


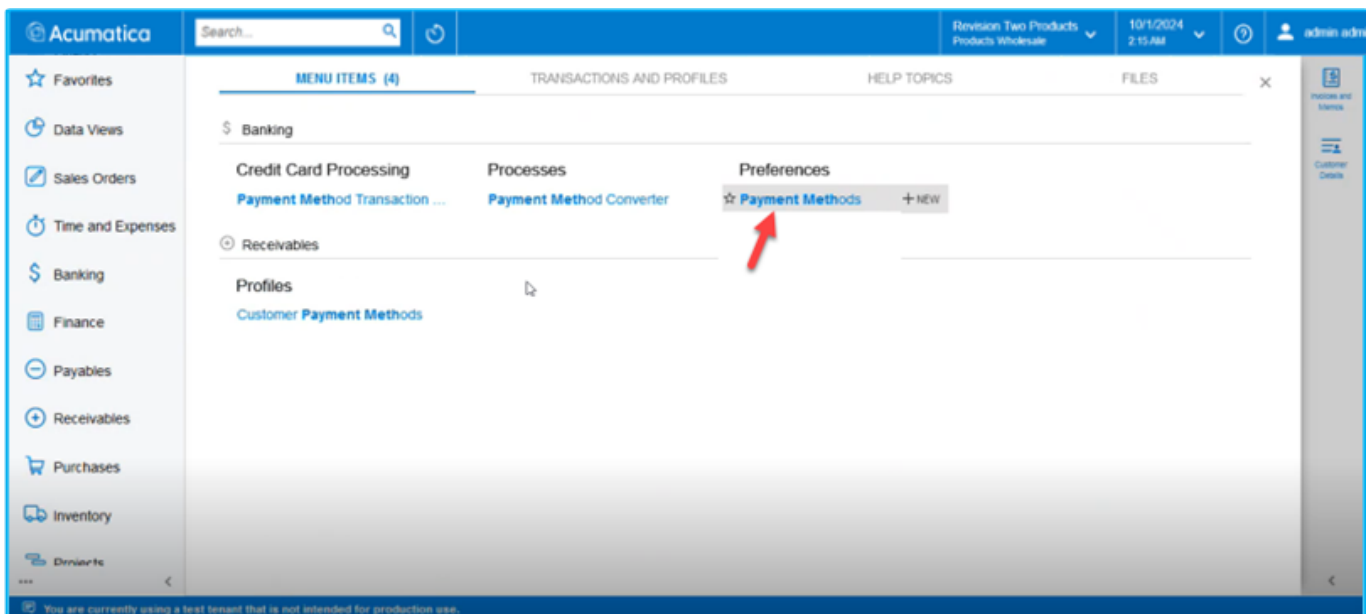
# Payment Methods and PayPal Portal Details

 The application allows you to get the payment refund that you have already made fully or partially. You can check the payment methods within Acumatica by entering [Payment Methods] in the Global Search box as illustrated below.

Follow the steps as described below:

