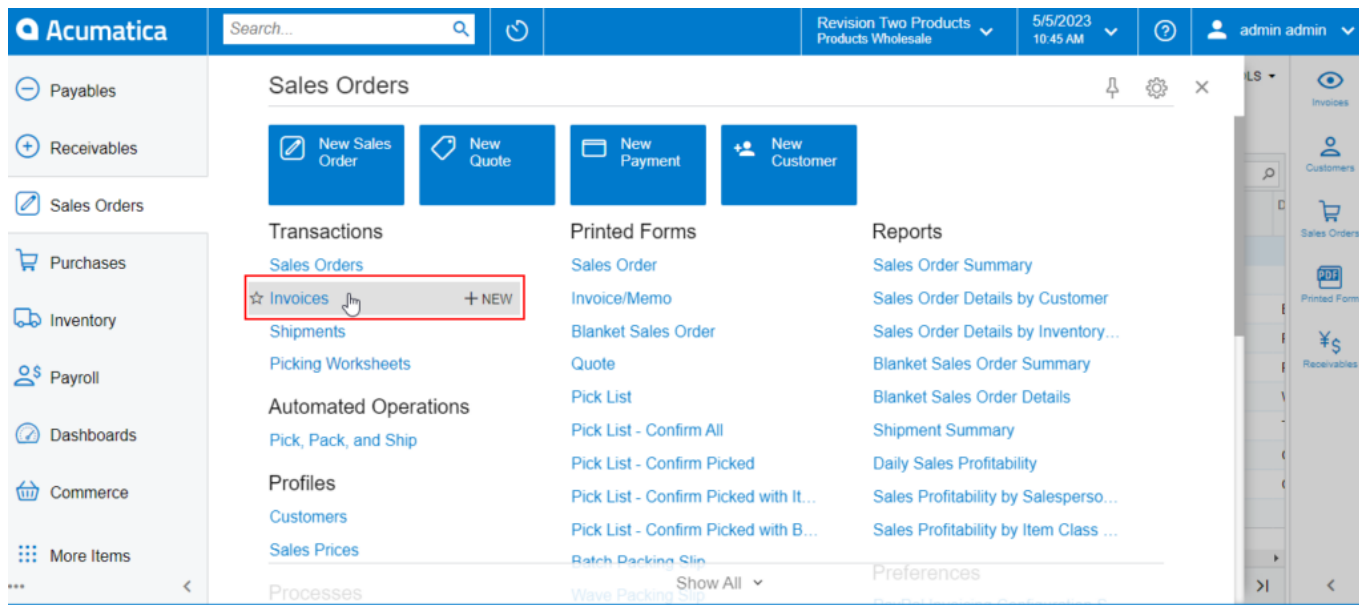


Steps to process a PayPal Invoice



- To check the status of a PayPal invoice on an individual Acumatica invoice, navigate to the Sales Order workspace and click Invoices.



