

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.

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Invoices

• Click on [+] icon.





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More Items	4										•	

- 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.





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Sales Orders			
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- Click on **[PayPal Invoice]** tab.
- Select [Paypal] as Payment Method.
 - $\circ\,$ A screen with 3 options will appear.
 - To get Invoice click on [Request Payment Via Paypal Invoice].





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- Enter a [PayPal Payer] Note if necessary.
- These are displayed in the memo line of the invoice.
 - Click [Request Money].
 - $\circ~$ 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.
 - $\circ\,$ The PayPal customer email, note, and invoice amount will also be listed.





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







Paypal

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Paypal

- ×
- Check all the invoice details.You can see Payment is [DUE].

voice nom Chier Executive	Onicer		M Download P
Chief Executive Officer		Invoice ##4617	Amount due: \$100.00
Suite 140 Bellevue, WA 98004 UNITED STATES		Issued : Dec 20, 2023 Due : Dec 20, 2023	Select payment method:
		\$100.00	You understand that data will be subject to the PayPan Vacy Statement.
Bill to	Ship to Alta Ace Alta Ace Amelia Armstrong		Don't recognize this invoice? Report this invoice
	156 10th Ave New York, NY 10011 UNITED STATES		If you don't recognize this invoice, report it. PayPal would never use an invoice or a money request to ask you for your account credentials.
Items			
AALEG0500		\$100.00	

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].





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• 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]**





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• 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.

