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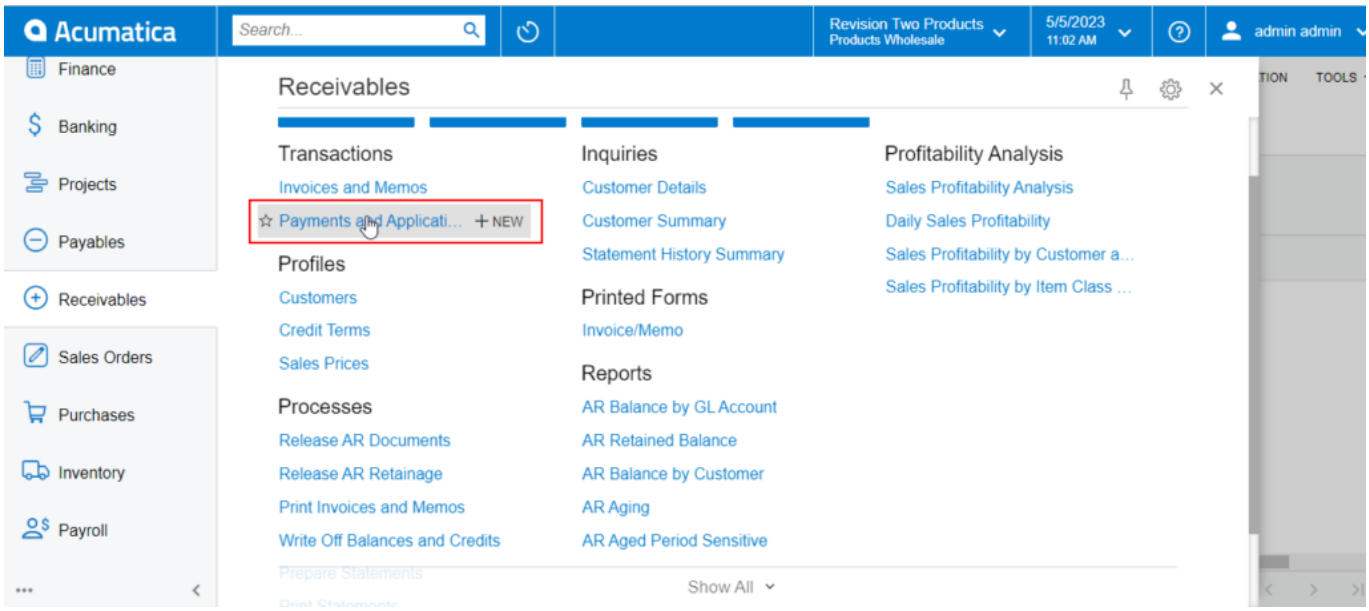
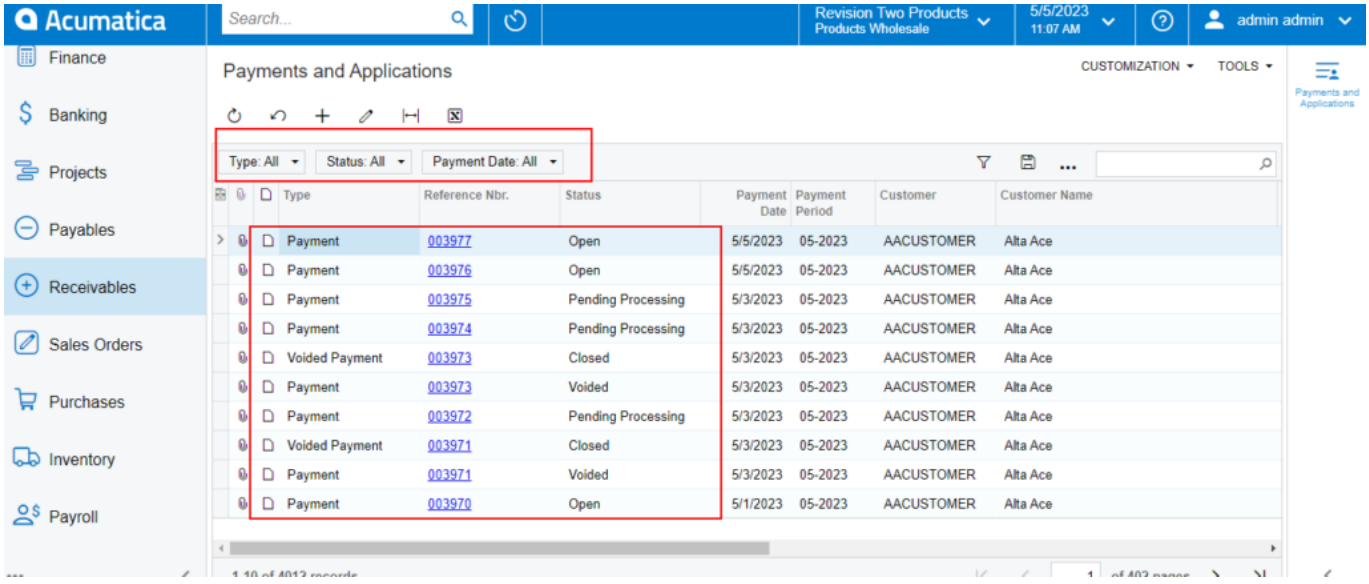
Paypal Invoicing

