

Payments via the Payments & Applications Screen

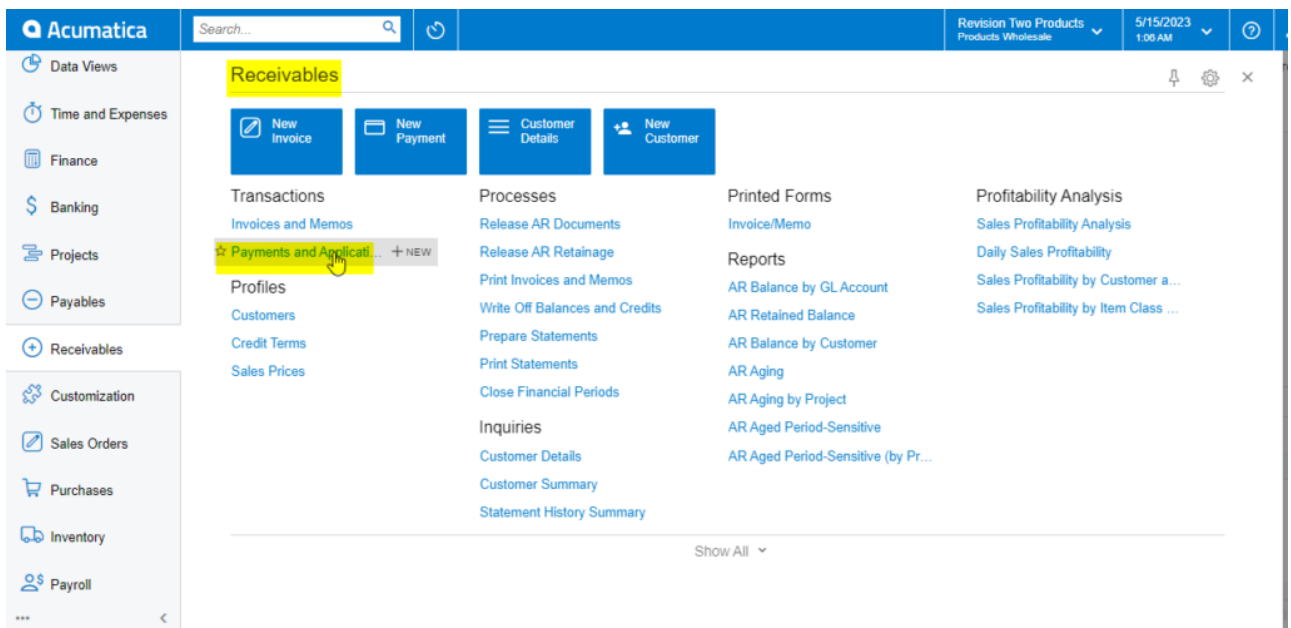
Processing Payflow payments give you the ability to apply a payment method from the Payments & Application screen.

This allows you to add, change, or remove a sales order without leaving the Payments & Application screen.

Payflow payments via the payments and applications screen

Steps to be followed:

1. Go to the Receivables workspace.



Receivables Workspace

2. Click on Payments & Application.
3. Click on the (+) button.

Payments and Applications CUSTOMIZATION ▾ TOOLS

Type: All **New Record** All ▾ Payment Date: All ▾

Type	Reference Nbr.	Status	Payment Date	Payment Period	Customer	Customer Name
Payment	003987	Pending Processing	5/17/2023	05-2023	AACUSTOMER	Alta Ace
Payment	003986	Pending Processing	5/11/2023	05-2023	AACUSTOMER	Alta Ace
Customer Refund	003985	On Hold	5/9/2023	05-2023	ECOMGUEST	eCommerce Guest Customer
Prepayment	003984	Open	5/9/2023	05-2023	ECOMGUEST	eCommerce Guest Customer
Customer Refund	003983	On Hold	5/9/2023	05-2023	ECOMGUEST	eCommerce Guest Customer
Prepayment	003982	Open	5/9/2023	05-2023	ECOMGUEST	eCommerce Guest Customer
Customer Refund	003981	On Hold	5/9/2023	05-2023	ECOMGUEST	eCommerce Guest Customer
Prepayment	003980	Open	5/9/2023	05-2023	ECOMGUEST	eCommerce Guest Customer
Customer Refund	003979	Closed	5/5/2023	05-2023	AACUSTOMER	Alta Ace

Payments and Application Screen

4. Select a customer.

Search... Revision Two Products Products Wholesale 5/25/2023 2:44 AM admin admin

Payments and Applications **Payment** NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

← ...

