

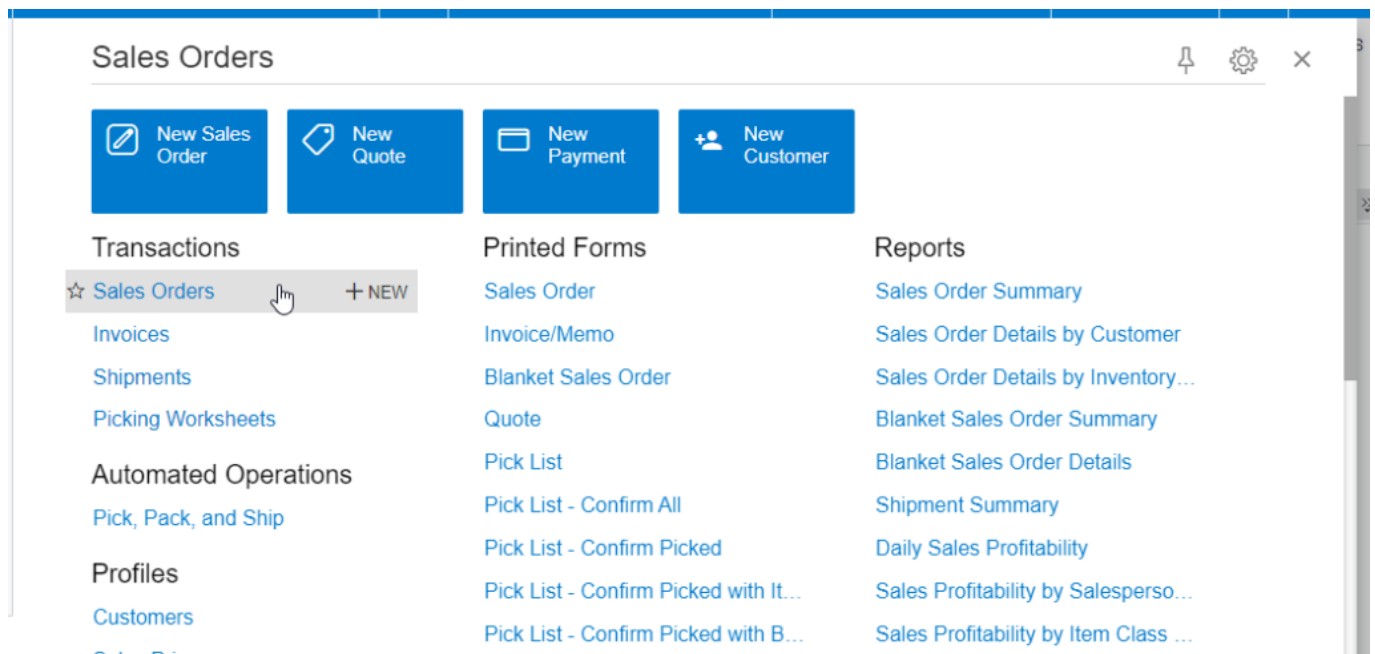
Payflow via the Sales Order Screen

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

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 ▾

← ↻ + 🗑️ 📄 ⏪ ⏩ HOLD ...

* Order Type:

Order Nbr.:

Status:

* Date:

* Requested On:

Customer Ord...

External Refer...

DETAILS TAXES COMMISSION

🔄 + ✎ ✕ ADD ITEM

🗑️ 📄 *Branch *Inventory

* Customer:

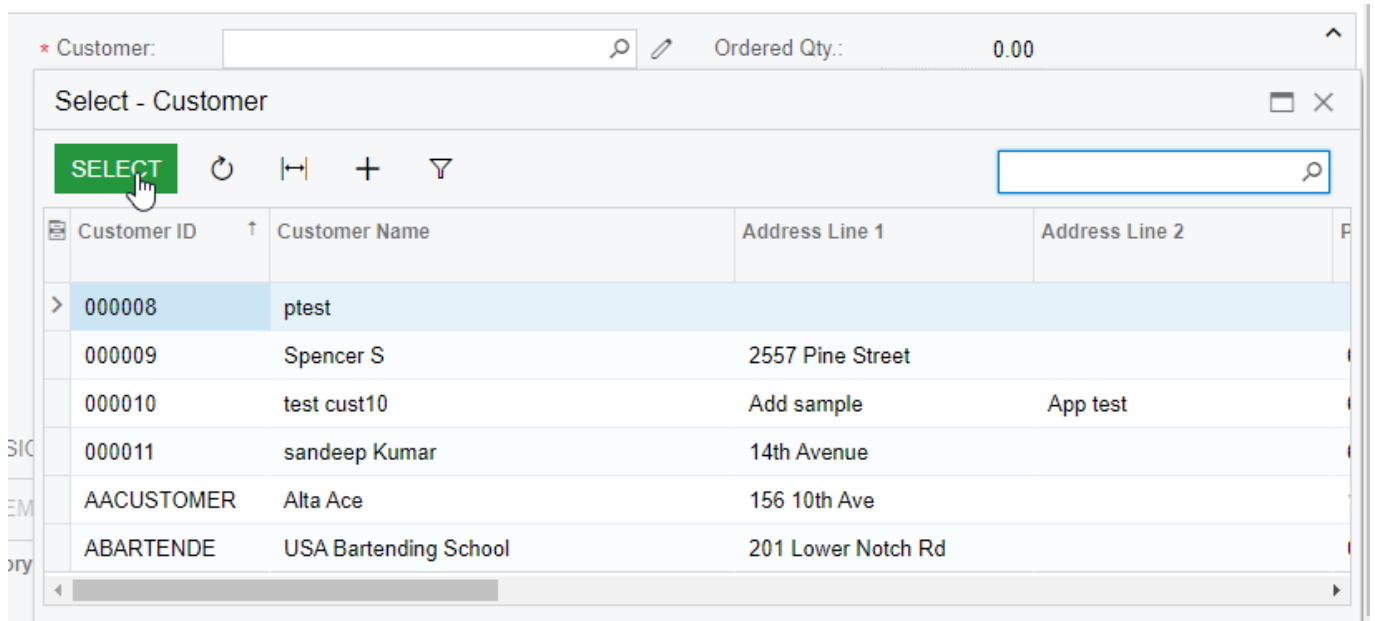
Ordered Qty.: 0.00

Select - Customer

SELECT ↻ ⏪ + 🔍

Customer ID	Customer Name	Address Line 1	Address Line 2
> 000008	ptest		
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	

