


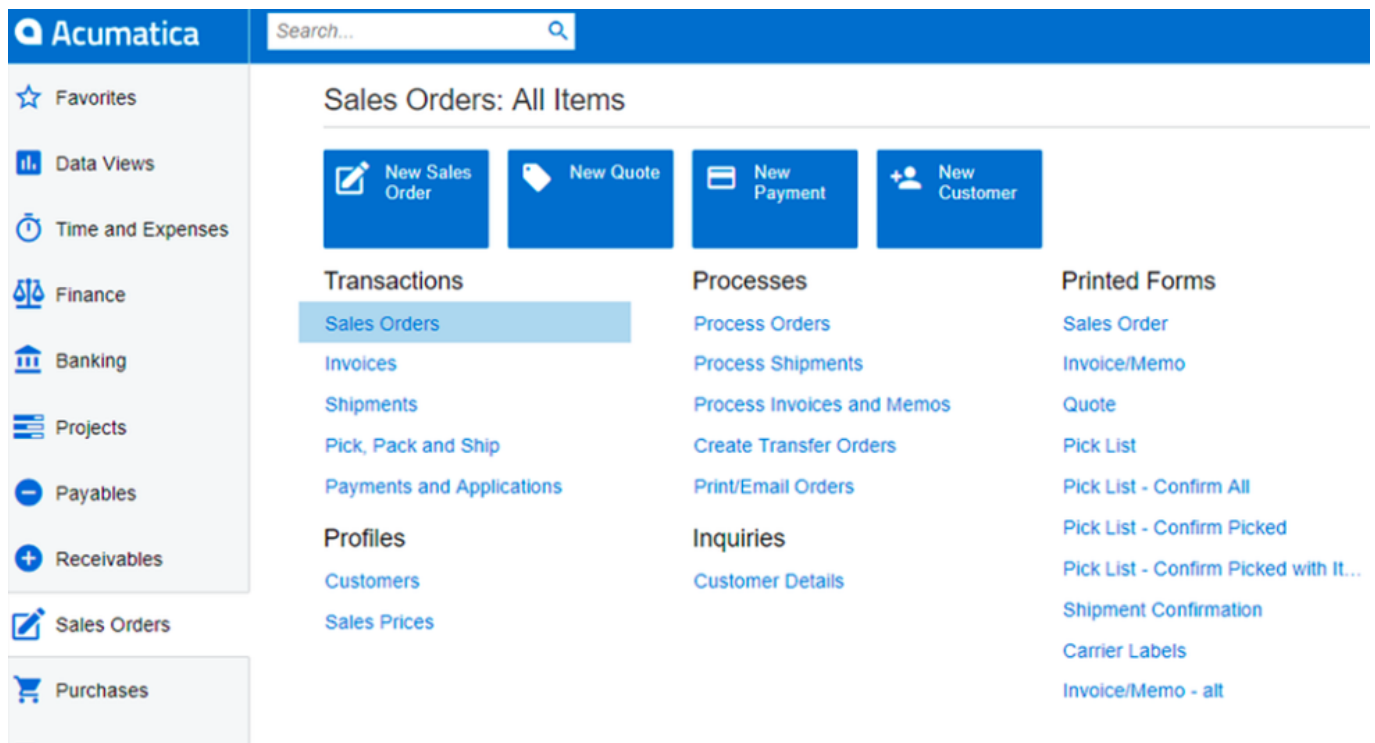
Payflow Payments via the Invoices Screen

 Processing Payflow payments via the Invoices 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 Invoices screen.

Process Payflow payments via the Invoices screen

Steps to be followed:

1. **Navigate to the left sidebar** of the Acumatica ERP and click Sales Order.



Sales Orders from Sales Orders Workspace

1. The application directs you to the Sales Order screen, where you can view the complete list of sales orders.
2. Create a new Sales Order or open an existing Sales Order.
3. Go to the **Actions** dropdown list.