Type: **Payment** * Customer: Payment Amo... 0.00

Reference Nbr.: <NEW> * Location: **Select - Customer**

Status: **Balanced** Payment M...

* Application Date: 5/25/2023 Card/Account

* Application Pe... 05-2023

* Payment Ref.:

* Cash Account

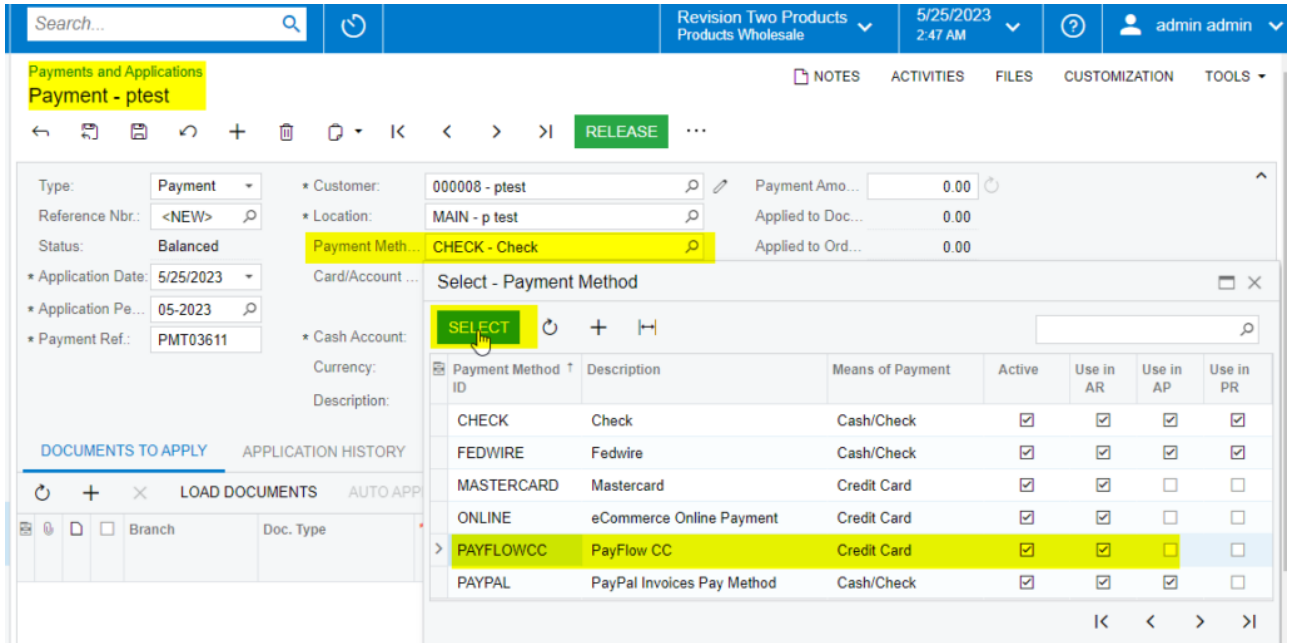
* Currency: Description

DOCUMENTS TO APPLY APPLICATION HISTO

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	
ABCHOLDING	ABC Holdings Inc	65 Broadway	