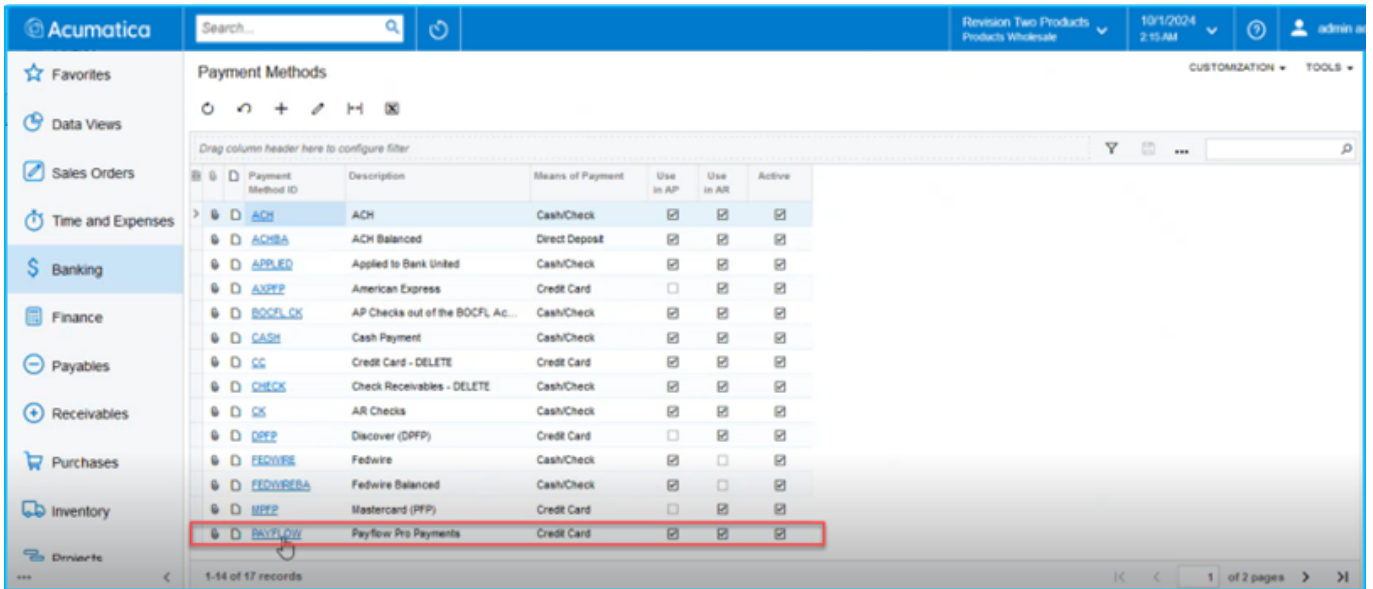
**Step 1:** In the Global Search Box type Payment Methods and you will be redirected to the following screen.

**Step 2:** Under the [Preferences] you will have multiple options. Go to Preferences and click on [Payment Methods].



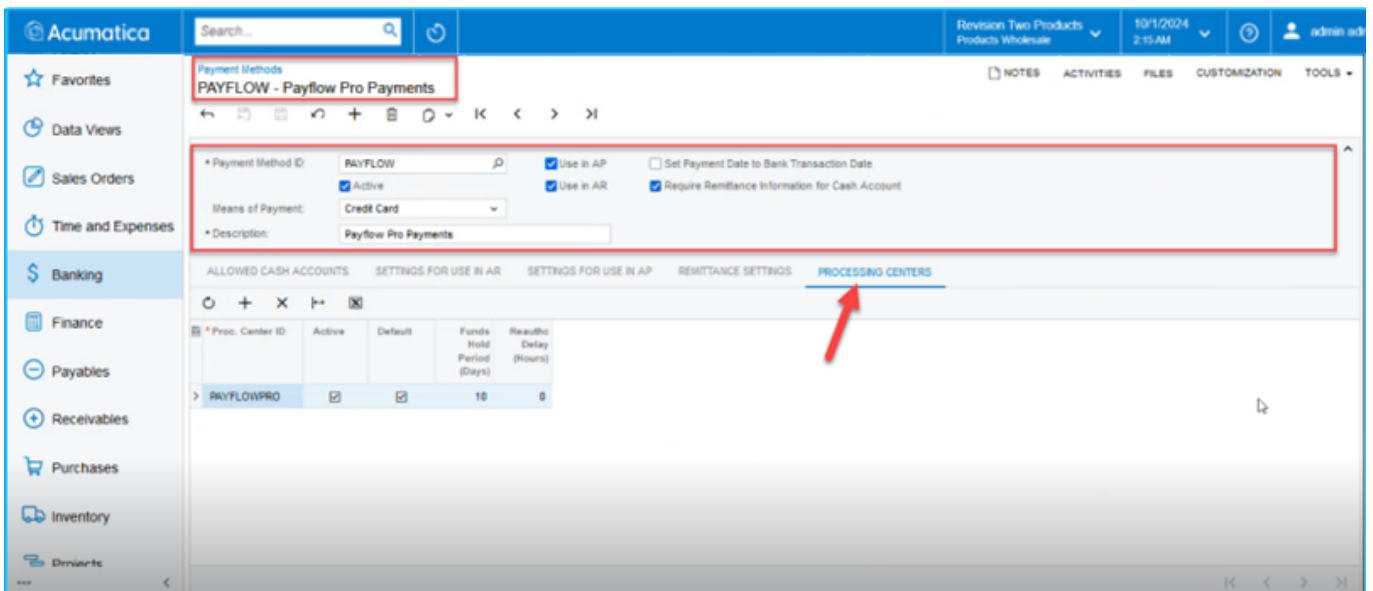
click on Payment Methods

**Step 3:** You can view all the Payment Methods that you have already created within Acumatica. The Payflow Pro Payments will also be in the list of Payment Methods ID columns.