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PayPal Payflow Plugin

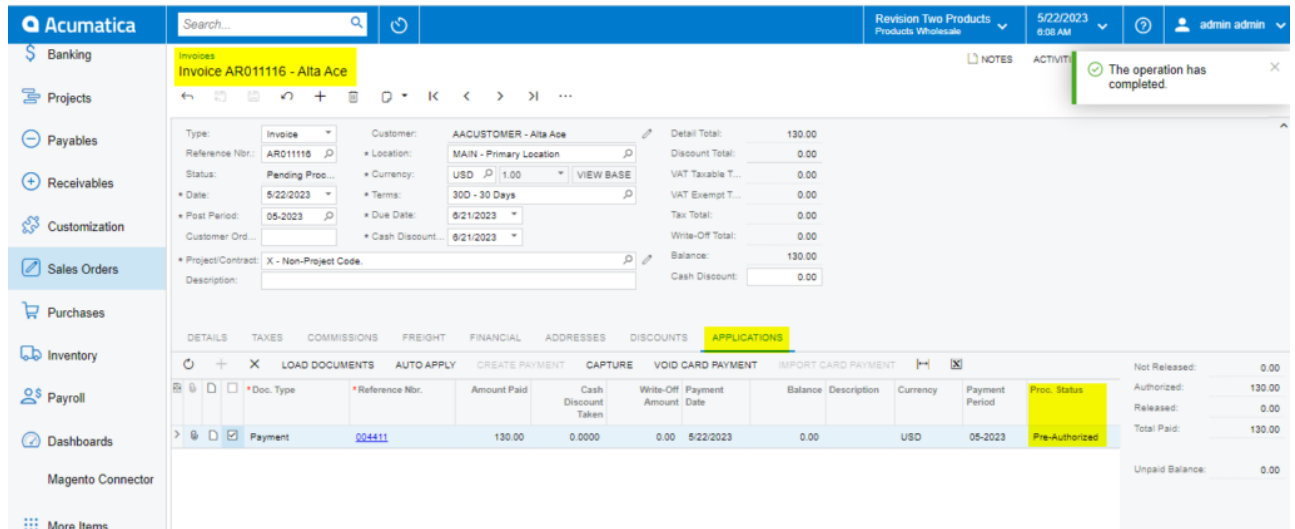
a. Select **Prepare Invoice**.

The screenshot shows the Acumatica software interface. The left sidebar contains navigation options: Banking, Projects, Payables, Receivables, Customization, Sales Orders, Purchases, Inventory, Payroll, Dashboards, Magento Connector, and More Items. The main area displays the 'Invoices' screen for 'Invoice AR011116 - Alta Ace'. The 'DETAILS' tab is active, showing invoice information such as Reference Nbr., Status, Date, Post Period, Customer Ord., Location, Currency, Terms, Due Date, Cash Discount, and Project/Contract. A 'Create Payment' dialog box is open on the right, showing a payment amount of 130.00 USD, payment method 'BRAINTREE - BRAINTREE', and card details. The 'AUTHORIZE' button is highlighted in yellow. The bottom right corner shows the 'Unpaid Balance' as 130.00.

Payment Settings Tab

4. The Invoices screen will appear.
5. Click the **Payment Information** tab.
 - a. Update the Payment Method if necessary.
 - b. Select and choose a **payment process** based on the sales order stage.

Payment Process Options: Authorize CC Payment



Acumatica

Search...

Revision Two Products
Products Wholesale

5/22/2023
6:08 AM

admin admin

Banking

Projects

Payables

Receivables

Customization

Sales Orders

Purchases

Inventory

Payroll

Dashboards

Magento Connector

More Items

Invoices
Invoice AR011116 - Alta Ace

NOTES

ACTIVITY

The operation has completed.

