


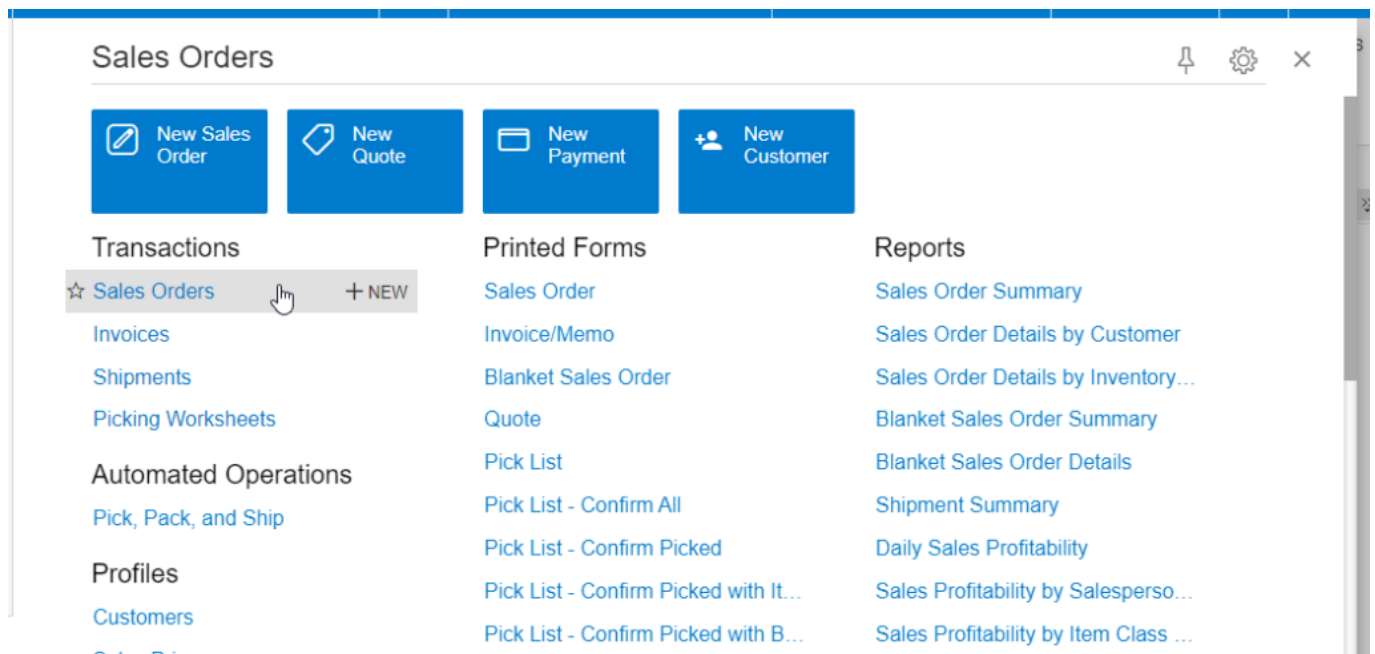
Payflow via the Sales Order Screen

 When processing Payflow payments through the Sales Order screen, you have the option to request a Payflow Payment, this gives you the choice to select either a tokenized or non-tokenized payment processing option.

Process Payflow via the Sales Order Screen in Acumatica

Steps to be followed:

1. Go to the left navigation menu of the Acumatica ERP and click the **(+)** button to add a new order.



Sales orders



KENSIUM

PayPal Payflow Plugin

Sales Orders

CUSTOMIZATION ▾ TOOLS ▾



ALL F **New Record** MY SALES ORDERS

Order Type	Order Nbr.	Status	Date	Sched. Shipment	Customer	Customer Name	Ordered
SO	SQ006798	Open	5/17/2023	5/17/2023	ABARTENDE	USA Bartending School	
SO	SQ006797	Open	5/10/2023	5/16/2023	ABARTENDE	USA Bartending School	
ER	AR010735	Open	5/9/2023	5/9/2023	ECOMGUEST	eCommerce Guest Customer	
SH	SQ006796	Completed	5/9/2023	5/9/2023	ECOMGUEST	eCommerce Guest Customer	
ER	AR010734	Open	5/9/2023	5/9/2023	ECOMGUEST	eCommerce Guest Customer	
SH	SQ006795	Completed	5/9/2023	5/9/2023	ECOMGUEST	eCommerce Guest Customer	
ER	AR010733	Open	5/9/2023	5/9/2023	ECOMGUEST	eCommerce Guest Customer	
SH	SQ006794	Completed	5/9/2023	5/9/2023	ECOMGUEST	eCommerce Guest Customer	
RC	AR010731	Completed	5/5/2023	5/5/2023	AACUSTOMER	Alta Ace	

Create a New Sales Order

Sales Orders
SO

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS ▾

← → + - K < > >I HOLD ...

* Order Type: SO
Order Nbr.: <NEW>
Status: Open
* Date: 5/23/2023
* Requested On: 5/23/2023
Customer Ord...
External Refer...

* Customer: Ordered Qty.: 0.00

Select - Customer

Customer ID	Customer Name	Address Line 1	Address Line 2
> 000008	pctest		
000009	Spencer S	2557 Pine Street	
000010	test cust10	Add sample	App test
000011	sandeep Kumar	14th Avenue	
AACUSTOMER	Alta Ace	156 10th Ave	
ABARTENDE	USA Bartending School	201 Lower Notch Rd	

DETAILS TAXES COMMISSIONS

ADD ITEM

* Branch * Inventory

Search customer on a new sales order



KENSIUM

PayPal Payflow Plugin

* Customer: Ordered Qty.: 0.00

Select - Customer

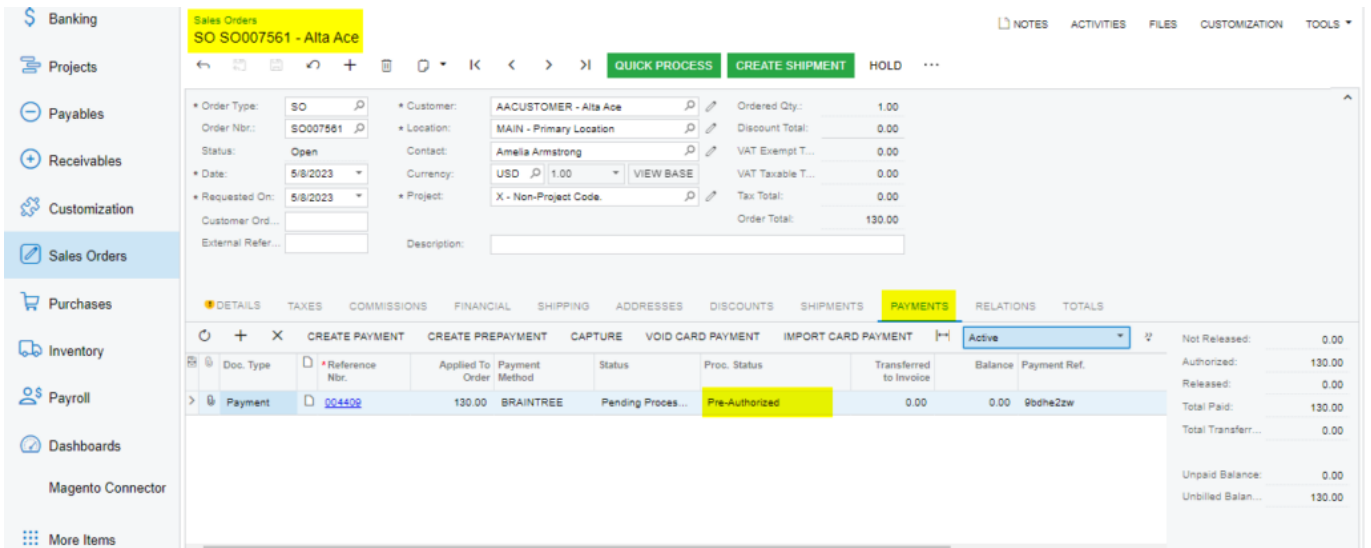
SELECT

Customer ID	Customer Name	Address Line 1	Address Line 2
> 000008	pctest		
000009	Spencer S	2557 Pine Street	
000010	test cust10	Add sample	App test
000011	sandeep Kumar	14th Avenue	
AACUSTOMER	Alta Ace	156 10th Ave	
ABARTENDE	USA Bartending School	201 Lower Notch Rd	

