


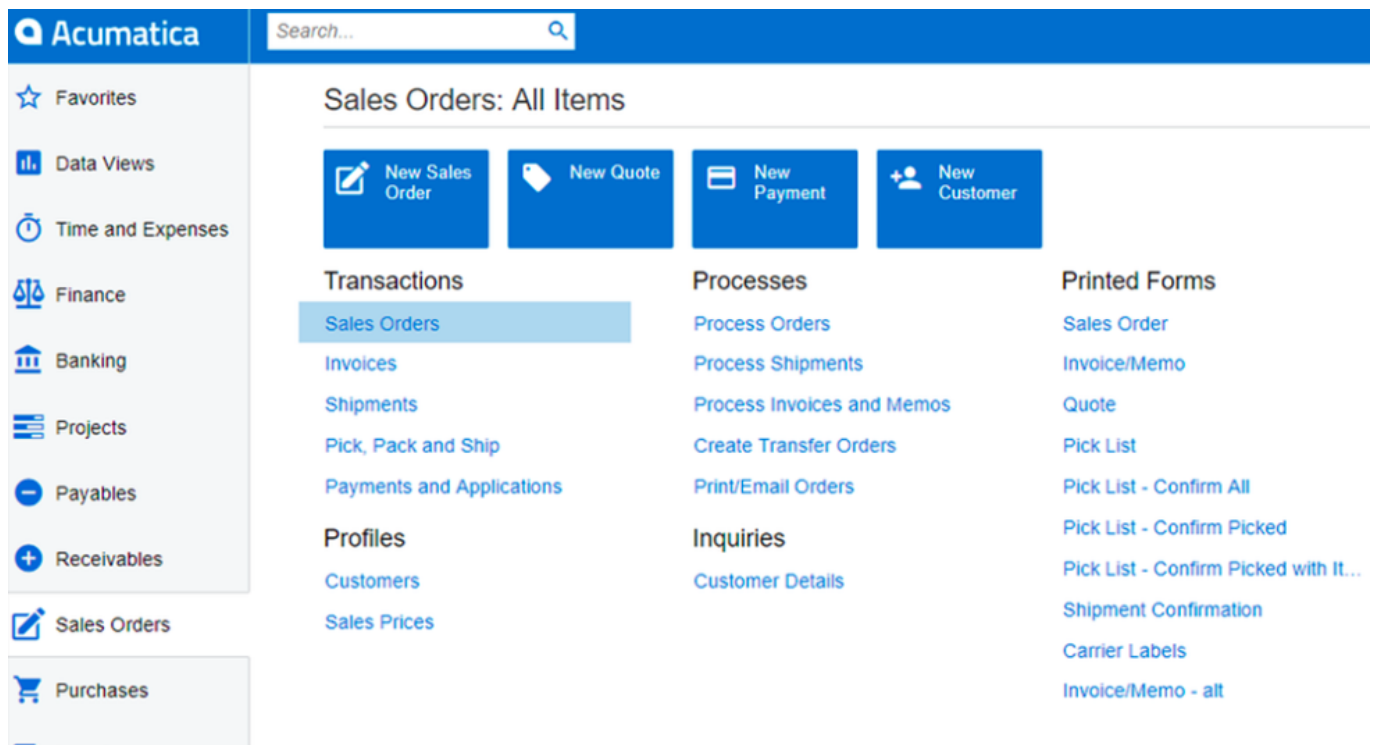
Payflow Payments via the Invoices Screen

 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:

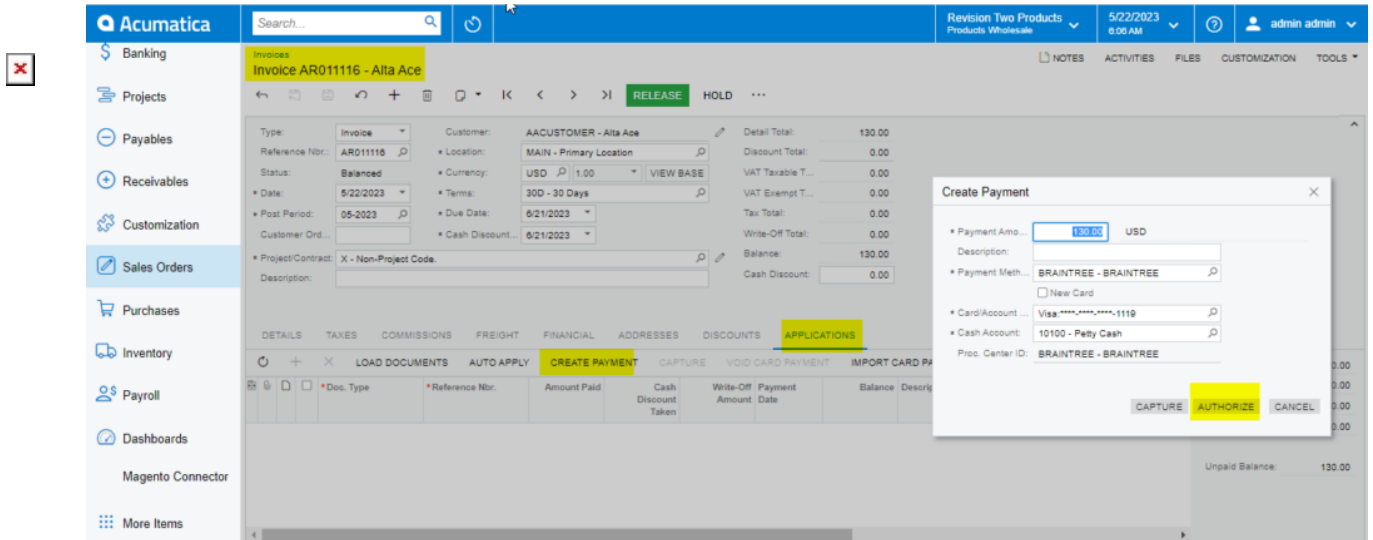
1. **Navigate to the left sidebar** of the Acumatica ERP and click Sales Order.



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.

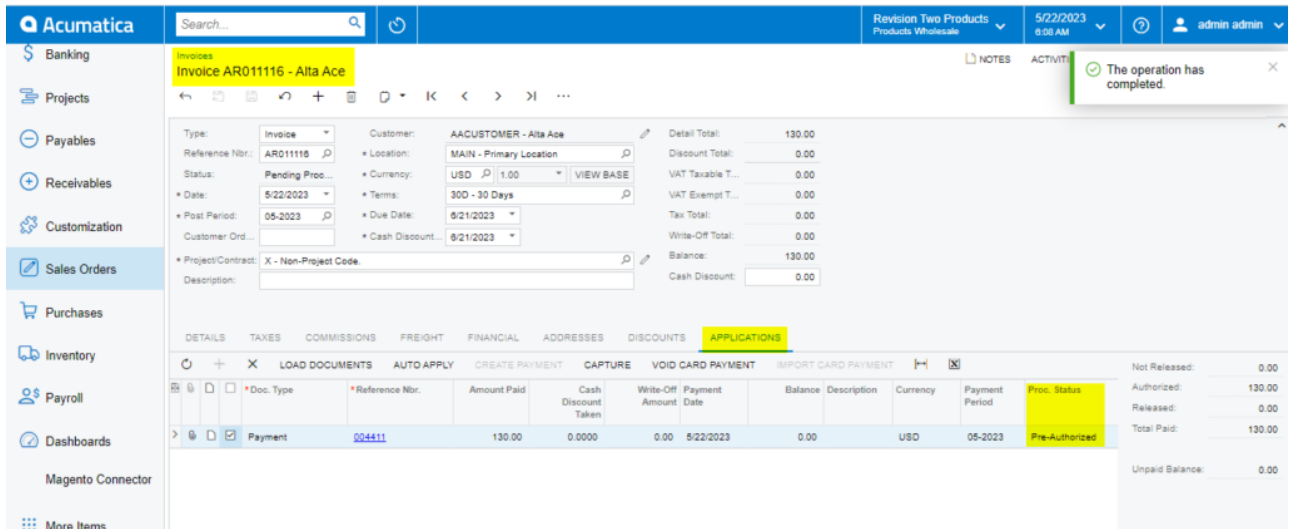
a. Select **Prepare Invoice**.



