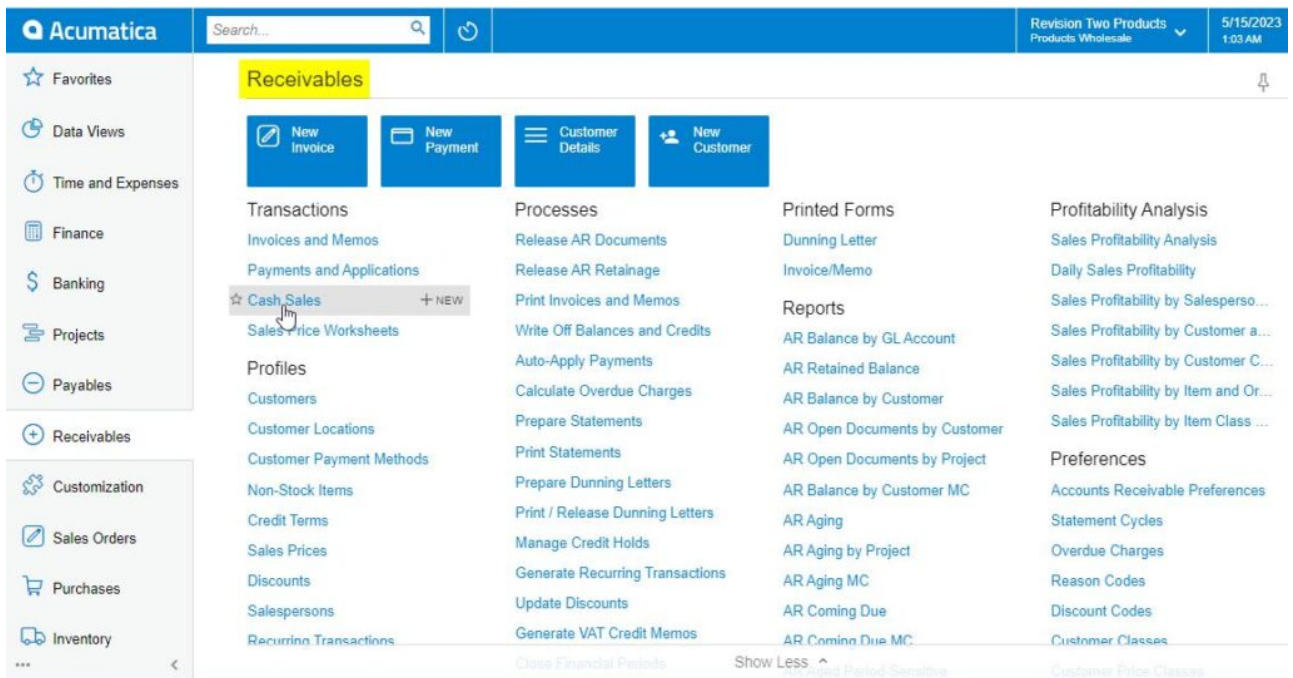


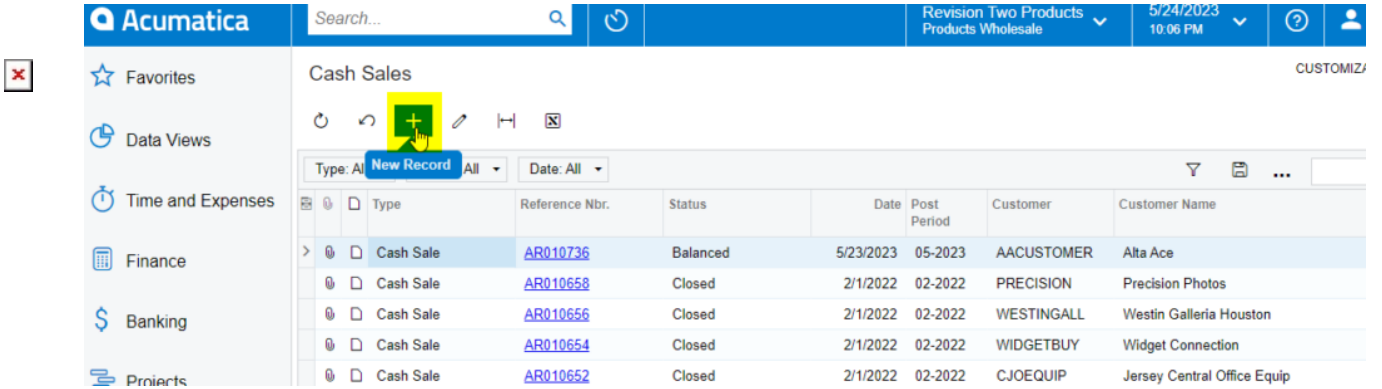
# Steps to add Payflow payments via the Cash Sales screen in Acumatica

1. Go to the left navigation menu of the Acumatica ERP and click **Receivables**.
2. On Receivables workspace, click **Cash Sales**.