Select customer on a new sale order

1. Select a **customer**.
2. Add **Stock items** in the **Details** tab.
3. Click the **Financial** tab.
 - a. Select a **Payflow Payment Method**.
4. Click a **payment process** based on the stage of the sales order:
 - a. Authorize CC Payment.
 - b. Capture CC Payment.
 - c. Void CC Auth./Payment.
5. The Processing Status Responses Reason are updated based on the action performed.
6. Click **Save**.

Authorize action on the Sales Order Screen



Sales Orders
SO SO007561 - Alta Ace

QUICK PROCESS CREATE SHIPMENT HOLD ...

Order Type: SO Customer: AACUSTOMER - Alta Ace Ordered Qty: 1.00
 Order Nbr.: SO007561 Location: MAIN - Primary Location Discount Total: 0.00
 Status: Open Contact: Amelia Armstrong VAT Exempt T...: 0.00
 Date: 5/8/2023 Currency: USD 1.00 VIEW BASE VAT Taxable T...: 0.00
 Requested On: 5/8/2023 Project: X - Non-Project Code Tax Total: 0.00
 Customer Ord... Order Total: 130.00
 External Refer... Description:

DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS **PAYMENTS** RELATIONS TOTALS

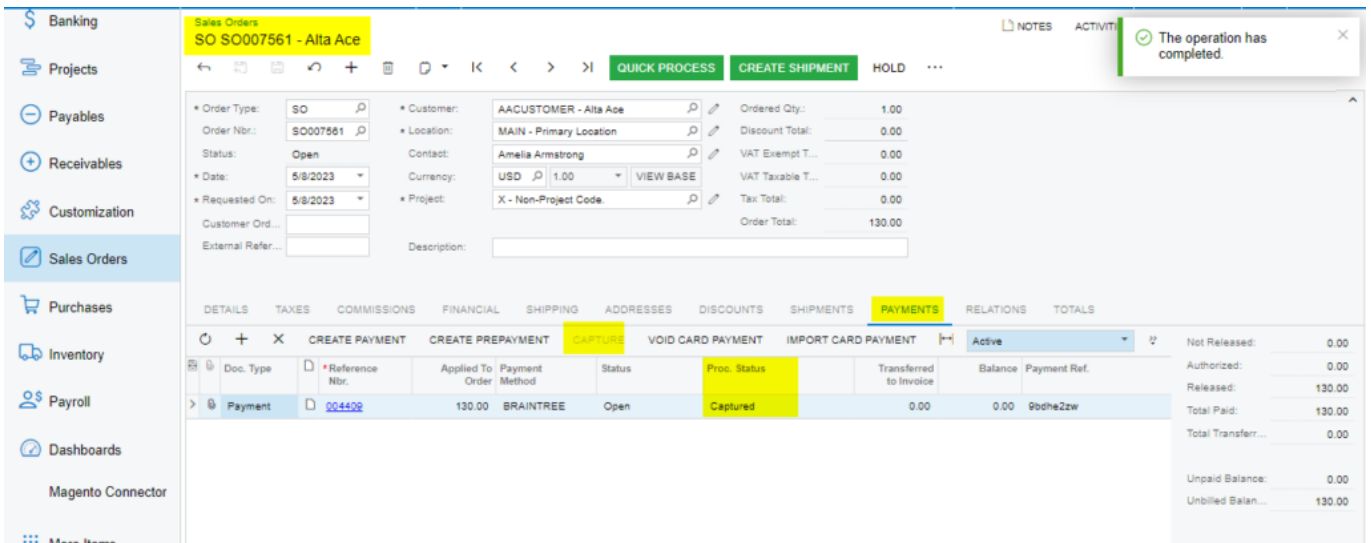
CREATE PAYMENT CREATE PREPAYMENT CAPTURE VOID CARD PAYMENT IMPORT CARD PAYMENT Active