Steps to process a PayPal Invoice on Payments

- To check the status of a PayPal invoice on an individual payment and application, in Acumatica, **[Receivables]** workspace and click **[Payments and Applications].**



Payments and Applications under Receivables



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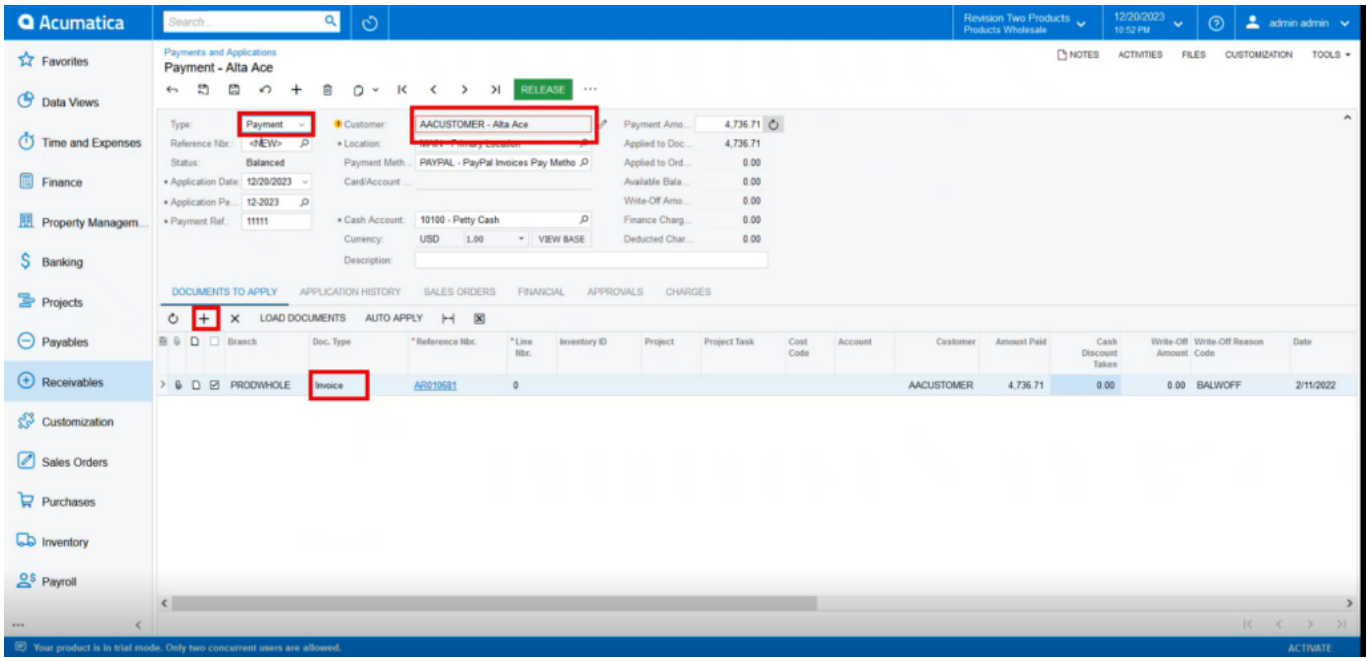
Payments and Applications

