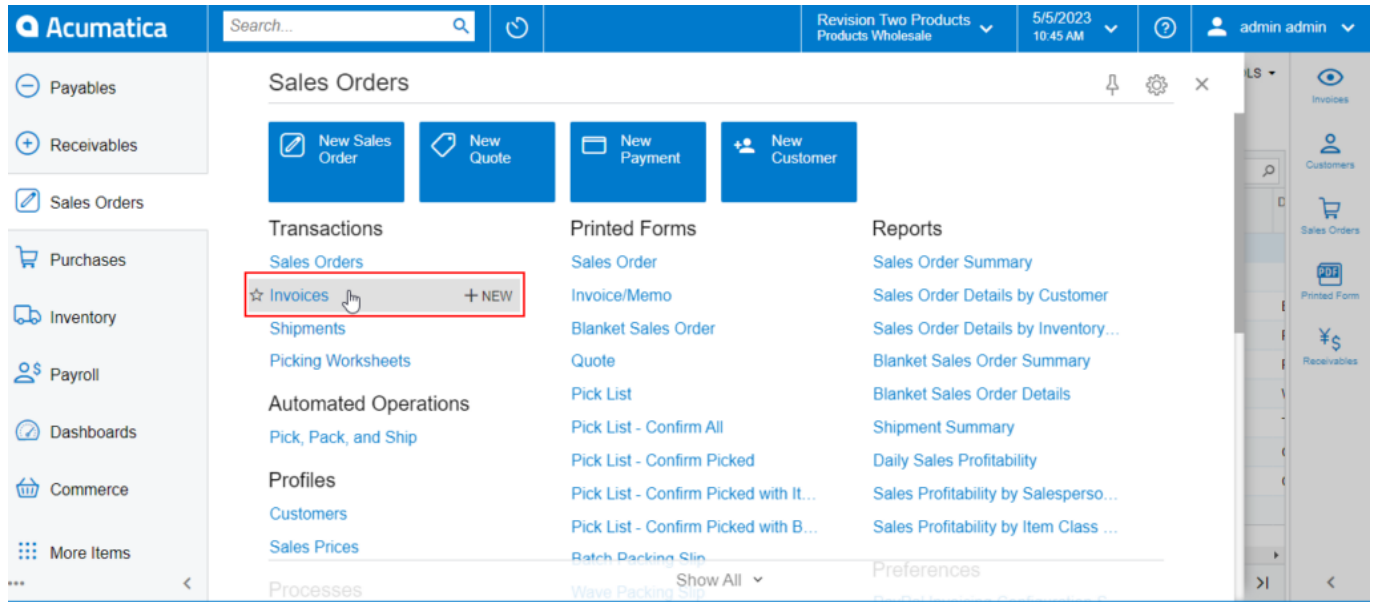


Steps to process a PayPal Invoice

- ✖ 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.

Acumatica Search... Revision Two Products Products Wholesale 5/5/2023 10:49 AM admin admin

Invoices CUSTOMIZATION TOOLS

Type: All Status: All Date: All Customer: All

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.



KENSIUM

PayPal Invoicing

Acumatica | Search | Revision Two Products Products Wholesale | 12/28/2023 10:59 PM | admin admin

