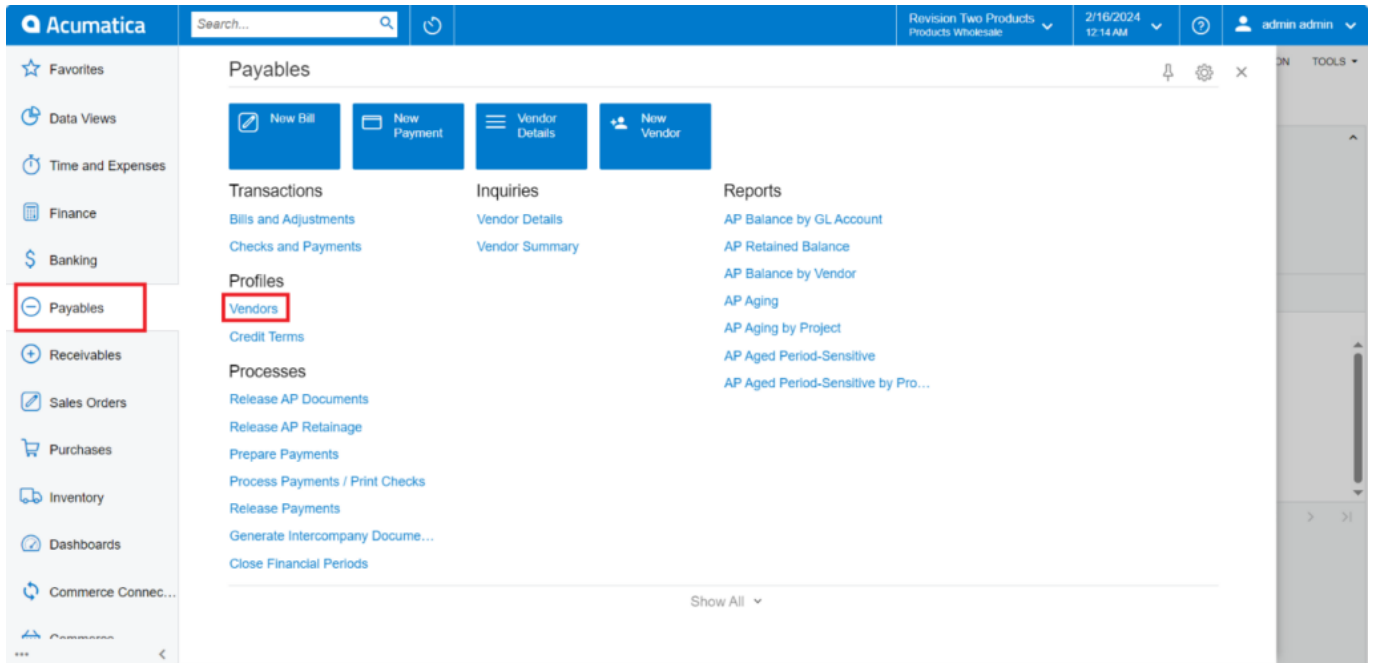


## Steps for Creation of Virtual Card

- ✘ **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

Acumatica Vendor Profile: AAVENDOR - Goto Vendor Inc.

Vendor ID: AAVENDOR - Goto Vendor Inc. | Balance: 0.00  
Vendor Status: Active | Prepayment Balance: 0.00  
Vendor Class: PRODUCT - Products Vendors | Retained Balance: 0.00

Tabs: 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

**DEFAULT PAYMENT SETTINGS**

Override  
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
-------------	-------