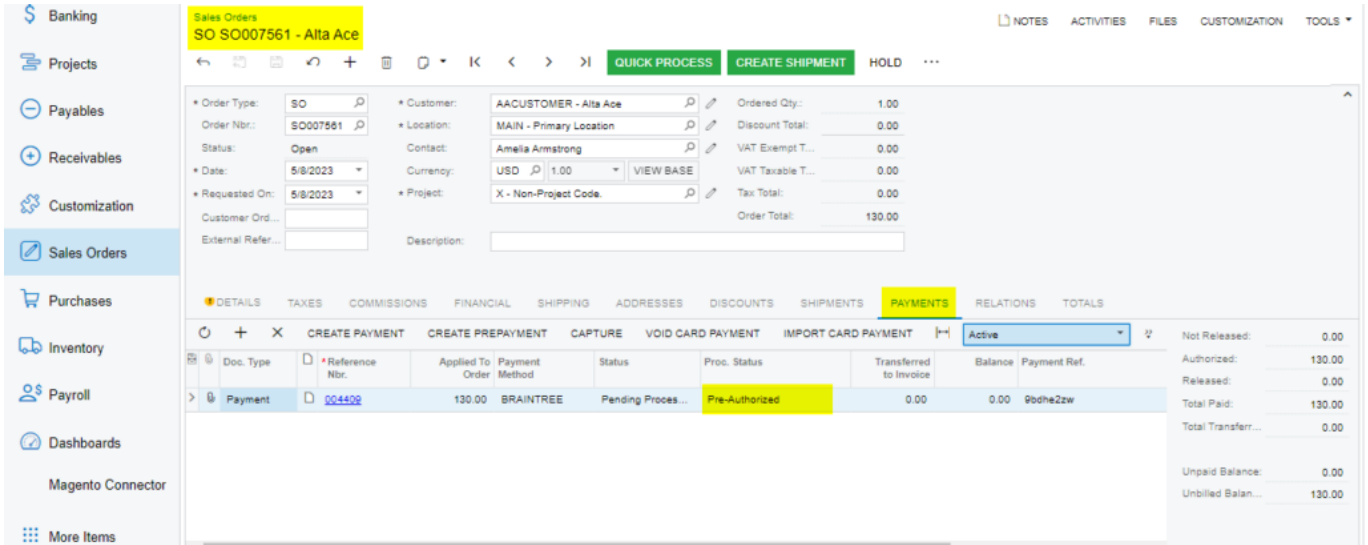
Search customer on a new sales order



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



The screenshot shows the 'Sales Orders' screen for order SO SO007561 - Alta Ace. The 'PAYMENTS' tab is active, displaying a table with the following data:

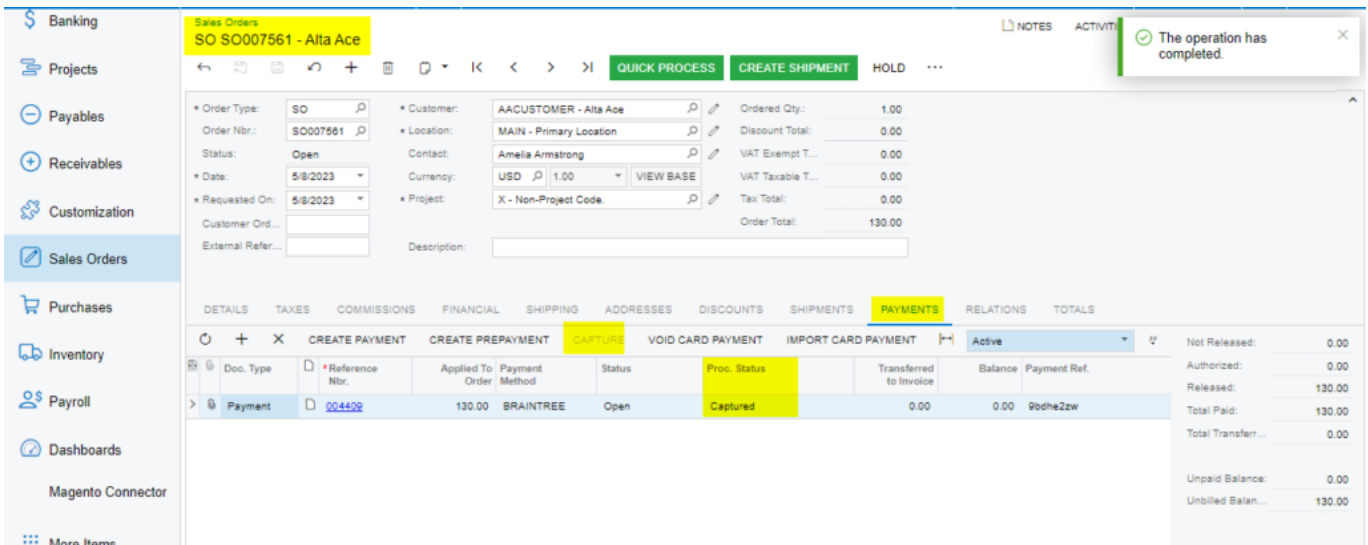
Doc. Type	Reference Nbr.	Applied To Order	Payment Method	Status	Proc. Status	Transferred to Invoice	Balance	Payment Ref.
Payment	004409	130.00	BRAINTREE	Pending Proces...	Pre-Authorized	0.00	0.00	9bdhe2zw

Summary statistics on the right side of the screen:

- 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



The screenshot shows the same sales order screen as above, but with the 'CAPTURE' button highlighted in the top navigation bar. The payment status in the table has changed to 'Captured'. A green notification box in the top right corner states: 'The operation has completed.'