Invoice AR010920 - Alta Ace

REMOVE CREDIT HOLD HOLD

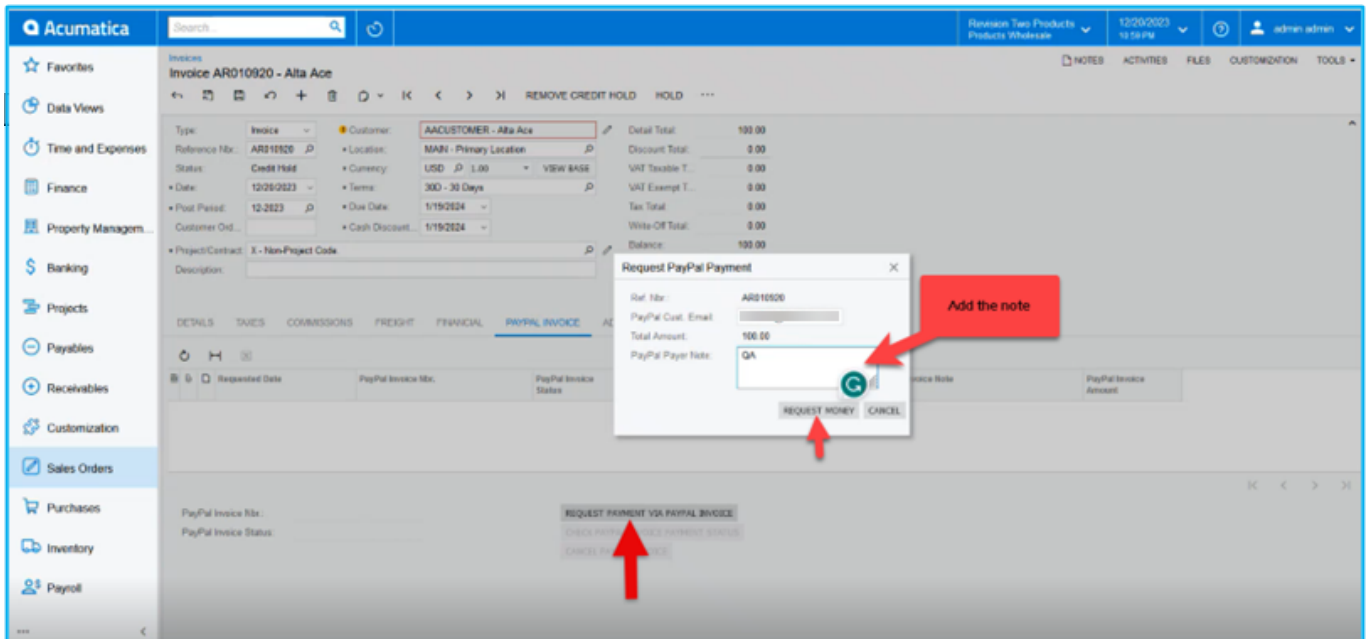
Type: Invoice | Customer: AACUSTOMER - Alta Ace | Detail Total: 100.00
Reference No: AR010920 | Location: MAIN - Primary Location | Discount Total: 0.00
Status: Credit Hold | Currency: USD 1.00 | View Base | VAT Taxable T.: 0.00
Date: 12/28/2023 | Terms: 30D - 30 Days | VAT Exempt T.: 0.00
Post Period: 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	AALEGO500			Lego 500 piece set	WHOLESALE	R1S1	1.00	EA	100.00	

