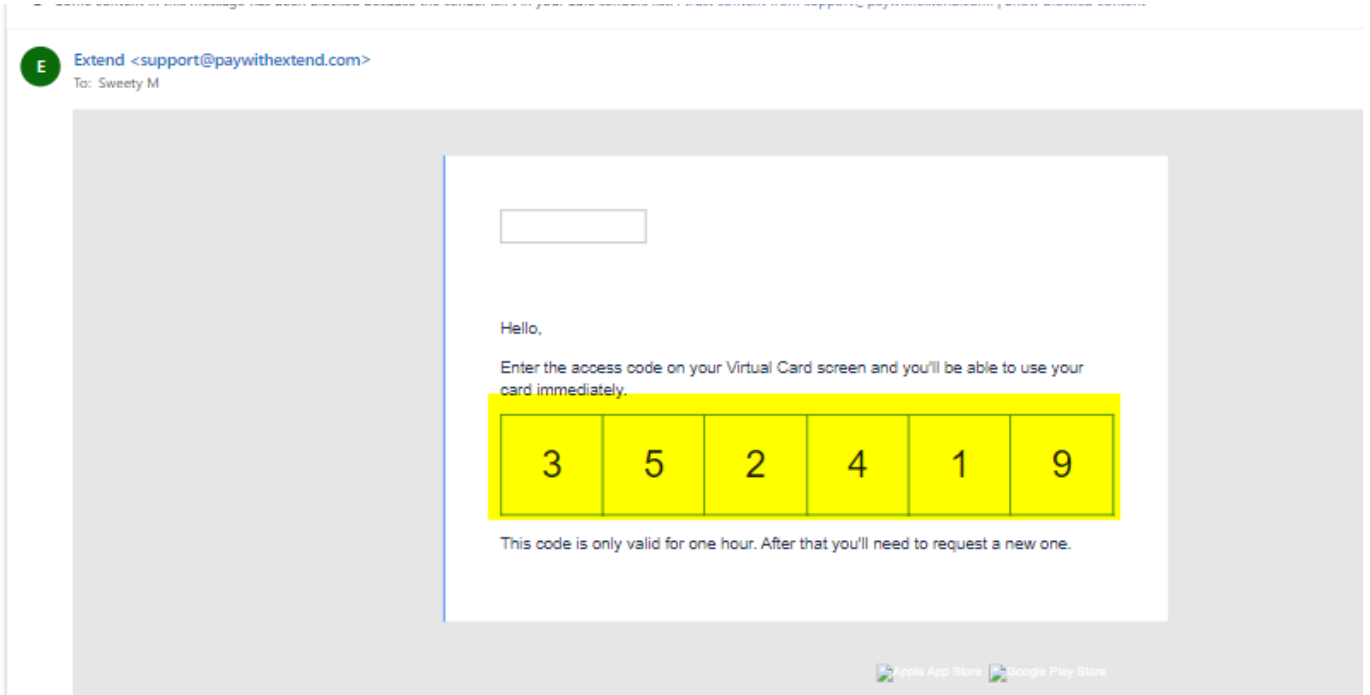
KENSIUM

Pay with Extend

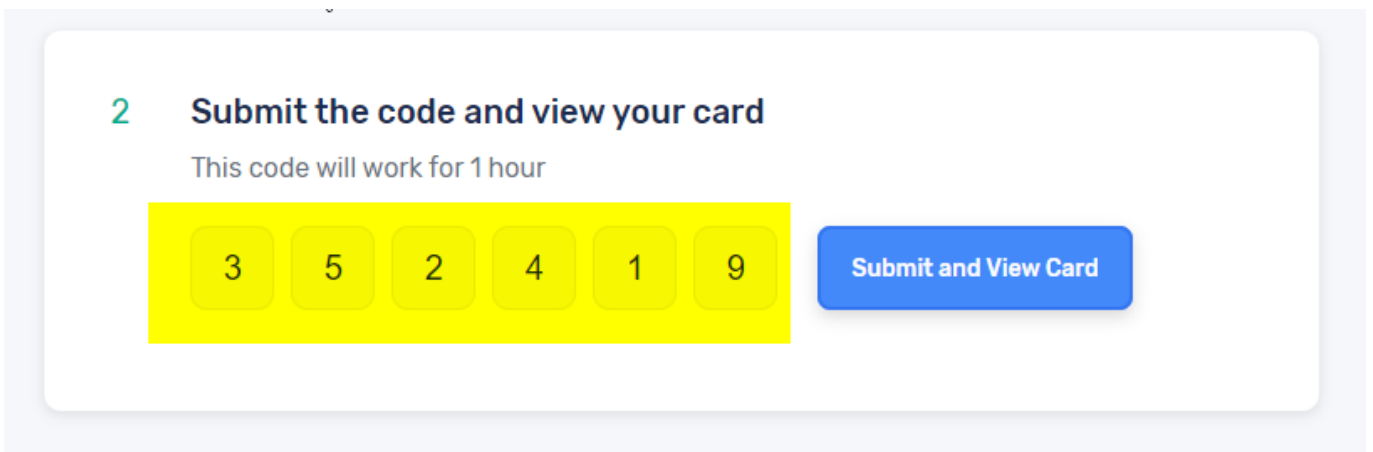
### Generate Code



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



### Code

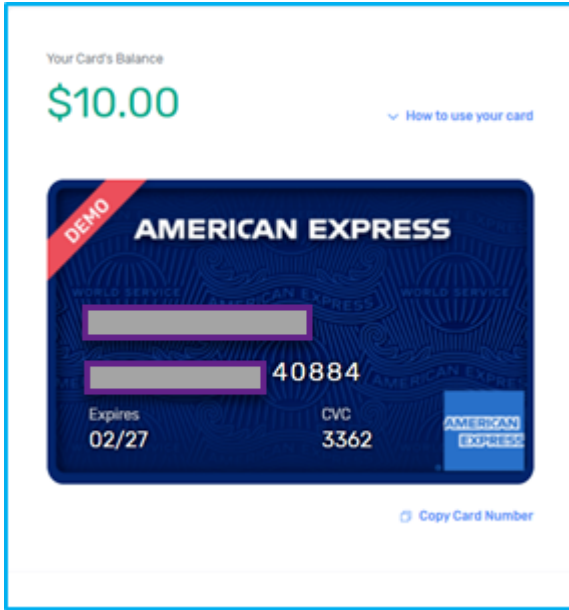