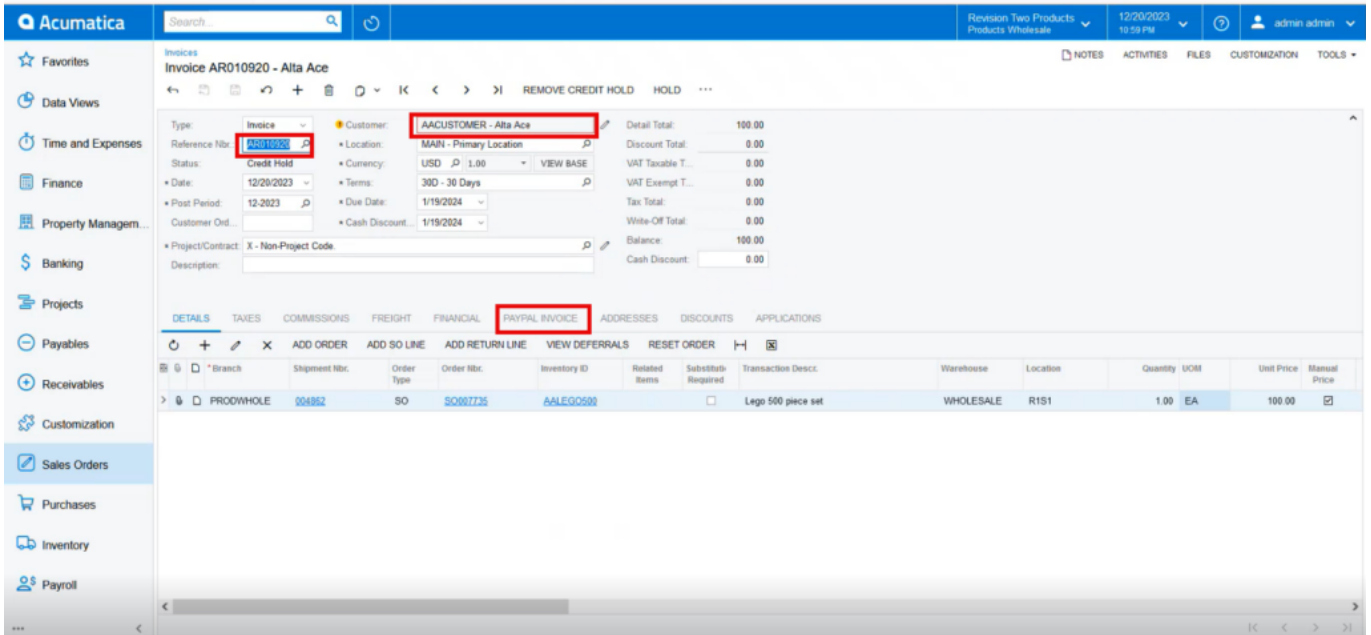
Invoices

- Click on **[+]** icon.

Acumatica		Search...		Revision Two Products Products Wholesale	5/5/2023 10:49 AM	?	admin admin
Invoices		CUSTOMIZATION TOOLS					
Type: All Status: All Date: All Customer: All							
Type	Reference Nbr.	Status	Date	Post Period	Customer	Customer Name	
Invoice	AR010726	Open	3/8/2023	03-2023	AACUSTOMER	Alta Ace	
Invoice	AR010725	Balanced	3/8/2023	03-2023	AACUSTOMER	Alta Ace	
Invoice	AR010721	Open	2/17/2022	02-2022	ABCSTUDIOS	ABC Studios Inc	
Invoice	AR010720	Open	2/28/2022	02-2022	ARTCAGES	Artcages	
Invoice	AR010719	Open	2/28/2022	02-2022	WESTERNTRC	Western Star Trucks	
Invoice	AR010718	Open	2/12/2022	02-2022	WIDPARENT	Widget Consolidated Holdings	
Invoice	AR010717	Open	2/23/2022	02-2022	PRECISION	Precision Photos	
Invoice	AR010716	Open	2/28/2022	02-2022	CJOEQUIP	Jersey Central Office Equip	
Invoice	AR010715	Open	2/28/2022	02-2022	ELEVATION	Elevation Computers	
Invoice	AR010714	Open	2/28/2022	02-2022	BRASSKEY	Brass Key Bar	

Invoices

- Upon clicking **[+]** icon you will be redirected to a new screen.
- Search for the **[Customer]**.
- Enter the **[Reference Nbr]**, the sales order related to this reference Nbr will pop-up below details tab.