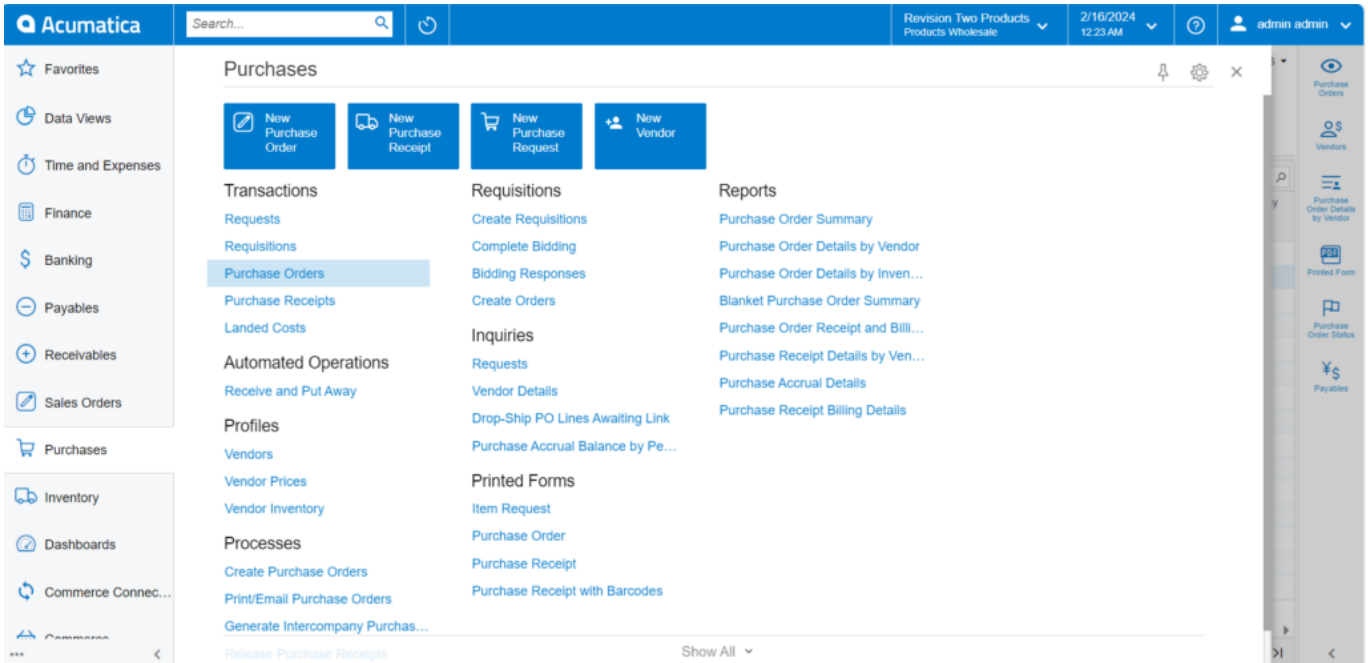
**REMIT-TO INFO**

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

## Vendors

### Purchase Order Screen:

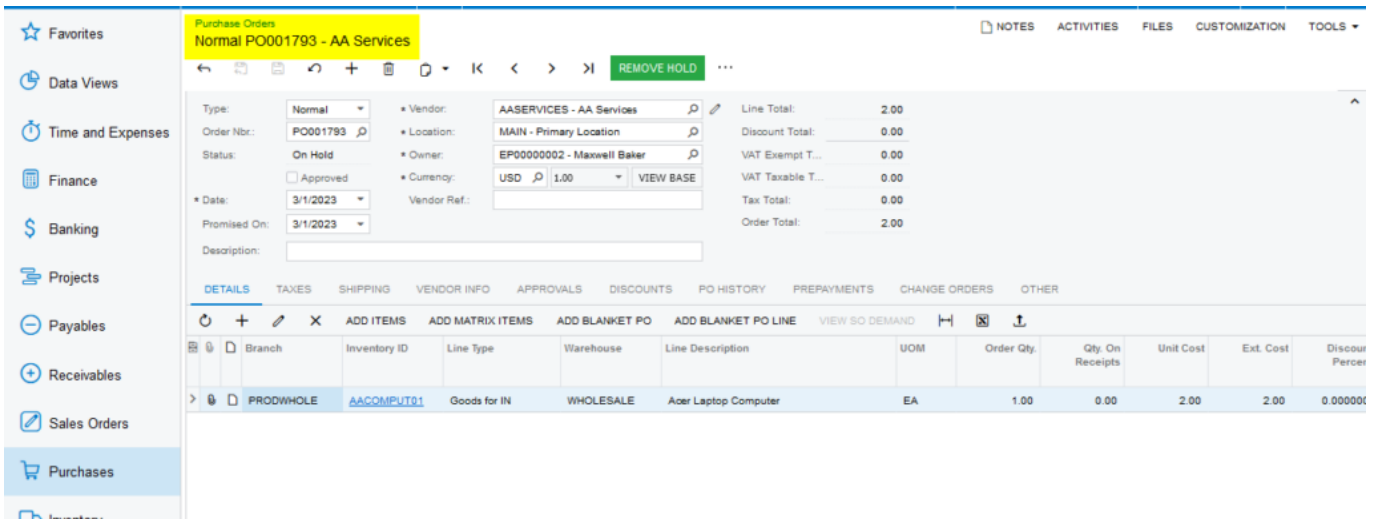
- Navigate to Purchase order screen



The screenshot shows the Acumatica Purchases dashboard. The top navigation bar includes the Acumatica logo, a search bar, and user information (Revision Two Products, Products Wholesale, 2/16/2024 12:23 AM, admin admin). The left sidebar contains various navigation options like Favorites, Data Views, Time and Expenses, Finance, Banking, Payables, Receivables, Sales Orders, Purchases, Inventory, Dashboards, and Commerce Connec... The main content area is titled 'Purchases' and features several sections: Transactions (Requests, Requisitions, Purchase Orders, Purchase Receipts, Landed Costs, Automated Operations, Profiles, Vendor Prices, Vendor Inventory, Processes), Requisitions (Create Requisitions, Complete Bidding, Bidding Responses, Create Orders, Inquiries, Requests, Vendor Details, Drop-Ship PO Lines Awaiting Link, Purchase Accrual Balance by Pe...), Printed Forms (Item Request, Purchase Order, Purchase Receipt, Purchase Receipt with Barcodes), and Reports (Purchase Order Summary, Purchase Order Details by Vendor, Purchase Order Details by Inven..., Blanket Purchase Order Summary, Purchase Order Receipt and Billi..., Purchase Receipt Details by Ven..., Purchase Accrual Details, Purchase Receipt Billing Details). There are also buttons for 'New Purchase Order', 'New Purchase Receipt', 'New Purchase Request', and 'New Vendor'.