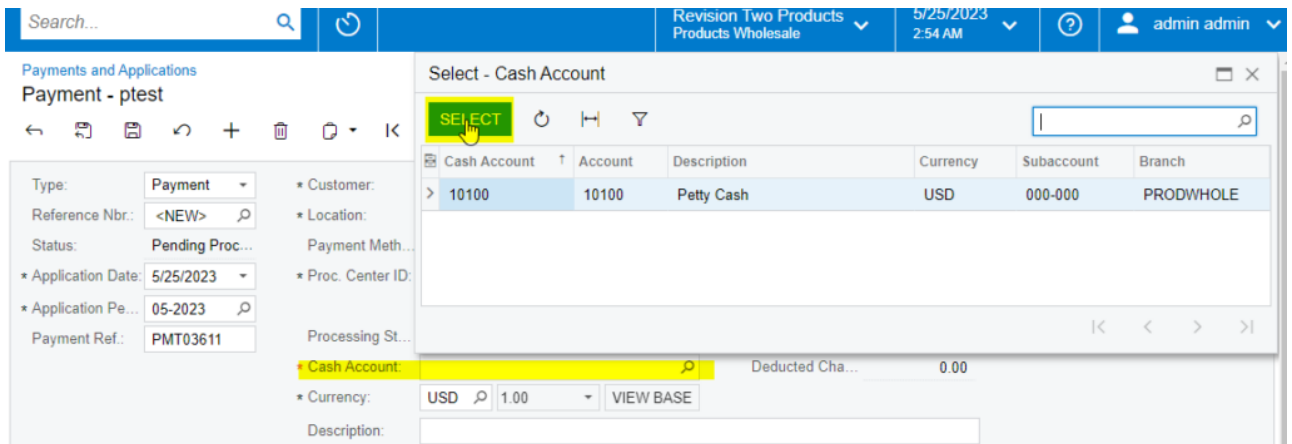
Selecting Customer from the Payment and Application screen.

5. Select the Payflow payment method.



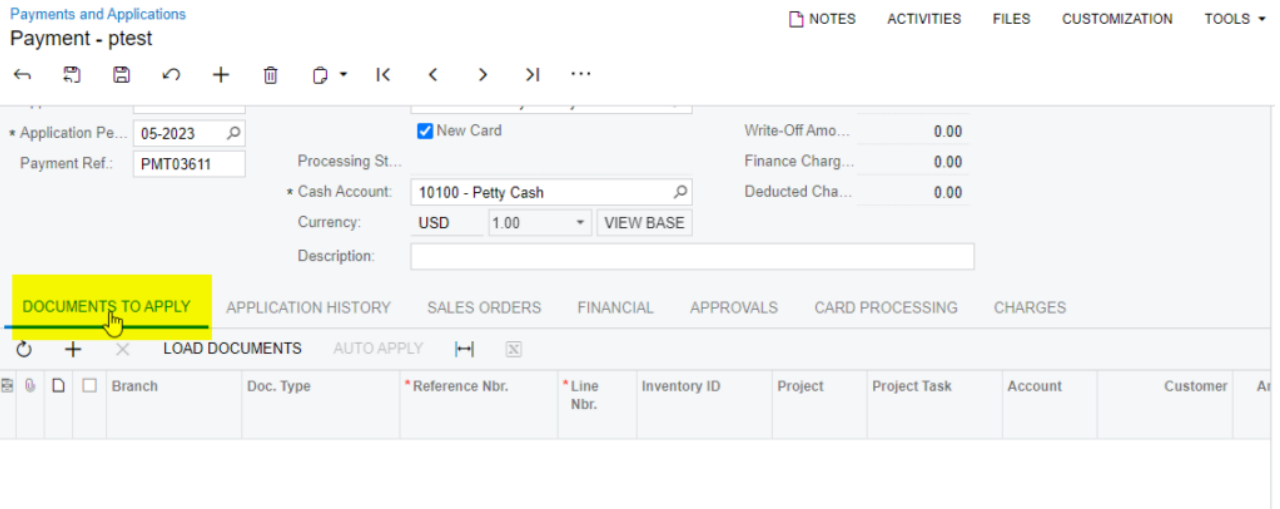
Payflow Payment Method from Payment and Application screen

