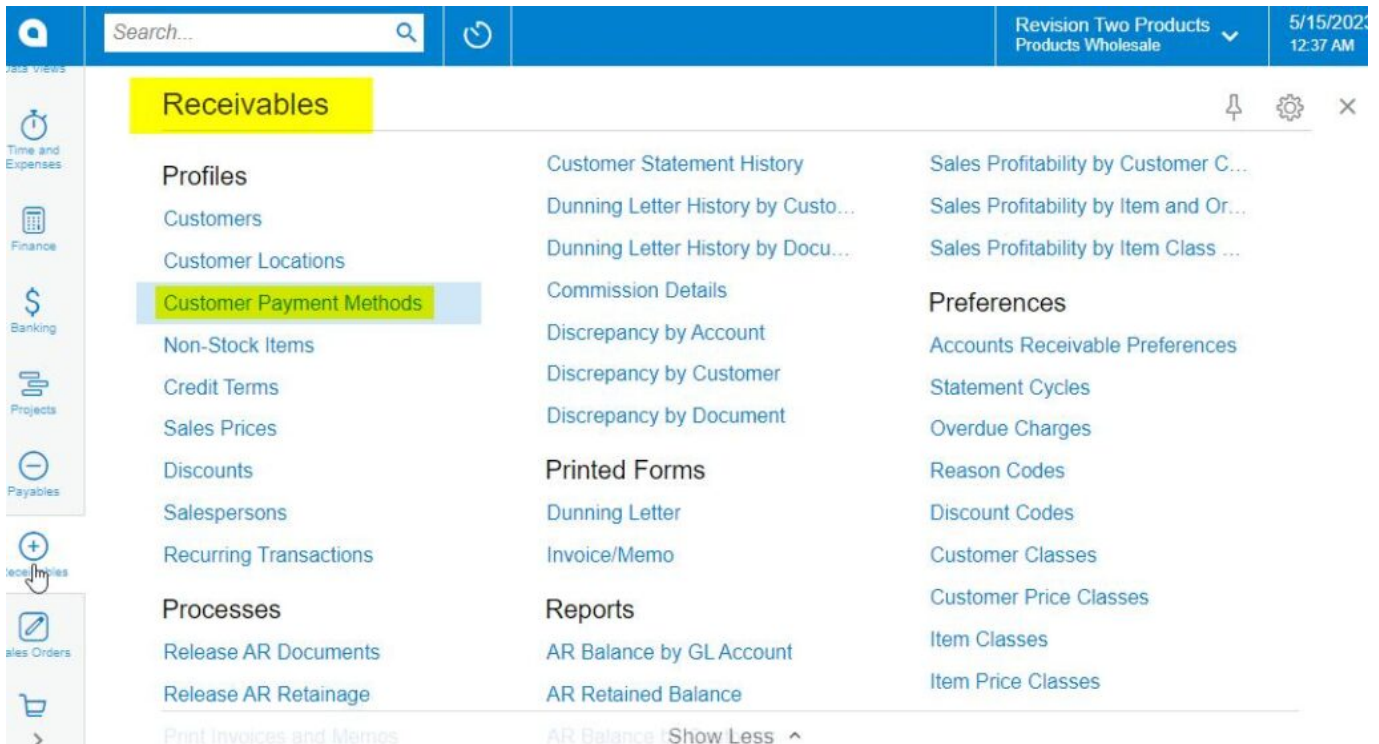


Add a Payflow Payment Method to Customers



To assign a payment method from PayPal Payflow to a customer in Acumatica ERP, follow these steps:

1. To get started, go to the Acumatica left navigation pane and select the **Receivables** workspace, and click **Customer Payment Methods**.



The screenshot shows the Acumatica ERP interface. The top navigation bar includes a search bar, a refresh icon, and user information: 'Revision Two Products', 'Products Wholesale', and the date '5/15/2023 12:37 AM'. The left navigation pane is expanded, showing various workspaces. The 'Receivables' workspace is selected and highlighted in yellow. Under the 'Receivables' workspace, the 'Customer Payment Methods' option is highlighted in blue. Other options visible in the 'Receivables' workspace include Profiles (Customers, Customer Locations, Non-Stock Items, Credit Terms, Sales Prices, Discounts, Salespersons, Recurring Transactions), Processes (Release AR Documents, Release AR Retainage), Customer Statement History, Dunning Letter History by Customer, Dunning Letter History by Document, Commission Details, Discrepancy by Account, Discrepancy by Customer, Discrepancy by Document, Printed Forms (Dunning Letter, Invoice/Memo), Reports (AR Balance by GL Account, AR Retained Balance), Sales Profitability by Customer Class, Sales Profitability by Item and Order, Sales Profitability by Item Class, Preferences (Accounts Receivable Preferences, Statement Cycles, Overdue Charges, Reason Codes, Discount Codes, Customer Classes, Customer Price Classes, Item Classes, Item Price Classes), and a 'Show Less' button.

Receivables Workspace

2. The Acumatica application directs you to the **Customer Payment Methods** screen.

Search...