Doc. Type	Reference Nbr.	Applied To Order	Payment Method	Status	Proc. Status	Transferred to Invoice	Balance	Payment Ref.
Payment	004409	130.00	BRAINTREE	Pending Proces...	Pre-Authorized	0.00	0.00	9bdhe2zw

Not Released: 0.00
 Authorized: 130.00
 Released: 0.00
 Total Paid: 130.00
 Total Transferr...: 0.00
 Unpaid Balance: 0.00
 Unbilled Balan...: 130.00

Authorized action on the sales order screen

Capture on Sales Order Screen



Sales Orders
SO SO007561 - Alta Ace

QUICK PROCESS CREATE SHIPMENT HOLD ...

Order Type: SO Customer: AACUSTOMER - Alta Ace Ordered Qty: 1.00
 Order Nbr.: SO007561 Location: MAIN - Primary Location Discount Total: 0.00
 Status: Open Contact: Amelia Armstrong VAT Exempt T...: 0.00
 Date: 5/8/2023 Currency: USD 1.00 VIEW BASE VAT Taxable T...: 0.00
 Requested On: 5/8/2023 Project: X - Non-Project Code Tax Total: 0.00
 Customer Ord... Order Total: 130.00
 External Refer... Description:

DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS **PAYMENTS** RELATIONS TOTALS

CREATE PAYMENT CREATE PREPAYMENT **CAPTURE** VOID CARD PAYMENT IMPORT CARD PAYMENT Active

Doc. Type	Reference Nbr.	Applied To Order	Payment Method	Status	Proc. Status	Transferred to Invoice	Balance	Payment Ref.
Payment	004409	130.00	BRAINTREE	Open	Captured	0.00	0.00	9bdhe2zw

Not Released: 0.00
 Authorized: 0.00
 Released: 130.00
 Total Paid: 130.00
 Total Transferr...: 0.00
 Unpaid Balance: 0.00
 Unbilled Balan...: 130.00

The operation has completed.

Capture on Sales Order Screen

Void on Sales Order Screen

Acumatica

Search...

Revision Two Products
Products Wholesale

5/22/2023
5:40 AM

admin

Banking

Projects

Payables

Receivables

Customization

Sales Orders

Purchases

Inventory

Payroll

Dashboards

Magento Connector

More Items

Sales Orders
SO SO007561 - Alta Ace

NOTES ACTIVITY

The operation has completed.

QUICK PROCESS CREATE SHIPMENT HOLD ...

* Order Type: SO * Customer: AACUSTOMER - Alta Ace Ordered Qty: 1.00
 Order Nbr.: SO007561 * Location: MAIN - Primary Location Discount Total: 0.00
 Status: Open Contact: Amelia Armstrong VAT Exempt T... 0.00
 * Date: 5/8/2023 Currency: USD 1.00 VIEW BASE VAT Taxable T... 0.00
 * Requested On: 5/8/2023 * Project: X - Non-Project Code Tax Total: 0.00
 Customer Ord... Order Total: 130.00
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DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS RELATIONS TOTALS

CREATE PAYMENT CREATE PREPAYMENT CAPTURE VOID CARD PAYMENT IMPORT CARD PAYMENT Active

Doc. Type	Reference Nbr.	Applied To Order	Payment Method	Status	Proc. Status	Transferred to Invoice	Balance	Payment Ref.

Not Released: 0.00
 Authorized: 0.00
 Released: 0.00
 Total Paid: 0.00
 Total Transferr... 0.00
 Unpaid Balance: 130.00
 Unbilled Balan... 130.00

Void Card Payment in Sales Order screen

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