6. Select a cash account.



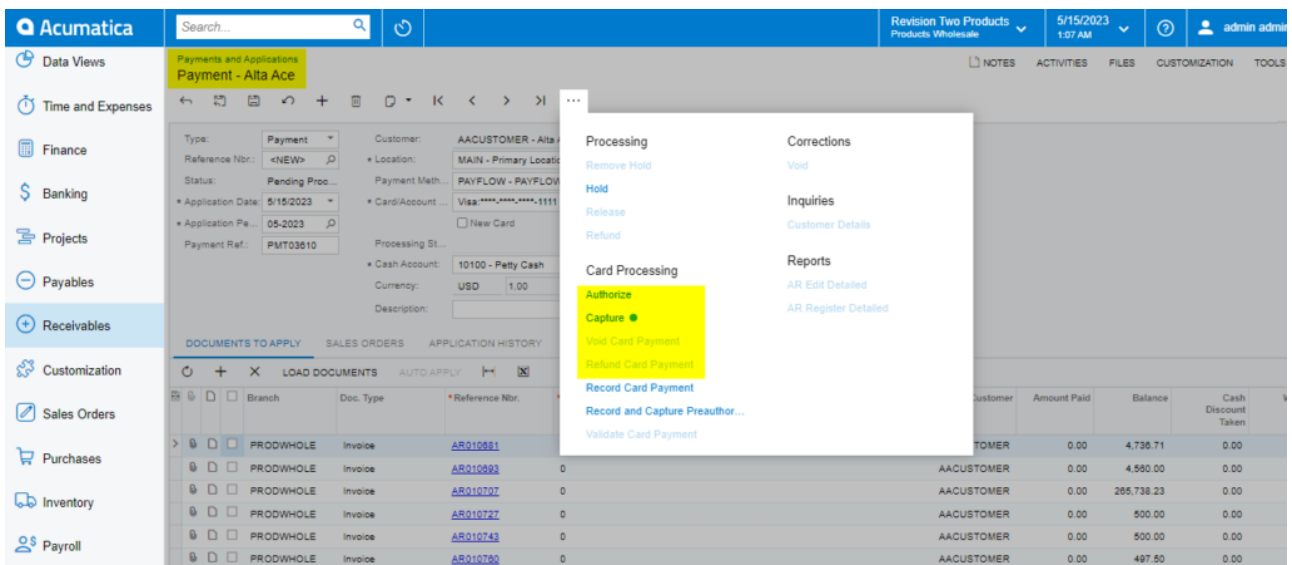
Cash Account from Payments and Application screen

- Go to the Documents to Apply details tab.