## Purchase Orders

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



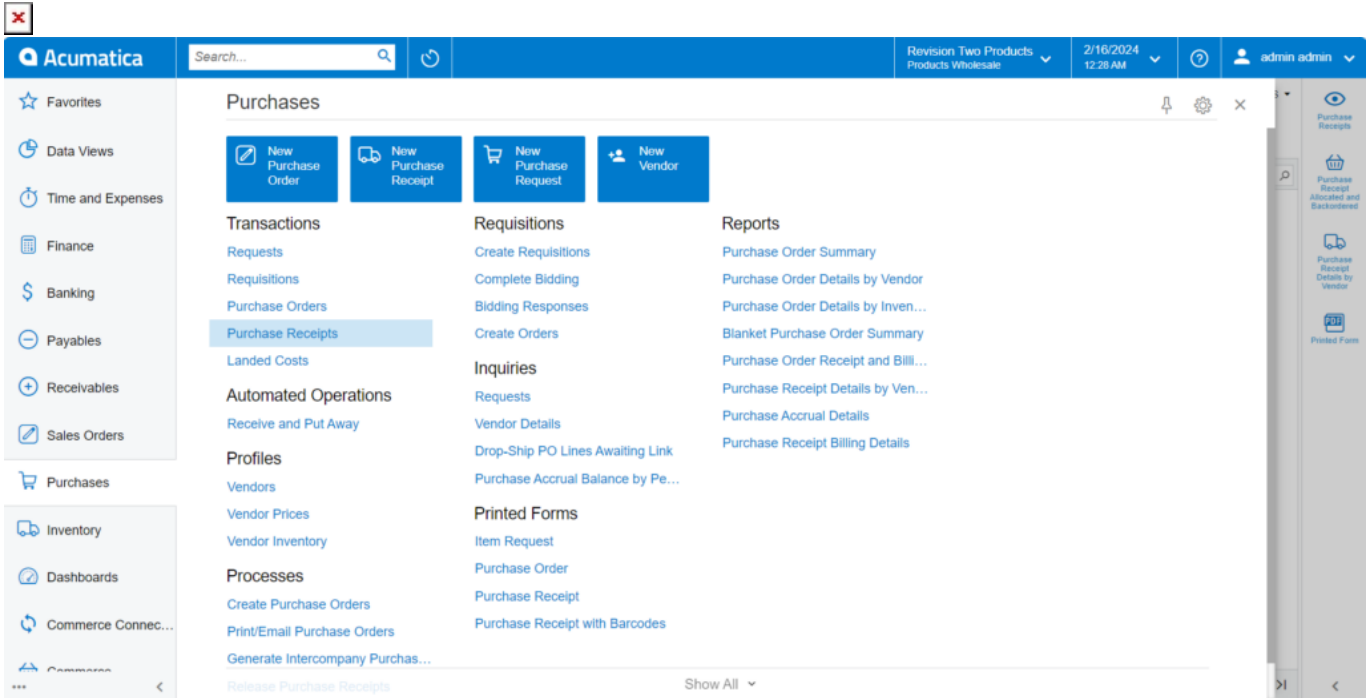
The screenshot shows the details of a Purchase Order in Acumatica. The header includes 'Purchase Orders', 'Normal PO001793 - AA Services', and a 'REMOVE HOLD' button. The main form contains fields for Type (Normal), Order Nbr (PO001793), Status (On Hold), Date (3/1/2023), Promised On (3/1/2023), Vendor (AASERVICES - AA Services), Location (MAIN - Primary Location), Owner (EP00000002 - Maxwell Baker), Currency (USD), and Vendor Ref. Summary statistics show Line Total: 2.00, Discount Total: 0.00, VAT Exempt T...: 0.00, VAT Taxable T...: 0.00, Tax Total: 0.00, and Order Total: 2.00. Below the form are tabs for DETAILS, TAXES, SHIPPING, VENDOR INFO, APPROVALS, DISCOUNTS, PO HISTORY, PREPAYMENTS, CHANGE ORDERS, and OTHER. A table below the tabs shows the purchase order line items:

Branch	Inventory ID	Line Type	Warehouse	Line Description	UOM	Order Qty.	Qty. On Receipts	Unit Cost	Ext. Cost	Discour Percen
PRODWHOLE	AACOMPVT01	Goods for IN	WHOLESALE	Acer Laptop Computer	EA	1.00	0.00	2.00	2.00	0.00000

## Purchase Orders

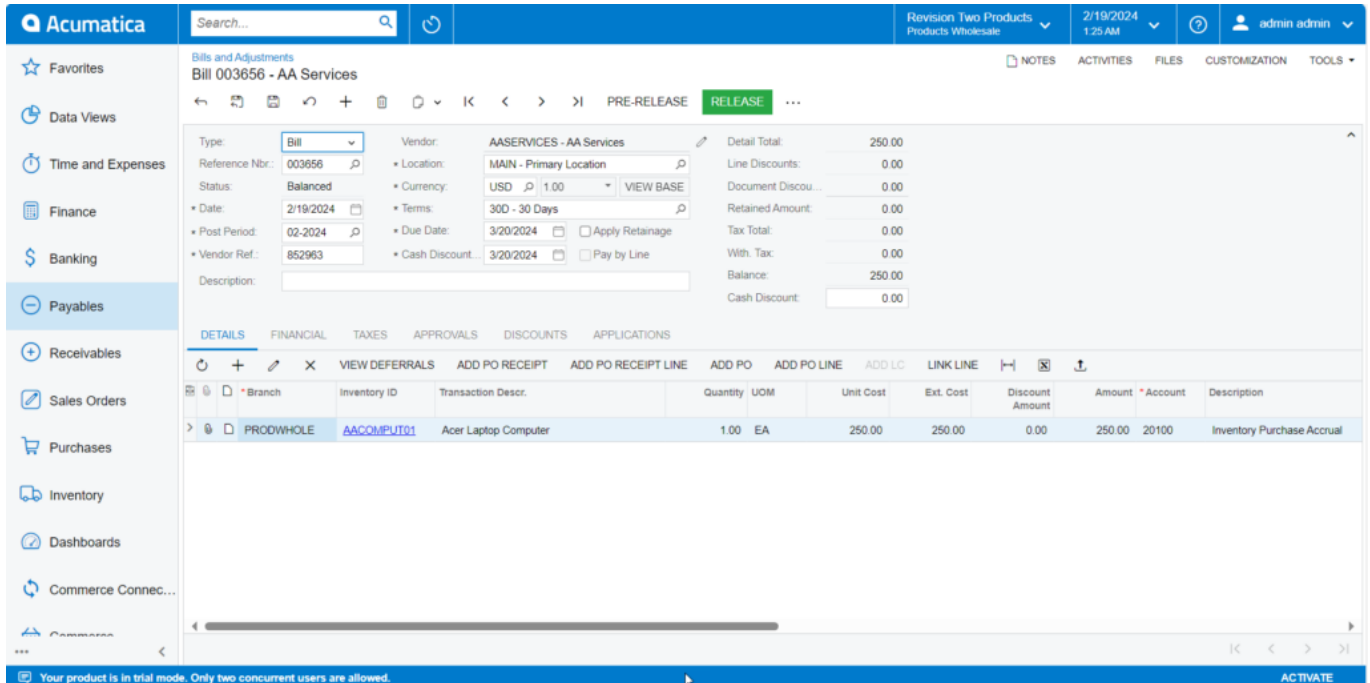
**Purchase receipts screen:**

- Navigate to Purchase receipts screen.