Revision Two Products
Products Wholesale

10/25/2019
4:50 AM

☆

Customer Payment Methods ☆

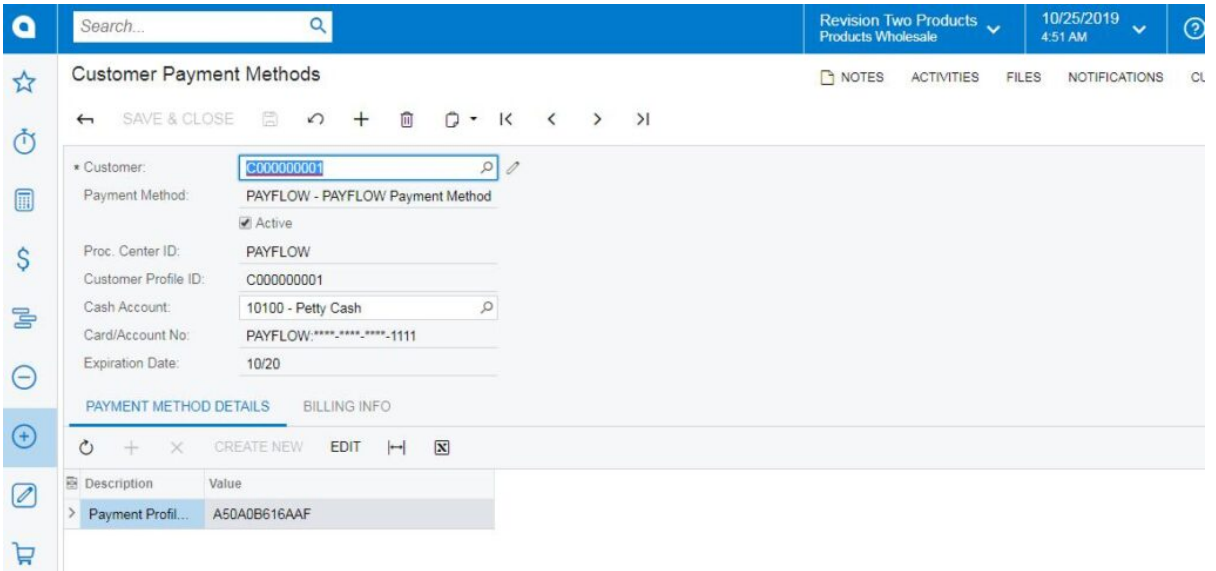
+

Drag column header here to configure filter

<input type="checkbox"/>	<input type="checkbox"/>	Customer	Payment Method	Customer Name	Cash Account	Card/Account No	Active
<input type="checkbox"/>	<input type="checkbox"/>	ABARTENDE	PAYFLOW	USA Bartending School	10100	PAYFLOW.****.****.4444	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	ABCHOLDING	PAYFLOW	ABC Holdings Inc		PAYFLOW.****.****.1111	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	ABCSTUDIOS	PAYFLOW	ABC Studios Inc		PAYFLOW.****.****.1111	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	ABCSTUDIOS	PAYFLOW	ABC Studios Inc	10100	PAYFLOW.****.****.4444	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	ACTIVESTAF	FEDWIRE	Active Staffing Service	22000	Fedwire	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	C000000001	PAYFLOW	Jeffrey C. Silvia	10100	PAYFLOW.****.****.1111	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	C000000002	PAYFLOW	Robert W. Cothran	10100	PAYFLOW.****.****.1111	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	C000000002	VISATOK	Robert W. Cothran	10600	VISATOK.****.****.1111	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	C000000003	PAYFLOW	Larry M. Wright	10100	PAYFLOW.****.****.5454	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	WIDGETCC	MASTERCARD	Widget Credit Card	10600	MASTERCARD.****.****.5100	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	WIDGETCC	VISA	Widget Credit Card	10600	VISA.****.****.1111	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	WIDGETCC	VISA	Widget Credit Card	10600	VISA.****.****.1111	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	WIDGETCC	VISA	Widget Credit Card	10600	VISA.****.****.1111	<input type="checkbox"/>

Customer Payment Methods Screen

3. Click the **(+)** button.
4. Select a **Customer ID**.
 - a. The screen corresponding to the chosen customer will be displayed.



Customer Payment Methods

SAVE & CLOSE

* Customer: C000000001

Payment Method: PAYFLOW - PAYFLOW Payment Method

☒ Active

Proc. Center ID: PAYFLOW

Customer Profile ID: C000000001

Cash Account: 10100 - Petty Cash

Card/Account No: PAYFLOW:****-****-1111

Expiration Date: 10/20

PAYMENT METHOD DETAILS BILLING INFO

CREATE NEW EDIT

Description	Value
Payment Profil...	A50A0B616AAF

Customer Payment Methods Screen for a Specific Customer

- b. Click the **Payment Method** tab.
 - c. Click the **Add Payment Method (+)** button.
 - d. Select a **Payment Method**.
 - e. Choose a **Payflow Payment Method**.
5. Select the **Active** checkbox.
 6. The **Proc. Center ID** data fields should auto-populate.
 7. Click **Save**.