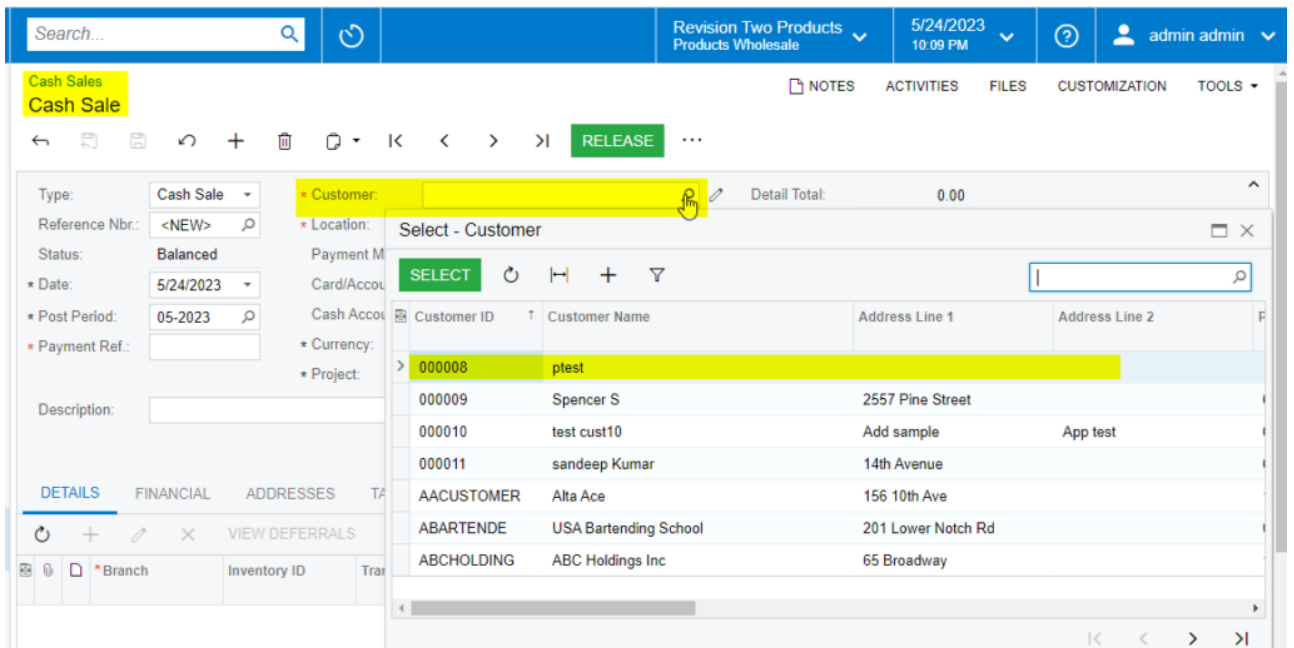
*Cash Sales on Receivables Workspace Screen*

