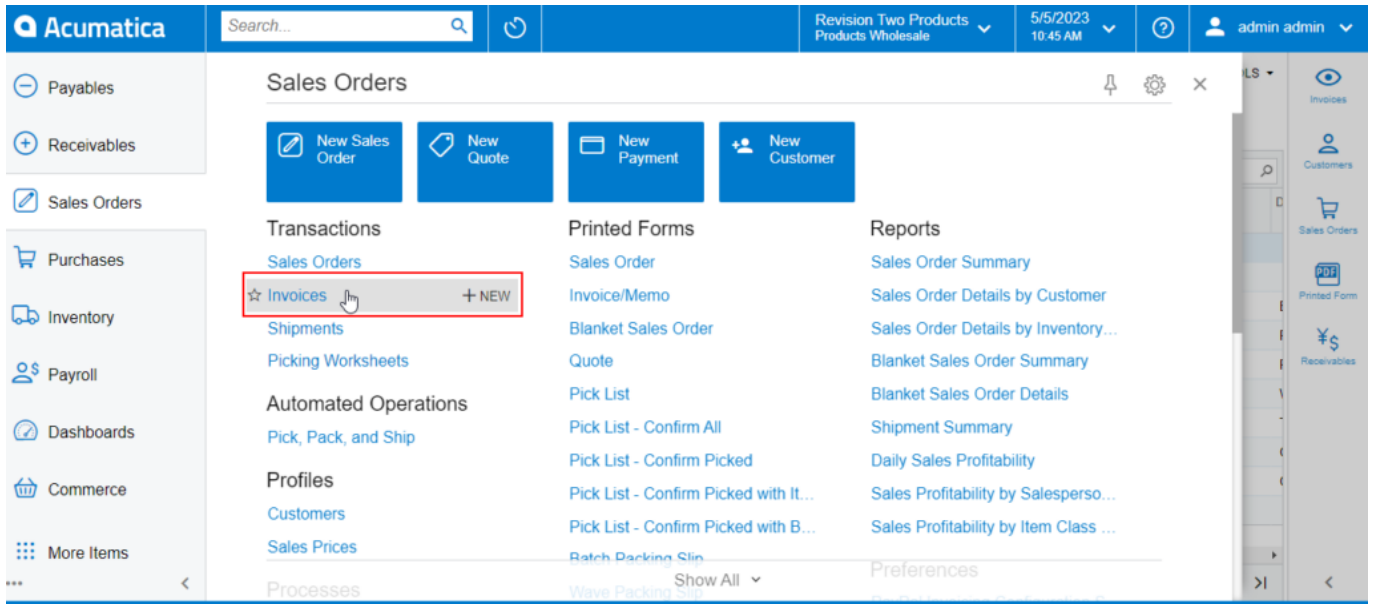


Steps to process a PayPal Invoice

- ✖ To check the status of a PayPal invoice on an individual Acumatica invoice, navigate to the Sales Order workspace and click Invoices.



Invoices

- Click on **[+]** icon.