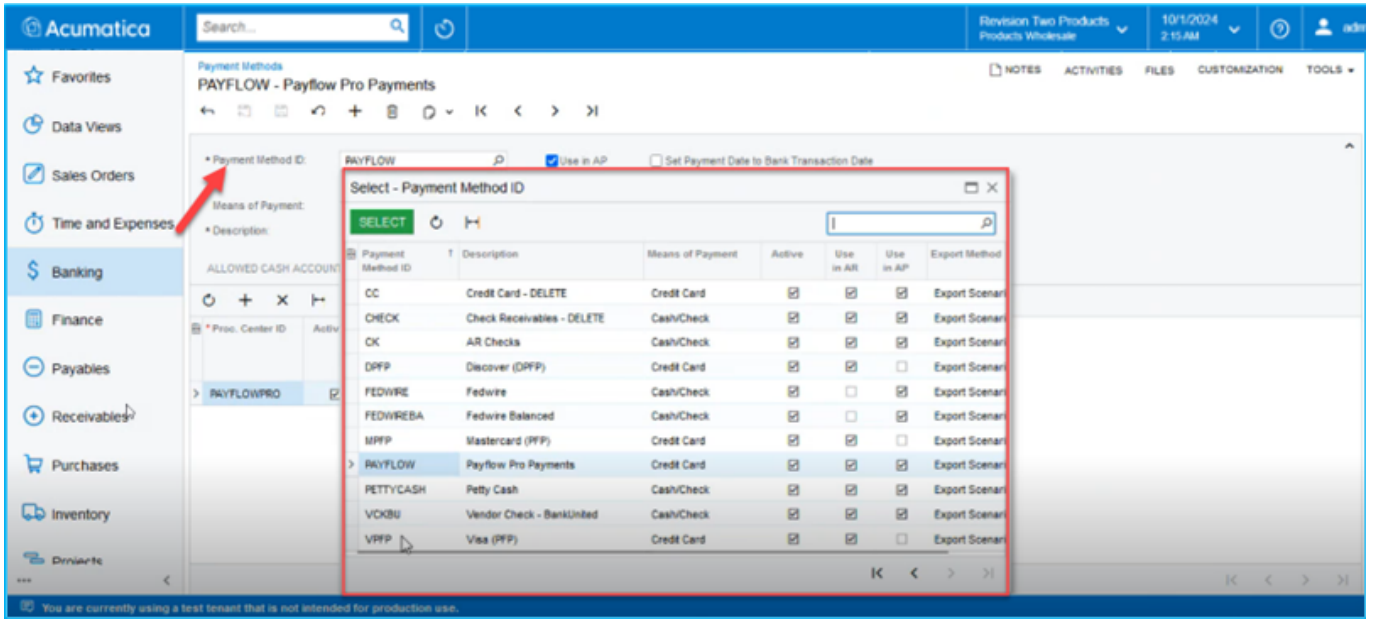
Payment Methods Screen

**Step 4:** When you select the payment method PAYFLOW, the application will redirect you to the Payment Method Details screen where you can review the configuration. Under [Processing Centre], you can check the Processing Centre ID, Status, Default setting, Funds Hold Period in days, and other relevant details as illustrated below.



