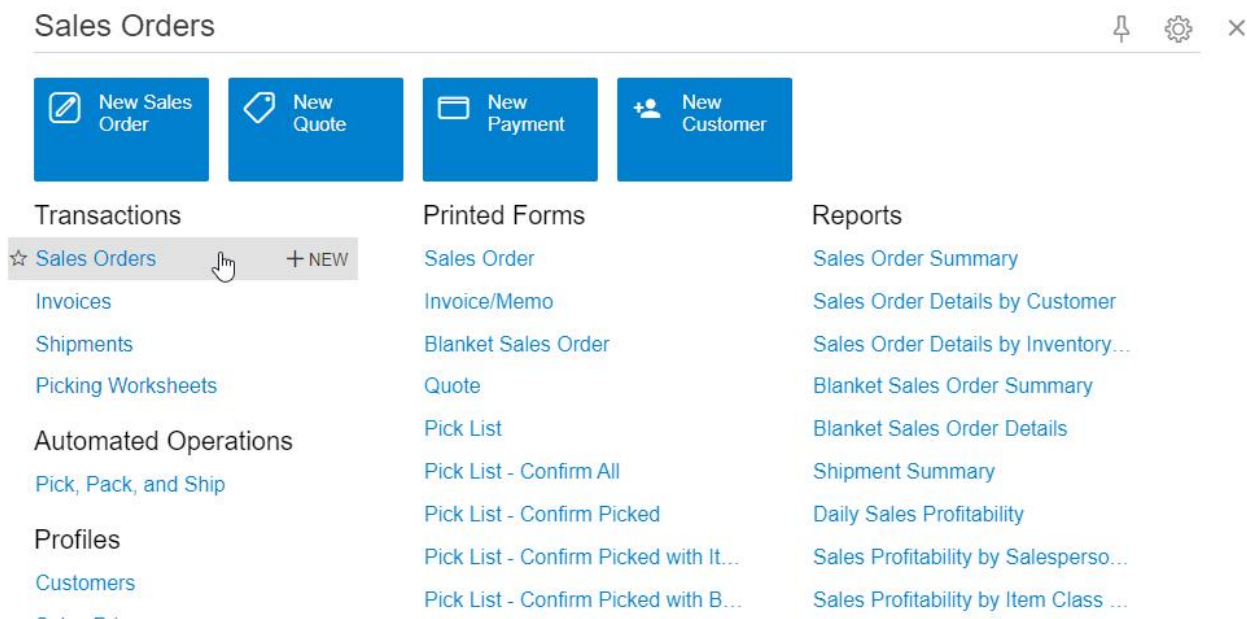









Steps to Process Payflow via the Sales Order Screen in Acumatica

1. Go to the left navigation menu of the Acumatica ERP and click the (+) button to add a new order.





















Sales orders

Sales Orders CUSTOMIZATION ▾ TOOLS ▾












ALL R **New Record** MY SALES ORDERS



Order Type: All ▾	Status: All ▾	Date: All ▾	Customer: All ▾						
Order Type	Order Nbr.	Status	Date	Sched. Shipment	Customer	Customer Name	Ordered		
>   SO	SO006798	Open	5/17/2023	5/17/2023	ABARTENDE	USA Bartending School			
  SO	SO006797	Open	5/10/2023	5/16/2023	ABARTENDE	USA Bartending School			
  ER	AR010735	Open	5/9/2023	5/9/2023	ECOMGUEST	eCommerce Guest Customer			
  SH	SO006796	Completed	5/9/2023	5/9/2023	ECOMGUEST	eCommerce Guest Customer			
  ER	AR010734	Open	5/9/2023	5/9/2023	ECOMGUEST	eCommerce Guest Customer			
  SH	SO006795	Completed	5/9/2023	5/9/2023	ECOMGUEST	eCommerce Guest Customer			
  ER	AR010733	Open	5/9/2023	5/9/2023	ECOMGUEST	eCommerce Guest Customer			
  SH	SO006794	Completed	5/9/2023	5/9/2023	ECOMGUEST	eCommerce Guest Customer			
  RC	AR010731	Completed	5/5/2023	5/5/2023	AACUSTOMER	Alta Ace			


Create a new sales order



Sales Orders NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS ▾



SO





* Order Type: SO  * Customer:  Ordered Qty.: 0.00



Order Nbr.: <NEW>  Status: Open

* Date: 5/23/2023  * Requested On: 5/23/2023 





Customer Ord...  External Refer... 

