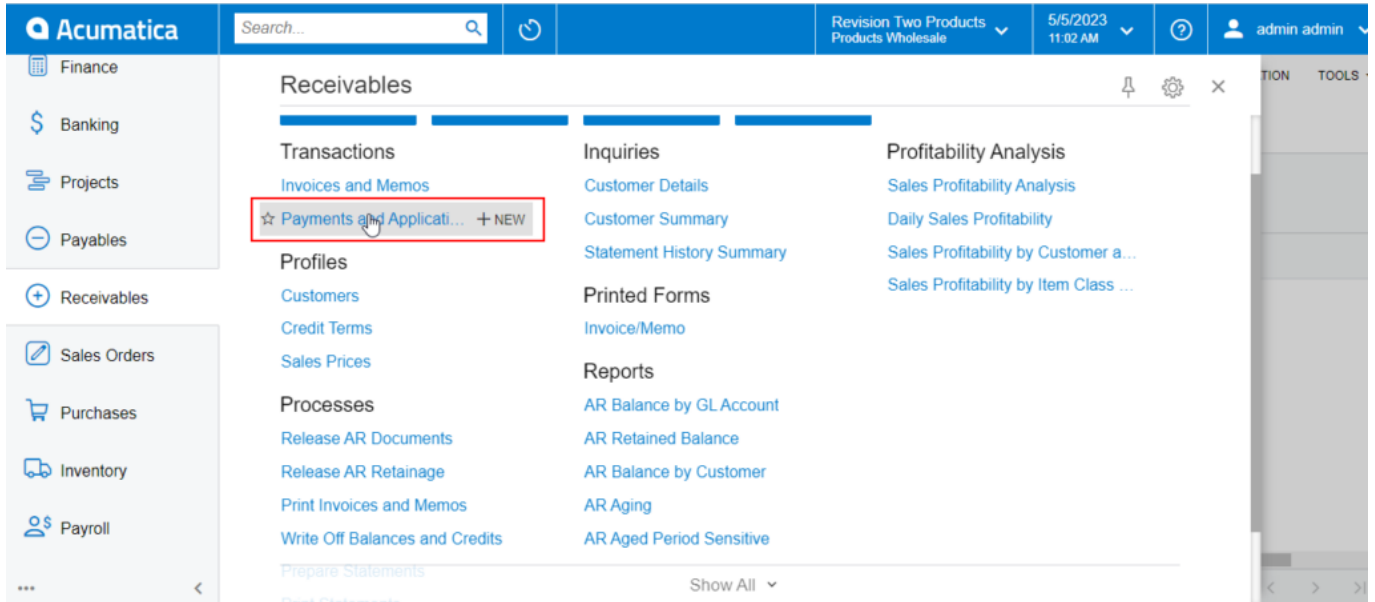
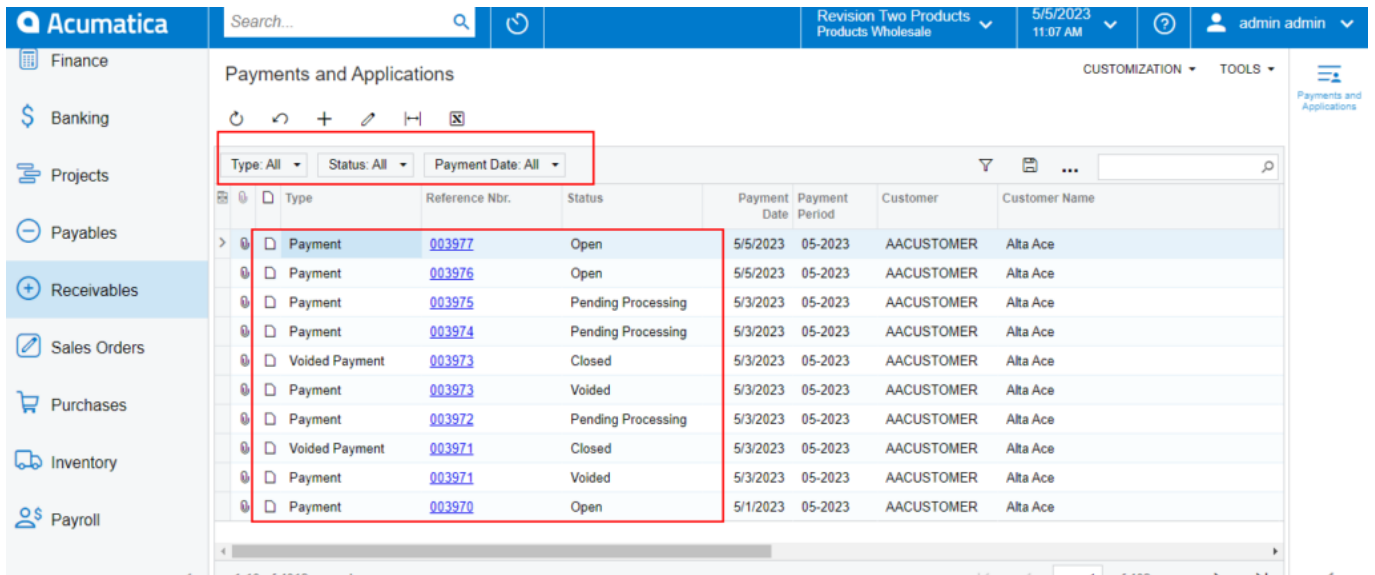