3. Click on the **(+)** button.



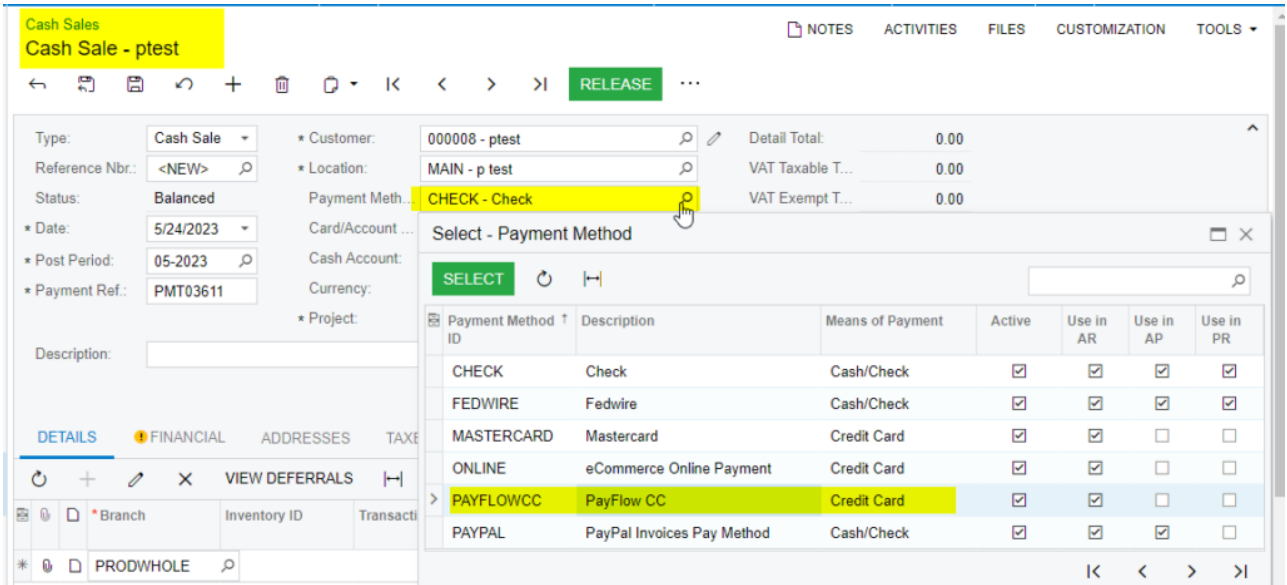
*Cash Sales Screen*

4. Select a **customer**.



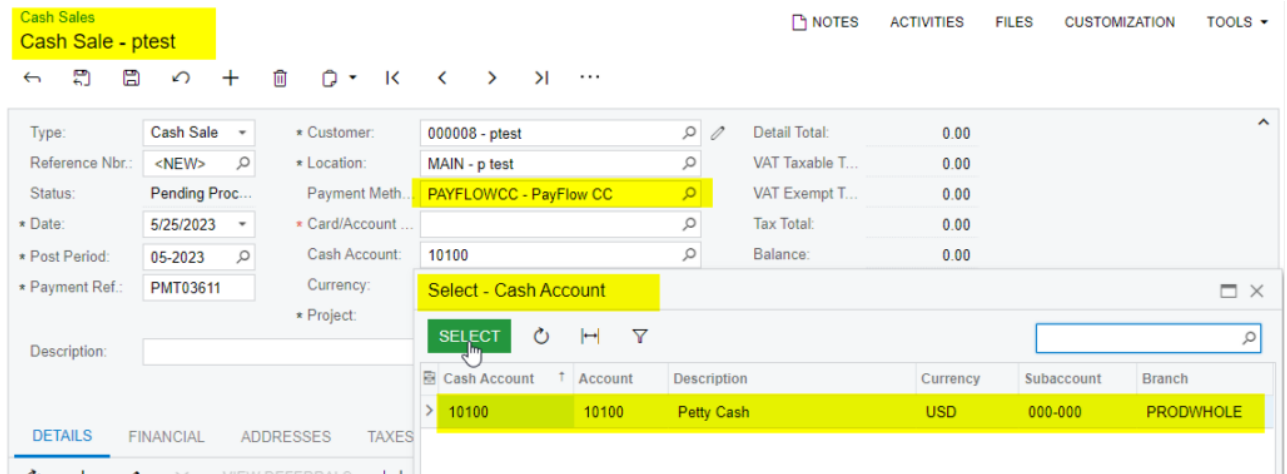
*Selecting a Customer on Cash Sales Screen*

5. Select the **payment method**.
6. Select Payflow payment method.



*Selecting Payflow as Payment Method*

7. Select the **cash account**.



*Selecting cash account*

- 8. Go to the details tab.
  - o Add at least one item.
  - o Add the quantity.

- Add the unit price.



Cash Sales

Cash Sale - ptest

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

← ↻ + 🗑️ 📄 ⏪ ⏩ RELEASE ...