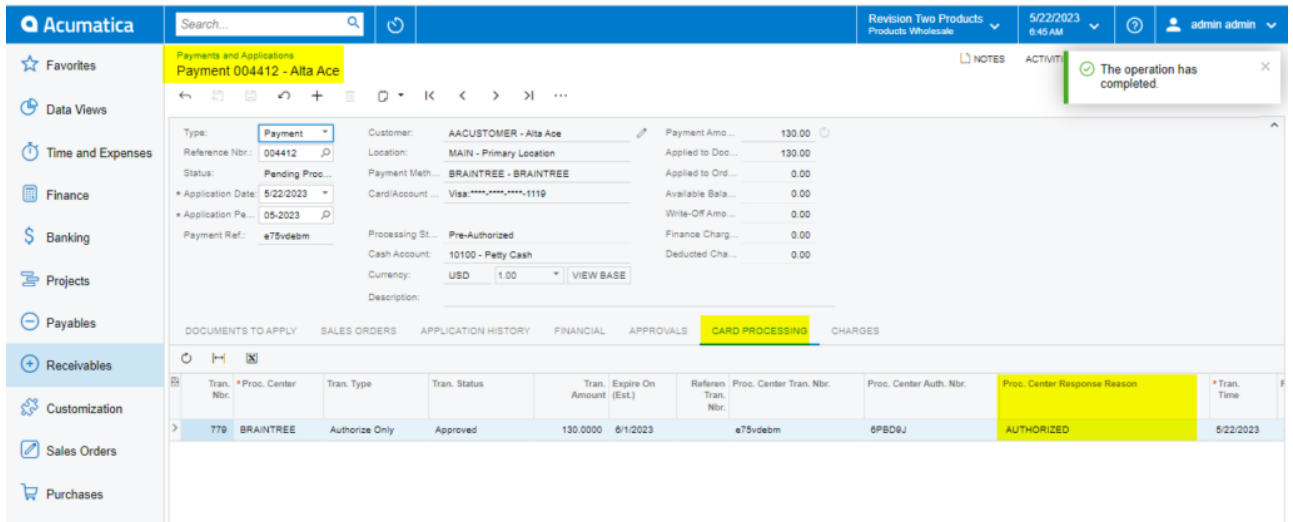
Payments and Applications

- Add at least one item.
 - Enter the payment amount.
7. Click Save.
 8. Click the Actions menu and perform one of the following actions.



Actions menu

Authorize on Payments and Applications Screen

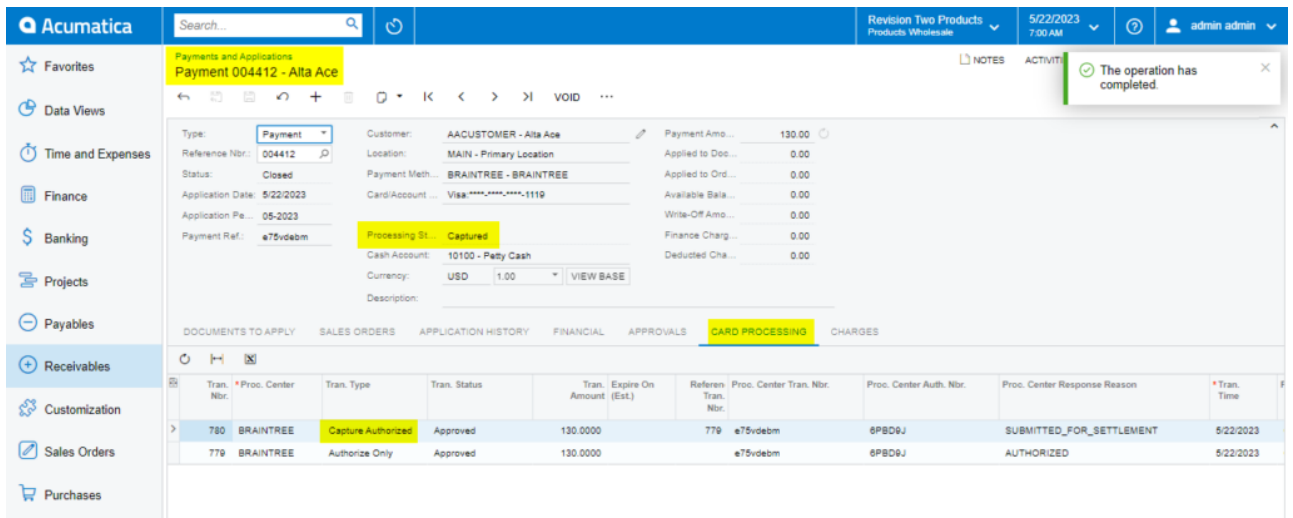


The screenshot shows the Acumatica interface for the 'Payments and Applications' screen. The main header includes 'Acumatica', a search bar, and user information 'Revision Two Products Products Wholesale' and '5/22/2023 6:45 AM'. A notification bubble in the top right corner states 'The operation has completed.' The left sidebar contains navigation options like Favorites, Data Views, Time and Expenses, Finance, Banking, Projects, Payables, Receivables, Customization, Sales Orders, and Purchases. The main content area displays details for 'Payment 004412 - Alta Ace'. The 'Processing St.' is set to 'Pre-Authorized'. Below the details is a table with columns: Tran. Nbr., Proc. Center, Tran. Type, Tran. Status, Tran. Amount, Tran. Expire On (Est.), Referen. Tran. Nbr., Proc. Center Tran. Nbr., Proc. Center Auth. Nbr., Proc. Center Response Reason, and Tran. Time. The table contains one row with the following data:

Tran. Nbr.	Proc. Center	Tran. Type	Tran. Status	Tran. Amount	Tran. Expire On (Est.)	Referen. Tran. Nbr.	Proc. Center Tran. Nbr.	Proc. Center Auth. Nbr.	Proc. Center Response Reason	Tran. Time
779	BRAINTREE	Authorize Only	Approved	130.0000	6/1/2023	e75vdebm	6PB09J		AUTHORIZED	5/22/2023

Authorize on Payments and Applications Screen

Capture on Payments and Applications Screen



The screenshot shows the Acumatica interface for the 'Payments and Applications' screen. The main header includes 'Acumatica', a search bar, and user information 'Revision Two Products Products Wholesale' and '5/22/2023 7:00 AM'. A notification bubble in the top right corner states 'The operation has completed.' The left sidebar contains navigation options like Favorites, Data Views, Time and Expenses, Finance, Banking, Projects, Payables, Receivables, Customization, Sales Orders, and Purchases. The main content area displays details for 'Payment 004412 - Alta Ace'. The 'Processing St.' is set to 'Captured'. Below the details is a table with columns: Tran. Nbr., Proc. Center, Tran. Type, Tran. Status, Tran. Amount, Tran. Expire On (Est.), Referen. Tran. Nbr., Proc. Center Tran. Nbr., Proc. Center Auth. Nbr., Proc. Center Response Reason, and Tran. Time. The table contains two rows with the following data:

Tran. Nbr.	Proc. Center	Tran. Type	Tran. Status	Tran. Amount	Tran. Expire On (Est.)	Referen. Tran. Nbr.	Proc. Center Tran. Nbr.	Proc. Center Auth. Nbr.	Proc. Center Response Reason	Tran. Time
780	BRAINTREE	Capture Authorized	Approved	130.0000		779	e75vdebm	6PB09J	SUBMITTED_FOR_SETTLEMENT	5/22/2023
779	BRAINTREE	Authorize Only	Approved	130.0000			e75vdebm	6PB09J	AUTHORIZED	5/22/2023

Capture on Payments and Applications Screen

Void Action on Payments and Applications Screen

Acumatica

Search...

Revision Two Products
Products Wholesale

5/22/2023
7:01 AM

admin admin

Payments and Applications
Voided Payment 004412 - Alta Ace

NOTES ACTIVITY

The operation has completed.

Type: Voided Pa... Customer: AACUSTOMER - Alta Ace Payment Amo... -130.00
 Reference Nbr.: 004412 Location: MAIN - Primary Location Applied to Doc... 0.00
 Status: Closed Payment Meth... BRAINTREE - BRAINTREE Applied to Ord... 0.00
 Application Date: 5/22/2023 Card/Account ... Visa*****1119 Available Bal... 0.00
 Application Pe... 05-2023 Write-Off Amo... 0.00
 Payment Ref.: e75vdebm Processing St.: Voided Finance Chrg... 0.00
 Cash Account: 10100 - Petty Cash Deducted Cha... 0.00
 Currency: USD 1.00 VIEW BASE
 Description:

DOCUMENTS TO APPLY SALES ORDERS APPLICATION HISTORY FINANCIAL APPROVALS CARD PROCESSING CHARGES

Tran. Nbr.	Proc. Center	Tran. Type	Tran. Status	Tran. Amount (Est.)	Referen. Tran. Nbr.	Proc. Center Auth. Nbr.	Proc. Center Response Reason	Tran. Time
783	BRAINTREE	Void	Approved	130.0000	780	e75vdebm	VOIDED	5/22/2023
780	BRAINTREE	Capture Authorized	Approved	130.0000	779	e75vdebm	SUBMITTED_FOR_SETTLEMENT	5/22/2023
779	BRAINTREE	Authorize Only	Approved	130.0000		e75vdebm	AUTHORIZED	5/22/2023

Void Action on Payments and Applications screen

9. Click the Credit Card Processing Information tab to view the payment details.