

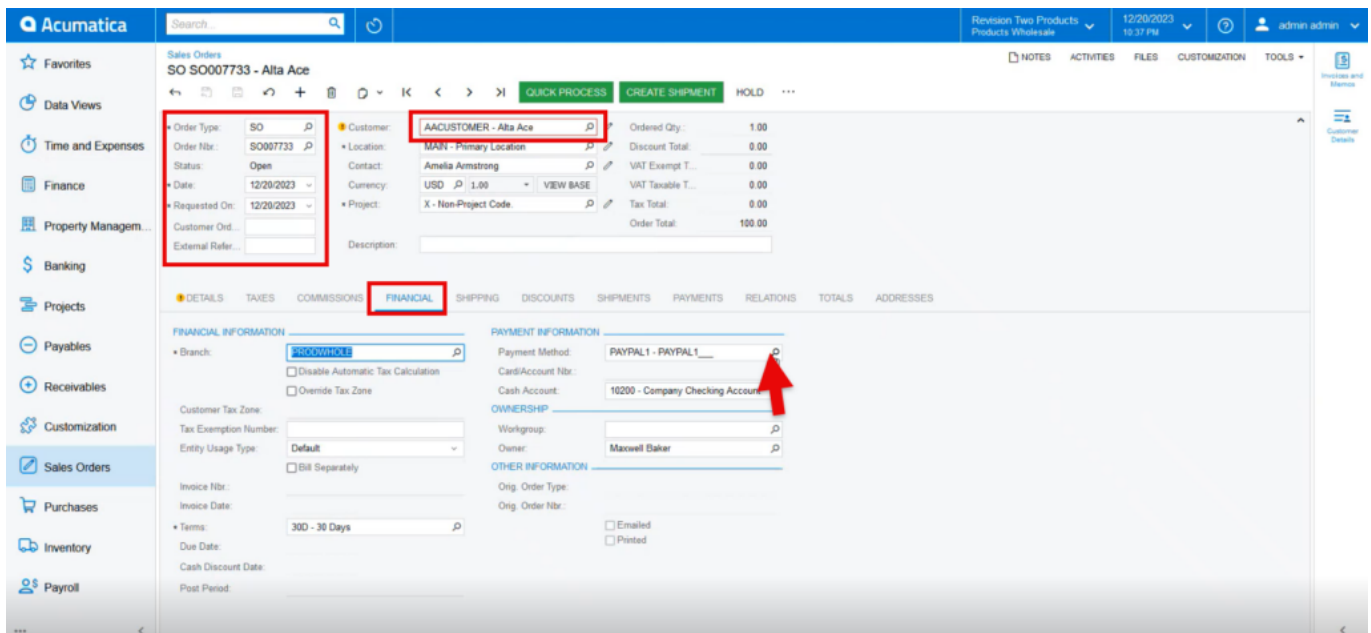
Send a PayPal Invoice



Acumatica allows users to generate PayPal invoices directly from within the system. This integration streamlines the invoicing process and eliminates the need for manual data entry or switching between different platforms.

Once an invoice is generated, Acumatica can automatically send it to the customer through PayPal. This ensures efficient and timely delivery of invoices, enhancing customer communication and reducing delays in payment.