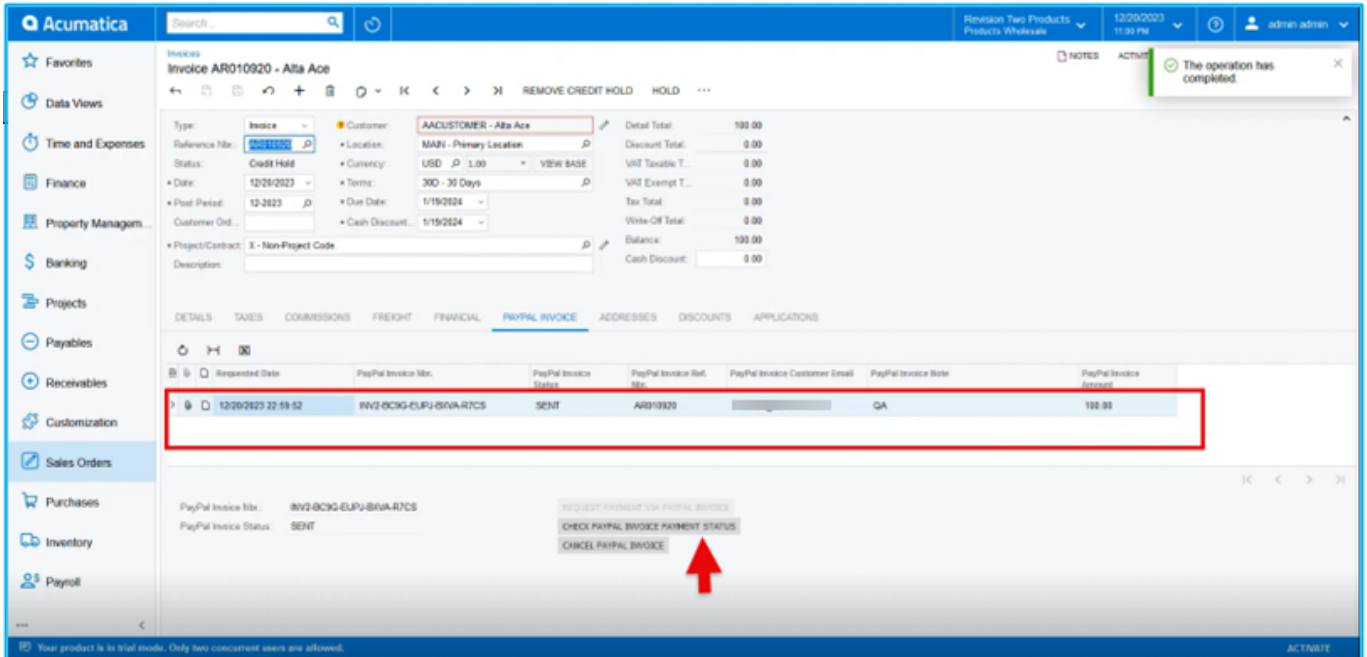
Invoices

- 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]**.



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.



The screenshot displays the Acumatica software interface for managing invoices. The main window shows the 'PAYPAL INVOICE' section for invoice AR010920. A table below the main form lists the invoice details, with a red box highlighting a row where the status is 'SENT'. Below the table, a red arrow points to a button labeled 'CHECK PAYPAL INVOICE PAYMENT STATUS'.

Requested Date	PayPal Invoice Nbr.	PayPal Invoice Status	PayPal Invoice Ref. Nbr.	PayPal Invoice Customer Email	PayPal Invoice Note	PayPal Invoice Amount
12/29/2023 12:59:52	INV-8C9G-ELFJ-8VA-R7CS	SENT	AR010920		GA	100.00

Invoices

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

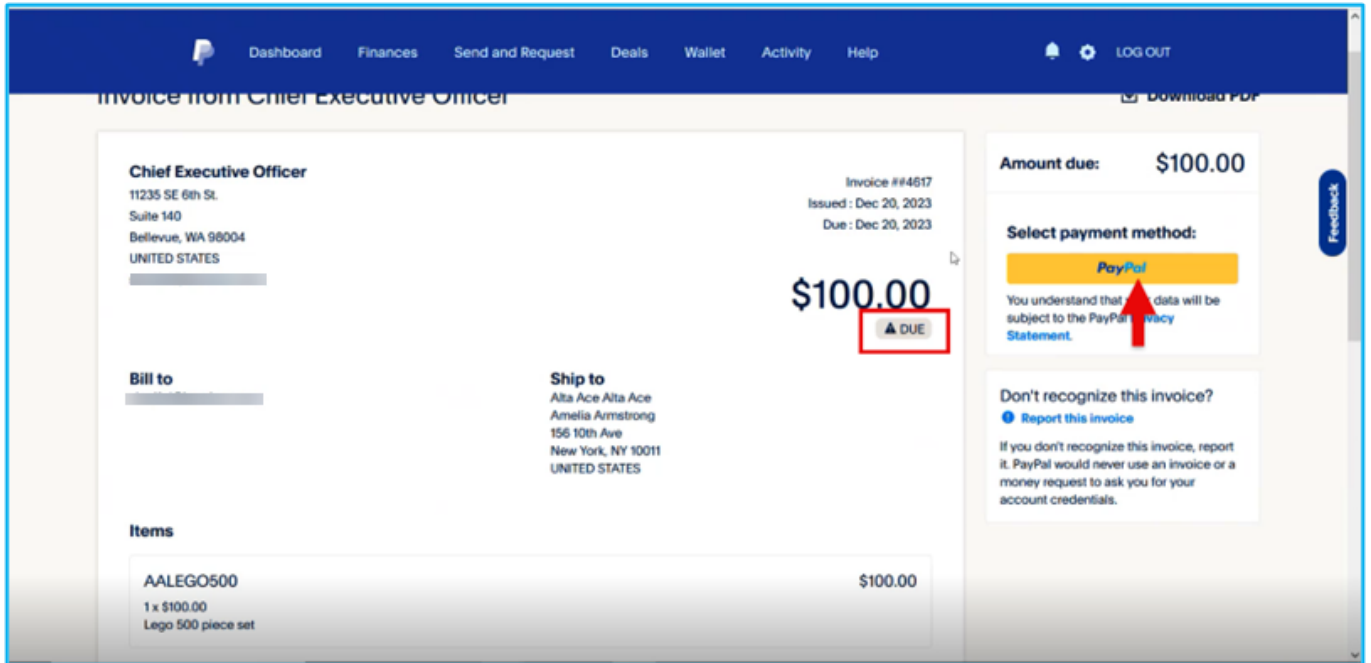
The screenshot shows the PayPal dashboard interface. At the top, there is a navigation bar with links for Dashboard, Finances, Send and Request, Deals, Wallet, Activity, and Help. On the right side of the navigation bar, there are icons for notifications, settings, and a LOG OUT button. The main content area is divided into two columns. The left column features a 'PayPal balance' widget 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', '-\$100.00', and 'Today, Dec 20 · Invoice Received'. The second transaction shows '-\$4,736.71' and the third shows '-\$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), 'Visa' (Credit ****6295), 'Visa' (****0555), and 'Visa' (Credit ****3129). Each card entry includes an 'Update' button.