KENSIUM

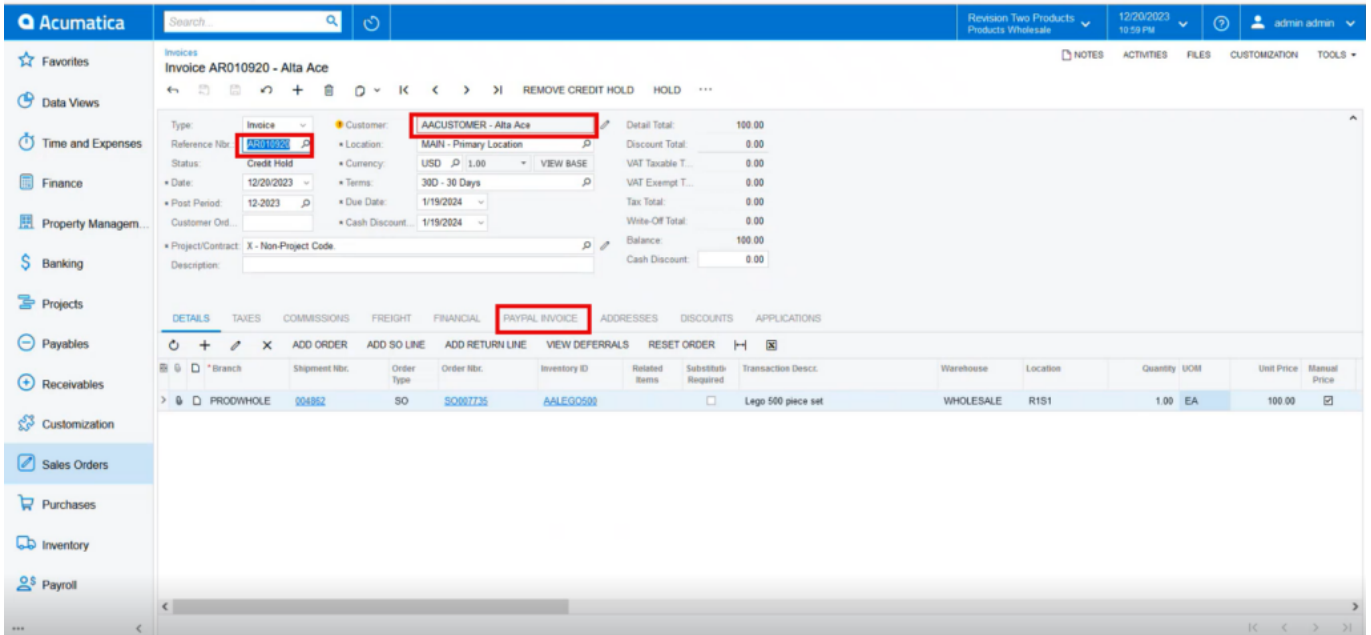
PayPal Invoicing

The screenshot shows the Acumatica Invoices screen. The top navigation bar includes the Acumatica logo, a search bar, a refresh icon, and user information (Revision Two Products, Products Wholesale, 5/5/2023 10:49 AM, admin admin). The left sidebar contains navigation options: Payables, Receivables, Sales Orders, Purchases, Inventory, Payroll, Dashboards, Commerce, and More Items. The main area displays a table of invoices with columns: Type, Reference Nbr., Status, Date, Post Period, Customer, and Customer Name. A red box highlights the first row of the table.

Type	Reference Nbr.	Status	Date	Post Period	Customer	Customer Name
Invoice	AR010726	Open	3/8/2023	03-2023	AACUSTOMER	Alta Ace
Invoice	AR010725	Balanced	3/8/2023	03-2023	AACUSTOMER	Alta Ace
Invoice	AR010721	Open	2/17/2022	02-2022	ABCSTUDIOS	ABC Studios Inc
Invoice	AR010720	Open	2/28/2022	02-2022	ARTCAGES	Artcages
Invoice	AR010719	Open	2/28/2022	02-2022	WESTERNTRC	Western Star Trucks
Invoice	AR010718	Open	2/12/2022	02-2022	WIDPARENT	Widget Consolidated Holdings
Invoice	AR010717	Open	2/23/2022	02-2022	PRECISION	Precision Photos
Invoice	AR010716	Open	2/28/2022	02-2022	CJOEQUIP	Jersey Central Office Equip
Invoice	AR010715	Open	2/28/2022	02-2022	ELEVATION	Elevation Computers
Invoice	AR010714	Open	2/28/2022	02-2022	BRASSKEY	Brass Key Bar

Invoices

- Upon clicking **[+]** icon you will be redirected to a new screen.
- Search for the **[Customer]**.
- Enter the **[Reference Nbr]**, the sales order related to this reference Nbr will pop-up below details tab.