**Purchase Receipts**

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

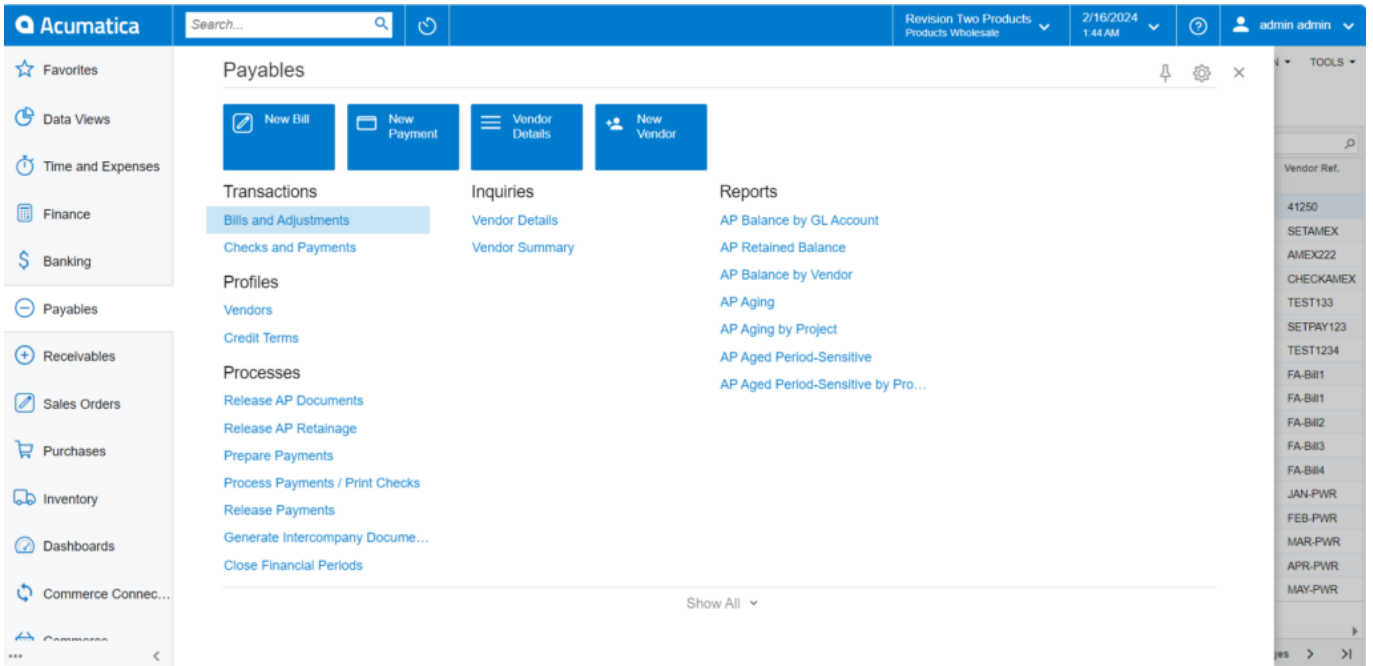


The screenshot shows the Acumatica interface for the 'Bills and Adjustments' screen. The top navigation bar includes the Acumatica logo, a search bar, and user information (Revision Two Products, Products Wholesale, 2/19/2024 1:25 AM, admin admin). The left sidebar contains navigation options: Favorites, Data Views, Time and Expenses, Finance, Banking, Payables (selected), Receivables, Sales Orders, Purchases, Inventory, Dashboards, and Commerce Connect. The main content area displays details for 'Bill 003656 - AA Services'. The 'DETAILS' tab is active, showing 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 on the right 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 the details is a table with columns: 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. A status bar at the bottom indicates 'Your product is in trial mode. Only two concurrent users are allowed.' and an 'ACTIVATE' button.

## Purchase Receipts

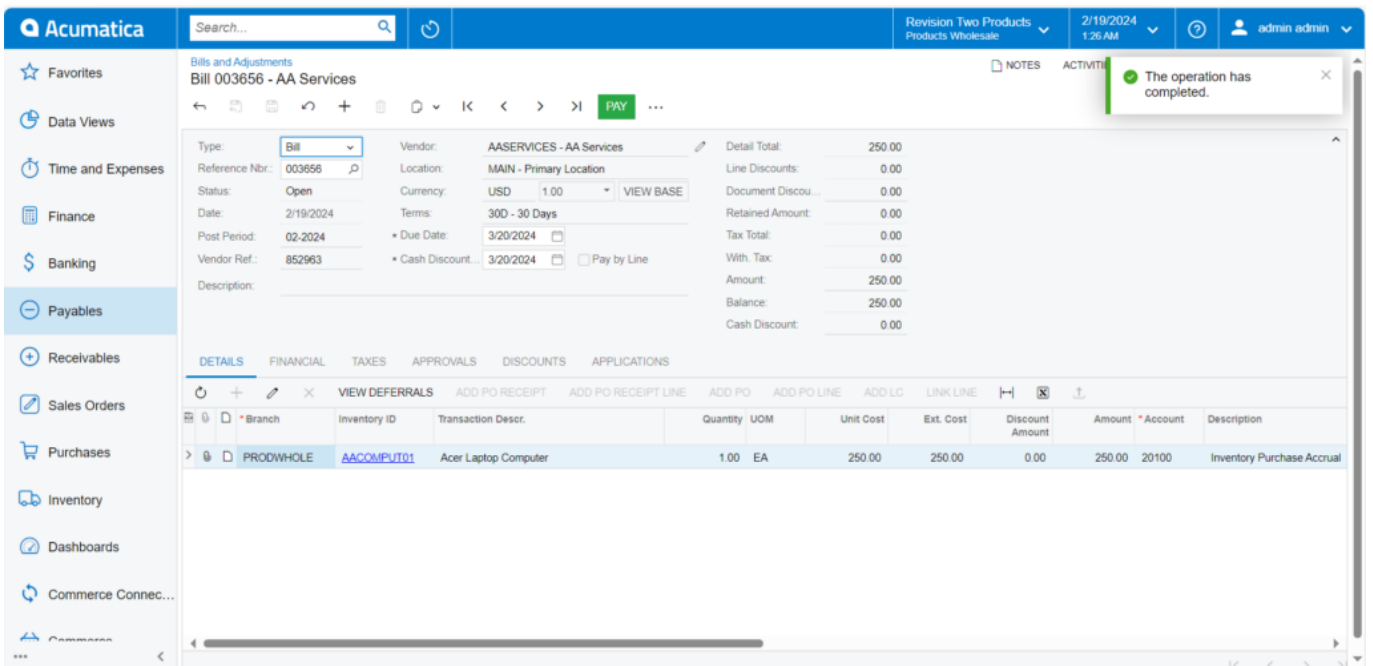
### Bills and Adjustments screen:

- 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 icon, 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. The right sidebar shows a 'TOOLS' section with a search bar and a list of 'Vendor Ref.' items 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 the same. 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, Cash Discount: 3/20/2024, and Pay by Line: unchecked. 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



KENSIUM

# Pay with Extend

- 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 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 main content area is titled "Bills and Adjustments" and shows "Bill 003656 - AA Services". 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

Summary values:

- 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

The table below shows the bill items:

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.



KENSIUM

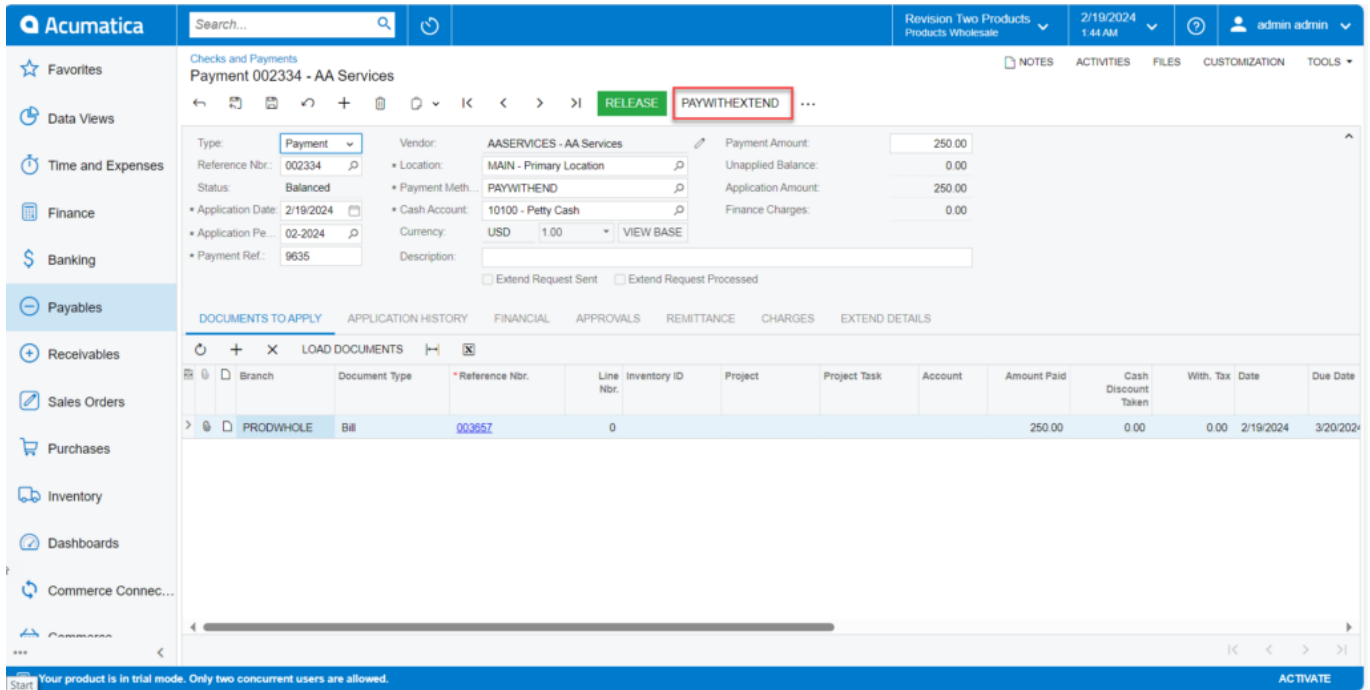
# Pay with Extend

The screenshot displays the Acumatica Payables module interface. At the top, there is a navigation bar with the Acumatica logo, a search bar, and user information (admin admin). The main content area is titled 'Payables' and features several sections: 'Transactions' (with 'Checks and Payments' selected), 'Inquiries' (with 'Vendor Summary'), and 'Reports' (with 'AP Aged Period-Sensitive by Pro...'). A left sidebar lists various financial modules, and a right sidebar shows a 'Payment Ref.' table with values like 542241, 634541, etc.