Steps to process a PayPal Invoice on Payments

- ✖ To check the status of a PayPal invoice on an individual payment and application, in Acumatica, **[Receivables]** workspace and click **[Payments and Applications]**.

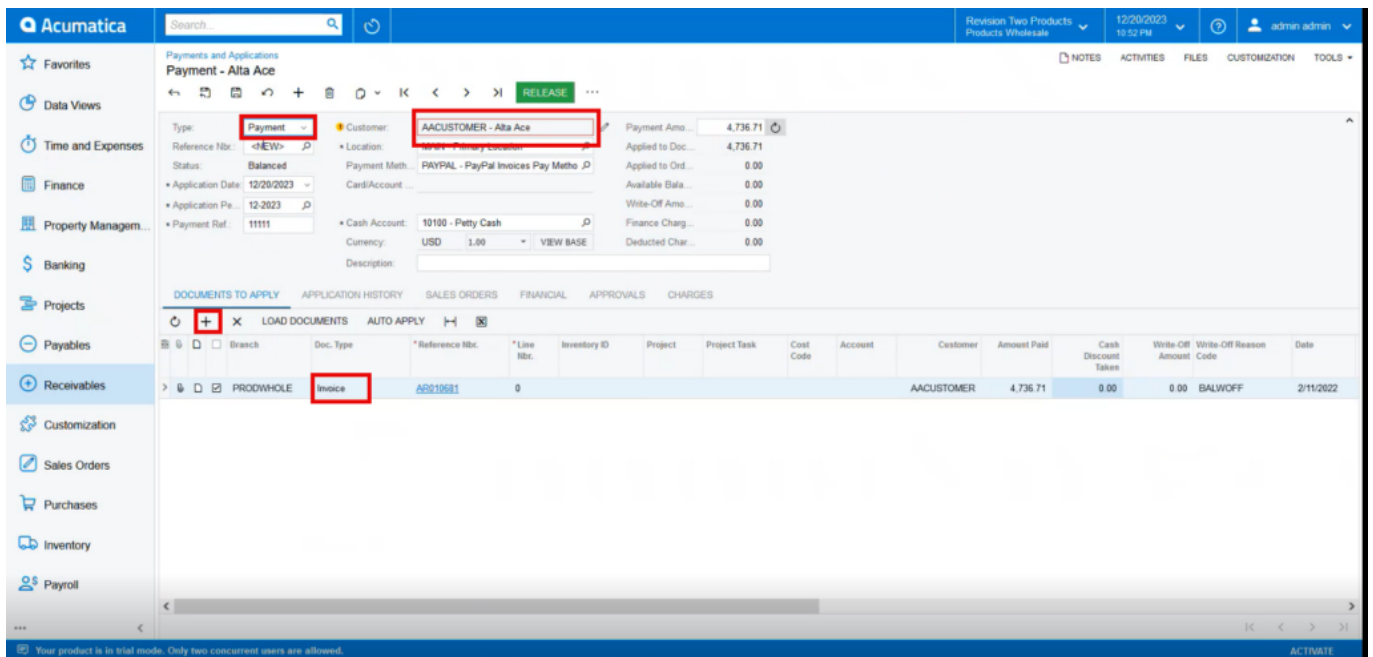


Payments and Applications under Receivables



Payments and Applications

- Click on **[+]** icon.
- Upon clicking **[+]** icon you will be redirected to a new screen.
- Select Action Type as **[Payment]**.
- Search for **[Customer]**.
- Click on **[+]** icon.