Acumatica

Invoice AR010920 - Alta Ace

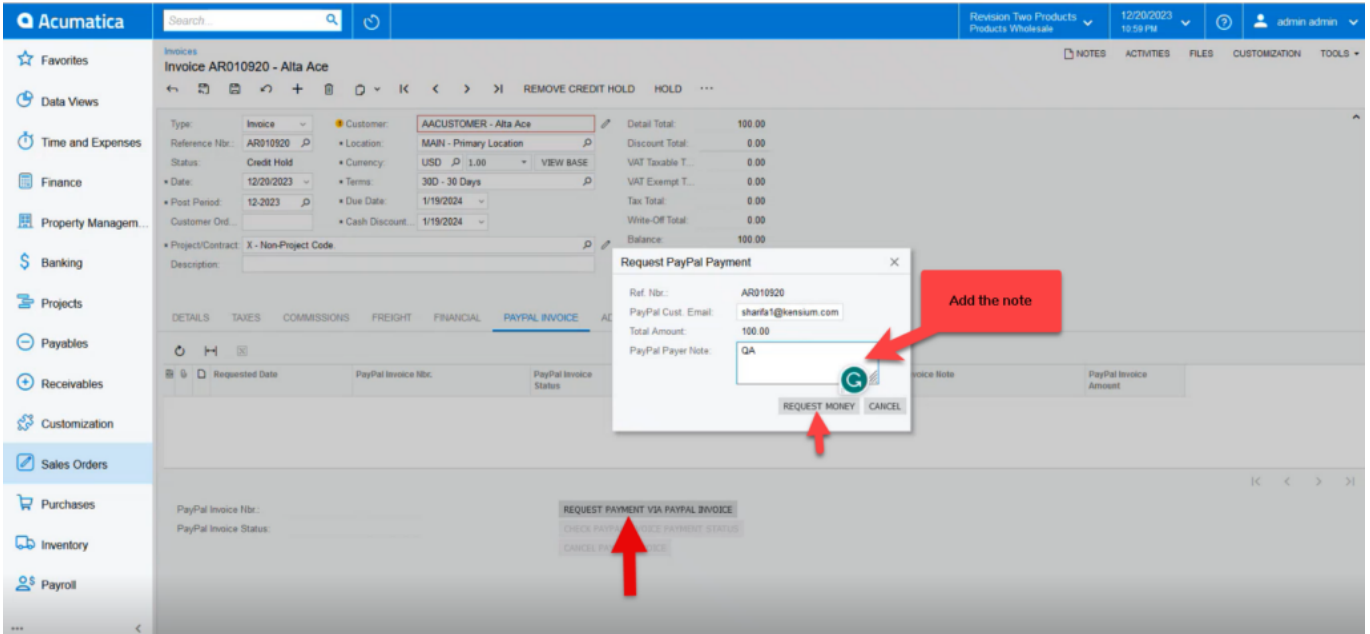
Type: Invoice Customer: AACUSTOMER - Alta Ace Detail Total: 100.00
 Reference No: AR010920 Location: MAIN - Primary Location Discount Total: 0.00
 Status: Credit Hold Currency: USD 1.00 View Base VAT Taxable T.: 0.00
 Date: 12/28/2023 Terms: 30D - 30 Days VAT Exempt T.: 0.00
 Post Period: 12-2023 Due Date: 1/19/2024 Tax Total: 0.00
 Customer Ord.: Cash Discount: 1/19/2024 Write-Off Total: 0.00
 Project/Contract: X - Non-Project Code Balance: 100.00
 Description: Cash Discount: 0.00

DETAILS TAXES COMMISSIONS FREIGHT FINANCIAL **PAYPAL INVOICE** ADDRESSES DISCOUNTS APPLICATIONS

Branch	Shipment Nbr.	Order Type	Order Nbr.	Inventory ID	Related Items	Substituted-Required	Transaction Desc.	Warehouse	Location	Quantity	UOM	Unit Price	Manual Price
PROOWHOLE	004852	SO	SO007735	AALEGO590			Lego 500 piece set	WHOLESALE	RIS1	1.00	EA	100.00	

Invoices

- 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]**.



The screenshot shows the Acumatica interface for an invoice AR010920. The invoice details include Customer: AACUSTOMER - Alta Ace, Reference Nbr: AR010920, Date: 12/29/2023, and Total Amount: 100.00. A 'Request PayPal Payment' dialog box is open, with fields for Ref. Nbr (AR010920), PayPal Cust. Email (sharfa1@kensium.com), Total Amount (100.00), and PayPal Payer Note (QA). A red callout box labeled 'Add the note' points to the payer note field. The dialog has 'REQUEST MONEY' and 'CANCEL' buttons. Below the dialog, a button labeled 'REQUEST PAYMENT VIA PAYPAL INVOICE' is visible with a red arrow pointing to it.