## Checks and Payments

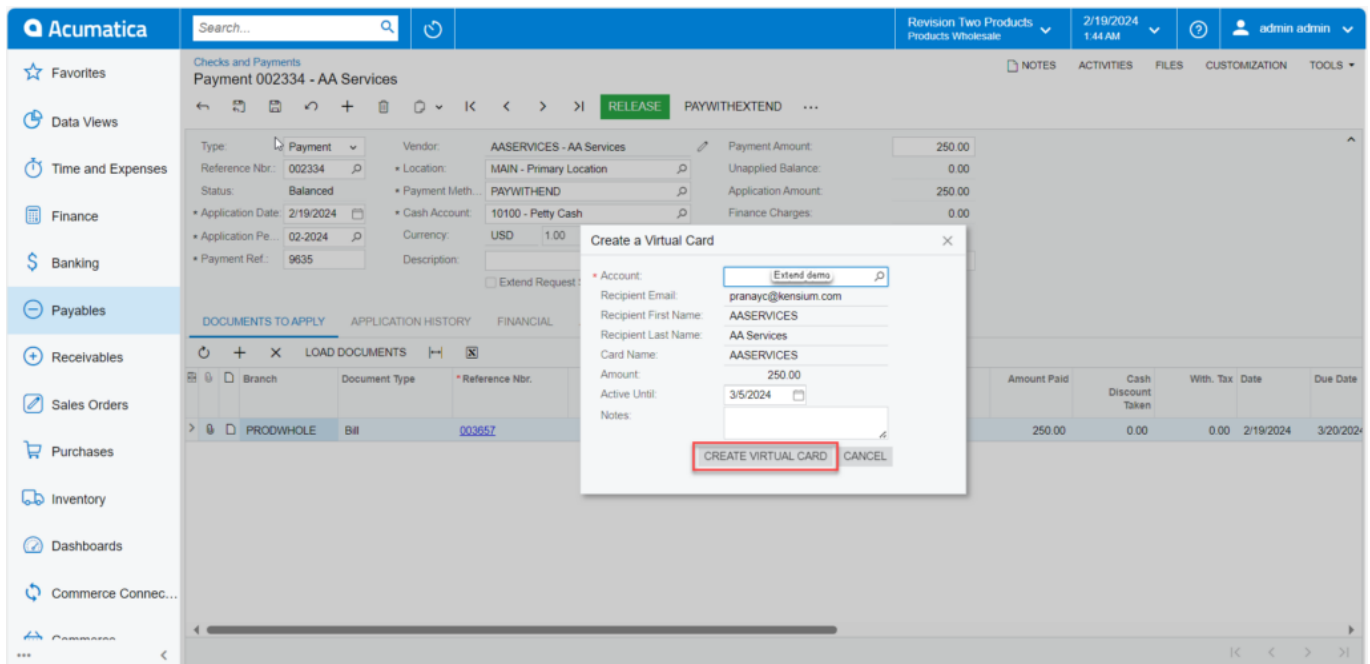
- In Checks and Payments screen click on Pay by Amex Action





The screenshot shows the Acumatica interface for a payment record. The top navigation bar includes 'Acumatica', a search bar, and user information. 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 area displays 'Checks and Payments' for 'Payment 002334 - AA Services'. A 'PAYWITHEXTEND' button is highlighted with a red box. Below the payment details is a table with columns: Branch, Document Type, Reference Nbr., Line Nbr., Inventory ID, Project, Project Task, Account, Amount Paid, Cash Discount Taken, With. Tax, Date, and Due Date. A single row is visible for 'PRODWOLE' with a reference number of '003657'.

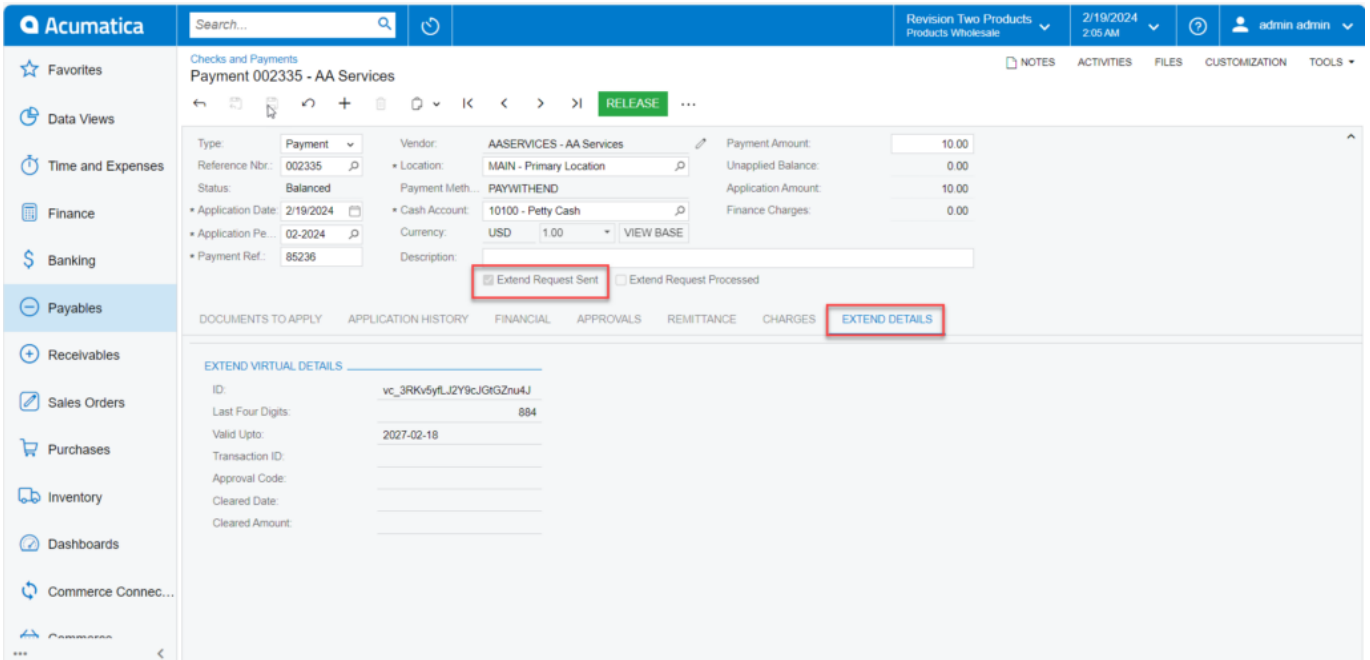
### Checks and Payments



This screenshot is similar to the one above but includes a 'Create a Virtual Card' dialog box. The dialog box has the following fields: Account (set to '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 and a 'Description' field. At the bottom of the dialog, there are 'CREATE VIRTUAL CARD' and 'CANCEL' buttons, with the 'CREATE VIRTUAL CARD' button highlighted in red.

