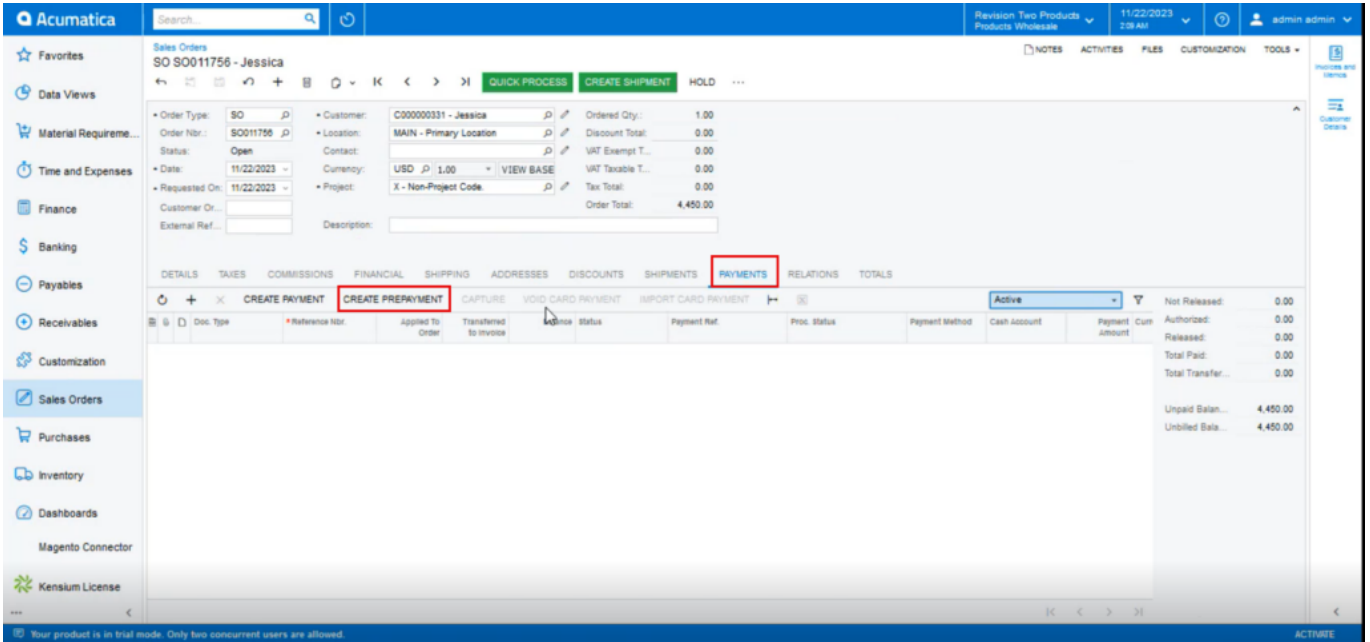


Proceed with Shipment



Before proceeding to shipment enable both the check boxes in **[Credit terms]** and **[Customer Classes]**.

- You need to click on the **[Payments]** tab in Sales Orders, then click on **[Create Prepayment]**.



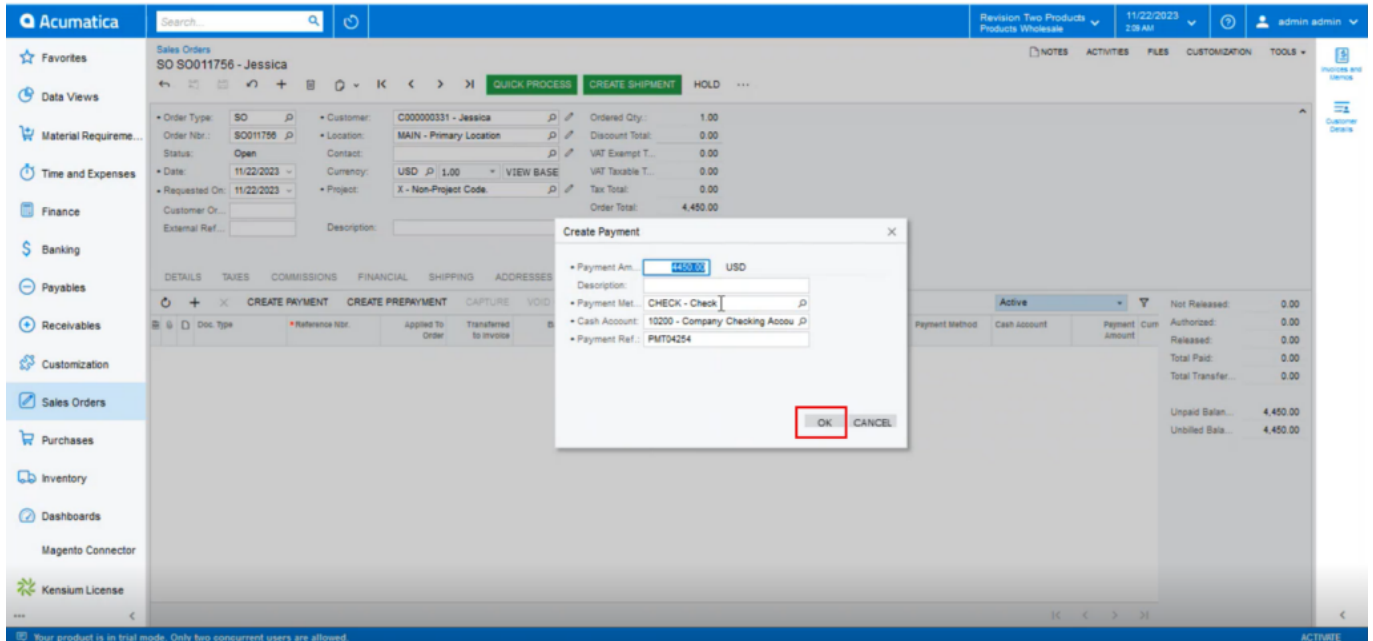
The screenshot shows the Acumatica Sales Order interface for order SO0011756. The 'PAYMENTS' tab is selected, and the 'CREATE PREPAYMENT' button is highlighted. The order details include:

- Order Type: SO
- Order Nbr.: SO011756
- Status: Open
- Date: 11/22/2023
- Requested On: 11/22/2023
- Customer: C00000031 - Jessica
- Location: MAIN - Primary Location
- Contact: [blank]
- Currency: USD 1.00
- Project: X - Non-Project Code
- Ordered Qty: 1.00
- Discount Total: 0.00
- VAT Exempt T.: 0.00
- VAT Taxable T.: 0.00
- Tax Total: 0.00
- Order Total: 4,450.00

The 'PAYMENTS' tab shows a table with columns: Doc. Type, Reference Nbr., Applied To Order, Transferred to Invoice, Balance, Status, Payment Ref., Proc. Status, Payment Method, Cash account, Payment Amount, Cum. Amount, Not Released, Authorized, Released, Total Paid, Total Transfer, Unpaid Balan., and Unbilled Balan.. The 'CREATE PREPAYMENT' button is highlighted in the table.

Create Payment

- You can view a pop-up with create payment and check for the **[Payment Am..]** and click on **[OK]**.



The screenshot shows the Acumatica software interface. A 'Create Payment' dialog box is open, displaying the following information:

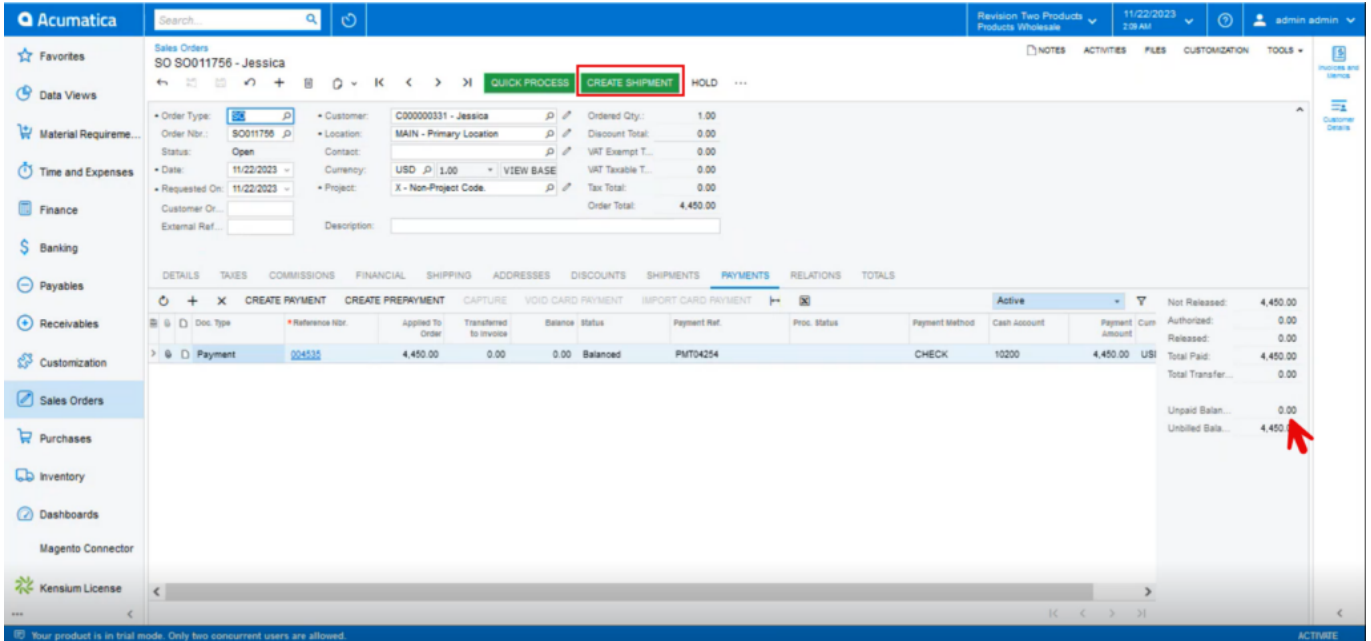
- Payment Am.: 4450.00 USD
- Description:
- Payment Met.: CHECK - Check
- Cash Account: 10200 - Company Checking Acct
- Payment Ref.: PMT04254