\* Post Period: 05-2023 Cash Account: 10200 - Company Checking Account Balance: 100.00

\* Payment Ref.: PMT03611 Currency: USD 1.00 VIEW BASE Payment Amo... 100.00

\* Project: X - Non-Project Code. Cash Discount... 0.00

Description: Finance Charg... 0.00

Deducted Cha... 0.00

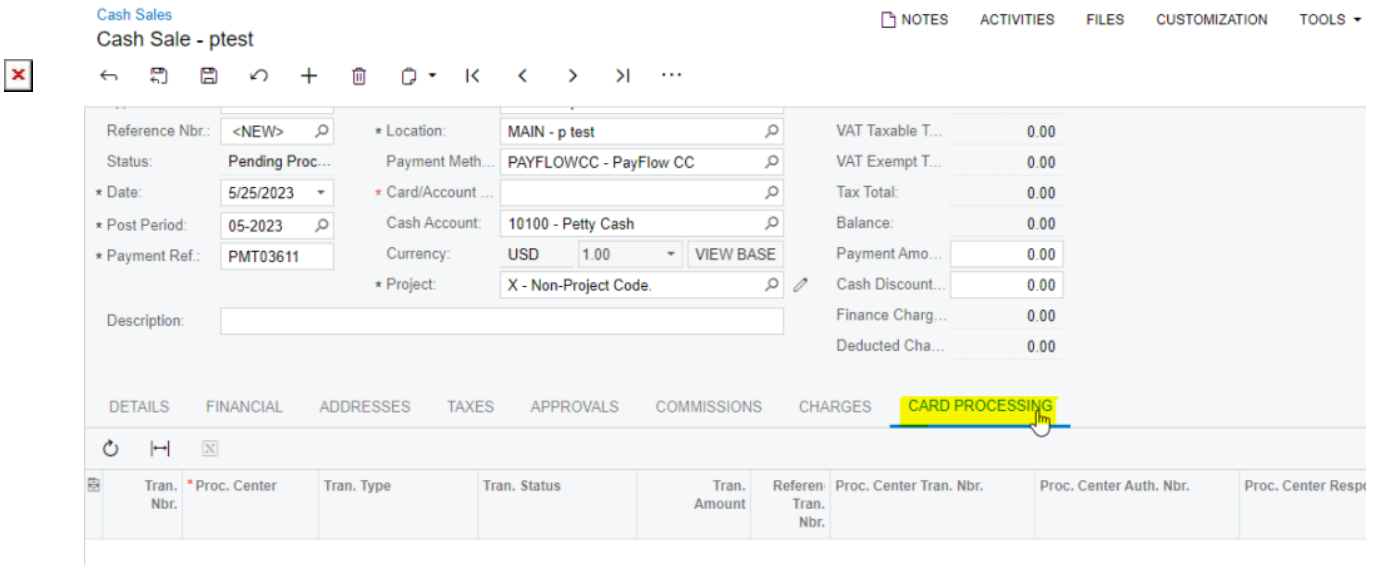
DETAILS FINANCIAL ADDRESSES TAXES APPROVALS COMMISSIONS CHARGES

VIEW DEFERRALS

Branch	Inventory ID	Transaction Descr.	Quantity	UOM	Unit Price	Ext. Price	Discount Percent	Disc Am
PRODWHOLE			1.00		100.00	100.00	0.000000	