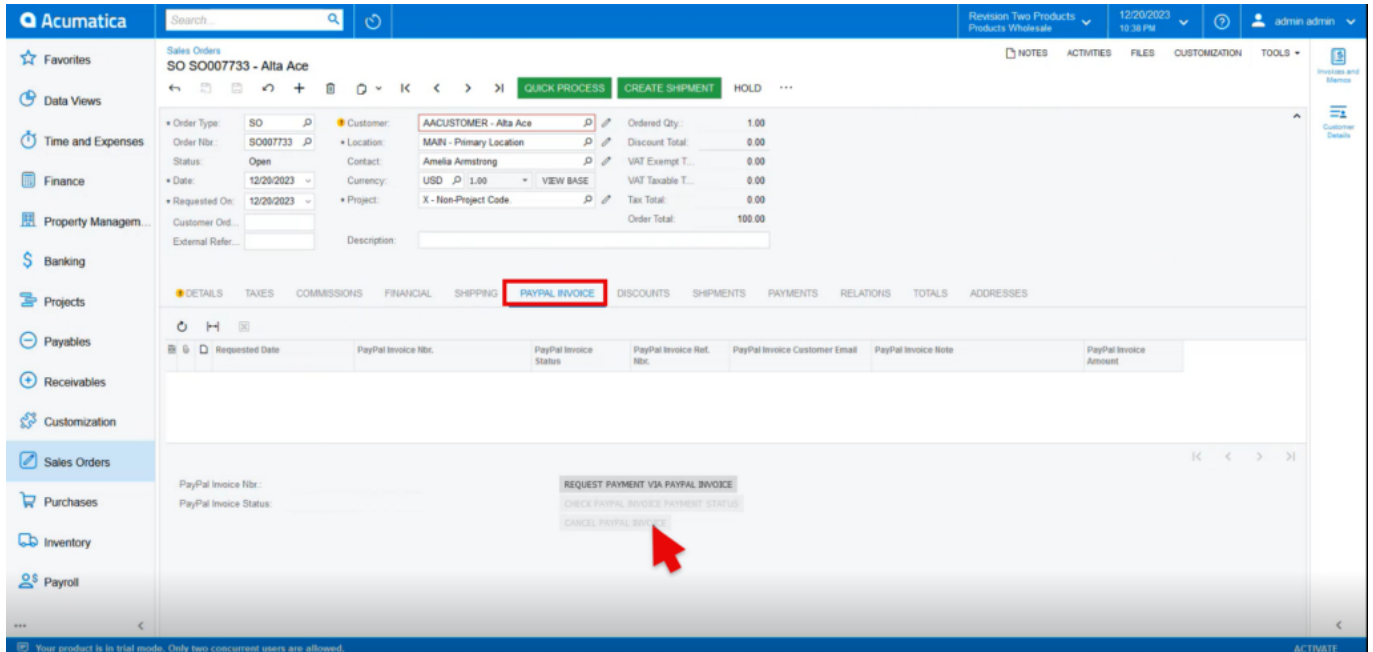
- Search for the **[Customer]**.
- Click on the **[Financial]** Tab.
- Search for the mapped **[Payment Method]**.



The screenshot shows the Acumatica Sales Orders interface. The 'Sales Orders' section is active, displaying details for 'SO SO007733 - Alta Ace'. The 'FINANCIAL' tab is selected. The 'Customer' field is highlighted with a red box, showing 'AACUSTOMER - Alta Ace'. The 'Payment Method' dropdown is also highlighted with a red box, showing 'PAYPAL1 - PAYPAL1'. A red arrow points to the 'Payment Method' dropdown.

Sales Orders

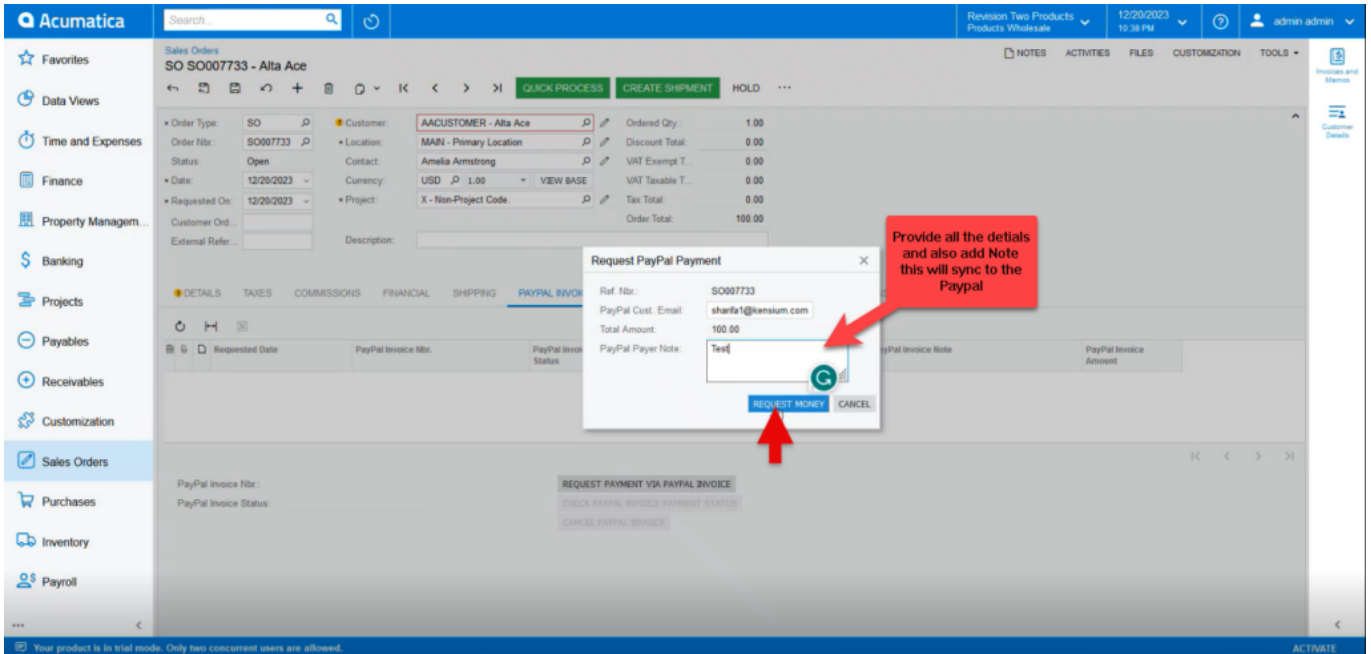
- Click on **[PayPal Invoice]** tab.
- A screen with 3 options will appear.
- To get Invoice click on **[Request Payment Via Paypal Invoice]**.