Paypal

The screenshot displays a PayPal invoice for an item. The item is 'AALEGO500', a '1 x \$100.00 Lego 500 piece set'. The subtotal and total are both \$100.00. Under the 'Seller note to customer' section, there is a 'Reference AR010920'. A red box labeled 'Invoice Nbr' has a red arrow pointing to the reference number. The invoice is powered by PayPal. At the bottom of the page, there are links for Help, Contact Us, Security, and Fees.

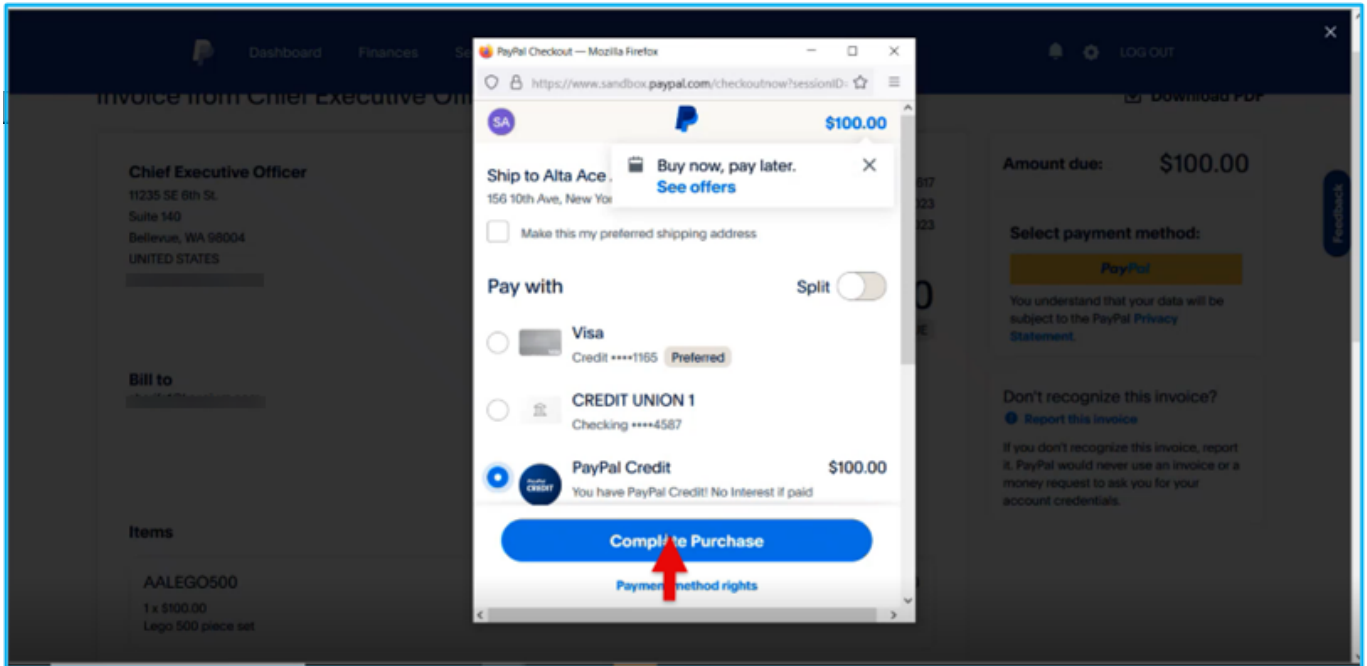
Paypal

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



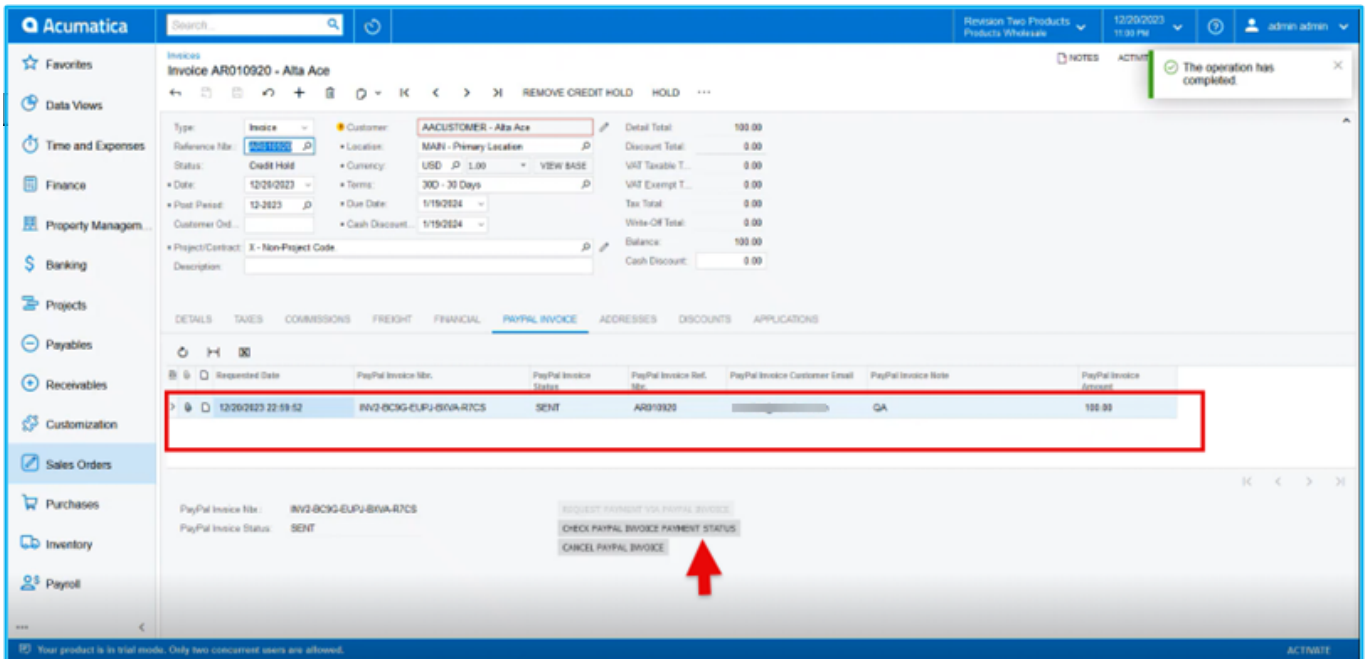
Paypal

- 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

Invoice AR010920 - Alla Ace

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

Reference No: AR010920 Location: MAN - Primary Location Discount Total: 0.00

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