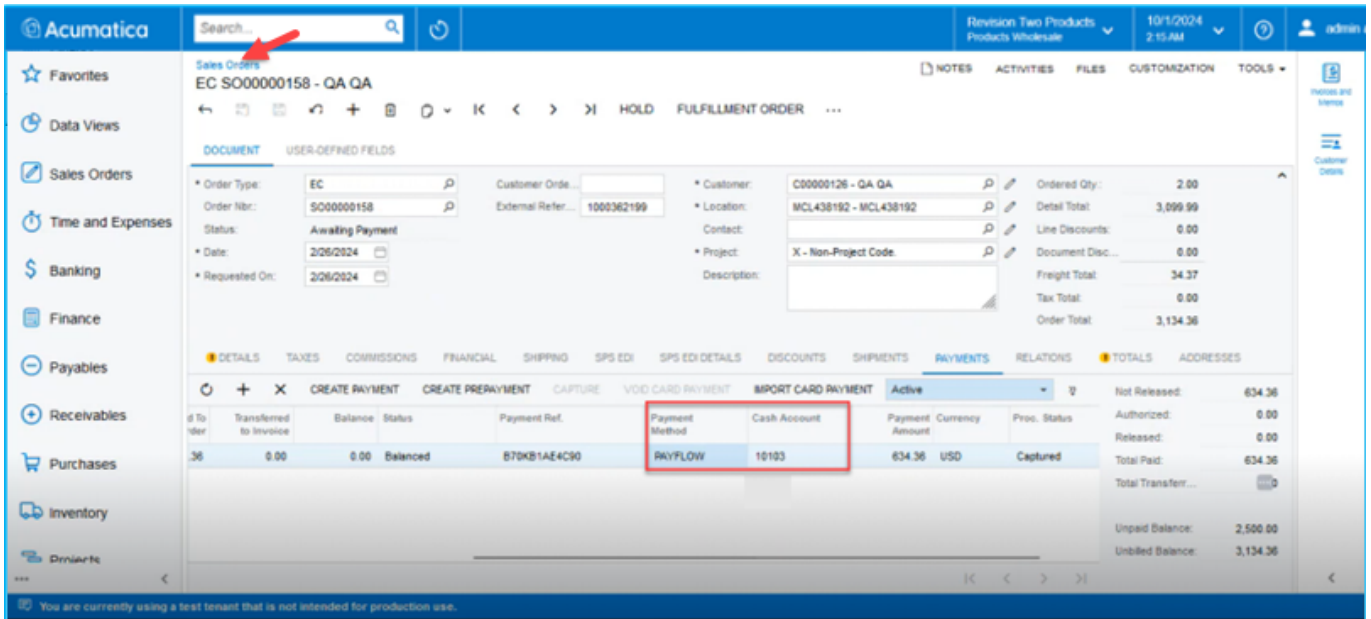
### Payflow ProPayment details

**Step 5:** Based on the card type VISA / Master you can configure the card and integrate it from the Payment Method ID look-up based on your business requirement and the type of the card that you want to integrate.



Select the Payment Method ID from the pop-up

**Step 6:** Navigate to the Sales Order, and the payment method from the Magento Sales Order will be integrated into Acumatica. After syncing the order from Magento, the corresponding payment method will be replicated on Acumatica.



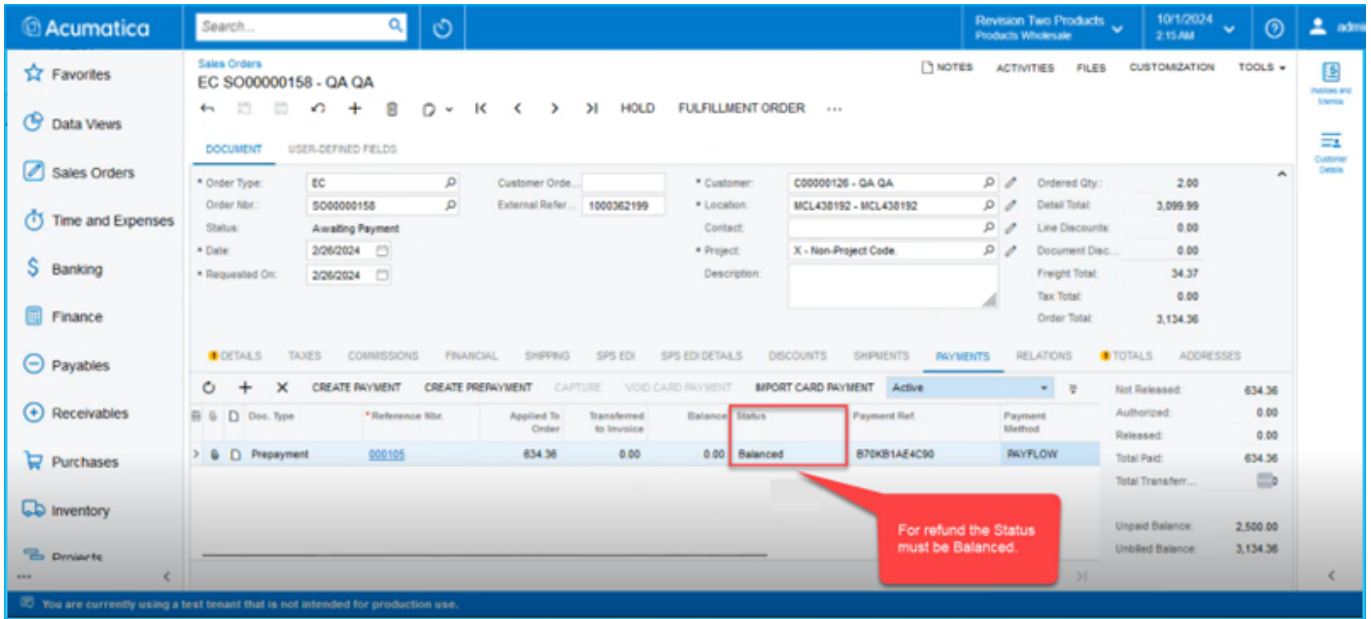
The screenshot shows the Acumatica interface for a Sales Order. The order number is EC SO00000158 - QA QA. The status is 'Awaiting Payment'. The payment method is 'PAYFLOW' and the cash account is '10103'. The payment amount is 634.36 USD. The status is 'Captured'. The interface includes a search bar at the top, a navigation menu on the left, and a main content area with various tabs and a table of payments.