The screenshot shows the Acumatica software interface. The top navigation bar includes the Acumatica logo, a search bar, and user information. The left sidebar lists various modules like Favorites, Data Views, Time and Expenses, Finance, Property Management, Banking, Projects, Payables, Receivables, Customization, Sales Orders, Purchases, Inventory, and Payroll. The main area displays a sales order for 'SO SO007733 - Alta Ace'. The 'PAYPAL INVOICE' tab is selected, showing a table with columns for Requested Date, PayPal Invoice Nbr., PayPal Invoice Status, PayPal Invoice Ref. Nbr., PayPal Invoice Customer Email, PayPal Invoice Note, and PayPal Invoice Amount. A red arrow points to the 'REQUEST PAYMENT VIA PAYPAL INVOICE' button.

Sales Orders

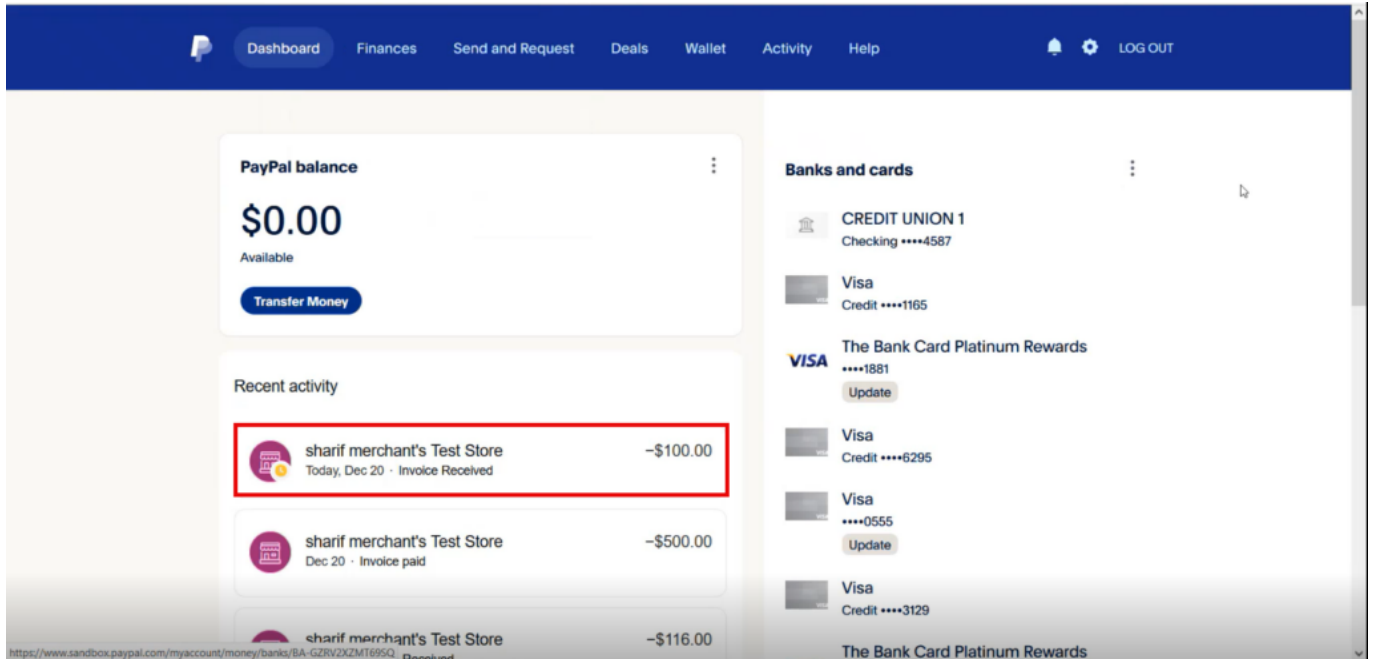
- The Reference Number will be the Order Number of the sales order.
- Enter the PayPal Customer Email corresponding to their account.
- PayPal accounts are identified by the email used for the PayPal account.
- This can differ from customer emails as they are entered in Acumatica.
- Ensure that the email associated with the customer's PayPal account is being used within the invoice request.
- The Total Amount is the amount being requested from the customer as it corresponds to the order total.