- Click on **[+]** icon.
- Upon clicking **[+]** icon you will be redirected to a new screen.
- Select Action Type as **[Payment].**
- Search for **[Customer].**
- Click on **[+]** icon.
- Select **[Doc.type]** as **[Invoice].**



Payments and Applications

- Click on **[Refresh]** and then Click on **[Save].**

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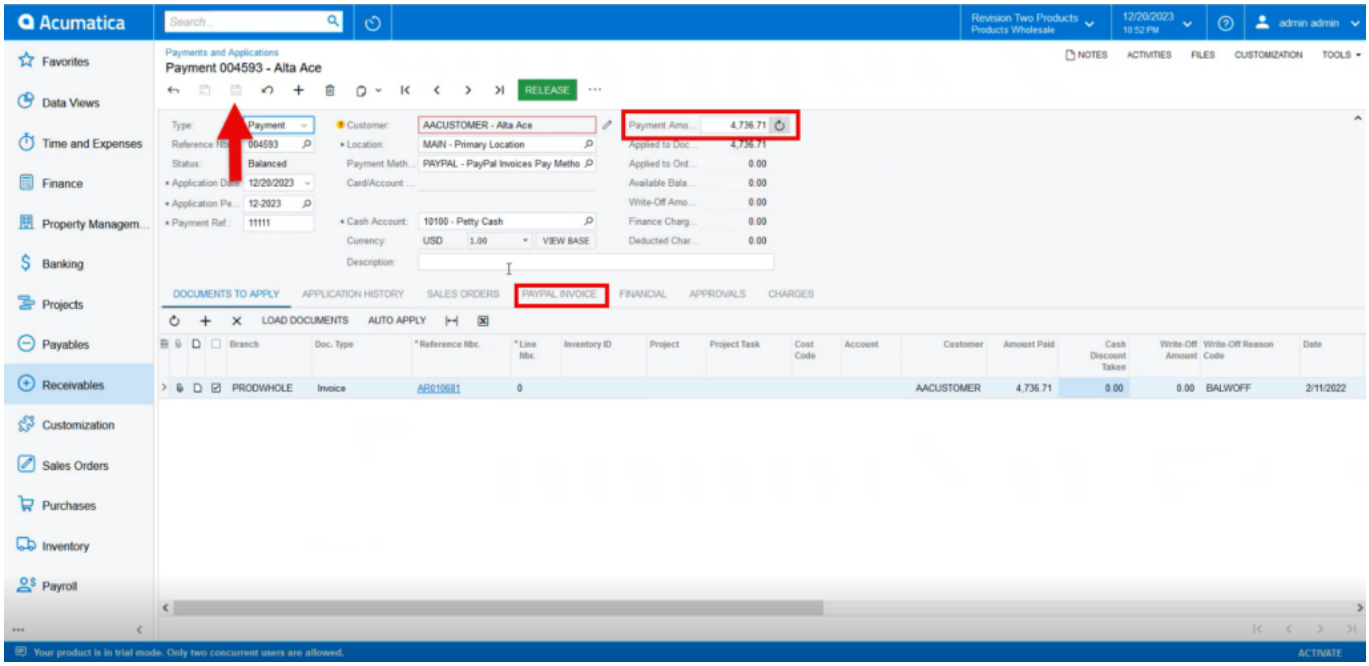

Payments and Applications

- Click on **[PayPal Invoice]** tab.
- Select **[Paypal]** as Payment Method.
- A screen with 3 options will appear.
- To get Invoice click on [**Request Payment Via Paypal Invoice]**.
- Enter a **[PayPal Payer**] Note if necessary.
- These are displayed in the memo line of the invoice.
- Click **[Request Money].**
- A line item will appear in the PayPal Invoice tab showing the date and time payment was requested, the invoice number, the invoice status, and the invoice reference number.
- The PayPal customer email, note, and invoice amount will also be listed.
- Click **[Save].**
- The invoice will be sent to the customer’s account for payment.