## 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. A red box highlights the 'Extend Request Sent' checkbox, which is currently checked. Another red box highlights the 'EXTEND DETAILS' tab in the navigation bar. Below the navigation bar, the 'EXTEND VIRTUAL DETAILS' section is visible, showing fields for ID, Last Four Digits, Valid Upto, Transaction ID, Approval Code, Cleared Date, and Cleared Amount.

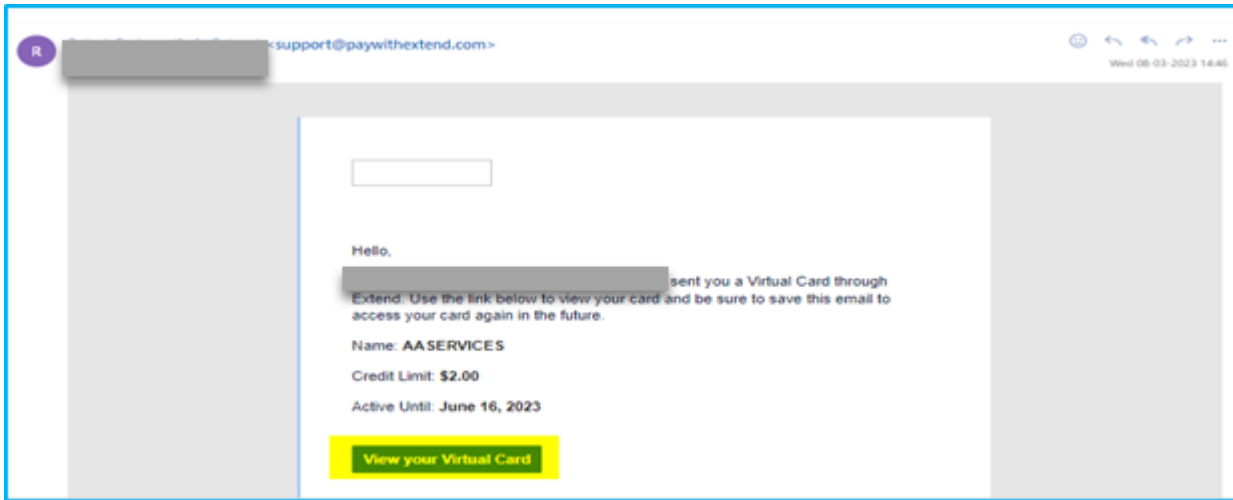
Field	Value
Type	Payment
Reference Nbr.	002335
Status	Balanced
Application Date	2/19/2024
Application Pe.	02-2024
Payment Ref.	85236
Vendor	AASERVICES - AA Services
Location	MAIN - Primary Location
Payment Meth.	PAYWITHEND
Cash Account	10100 - Petty Cash
Currency	USD 1.00
Description	
Payment Amount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