Date: 12/29/2023 Terms: 300 - 30 Days VAT Exempt T...: 0.00

Post Period: 12-3123 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

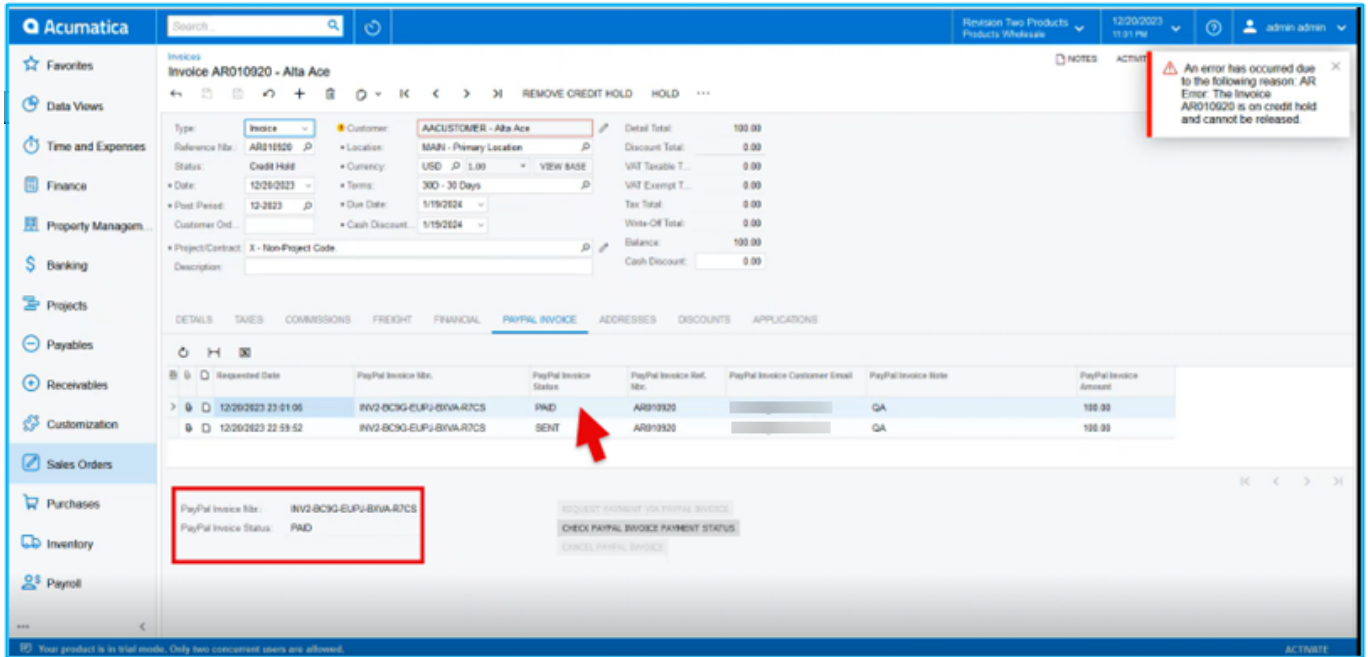
Description: Cash Discount: 0.00

Requested Date	PayPal Invoice No.	PayPal Invoice Status	PayPal Invoice Ref. No.	PayPal Invoice Customer Email	PayPal Invoice Note	PayPal Invoice Amount
12/29/2023 12:59:52	INV-0C9G-ELFJ-81A-R7CS	SENT	AR010920	GA		100.00

Buttons: REQUEST PAYMENT VIA PAYPAL INVOICE, CHECK PAYPAL INVOICE PAYMENT STATUS, CANCEL PAYPAL INVOICE

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]**



Acumatica | Invoice AR010920 - Alta Ace

Customer: AACUSTOMER - Alta Ace | Detail Total: 100.00

Reference Nbr: AR010920 | Location: MANH - Primary Location | Discount Total: 0.00

Status: Credit Hold | Currency: USD | 1.00 | VMT Taxable T...: 0.00

Date: 12/26/2023 | Terms: 30D - 30 Days | VMT Exempt T...: 0.00

Post Period: 12-2023 | Due Date: 1/19/2024 | Wire-Off Total: 0.00

Customer Ord.: | Cash Discount: 1/19/2024 | Balance: 100.00

Project/Contract: X - Non-Project Code | Cash Discount: 0.00

Requested Date	PayPal Invoice Nbr.	PayPal Invoice Status	PayPal Invoice Ref. Nbr.	PayPal Invoice Customer Email	PayPal Invoice Note	PayPal Invoice Amount
12/26/2023 23:01:06	INV2-8C9G-EUPJ-BNA-R7CS	PAID	AR010920		GA	100.00
12/26/2023 22:59:52	INV2-8C9G-EUPJ-BNA-R7CS	SENT	AR010920		GA	100.00

PayPal Invoice Nbr.: INV2-8C9G-EUPJ-BNA-R7CS
PayPal Invoice Status: PAID

REQUEST PAYMENT VIA PAYPAL INVOICE
CHECK PAYPAL INVOICE PAYMENT STATUS
CANCEL PAYPAL INVOICE

An error has occurred due to the following reason: AR Error: The Invoice AR010920 is on credit hold and cannot be released.

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.