DETAILS TAXES COMMISSION

    ADD ITEM

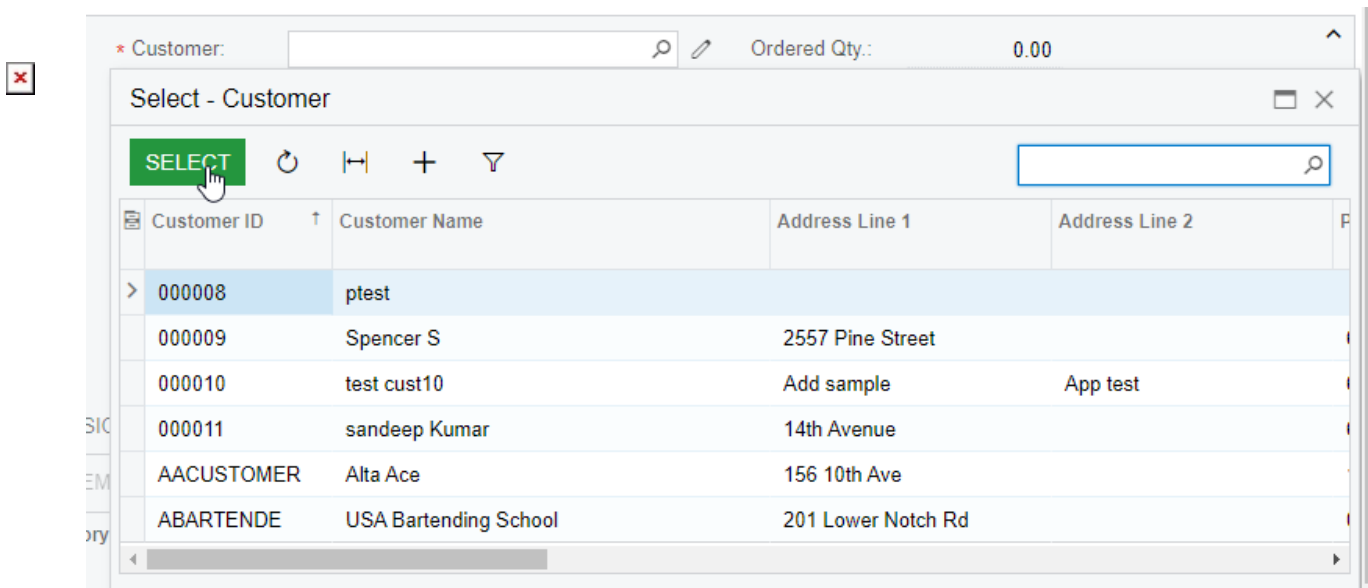
* Branch  * Inventory 

Select - Customer

SELECT    

Customer ID	Customer Name	Address Line 1	Address Line 2
> 000008	pctest		
000009	Spencer S	2557 Pine Street	
000010	test cust10	Add sample	App test
000011	sandeep Kumar	14th Avenue	
AACUSTOMER	Alta Ace	156 10th Ave	
ABARTENDE	USA Bartending School	201 Lower Notch Rd	

Search customer on a new sales order



Select customer on a new sales order

2. Select a **customer**.
3. Add **Stock items** in the **Details** tab.
4. Click the **Financial** tab.
 - a. Select a Payflow Payment Method.
1. Click a **payment process** based on the stage of the sales order:
 1. Authorize CC Payment.
 2. Capture CC Payment.
 3. Void CC Auth./Payment.
2. The Processing Status Responses Reason are updated based on the action performed.
3. Click **Save**.