- Select **[Doc.type]** as **[Invoice]**.



The screenshot shows the Acumatica interface for creating a payment. The 'Payment - Alta Ace' form is displayed with the following details:

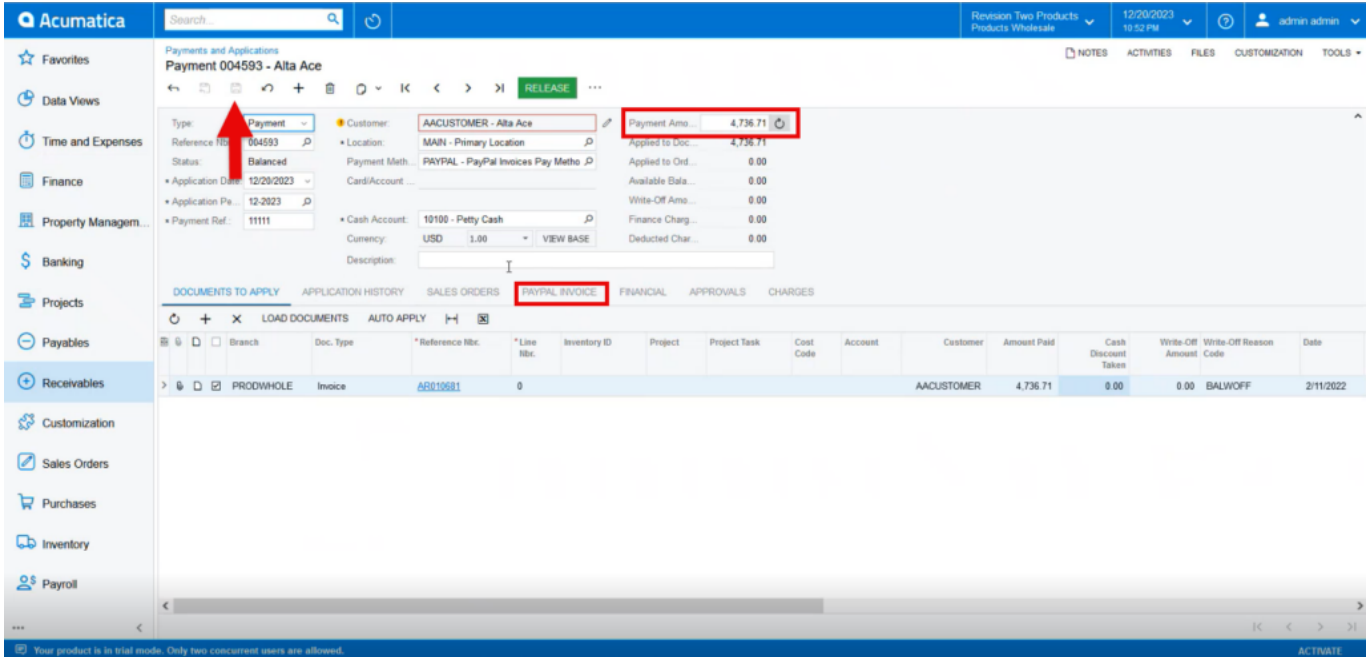
- Type: **Payment** (highlighted with a red box)
- Customer: **AACUSTOMER - Alta Ace** (highlighted with a red box)
- Payment Amount: 4,736.71
- Applied to Doc: 4,736.71
- Payment Method: PAYPAL - PayPal Invoices Pay Metho
- Application Date: 12/20/2023
- Cash Account: 10100 - Petty Cash
- Currency: USD 1.00