## 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](#)



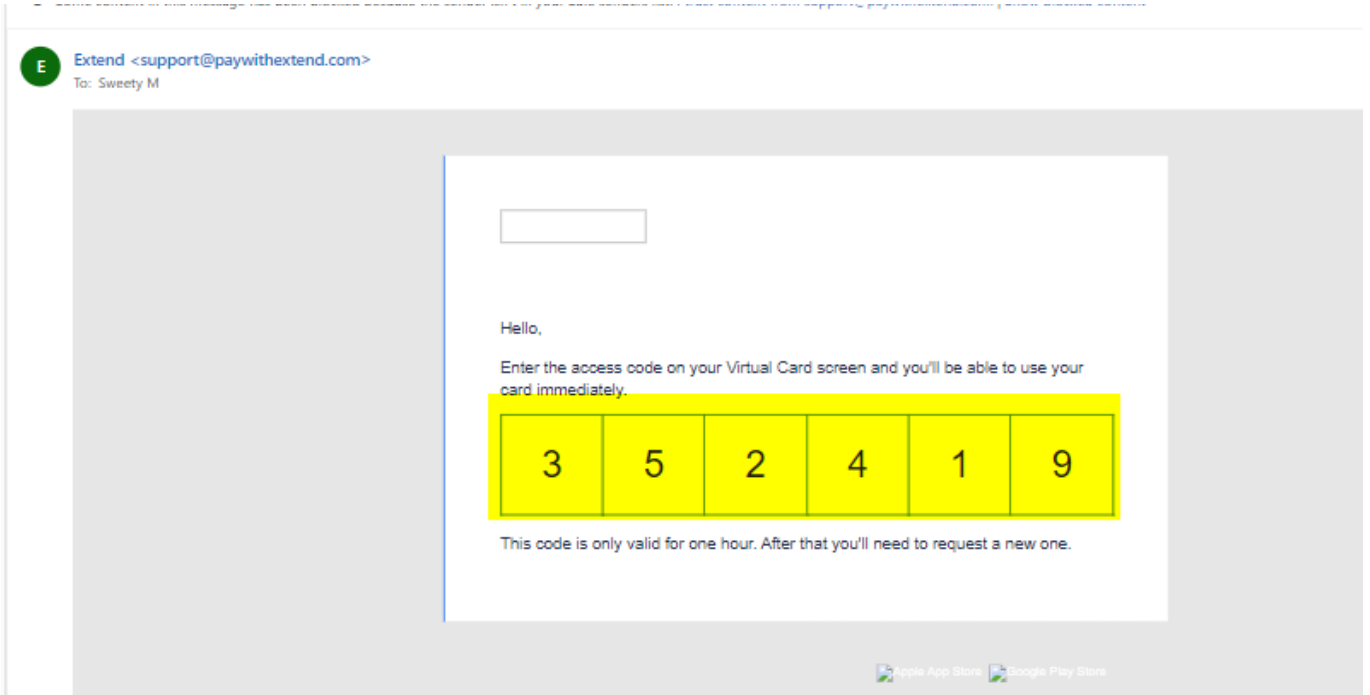
KENSIUM

Pay with Extend

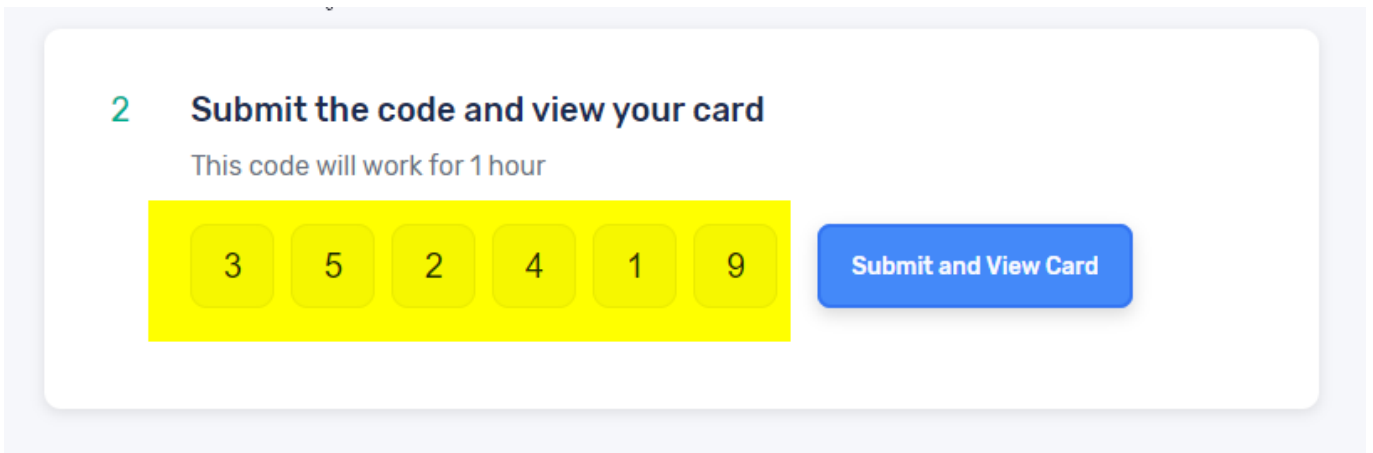
### Generate Code



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



### Code

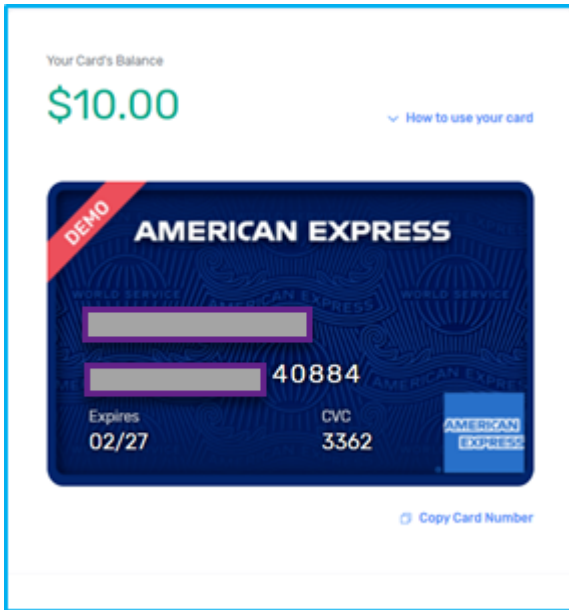


### Submit and View Card



KENSIUM

# Pay with Extend

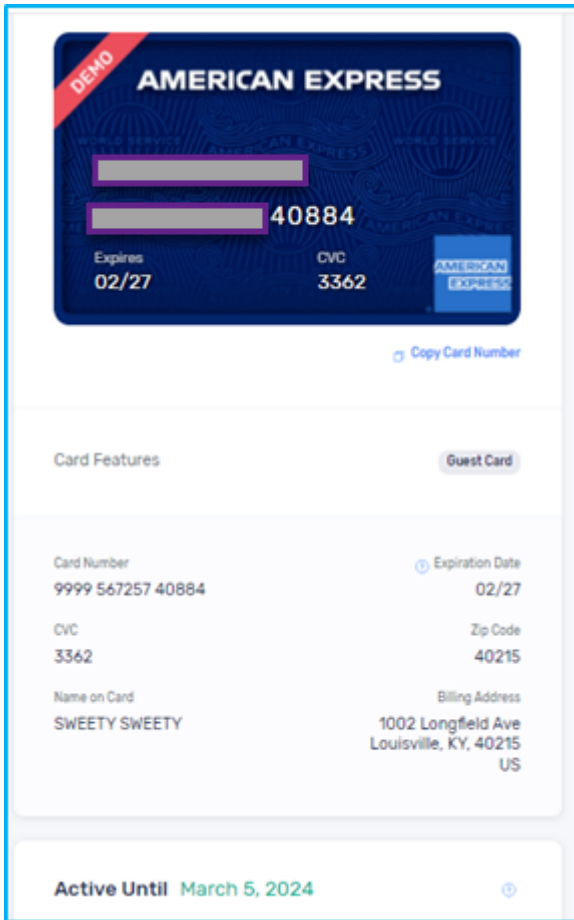


Card



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.