Acumatica

Invoice AR010920 - Alta Ace

Customer: AACUSTOMER - Alta Ace

Location: MAIN - Primary Location

Currency: USD 1.00

Terms: 300 - 30 Days

Date: 12/20/2023

Post Period: 12-2023

Due Date: 1/19/2024

Cash Discount: 1/19/2024

Project/Contract: X - Non-Project Code

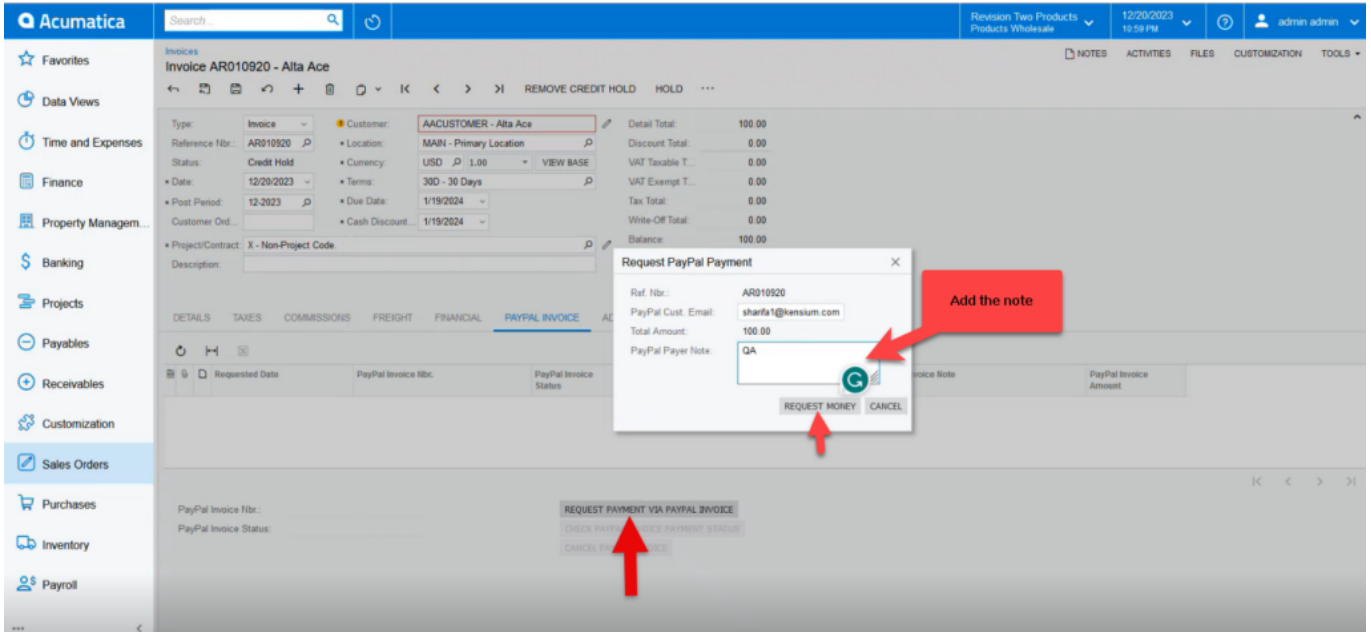
Description:

DETAILS TAXES COMMISSIONS FREIGHT FINANCIAL **PAYPAL INVOICE** ADDRESSES DISCOUNTS APPLICATIONS

Branch	Shipment Nbr.	Order Type	Order Nbr.	Inventory ID	Related Items	Substituted Required	Transaction Desc.	Warehouse	Location	Quantity	UOM	Unit Price	Manual Price
PRODWHOUSE	004852	SO	SO987735	AALEGO590			Lego 500 piece set	WHOLESALE	R1S1	1.00	EA	100.00	

Invoices

- 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]**.



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 an 'Invoice AR010920 - Alta Ace'. A 'Request PayPal Payment' dialog box is open in the center. It contains the following fields: 'Ref. Nbr.' (AR010920), 'PayPal Cust. Email' (sharfa1@hensum.com), 'Total Amount' (100.00), and 'PayPal Payer Note' (QA). A red arrow points to the 'REQUEST MONEY' button at the bottom of the dialog. Another red arrow points to the 'PayPal Payer Note' field with the text 'Add the note'. Below the dialog box, a red arrow points to the 'REQUEST PAYMENT VIA PAYPAL INVOICE' button in the background interface.