| Order Type       | Customer Order | Customer              | Ordered Qty    |
|------------------|----------------|-----------------------|----------------|
| EC               |                | C0000126 - QA QA      | 2.00           |
| Order Nbr        | External Ref   | Location              | Detail Total   |
| SO00000158       | 1000362199     | MCL438192 - MCL438192 | 3,099.99       |
| Status           | Date           | Project               | Line Discounts |
| Awaiting Payment | 2/06/2024      | X - Non-Project Code  | 0.00           |
| Requested On     | Requested On   | Description           | Document Disc  |
| 2/06/2024        | 2/06/2024      |                       | 0.00           |
|                  |                |                       | Freight Total  |
|                  |                |                       | 34.37          |
|                  |                |                       | Tax Total      |
|                  |                |                       | 0.00           |
|                  |                |                       | Order Total    |
|                  |                |                       | 3,134.36       |

| Order | Transferred to Invoice | Balance | Status   | Payment Ref. | Payment Method | Cash Account | Payment Amount | Currency | Proc. Status |
|-------|------------------------|---------|----------|--------------|----------------|--------------|----------------|----------|--------------|
| 36    | 0.00                   | 0.00    | Balanced | B70KB1AE4C90 | PAYFLOW        | 10103        | 634.36         | USD      | Captured     |

### Payment Method Synced from Magento to Acumatica

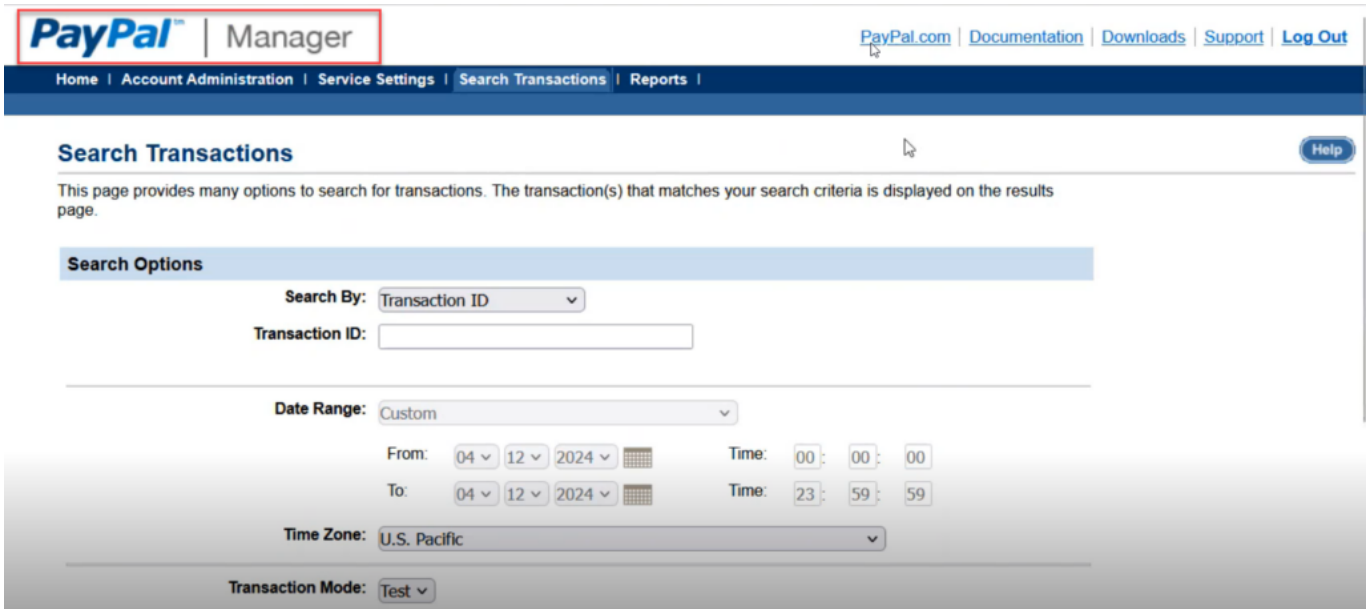
**Step 7:** Before initiating a refund on a Sales Order, ensure the Status of the Sales Order is Balanced. If it isn't, the application will prevent you from starting a refund against that specific sales order, as shown in the illustration.