### Submit and View Card



KENSIUM

# Pay with Extend

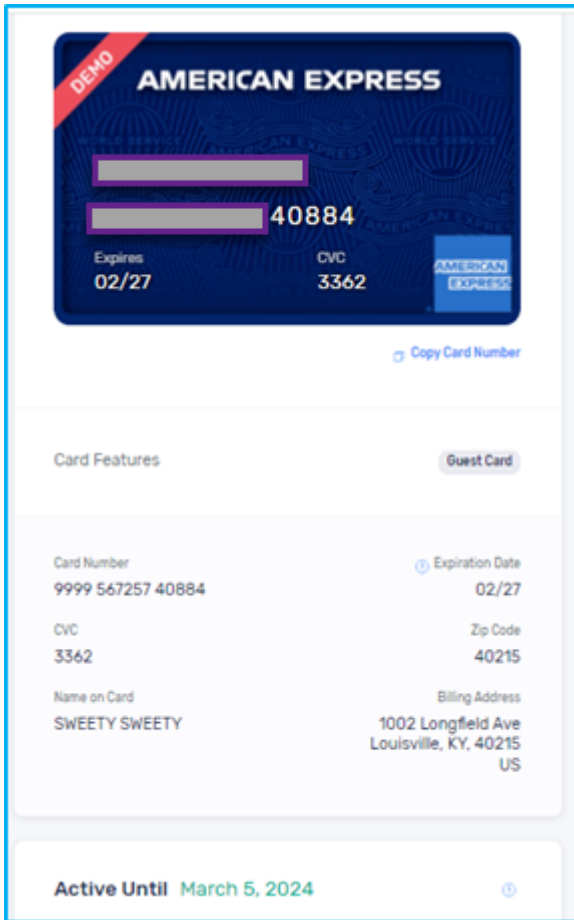


Card



KENSIUM

Pay with Extend



Card

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