Invoices

- 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.

Acumatica

Search

Revision Two Products
Products Wholesale

12/20/2023
11:00 PM

admin admin

NOTES ACTIVATE

The operation has completed.

Invoice AR010920 - Alta Ace

REMOVE CREDIT HOLD HOLD

Type: Invoice Customer: AACUSTOMER - Alta Ace Detail Total: 100.00

Reference Nbr.: AR010920 Location: MAIN - Primary Location Discount Total: 0.00

Status: Credit Hold Currency: USD 1.00 VAT Taxable T... 0.00

Date: 12/20/2023 Terms: 30D - 30 Days VAT Exempt T... 0.00

Post Period: 12/2023 Due Date: 1/19/2024 Tax Total: 0.00

Customer Ord... Cash Discount: 1/19/2024 Write-Off Total: 0.00

Project/Contract: X - Non-Project Code Balance: 100.00

Description: Cash Discount: 0.00

DETAILS TAXES COMMISSIONS FREIGHT FINANCIAL **PAYPAL INVOICE** ADDRESSES DISCOUNTS APPLICATIONS

Requested Date	PayPal Invoice Nbr.	PayPal Invoice Status	PayPal Invoice Ref. Nbr.	PayPal Invoice Customer Email	PayPal Invoice Rate	PayPal Invoice Amount
12/20/2023 22:59:52	INV2-BC9G-EUPJ-BXVA-R7CS	SENT	AR010920	sharifa1@kensium.com	QA	100.00

PayPal Invoice Nbr.: INV2-BC9G-EUPJ-BXVA-R7CS

PayPal Invoice Status: SENT

REQUEST PAYMENT VIA PAYPAL INVOICE

CHECK PAYPAL INVOICE PAYMENT STATUS

CANCEL PAYPAL INVOICE

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

ACTIVATE

Invoices

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



PayPal dashboard screenshot showing recent activity. The first transaction is highlighted with a red box:

Transaction	Amount
sharif merchant's Test Store Today, Dec 20 · Invoice Received	-\$100.00
sharif merchant's Test Store Today, Dec 20 · Invoice Received	-\$4,736.71
sharif merchant's Test Store Dec 20 · Invoice paid	-\$100.00

The right sidebar shows 'Banks and cards' with a list of credit cards and bank accounts.

Paypal

PayPal invoice screenshot showing item details and seller note:

Item	Amount
AALEGO500 1 x \$100.00 Lego 500 piece set	\$100.00
Subtotal	\$100.00
Total	\$100.00