Invoices

- 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.

Invoices

- Click **[Save]**.
- The invoice will be sent to the customer's account for payment.

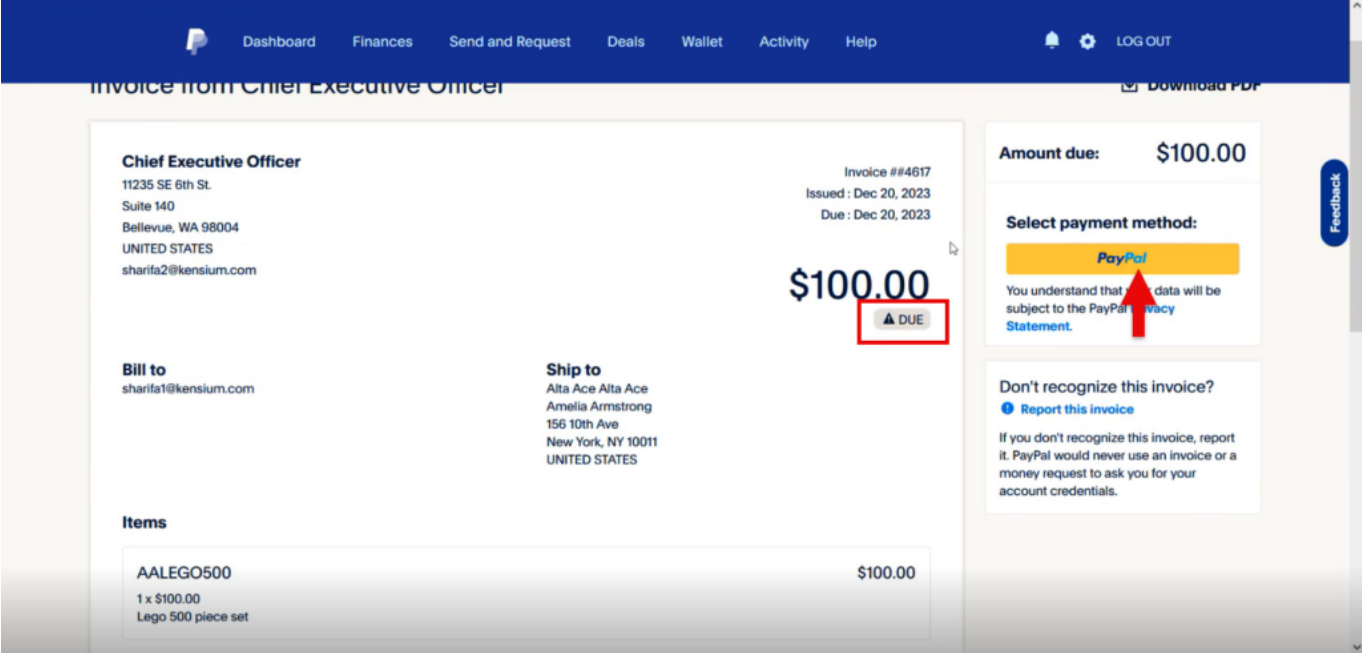
The screenshot shows the PayPal dashboard interface. At the top, there is a navigation bar with links for Dashboard, Finances, Send and Request, Deals, Wallet, Activity, and Help. On the right side of the navigation bar, there are icons for a notification bell, a settings gear, and a LOG OUT button. The main content area is divided into two columns. The left column features a 'PayPal balance' card showing a balance of \$0.00 with an available status and a 'Transfer Money' button. Below this is a 'Recent activity' section with a list of transactions. The first transaction is highlighted with a red box and contains the following details: 'sharif merchant's Test Store' with a debit of -\$100.00, dated 'Today, Dec 20', and the status 'Invoice Received'. The second transaction shows a debit of -\$4,736.71, and the third shows a debit of -\$100.00. The right column is titled 'Banks and cards' and lists several payment methods: 'CREDIT UNION 1' (Checking ****4587), 'Visa' (Credit ****1165), 'VISA The Bank Card Platinum Rewards' (****1881 with an 'Update' button), 'Visa' (Credit ****6295), 'Visa' (****0555 with an 'Update' button), and 'Visa' (Credit ****3129). A 'The Bank Card Platinum Rewards' card is also partially visible at the bottom.

