

Payflow Payments via the Cash Sales Screen

Processing Payflow payments via the Cash Sales screen allows you to assign a payment method to a sales order(s). The purpose of this feature is to provide the ability to add, modify, or remove a sales order without having to exit the Cash Sales screen.

Payflow payments via the Cash Sales screen in Acumatica

You need to add the following steps:

- 1. Go to the left navigation menu of the Acumatica ERP and click **Receivables**.
- 2. On the Receivables workspaces, click Cash Sales.



Cash Sales on Receivables Workspace Screen

3. Click on the (+) button.



PayPal Payflow Plugin

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Cash Sales Screen

4. Select a customer.

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Selecting a Customer on the Cash Sales Screen

- 5. Select the **payment method**.
- 6. Select the Payflow payment method.



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PayPal Payflow Plugin

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Selecting Payflow as Payment Method

7. Select the **cash account**.

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Selecting Cash Account

- 8. Go to the details tab.
 - $\circ\,$ Add at least one item.
 - $\circ\,$ Add the quantity.
 - $\circ\,$ Add the unit price.



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DETAILS FI	INANCIAL AL	DDRESSES TAXES	APPROVALS COMMI	SSIONS CI	HARGES Quantity UOM	Unit Price	Ext. Price	Discount Percent

Details tab adding the Quantity and Unit Price

- 9. Click Save.
- 10. Click the **Actions** menu to perform one of the following actions:
 - Email Invoice/Memo form.
 - $\circ~$ Send an e-mail.
 - \circ CC Enter the payment.
- 11. CC Authorize Payment.
- 12. Click the **Credit Card Processing Information** tab to view the payment transaction details.

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Cash Sales screen

13. Click on the actions menu to perform the following actions Authorize, Capture and Void.

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Card Processing on Cash Sales Screen

Authorize Action on Cash Sales Screen

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Authorize Action on Cash Sales screen

Capture Payment by Cash Sales

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Capture Payment on Cash Sales screen

Void On Cash Sales Screen

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Void on Cash Sales screen

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