Seller note to customer
QA
Reference AR010920

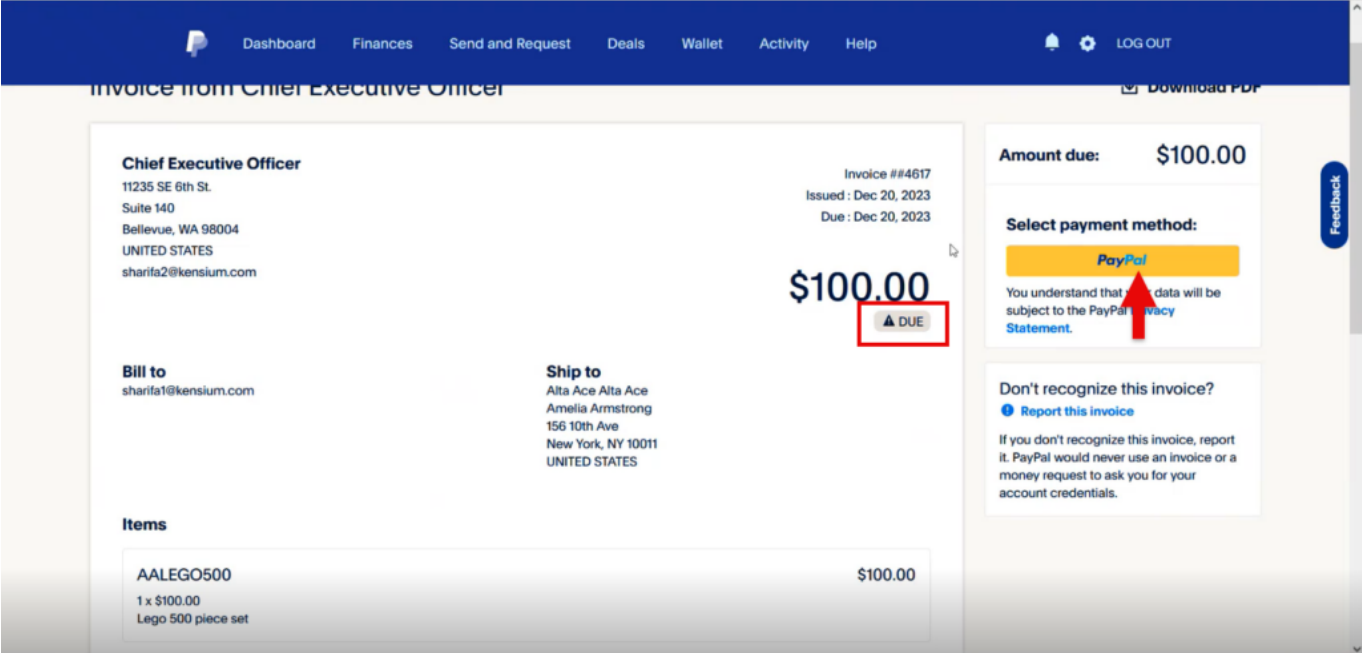
Invoice Nbr

Powered by PayPal

Paypal



- Check all the invoice details.
- You can see Payment is **[DUE]**.



Dashboard Finances Send and Request Deals Wallet Activity Help

LOG OUT

Invoice from Chief Executive Officer