The 'OK' button is highlighted with a red box. The background shows a 'Sales Orders' screen for order SO0011756 - Jessica, with various tabs like DETAILS, TAXES, COMMISSIONS, FINANCIAL, SHIPPING, and ADDRESSES. A summary table on the right shows financial details:

Payment Method	Cash Account	Payment	Cum Amount
Not Released:			0.00
Authorized:			0.00
Released:			0.00
Total Paid:			0.00
Total Transfer:			0.00
Unpaid Balan:			4,450.00
Unbilled Balan:			4,450.00

Click on OK

- Once the payment is done, you can see that **[Unpaid Balance]** as **[Zero]** then click on **[Create Shipment]**.



Acumatica

Search

Revision Two Products
Products Wholesale

11/22/2023
1:09 AM

admin admin

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

Sales Orders
SO SO011756 - Jessica

QUICK PROCESS **CREATE SHIPMENT** HOLD

Order Type: SO Order Nbr.: SO011756 Status: Open Date: 11/22/2023 Requested On: 11/22/2023 Customer Cr.: External Ref.: Description:

Customer: C000000331 - Jessica Location: MAIN - Primary Location Contact: Currency: USD 1.00 Project: X - Non-Project Code

Ordered Qty.: 1.00 Discount Total: 0.00 VAT Exempt T.: 0.00 VAT Taxable T.: 0.00 Tax Total: 0.00 Order Total: 4,450.00

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	Transferred to Invoice	Balance	Status	Payment Ref.	Proc. Status	Payment Method	Cash Account	Payment Amount	Cum Amount	Not Released	Authorized	Released	Total Paid	Total Transfer	Unpaid Balan	Unbilled Sala
Payment	004535	4,450.00	0.00	0.00	Balanced	PMT04254		CHECK	10200	4,450.00	US\$	4,450.00	0.00	0.00	4,450.00	0.00	0.00	4,450.00

Not Released: 4,450.00
Authorized: 0.00
Released: 0.00
Total Paid: 4,450.00
Total Transfer: 0.00
Unpaid Balan: 0.00
Unbilled Sala: 4,450.00

Your product is in trial mode. Only two concurrent users are allowed.

ACTHREE

Click on Create Shipment

- Upon selecting **[Confirm Shipment]**, you can **[Prepare Invoice]**, completing the shipment process.



Acumatica

Search

Revision Two Products Wholesale

11/22/2023 2:16 AM

admin admin

Favorites

Data Views

Material Require...

Time and Expenses

Finance

Banking

Payables

Receivables

Customization

Sales Orders

Purchases

Inventory

Dashboards

Magento Connector

Kensium License

Shipments

005314 - Jessica

PREPARE INVOICE

UPDATE IN

Shipment Nbr: 005314

Customer: C000000331

Shipped Qua... 1.00

Type: Shipment

Location: MAIN - Primary Station

Control Quan... 1.00

Status: Confirmed

Warehouse ID: WHOLESALE - Wholesale Warehouse

Shipped Weig... 27.200000

Operation: Issue

Workgroup:

Shipped Volu... 30.000000

Shipment Date: 11/22/2023

Owner:

Packages: 2

Package Wei... 27.280000

Description:

DETAILS

ORDERS

SHIPPING

PACKAGES

LINE DETAILS

ADD ORDER

INVENTORY SUMMARY

Order Nbr.	Inventory ID	Free Item	Warehouse	Location	UCM	Shipped Qty	Ordered Qty	Open Qty	Picked Qty	Packed Qty	Lot/Serial Nbr.	Expiration Date	Reason Code	Description
SO 00011758	AACOMPVT21		WHOLESALE	R1S1	PACK	1.00	1.00	0.00	0.00	0.00				Acer La

On Hand 189.50 PRCK, Available 164.00 PRCK, Available for Shipping 164.00 PRCK

Your product is in trial mode. Only two concurrent users are allowed.

ACTIVE

Invoice