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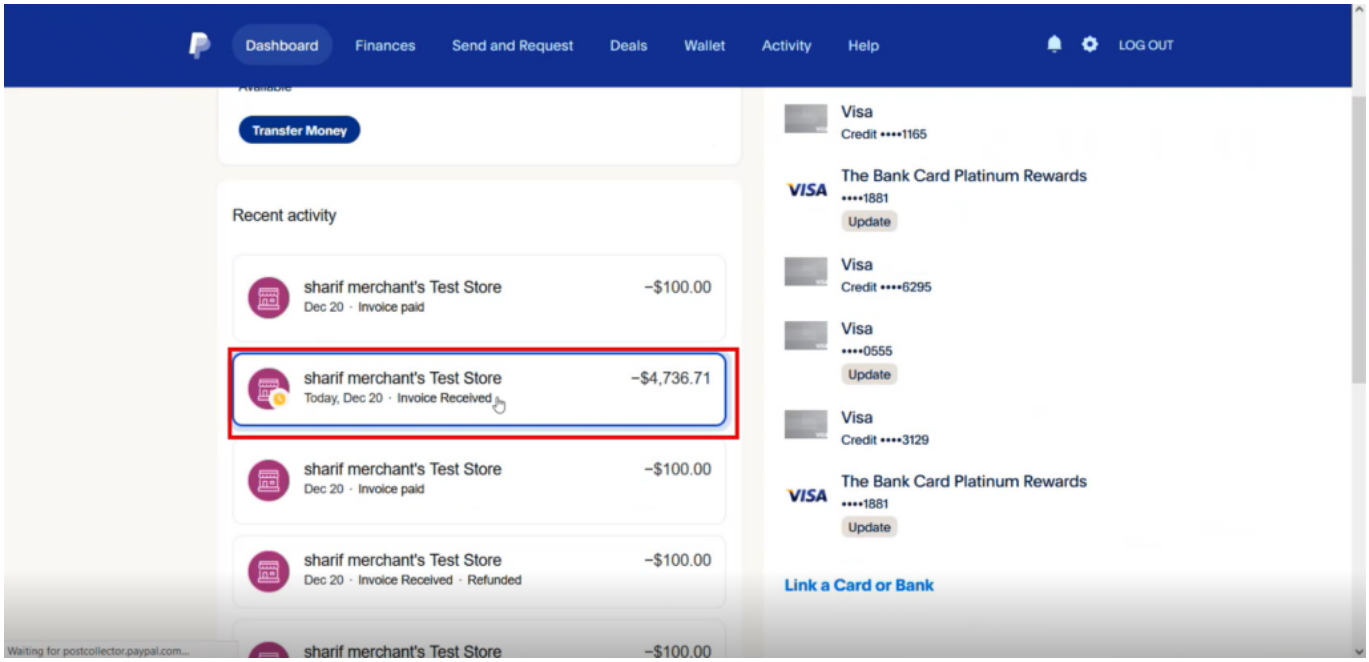
Paypal Invoicing