The screenshot shows the Acumatica software interface. On the left is a navigation menu with options like Favorites, Data Views, Time and Expenses, Finance, Property Management, Banking, Projects, Payables, Receivables, Customization, Sales Orders, Purchases, Inventory, and Payroll. The main area displays a Sales Order for 'Alta Ace' with details such as Order Nbr. (SO007733), Status (Open), Date (12/20/2023), and Customer (AACUSTOMER - Alta Ace). A 'Request PayPal Payment' dialog box is open in the center, containing fields for Ref. Nbr. (SO007733), PayPal Cust. Email (sharfa1@kensium.com), Total Amount (100.00), and PayPal Payer Note (Test). A red arrow points to the 'REQUEST MONEY' button in the dialog box. A red callout box with the text 'Provide all the details and also add Note this will sync to the Paypal' points to the 'PayPal Payer Note' field. At the bottom of the dialog box, there are buttons for 'REQUEST MONEY' and 'CANCEL'. Below the dialog box, there are buttons for 'REQUEST PAYMENT VSA PAYPAL INVOICE', 'CHECK PAYPAL INVOICE PAYMENT STATUS', and 'CANCEL PAYPAL INVOICE'.

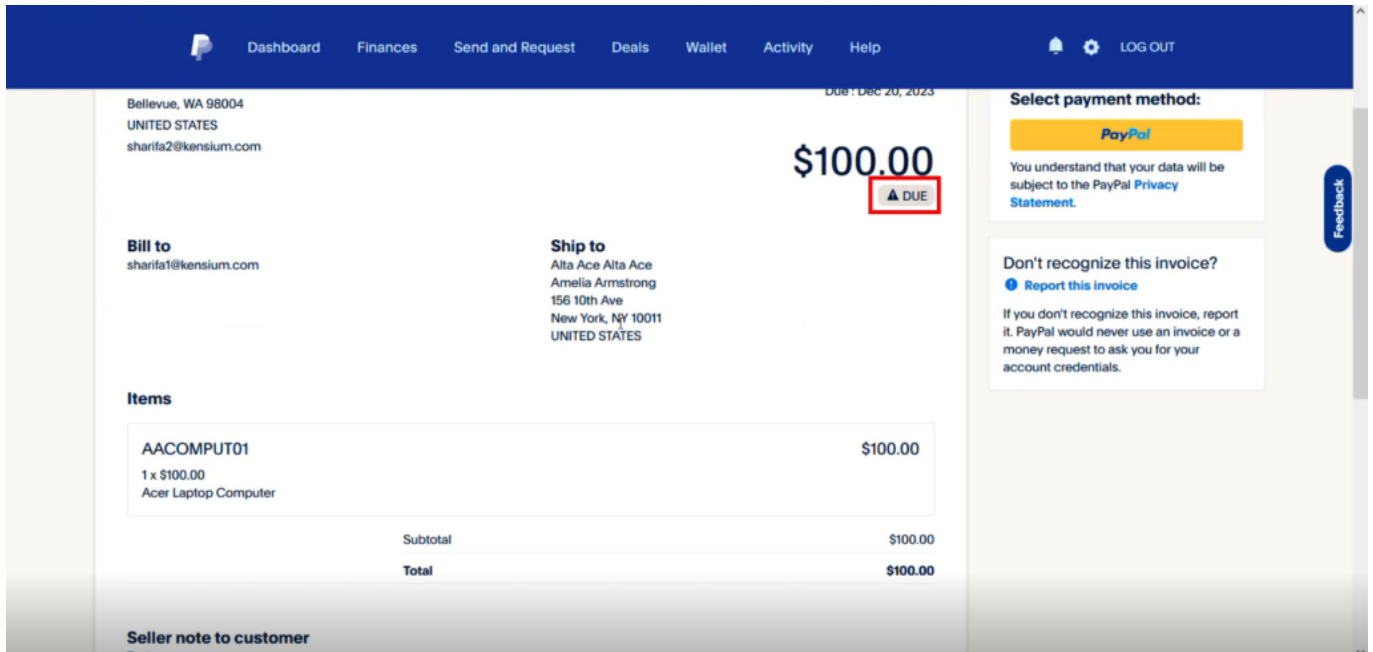
Sales Orders

- Click **[Save]**.
- The invoice will be sent to the customer's account for payment.



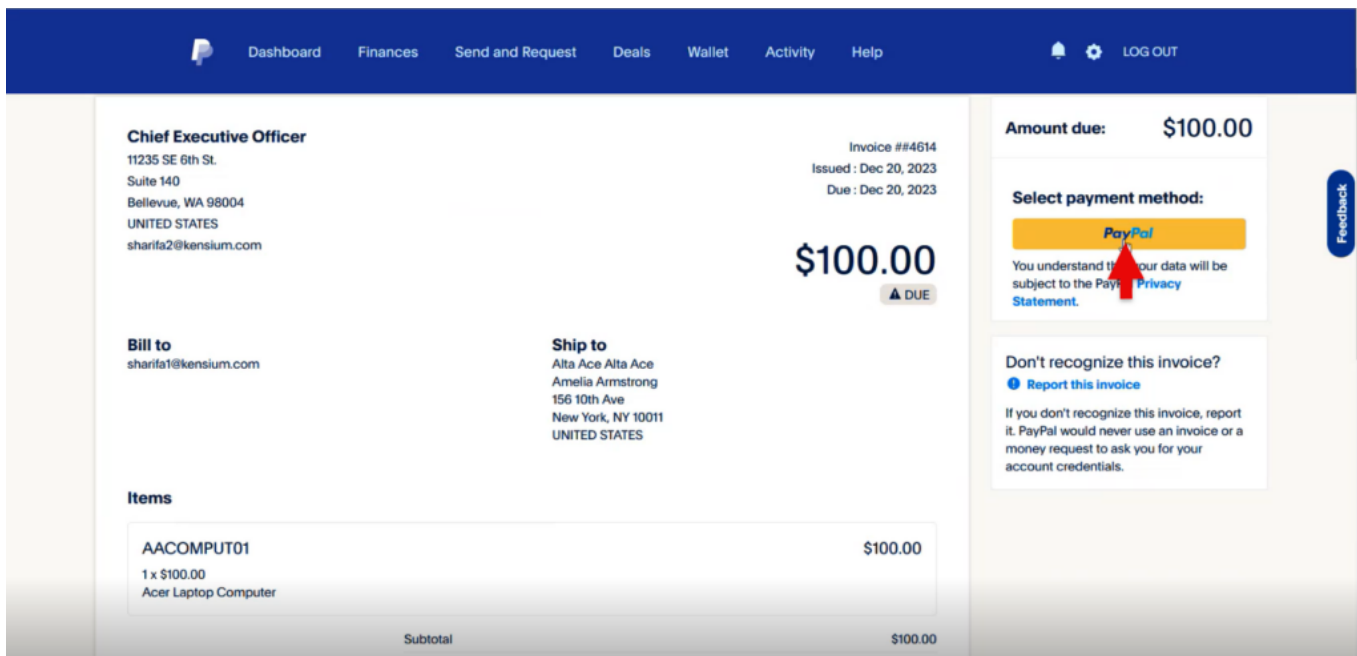
Paypal

- Click on the Invoice.



Paypal

- Click on [Paypal].



Dashboard Finances Send and Request Deals Wallet Activity Help LOG OUT

Chief Executive Officer
11235 SE 6th St.
Suite 140
Bellevue, WA 98004
UNITED STATES
sharifa2@kensium.com

Invoice ##4614
Issued : Dec 20, 2023
Due : Dec 20, 2023

\$100.00
▲ DUE

Amount due: \$100.00

Select payment method:

[PayPal](#)

You understand that your data will be subject to the PayPal [Privacy Statement](#).

Don't recognize this invoice?
[Report this invoice](#)

If you don't recognize this invoice, report it. PayPal would never use an invoice or a money request to ask you for your account credentials.