Below the form, the 'DOCUMENTS TO APPLY' section contains a table with the following data:

Doc. Type	*Reference Nbr.	*Line Nbr.	Inventory ID	Project	Project Task	Cost Code	Account	Customer	Amount Paid	Cash Discount Taken	Write-Off Amount	Write-Off Reason Code	Date
Invoice	AR019581	0						AACUSTOMER	4,736.71	0.00	0.00	BALWOFF	2/11/2022

Payments and Applications

- Click on **[Refresh]** and then Click on **[Save]**.



Acumatica

Search

Revision Two Products
Products Wholesale

12/20/2023
10:52 PM

admin admin

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

Payments and Applications
Payment 004593 - Alta Ace

RELEASE

Type: **Payment**

Reference ID: 004593

Status: **Balanced**

Application Date: 12/20/2023

Application Pa...: 12-2023

Payment Ref.: 11111

Customer: AACUSTOMER - Alta Ace

Location: MAIN - Primary Location

Payment Meth.: PAYPAL - PayPal Invoices Pay Metho

Card/Account...

Cash Account: 10100 - Petty Cash

Currency: USD 1.00

VIEW BASE

Description:

Payment Amo...: 4,736.71

Applied to Doc...: 4,736.71

Applied to Ord...: 0.00

Available Bal...: 0.00

Write-Off Amo...: 0.00

Finance Chang...: 0.00

Deducted Char...: 0.00

DOCUMENTS TO APPLY APPLICATION HISTORY SALES ORDERS **PAYPAL INVOICE** FINANCIAL APPROVALS CHARGES

LOAD DOCUMENTS	AUTO APPLY															
Doc. Type	*Reference Ibr.	*Line Ibr.	Inventory ID	Project	Project Task	Cost Code	Account	Customer	Amount Paid	Cash Discount Taken	Write-Off Amount	Write-Off Reason Code	Date			
PRODWHOLE Invoice	AB010681	0						AACUSTOMER	4,736.71	0.00	0.00	BALWOFF	2/11/2022			

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

ACTIVATE

Payments and Applications

- Click on **[PayPal Invoice]** tab.
- Select **[Paypal]** as Payment Method.
- A screen with 3 options will appear.
- To get Invoice click on **[Request Payment Via Paypal Invoice]**.
- Enter a **[PayPal Payer]** Note if necessary.
- These are displayed in the memo line of the invoice.
- Click **[Request Money]**.
- A line item will appear in the PayPal Invoice tab showing the date and time payment was requested, the invoice number, the invoice status, and the invoice reference number.
- The PayPal customer email, note, and invoice amount will also be listed.
- Click **[Save]**.
- The invoice will be sent to the customer's account for payment.



KENSIUM

PayPal Invoicing

The screenshot shows the PayPal dashboard with a navigation bar at the top containing 'Dashboard', 'Finances', 'Send and Request', 'Deals', 'Wallet', 'Activity', and 'Help'. On the right side of the navigation bar are a notification bell, a gear icon, and 'LOG OUT'. The main content area is divided into two columns. The left column features a 'Transfer Money' button and a 'Recent activity' section. The activity list includes several transactions from 'sharif merchant's Test Store'. The second transaction, dated 'Today, Dec 20', is for '\$-4,736.71' and is labeled 'Invoice Received', and it is highlighted with a red rectangular border. The right column displays a list of linked Visa credit cards, including 'The Bank Card Platinum Rewards' cards with various card numbers and 'Update' buttons. A 'Link a Card or Bank' link is visible at the bottom of this section.