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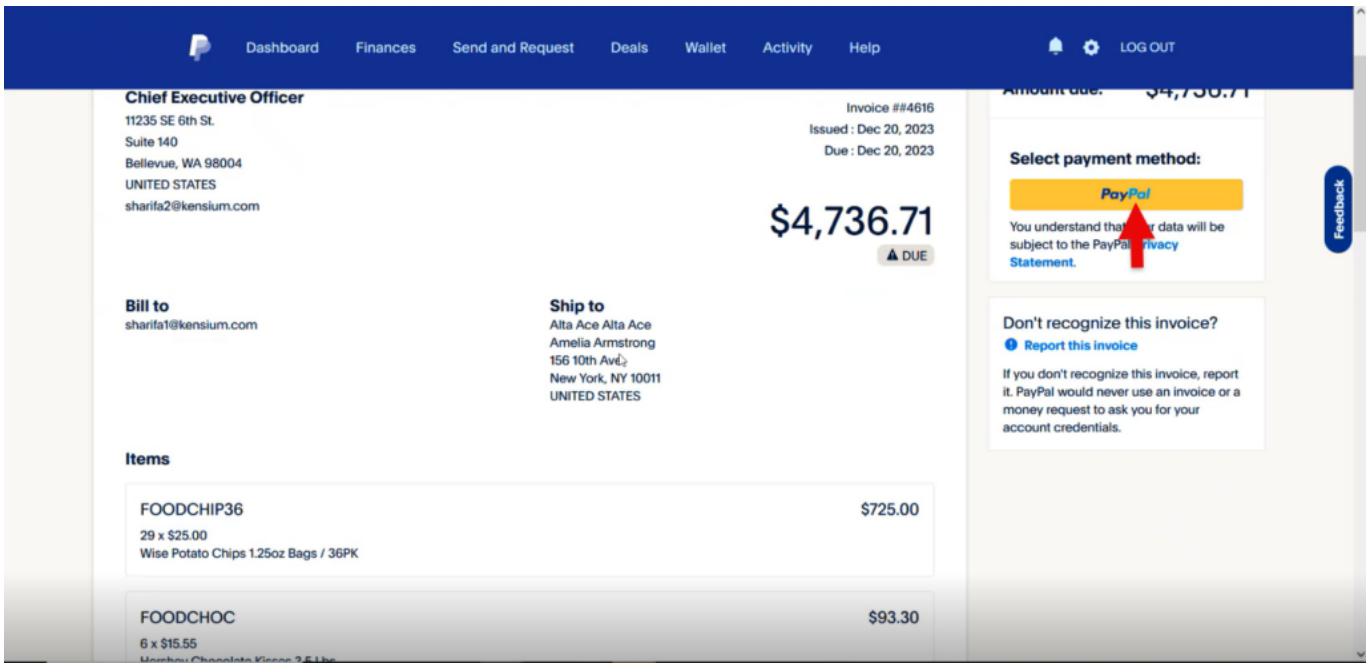

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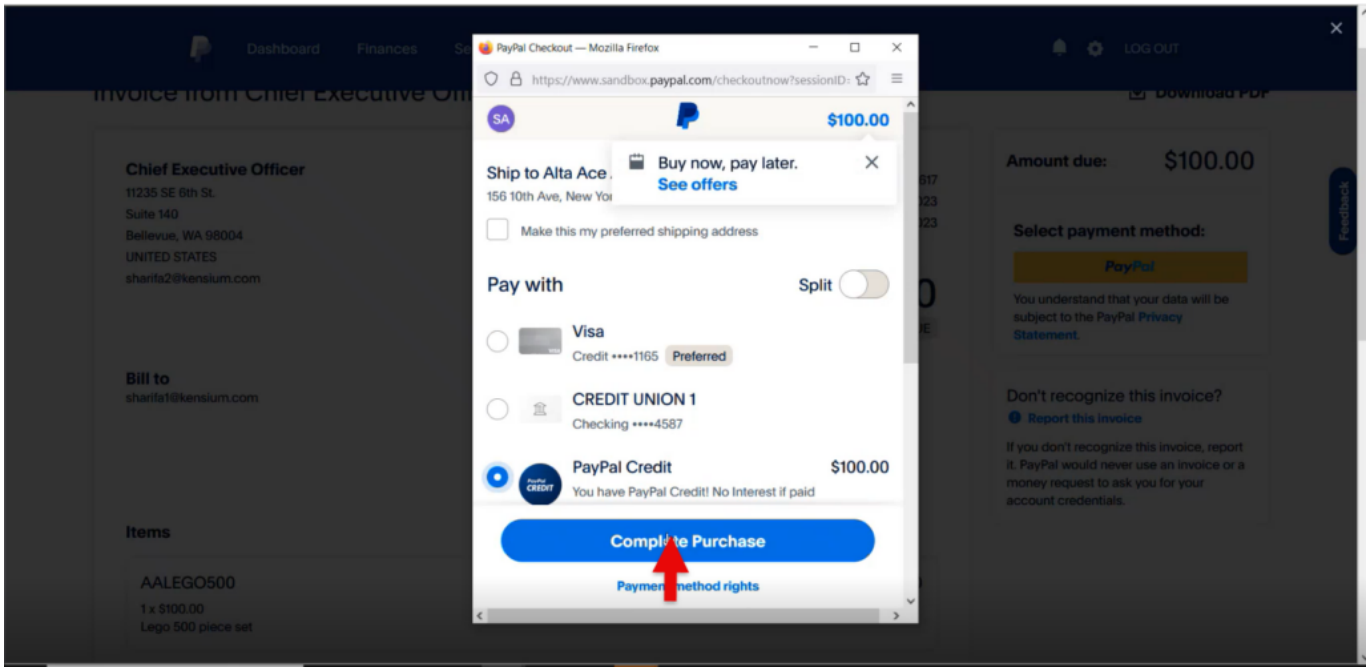
- Check all the invoice details.
- You can see Payment is [**DUE].**
- Click on **[PayPal].**
- Select **[Pay with].**