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**

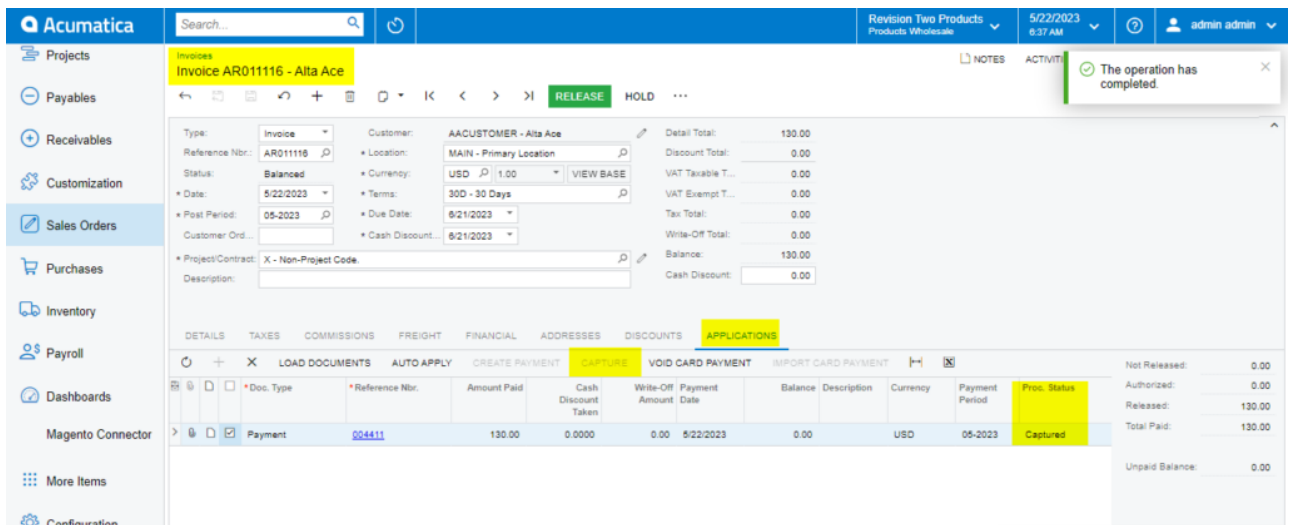


The screenshot shows the Acumatica interface for an invoice (Invoice AR011116 - Alta Ace). The 'APPLICATIONS' tab is selected, and the 'Payment' row in the table is highlighted. The 'Proc. Status' column for this row is 'Pre-Authorized'. A notification at the top right states 'The operation has completed.'

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

Authorize Payment action in Invoice Screen

Capture CC Payment

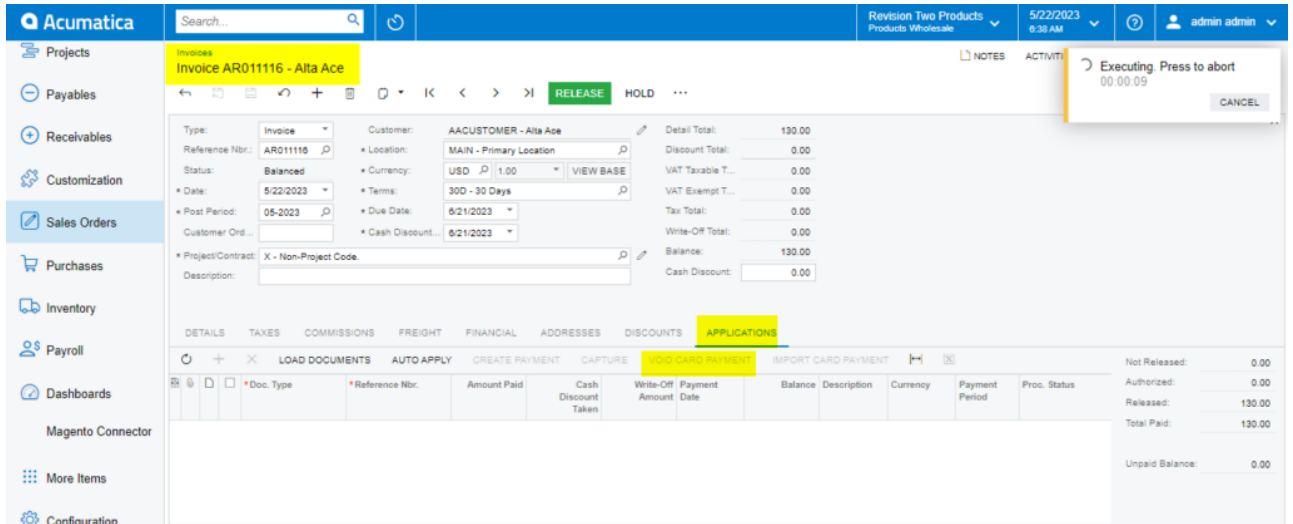


The screenshot shows the Acumatica interface for the same invoice. The 'APPLICATIONS' tab is selected, and the 'Payment' row in the table is highlighted. The 'Proc. Status' column for this row is 'Captured'. A notification at the top right states 'The operation has completed.'

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

Capture CC Payment Action in Invoice Screen

Void CC Authorized/Payment



The screenshot shows the Acumatica interface for an invoice. The 'APPLICATIONS' tab is selected, and the 'VOID CARD PAYMENT' button is highlighted. A modal dialog box is open in the top right corner with the text 'Executing. Press to abort 00:00:09' and 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.