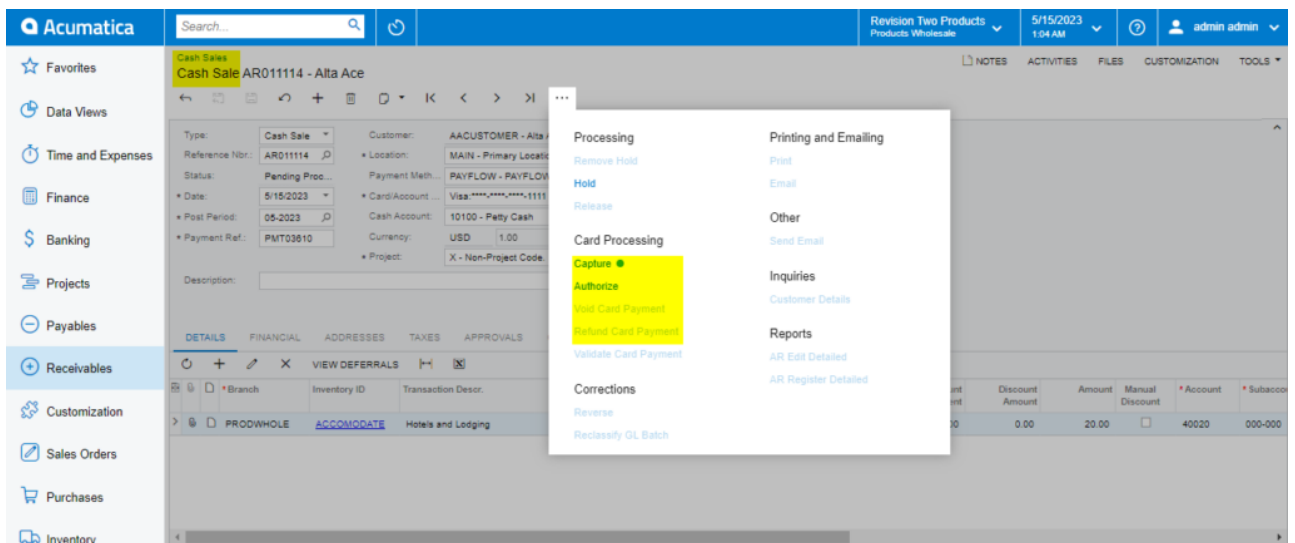
*Details tab adding the Quantity and Unit Price*

9. Click **Save**.
10. Click the **Actions** menu to perform one of the following actions:
  - a. Email Invoice/Memo form.
  - b. Send an e-mail.
  - c. CC Enter the payment.
11. CC Authorize Payment.
12. Click the **Credit Card Processing Information** tab to view the payment transaction details.