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- Click on **[Complete Purchase].**
- Status for the Payment is **[PAID].**
- Navigate back to the sales order screen and click on **[Check Paypal Invoice Payment 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]**

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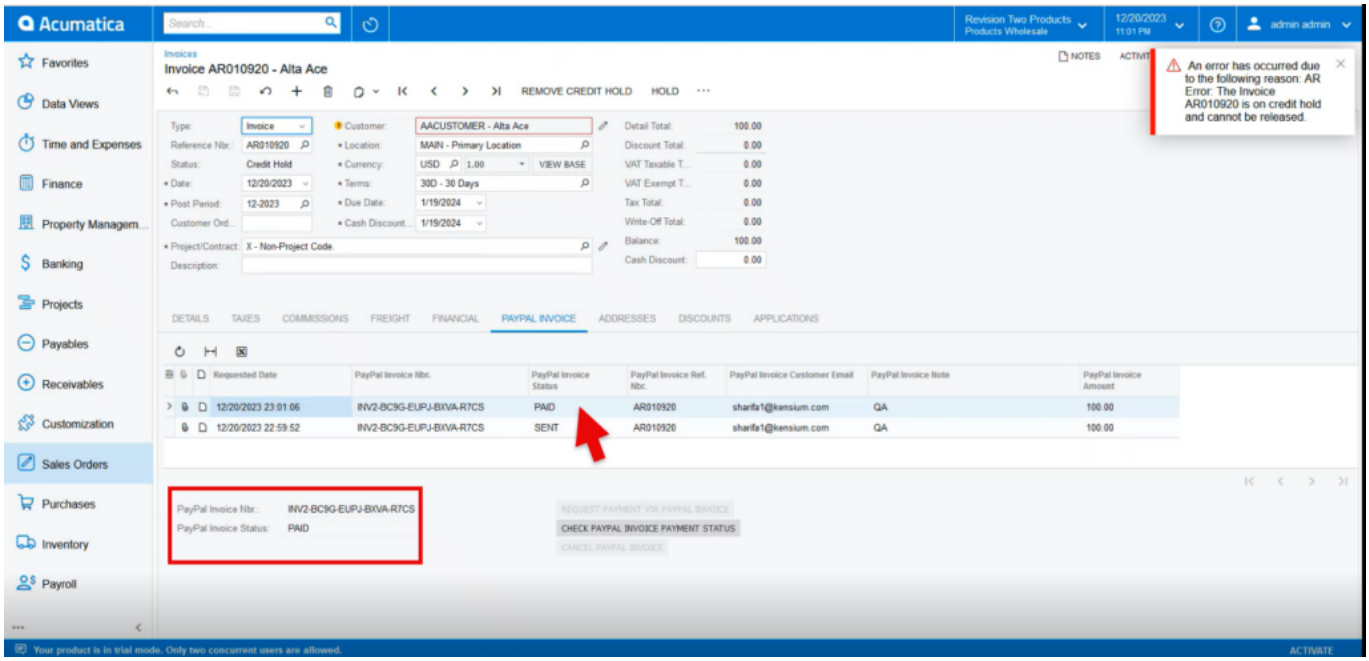

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- If the payment has not been completed, a red **[X]** will appear at the top of the sales order with an error message stating that the invoice has not been paid. No additional line will appear on the table.

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