Bill to
sharifa1@kensium.com

Ship to
Alta Ace Alta Ace
Amelia Armstrong
156 10th Ave
New York, NY 10011
UNITED STATES

Items

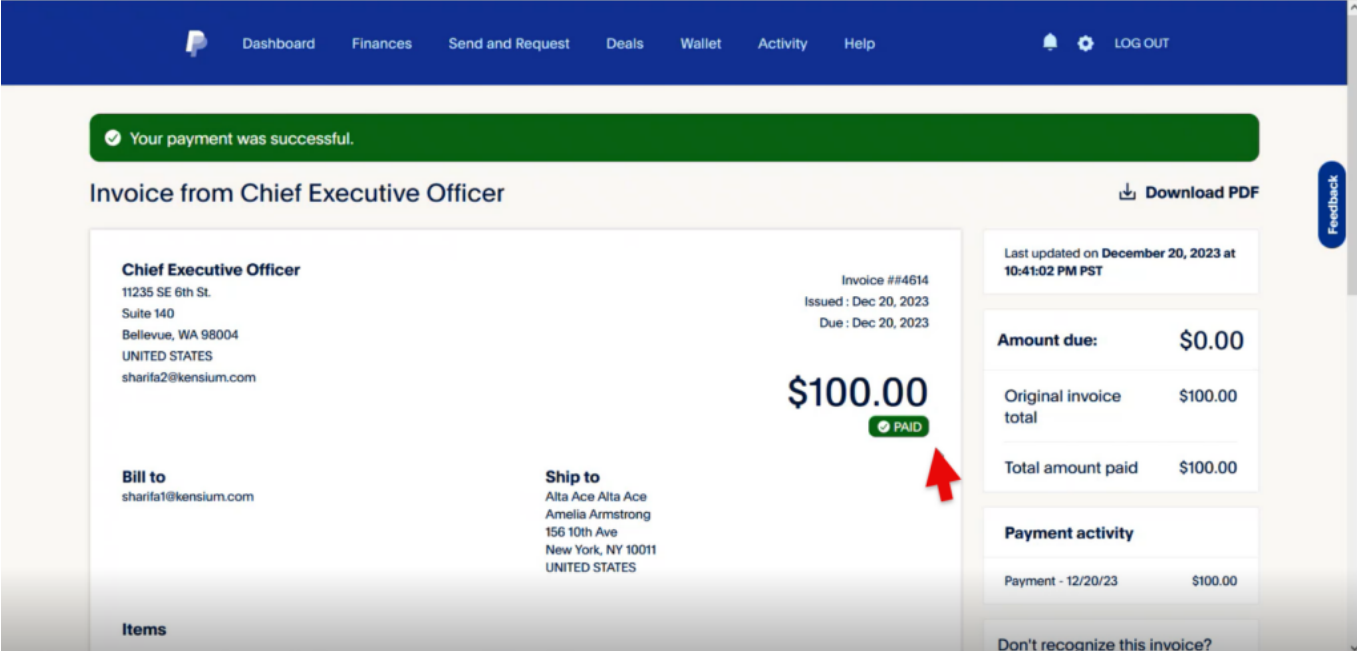
AACOMPUT01 1 x \$100.00 Acer Laptop Computer	\$100.00
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Subtotal \$100.00

Feedback

Paypal

- Click on [Complete Purchase].



The screenshot displays the Fusion PayPal Invoicing dashboard. At the top, a green banner confirms "Your payment was successful." Below this, the main section is titled "Invoice from Chief Executive Officer". On the left, the "Chief Executive Officer" contact information is listed: 11235 SE 6th St., Suite 140, Bellevue, WA 98004, UNITED STATES, with email sharifa2@kensium.com. The "Invoice #4614" is issued on Dec 20, 2023, with a due date of Dec 20, 2023. The amount due is \$100.00, and a green "PAID" button with a checkmark is visible next to it, highlighted by a red arrow. To the right, a "Download PDF" link is present. Below the invoice details, the "Payment activity" table shows a payment of \$100.00 on 12/20/23. The "Amount due" section shows \$0.00, and the "Original invoice total" is \$100.00. A "Feedback" button is located on the far right.

Sales Order

- You can view the invoice with **[Paid]** Status.
- Once the payment is done, a new line will appear in the table above the initial payment request with the **[PayPal Invoice Status]** listed as **[PAID]**