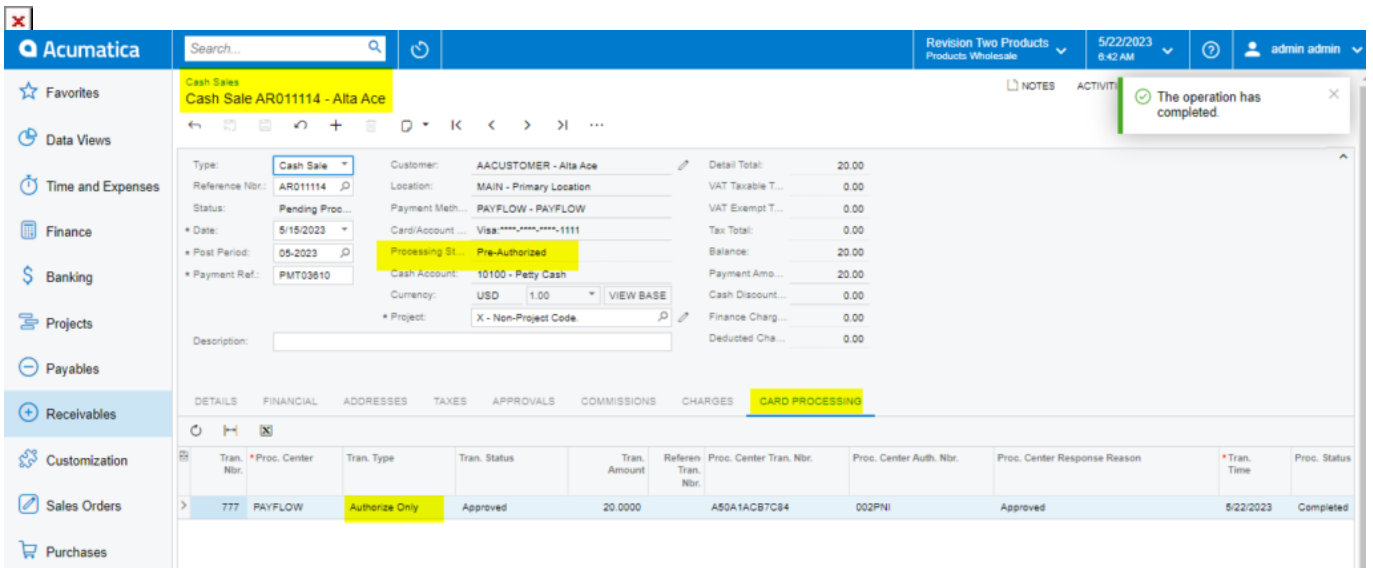
Cash Sales screen

13. Click on the actions menu to perform the following actions Authorize, Capture and Void.



Card Processing on Cash Sales screen

### Authorize Action on Cash Sales Screen

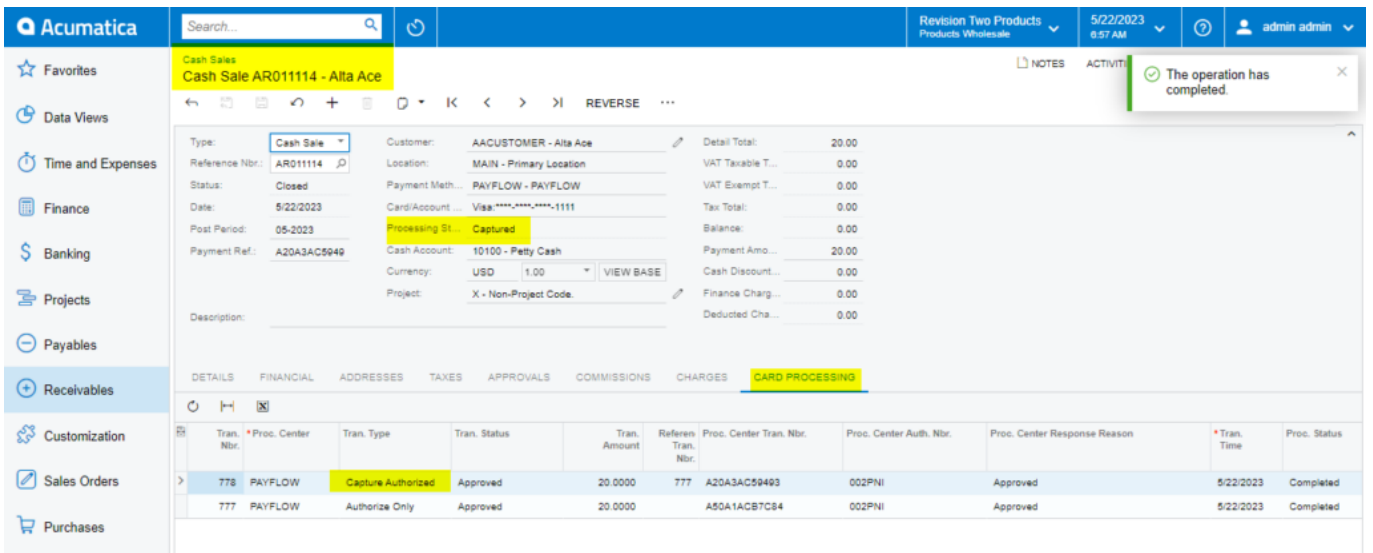


The screenshot shows the Acumatica interface for a Cash Sale AR011114. The transaction is in a 'Pending Proc.' status. The 'Processing St.' is 'Pre-Authorized'. The 'Card Processing' tab is active, and the 'Authorize Only' button is highlighted. A table below shows transaction details:

Tran. Nbr.	Proc. Center	Tran. Type	Tran. Status	Tran. Amount	Referen. Tran. Nbr.	Proc. Center Tran. Nbr.	Proc. Center Auth. Nbr.	Proc. Center Response Reason	Tran. Time	Proc. Status
777	PAYFLOW	Authorize Only	Approved	20.0000		A50A1ACB7C84	002PNI	Approved	5/22/2023	Completed