The screenshot shows the Acumatica interface for a sales order. The order number is EC SO00000158 - QA QA. The status is 'Awaiting Payment'. A payment record is shown with a status of 'Balanced', which is highlighted in red. A red callout box points to this status with the text: "For refund the Status must be Balanced."

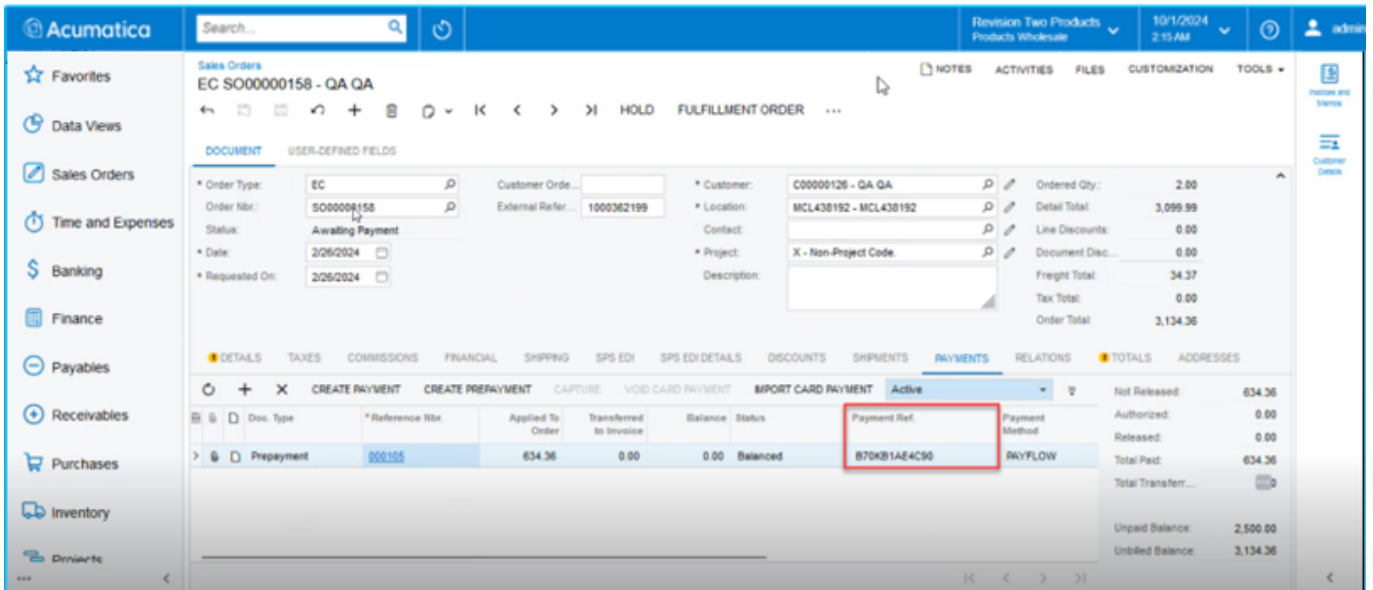
Status must be Balanced to initiate the refund

**Step 8:** Navigate to the PayPal Flow Portal. Get the Payment Reference Number handy from the Acumatica Sales Order screen as illustrated below.