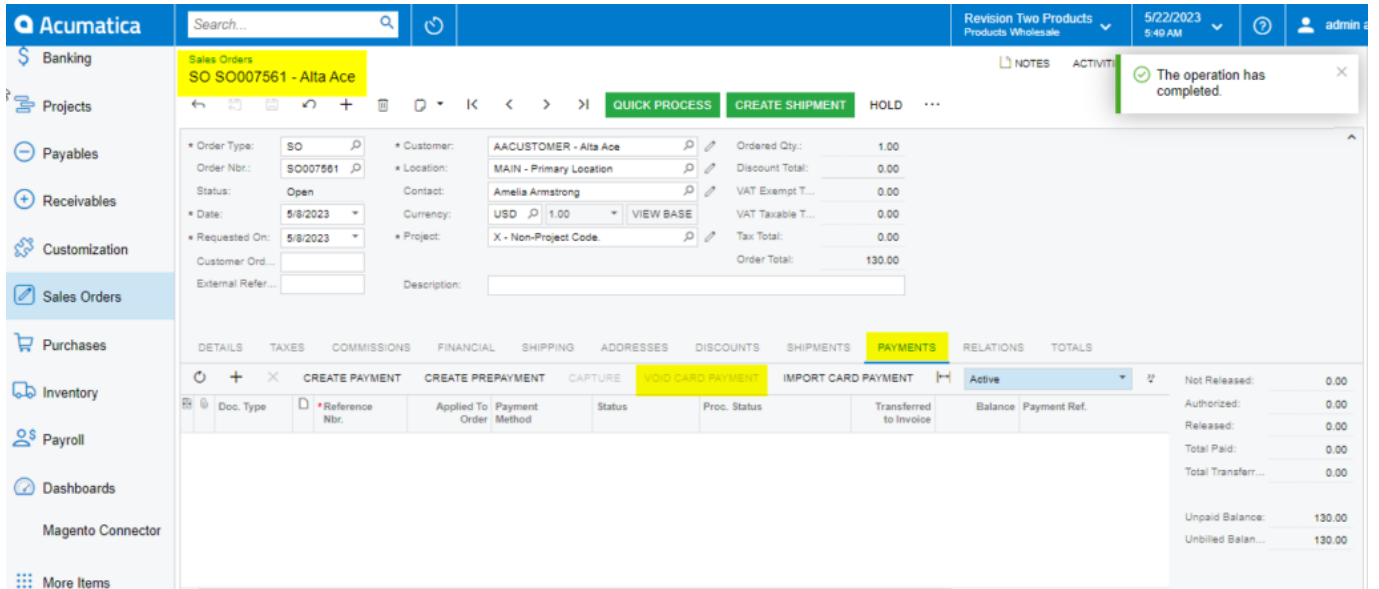
Doc. Type	Reference Nbr.	Applied To Order	Payment Method	Status	Proc. Status	Transferred to Invoice	Balance	Payment Ref.
Payment	004409	130.00	BRAINTREE	Open	Captured	0.00	0.00	9bdhe2zw

Summary statistics on the right side of the screen:

- 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

Capture on Sales Order Screen

Void on Sales Order Screen



The screenshot shows the Acumatica interface for a Sales Order (SO SO007561 - Alta Ace). The Payments tab is active, and the 'VOID CARD PAYMENT' button is highlighted in yellow. The interface includes a sidebar with navigation options like Banking, Projects, Payables, Receivables, Customization, Sales Orders, Purchases, Inventory, Payroll, and Dashboards. The main area displays order details and a table for payment actions.

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

Summary statistics on the right side of the Payments tab:

- 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.