### Authorize Action on Cash Sales screen

### Capture Payment by Cash Sales

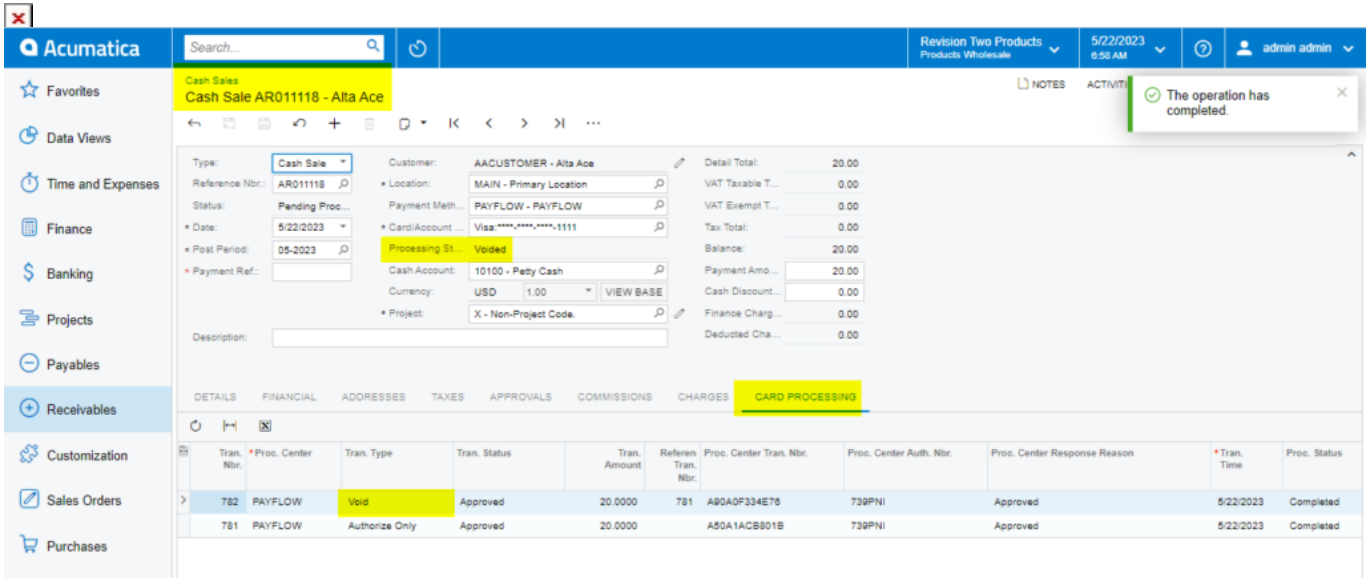


The screenshot shows the Acumatica interface for a Cash Sale AR011114. The transaction is in a 'Closed' status. The 'Processing St.' is 'Captured'. The 'Card Processing' tab is active, and the 'Capture Authorized' button is highlighted. A table below shows transaction details:

Tran. Nbr.	Proc. Center	Tran. Type	Tran. Status	Tran. Amount	Referen. Tran. Nbr.	Proc. Center Tran. Nbr.	Proc. Center Auth. Nbr.	Proc. Center Response Reason	Tran. Time	Proc. Status
778	PAYFLOW	Capture Authorized	Approved	20.0000	777	A20A3AC59493	002PNI	Approved	5/22/2023	Completed
777	PAYFLOW	Authorize Only	Approved	20.0000		A50A1ACB7C84	002PNI	Approved	5/22/2023	Completed

### Capture Payment on Cash Sales screen

## Void On Cash Sales Screen



Acumatica Search... Revision Two Products Products Wholesale 5/22/2023 6:58 AM admin admin

Cash Sales  
Cash Sale AR011118 - Alta Ace

NOTES ACTIVITY The operation has completed.

Type: Cash Sale Customer: AACUSTOMER - Alta Ace Detail Total: 20.00  
 Reference Nbr.: AR011118 Location: MAIN - Primary Location VAT Taxable T...: 0.00  
 Status: Pending Proc... Payment Meth.: PAYFLOW - PAYFLOW VAT Exempt T...: 0.00  
 \* Date: 5/22/2023 \* Card/Account: Visa \*\*\*\* \* 1111 Tax Total: 0.00  
 \* Post Period: 05-2023 Processing St.: Voided Balance: 20.00  
 \* Payment Ref.: Cash Account: 10100 - Petty Cash Payment Amo...: 20.00  
 Currency: USD 1.00 VIEW BASE Cash Discount...: 0.00  
 \* Project: X - Non-Project Code Finance Charg...: 0.00  
 Description: Deducted Cha...: 0.00

DETAILS FINANCIAL ADDRESSES TAXES APPROVALS COMMISSIONS CHARGES CARD PROCESSING

Tran. Nbr.	Proc. Center	Tran. Type	Tran. Status	Tran. Amount	Referen. Tran. Nbr.	Proc. Center Tran. Nbr.	Proc. Center Auth. Nbr.	Proc. Center Response Reason	Tran. Time	Proc. Status
782	PAYFLOW	Void	Approved	20.0000	781	A60A0F334E76	739PNI	Approved	5/22/2023	Completed
781	PAYFLOW	Authorize Only	Approved	20.0000		A50A1ACB801B	739PNI	Approved	5/22/2023	Completed

Void on Cash Sales screen