Paypal

This screenshot displays a PayPal invoice item page. The top navigation bar is identical to the dashboard view. The main content area shows a list of items. The first item is 'AALEGO500' with a price of \$100.00, described as '1 x \$100.00 Lego 500 piece set'. Below the item list, a summary table shows a 'Subtotal' of \$100.00 and a 'Total' of \$100.00. Underneath the summary, there is a 'Seller note to customer' section with the text 'QA' and a 'Reference AR010920'. A red box labeled 'Invoice Nbr' has a red arrow pointing to the 'Reference AR010920' text. At the bottom of the page, there is a 'Powered by PayPal' logo and a footer with links for Help, Contact Us, Security, and Fees. A vertical 'Feedback' button is located on the right side of the page.

Paypal

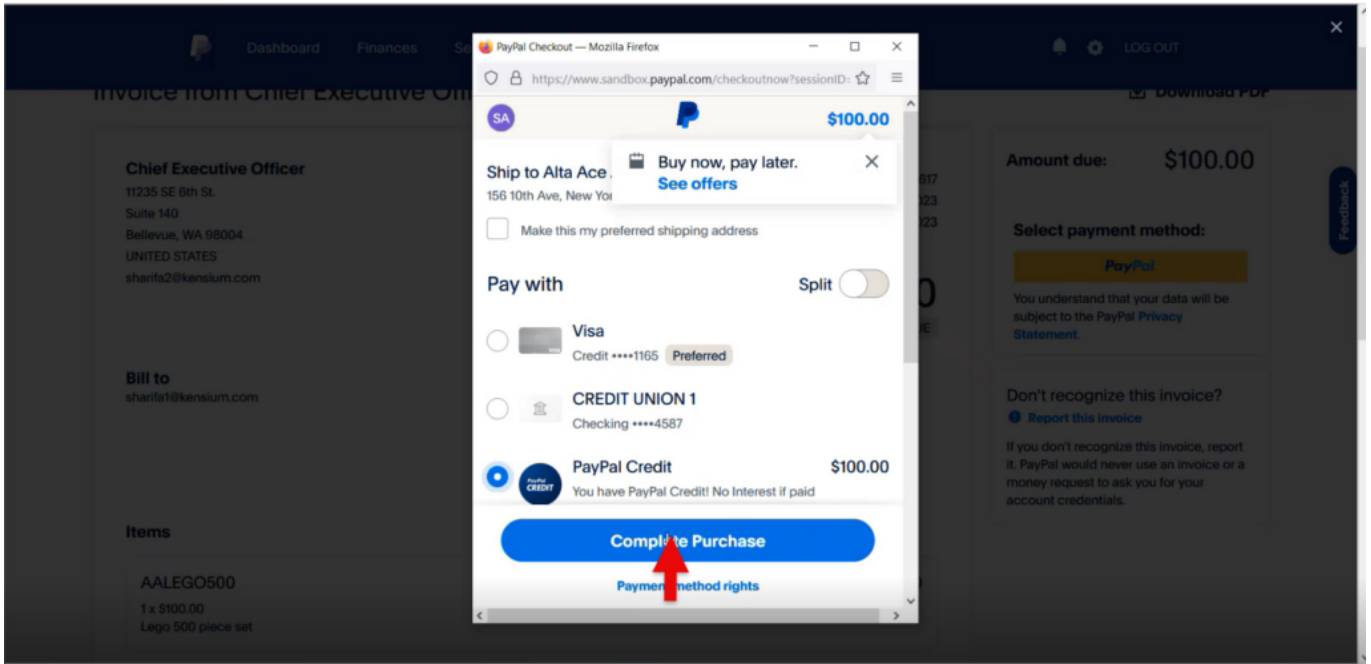
- ✘ • Check all the invoice details.
- You can see Payment is **[DUE]**.