Download PDF

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

Invoice ##4617
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.

Feedback

Bill to
sharifa1@kensium.com

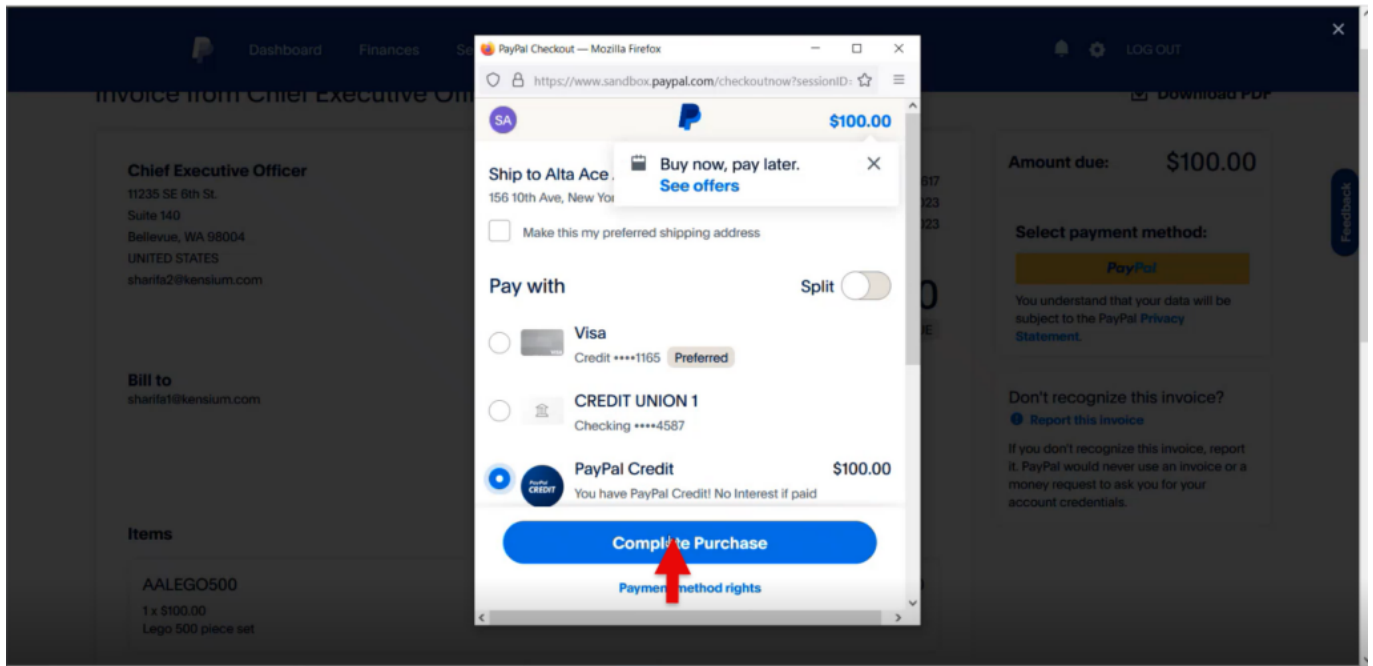
Ship to
Alta Ace Alta Ace
Amelia Armstrong
156 10th Ave
New York, NY 10011
UNITED STATES