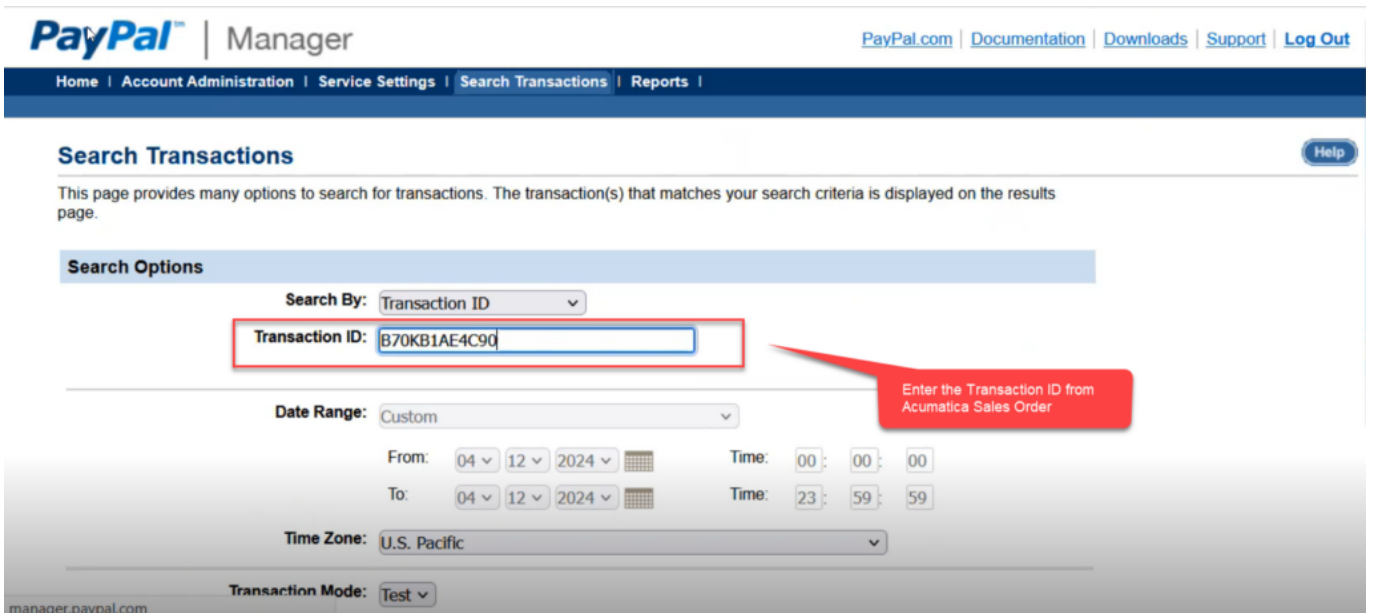
The screenshot shows the PayPal Manager interface. The 'Search By' dropdown is set to 'Transaction ID' and is highlighted with a red box. The page shows search options for Transaction ID, Date Range, Time Zone, and Transaction Mode.

PayPal Portal Screen



Payment Reference Number in Acumatica

**Step 9:** Navigate to Search Transaction on the PayPal Portal screen and enter the [Payment Reference ID] from the Acumatica sales order.



Enter the Transaction ID

Email: [redacted].com

**Additional Information**

Customer IP Address: [redacted]      Merchant: [redacted]  
Client IP Address: [redacted]      User: magento  
Client Type: Z  
Client Version: 4.0.0.1  
Transaction State: 8  
Duration: 0.00

**Transaction History**

| Transaction ID | Timestamp                | Transaction Type | Amount     | Result | Details                 |
|----------------|--------------------------|------------------|------------|--------|-------------------------|
| B70KB1AE4C90   | Feb 26, 2024 10:33:11 AM | Sale             | 634.36 USD | 0      | --                      |
| B50K1C0338C7   | Feb 26, 2024 10:32:58 AM | Authorization    | 0.00 USD   | 0      | <a href="#">Details</a> |

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Transaction details in the PayPal Portal