The screenshot shows a PayPal invoice interface. At the top, there is a navigation bar with links for Dashboard, Finances, Send and Request, Deals, Wallet, Activity, and Help. The main content area displays the invoice details for 'Chief Executive Officer' of Kensium, including their address and contact information. The invoice number is ##4617, issued on Dec 20, 2023, and due on Dec 20, 2023. The amount due is \$100.00, which is highlighted with a red box and labeled as 'DUE'. The 'PayPal' button is also highlighted with a red box and an arrow. The 'Items' section lists 'AALEGO500' for \$100.00, which is a 'Lego 500 piece set'. The 'Ship to' address is for Alta Ace in New York, NY. The right sidebar contains a 'Feedback' button and a 'Report this invoice' link.

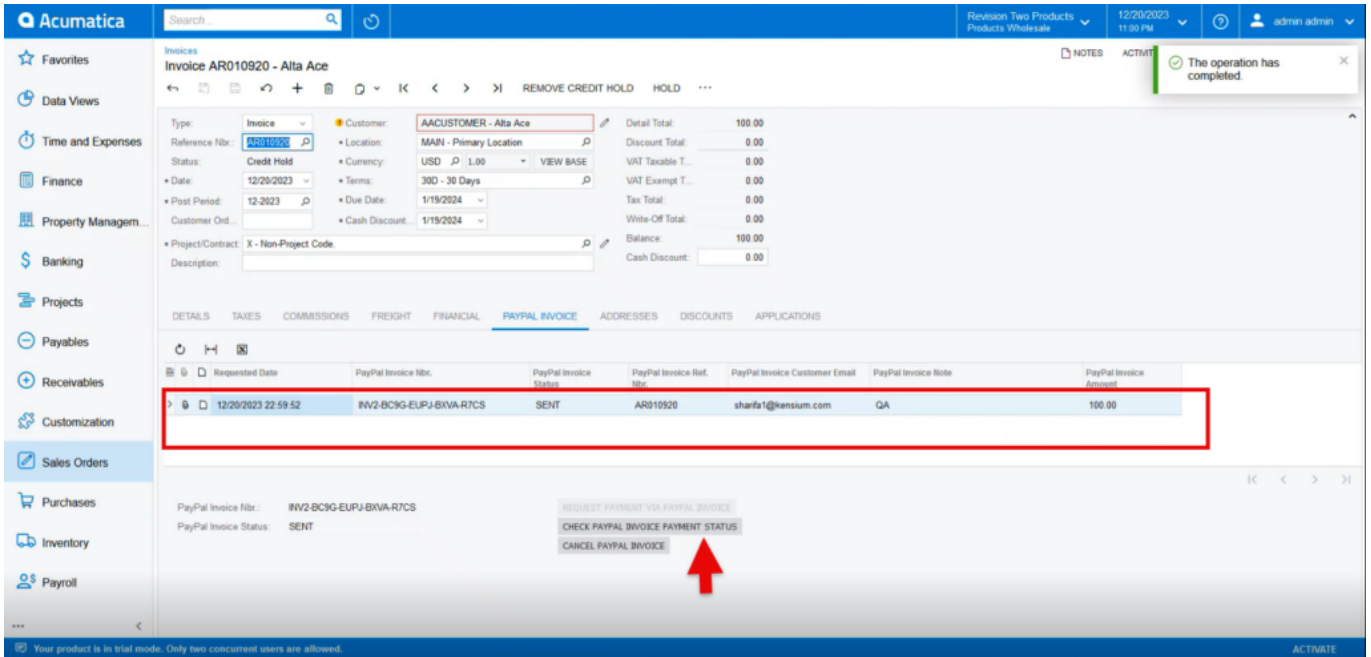
Paypal

- 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]**.



Acumatica

Revision Two Products
Products Wholesale

12/20/2023
11:00 PM

admin admin

NOTES ACTIVITY

The operation has completed.

Invoices

Invoice AR010920 - Alta Ace

REMOVE CREDIT HOLD HOLD ...