Items

AALEGO500 1 x \$100.00 Lego 500 piece set	\$100.00
---	----------

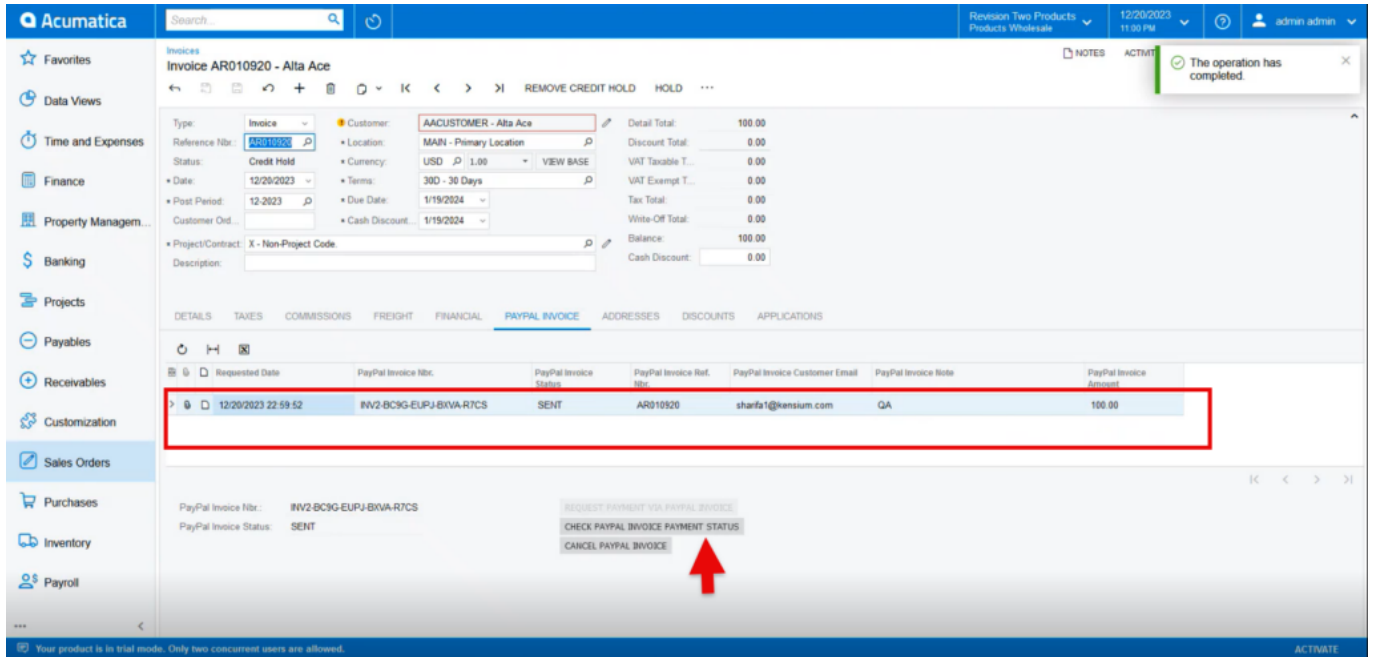
Paypal

- Click on **[PayPal]**.
- Select **[Pay with]**.



Paypal

- 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]**.



Acumatica

Search

Revision Two Products
Products Wholesale

12/20/2023
11:00 PM

admin admin

NOTES ACTIVITY

The operation has completed.

Invoice AR010920 - Alta Ace

REMOVE CREDIT HOLD HOLD

Type: Invoice Customer: AACUSTOMER - Alta Ace Detail Total: 100.00

Reference Nbr.: AR010920 Location: MAIN - Primary Location Discount Total: 0.00

Status: Credit Hold Currency: USD 1.00 View Base VAT Taxable T...: 0.00

Date: 12/20/2023 Terms: 30D - 30 Days VAT Exempt T...: 0.00

Post Period: 12/2023 Due Date: 1/19/2024 Tax Total: 0.00

Customer Ord.: Cash Discount: 1/19/2024 Write-Off Total: 0.00

Project/Contract: X - Non-Project Code Balance: 100.00

Description: Cash Discount: 0.00

DETAILS TAXES COMMISSIONS FREIGHT FINANCIAL **PAYPAL INVOICE** ADDRESSES DISCOUNTS APPLICATIONS

Requested Date	PayPal Invoice Nbr.	PayPal Invoice Status	PayPal Invoice Ref. Nbr.	PayPal Invoice Customer Email	PayPal Invoice Rate	PayPal Invoice Amount
12/20/2023 22:59:52	INV2-BC9G-EUPJ-BXVA-R7CS	SENT	AR010920	sharifa1@kensium.com	QA	100.00