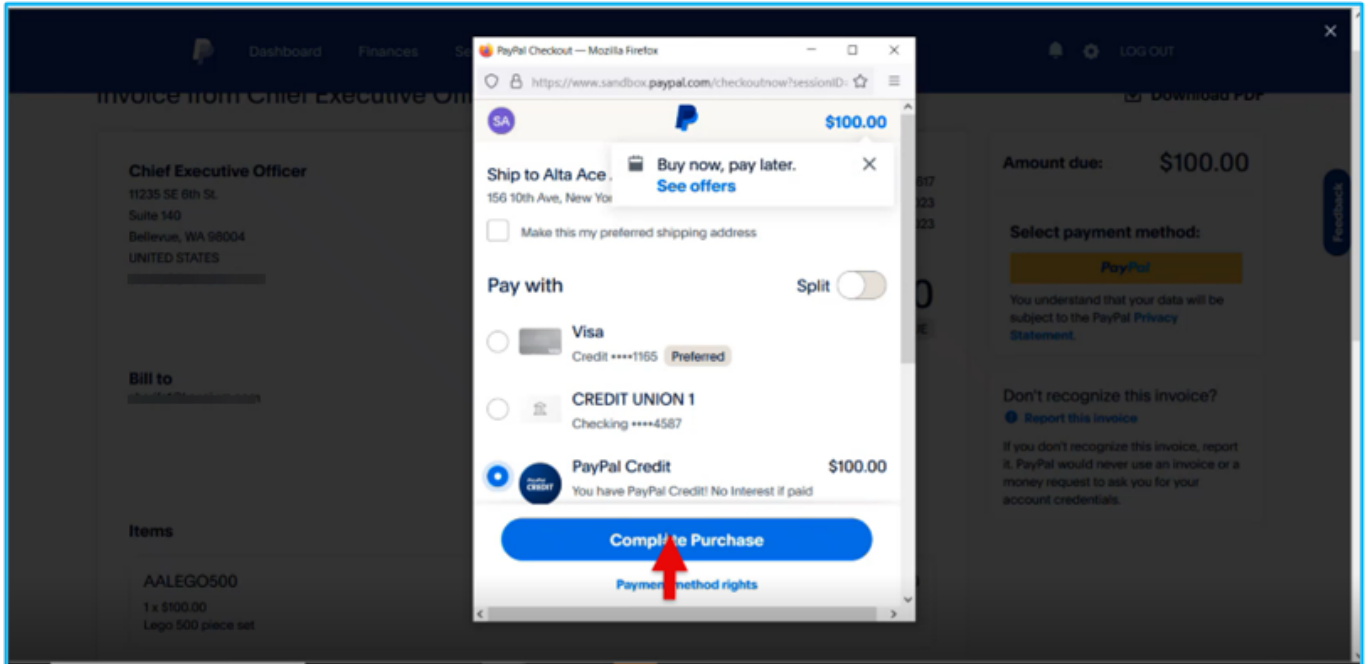
Paypal

The screenshot displays a PayPal invoice for a total amount of \$4,736.71, which is marked as 'DUE'. The invoice is addressed to the 'Chief Executive Officer' at 11235 SE 6th St., Bellevue, WA 98004, UNITED STATES. It is issued on Dec 20, 2023, and is due on Dec 20, 2023. The invoice includes a list of items: 'FOODCHIP36' (29 x \$25.00) for \$725.00 and 'FOODCHOC' (6 x \$15.55) for \$93.30. On the right side of the invoice, there is a 'Select payment method:' section with a yellow 'PayPal' button highlighted by a red arrow. Below this, there is a 'Don't recognize this invoice?' section with a 'Report this invoice' link. A 'Feedback' button is located on the far right edge of the invoice page.

Paypal

KENSIUM PayPal Invoicing

- Check all the invoice details.
- You can see Payment is [**DUE**].
- Click on [**PayPal**].
- Select [**Pay with**].



Paypal

- Click on [**Complete Purchase**].
- Status for the Payment is [**PAID**].
- Navigate back to the sales order screen and click on [**Check Paypal Invoice Payment Status**].
- Once the payment is done, a new line will appear in the table above the initial payment request with the [**PayPal Invoice Status**] listed as [**PAID**]



Paypal

- If the payment has not been completed, a red [**X**] will appear at the top of the sales order with an error message stating that the invoice has not been paid. No additional line will appear on the table.