Type: Invoice Customer: AACUSTOMER - Alta Ace Detail Total: 100.00

Reference Nbr.: AR010920 Location: MAIN - Primary Location Discount Total: 0.00

Status: Credit Hold Currency: USD 1.00 View Base VAT Taxable T...: 0.00

Date: 12/25/2023 Terms: 30D - 30 Days VAT Exempt T...: 0.00

Post Period: 12/2023 Due Date: 1/19/2024 Tax Total: 0.00

Customer Ord... Cash Discount: 1/19/2024 Write-Off Total: 0.00

Project/Contract: X - Non-Project Code Balance: 100.00

Description: Cash Discount: 0.00

DETAILS TAXES COMMISSIONS FREIGHT FINANCIAL **PAYPAL INVOICE** ADDRESSES DISCOUNTS APPLICATIONS

Requested Date	PayPal Invoice Nbr.	PayPal Invoice Status	PayPal Invoice Ref. Nbr.	PayPal Invoice Customer Email	PayPal Invoice Note	PayPal Invoice Amount
12/20/2023 22:59:52	INV2-BC9G-EUPJ-BXVA-R7CS	SENT	AR010920	sharifa1@kensium.com	QA	100.00

PayPal Invoice Nbr.: INV2-BC9G-EUPJ-BXVA-R7CS

PayPal Invoice Status: SENT

REQUEST PAYMENT VIA PAYPAL INVOICE

CHECK PAYPAL INVOICE PAYMENT STATUS

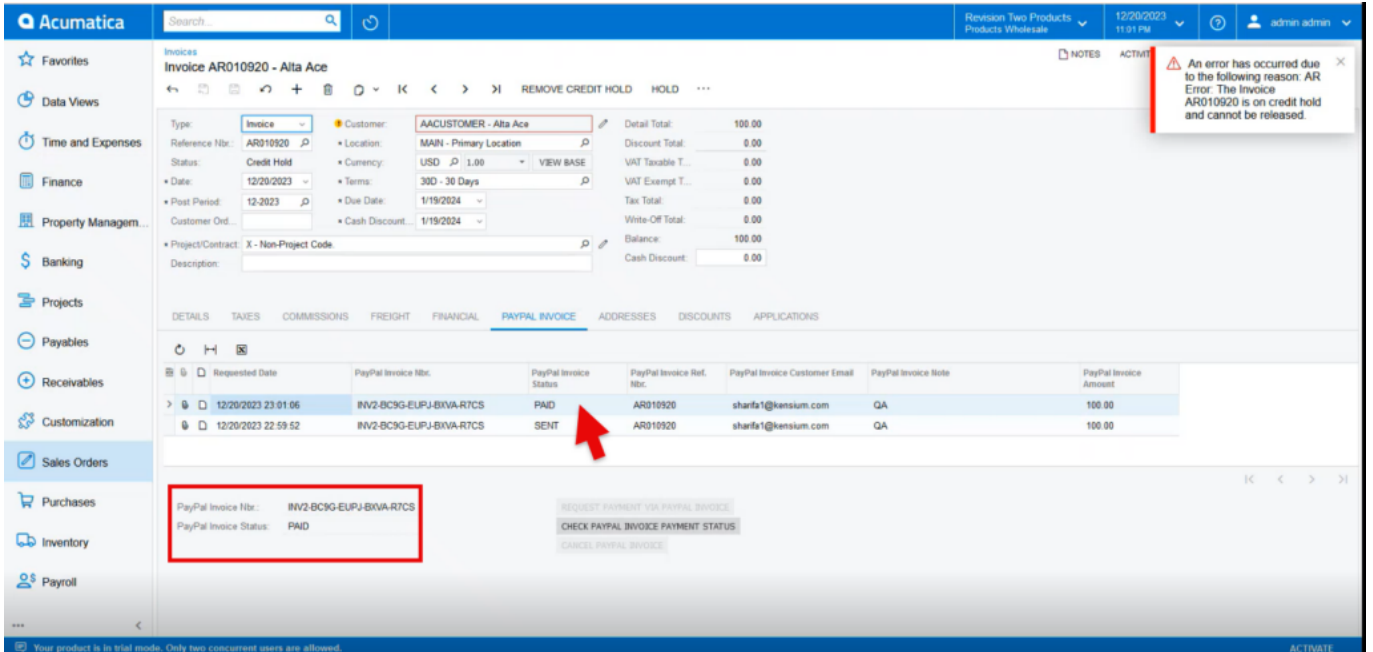
CANCEL PAYPAL INVOICE

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

ACTIVITY

Invoices

- 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]**



Invoices

- 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.