PayPal Invoice Nbr.: INV2-BC9G-EUPJ-BXVA-R7CS

PayPal Invoice Status: SENT

REQUEST PAYMENT VIA PAYPAL INVOICE

CHECK PAYPAL INVOICE PAYMENT STATUS

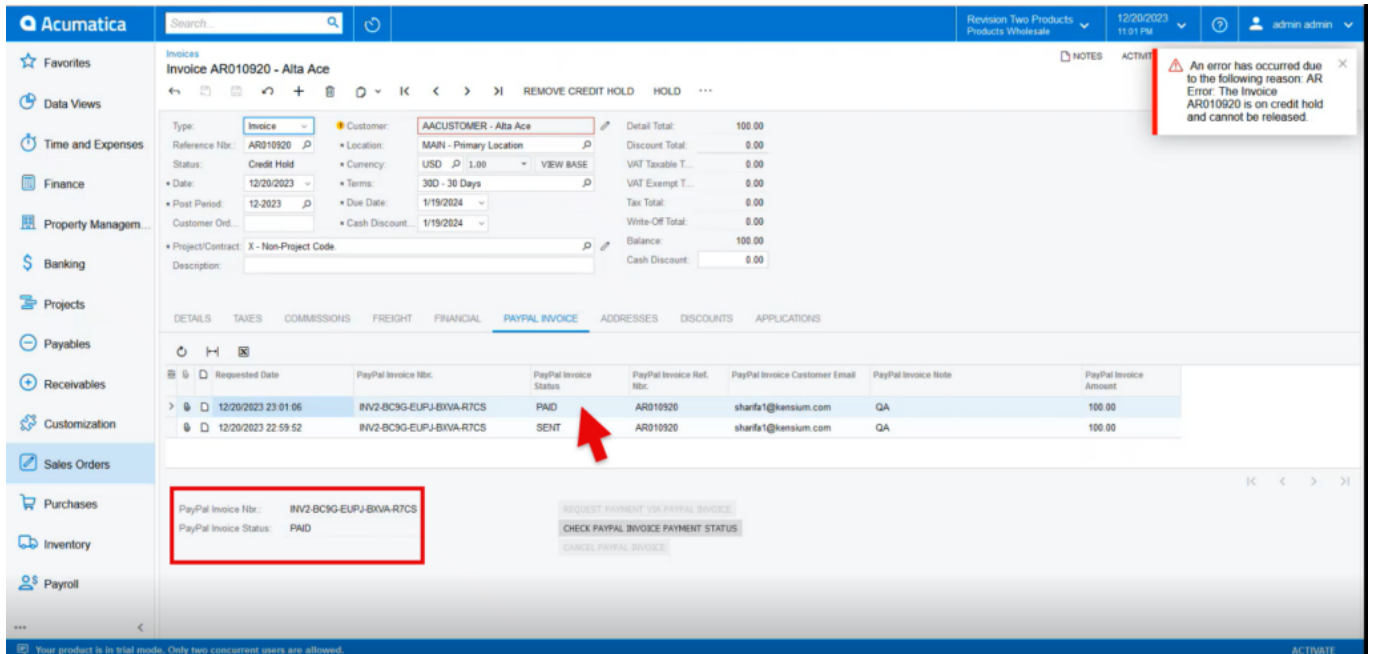
CANCEL PAYPAL INVOICE

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

ACTIVATE

Invoices

- 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]**



Acumatica

Revision Two Products
Products Wholesale

12/20/2023
11:01 PM

admin admin

NOTES ACTIVITY

An error has occurred due to the following reason: AR Error: The Invoice AR010920 is on credit hold and cannot be released.

Invoice AR010920 - Alta Ace

REMOVE CREDIT HOLD HOLD ...

Type: Invoice Customer: AACUSTOMER - Alta Ace Detail Total: 100.00

Reference Nbr.: AR010920 Location: MAIN - Primary Location Discount Total: 0.00

Status: Credit Hold Currency: USD 1.00 View Base VAT Taxable T...: 0.00

Date: 12/20/2023 Terms: 30D - 30 Days VAT Exempt T...: 0.00

Post Period: 12-2023 Due Date: 1/19/2024 Tax Total: 0.00

Customer Ord... Cash Discount: 1/19/2024 Write-Off Total: 0.00

Project/Contract: X - Non-Project Code Balance: 100.00

Description: Cash Discount: 0.00

DETAILS TAXES COMMISSIONS FREIGHT FINANCIAL PAYPAL INVOICE ADDRESSES DISCOUNTS APPLICATIONS

Requested Date	PayPal Invoice Nbr.	PayPal Invoice Status	PayPal Invoice Ref. Nbr.	PayPal Invoice Customer Email	PayPal Invoice Note	PayPal Invoice Amount
12/20/2023 23:01:06	INV2-BC3G-EUPJ-BXVA-R7CS	PAID	AR010920	sharifa1@kensium.com	QA	100.00
12/20/2023 22:59:52	INV2-BC3G-EUPJ-BXVA-R7CS	SENT	AR010920	sharifa1@kensium.com	QA	100.00

PayPal Invoice Nbr.: INV2-BC3G-EUPJ-BXVA-R7CS

PayPal Invoice Status: PAID

REQUEST PAYMENT VIA PAYPAL INVOICE

CHECK PAYPAL INVOICE PAYMENT STATUS

CANCEL PAYPAL INVOICE

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

ACTIVATE

Invoices

- 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.