Type: Invoice Customer: AACUSTOMER - Alta Ace Detail Total: 130.00

Reference Nbr.: AR011116 Location: MAIN - Primary Location Discount Total: 0.00

Status: Pending Proc... Currency: USD 1.00 VIEW BASE VAT Taxable T...: 0.00

Date: 5/22/2023 Terms: 300 - 30 Days VAT Exempt T...: 0.00

Post Period: 05-2023 Due Date: 6/21/2023 Tax Total: 0.00

Customer Ord... Cash Discount: 6/21/2023 Write-Off Total: 0.00

Project/Contract: X - Non-Project Code Balance: 130.00

Description: Cash Discount: 0.00

DETAILS TAXES COMMISSIONS FREIGHT FINANCIAL ADDRESSES DISCOUNTS APPLICATIONS

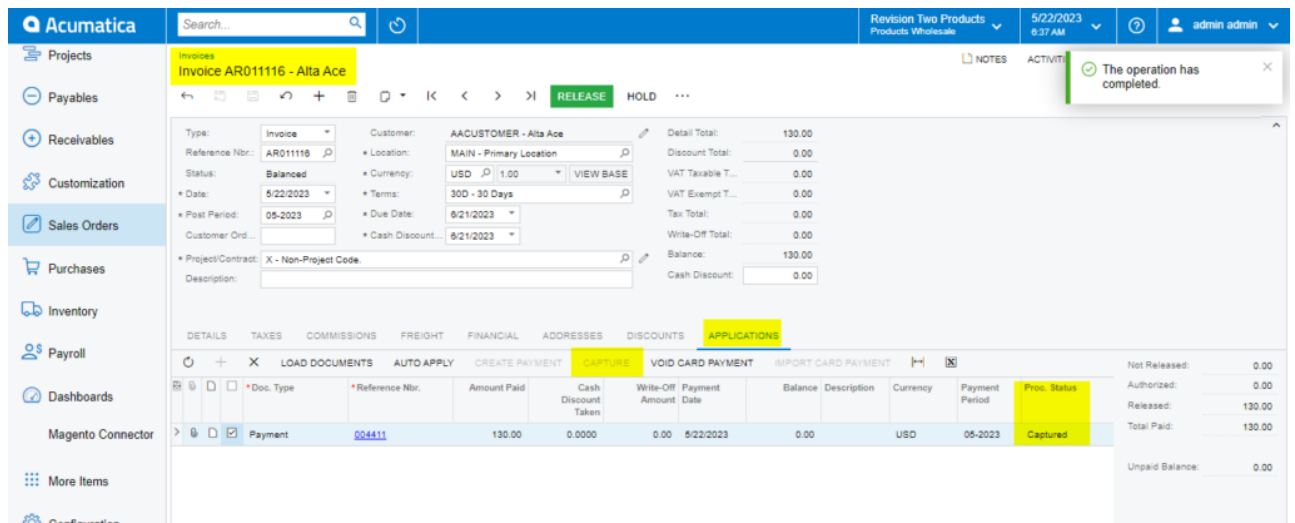
LOAD DOCUMENTS AUTO APPLY CREATE PAYMENT CAPTURE VOID CARD PAYMENT IMPORT CARD PAYMENT

Doc. Type	Reference Nbr.	Amount Paid	Cash Discount Taken	Write-Off Amount	Payment Date	Balance	Description	Currency	Payment Period	Prop. Status
Payment	004411	130.00	0.0000	0.00	5/22/2023	0.00	USD	05-2023	Pre-Authorized	

Not Released: 0.00
Authorized: 130.00
Released: 0.00
Total Paid: 130.00
Unpaid Balance: 0.00

Authorize Payment action in Invoice Screen

Capture CC Payment



Acumatica

Search...

Revision Two Products
Products Wholesale

5/22/2023
6:37 AM

admin admin

Projects

Payables

Receivables

Customization

Sales Orders

Purchases

Inventory

Payroll

Dashboards

Magento Connector

More Items

Configuration

Invoices
Invoice AR011116 - Alta Ace

NOTES

ACTIVITY

The operation has completed.

Type: Invoice Customer: AACUSTOMER - Alta Ace Detail Total: 130.00

Reference Nbr.: AR011116 Location: MAIN - Primary Location Discount Total: 0.00

Status: Balanced Currency: USD 1.00 VIEW BASE VAT Taxable T...: 0.00

Date: 5/22/2023 Terms: 300 - 30 Days VAT Exempt T...: 0.00

Post Period: 05-2023 Due Date: 6/21/2023 Tax Total: 0.00

Customer Ord... Cash Discount: 6/21/2023 Write-Off Total: 0.00

Project/Contract: X - Non-Project Code Balance: 130.00

Description: Cash Discount: 0.00

DETAILS TAXES COMMISSIONS FREIGHT FINANCIAL ADDRESSES DISCOUNTS APPLICATIONS

LOAD DOCUMENTS AUTO APPLY CREATE PAYMENT CAPTURE VOID CARD PAYMENT IMPORT CARD PAYMENT

Doc. Type	Reference Nbr.	Amount Paid	Cash Discount Taken	Write-Off Amount	Payment Date	Balance	Description	Currency	Payment Period	Prop. Status
Payment	004411	130.00	0.0000	0.00	5/22/2023	0.00	USD	05-2023	Captured	

Not Released: 0.00
Authorized: 0.00
Released: 130.00
Total Paid: 130.00
Unpaid Balance: 0.00

Capture CC Payment Action in Invoice Screen

Void CC Authorized/Payment



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PayPal Payflow Plugin

The screenshot shows the Acumatica interface for viewing an invoice. The left sidebar contains navigation options: Projects, Payables, Receivables, Customization, Sales Orders (highlighted), Purchases, Inventory, Payroll, Dashboards, Magento Connector, More Items, and Configuration. The main area displays invoice details for 'Invoice AR011116 - Alta Ace'. The 'APPLICATIONS' tab is selected, showing a table with columns for Doc. Type, Reference Nbr., Amount Paid, Cash Discount Taken, Write-Off Amount, Payment Date, Balance, Description, Currency, Payment Period, Proc. Status, and Not Released. A 'VOID CARD PAYMENT' button is highlighted in the top right of the table. A processing status dialog is open in the top right corner, indicating 'Executing. Press to abort' with a 'CANCEL' button.

Void CC Payment at Invoices Screen

- a. The Processing Status field and **Credit Card Processing Info** grid will update based on the action performed.
6. Click **Save**.

Note: After the void card payment action in the Payment tab, the Void Card action is disabled.