Authorize action on Sales Order Screen

Banking Projects Payables Receivables Customization **Sales Orders** Purchases Inventory Payroll Dashboards Magento Connector More Items

Sales Orders
SO SO007561 - Alta Ace

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

QUICK PROCESS CREATE SHIPMENT HOLD

Order Type: SO Order Nbr.: SO007561 Status: Open Date: 5/8/2023 Requested On: 5/8/2023 Customer Ord... External Refer... Customer: AACUSTOMER - Alta Ace Location: MAIN - Primary Location Contact: Amelia Armstrong Currency: USD 1.00 Project: X - Non-Project Code Ordered Qty.: 1.00 Discount Total: 0.00 VAT Exempt T...: 0.00 VAT Taxable T...: 0.00 Tax Total: 0.00 Order Total: 130.00 Description:

DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS **PAYMENTS** RELATIONS TOTALS

CREATE PAYMENT CREATE PREPAYMENT CAPTURE VOID CARD PAYMENT IMPORT CARD PAYMENT Active

Doc. Type	Reference Nbr.	Applied To Order	Payment Method	Status	Proc. Status	Transferred to Invoice	Balance	Payment Ref.
Payment	004402	130.00	BRAINTREE	Pending Proces...	Pre-authorized	0.00	0.00	9bdhe2zw

Not Released: 0.00
Authorized: 130.00
Released: 0.00
Total Paid: 130.00
Total Transferr...: 0.00
Unpaid Balance: 0.00
Unbilled Balan...: 130.00

Authorized action on sales order screen

Capture on Sales Order Screen

Banking Projects Payables Receivables Customization **Sales Orders** Purchases Inventory Payroll Dashboards Magento Connector More Items

Sales Orders
SO SO007561 - Alta Ace

NOTES ACTIVITY ✓ The operation has completed.

QUICK PROCESS CREATE SHIPMENT HOLD

Order Type: SO Order Nbr.: SO007561 Status: Open Date: 5/8/2023 Requested On: 5/8/2023 Customer Ord... External Refer... Customer: AACUSTOMER - Alta Ace Location: MAIN - Primary Location Contact: Amelia Armstrong Currency: USD 1.00 Project: X - Non-Project Code Ordered Qty.: 1.00 Discount Total: 0.00 VAT Exempt T...: 0.00 VAT Taxable T...: 0.00 Tax Total: 0.00 Order Total: 130.00 Description:

DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS **PAYMENTS** RELATIONS TOTALS

CREATE PAYMENT CREATE PREPAYMENT **CAPTURE** VOID CARD PAYMENT IMPORT CARD PAYMENT Active

Doc. Type	Reference Nbr.	Applied To Order	Payment Method	Status	Proc. Status	Transferred to Invoice	Balance	Payment Ref.
Payment	004402	130.00	BRAINTREE	Open	Captured	0.00	0.00	9bdhe2zw

Not Released: 0.00
Authorized: 0.00
Released: 130.00
Total Paid: 130.00
Total Transferr...: 0.00
Unpaid Balance: 0.00
Unbilled Balan...: 130.00

Capture on Sales Order Screen

Void on Sales Order Screen

Acumatica

Search...

Revision Two Products
Products Wholesale

5/22/2023
5:40 AM

admin

Banking

Projects

Payables

Receivables

Customization

Sales Orders

Purchases

Inventory

Payroll

Dashboards

Magento Connector

More Items

Sales Orders

SO SO007561 - Alta Ace

QUICK PROCESS

CREATE SHIPMENT

HOLD

...

* Order Type:

SO

* Customer:

AACUSTOMER - Alta Ace

Ordered Qty:

1.00

Order Nbr.:

SO007561

* Location:

MAIN - Primary Location

Discount Total:

0.00

Status:

Open

Contact:

Amelia Armstrong

VAT Exempt T...

0.00

* Date:

5/8/2023

Currency:

USD 1.00

VIEW BASE

VAT Taxable T...

0.00

* Requested On:

5/8/2023

* Project:

X - Non-Project Code

Tax Total:

0.00

Customer Ord...

Order Total:

130.00

External Refer...

Description:

DETAILS

TAXES

COMMISSIONS

FINANCIAL

SHIPPING

ADDRESSES

DISCOUNTS

SHIPMENTS

PAYMENTS

RELATIONS

TOTALS

CREATE PAYMENT

CREATE PREPAYMENT

CAPTURE

VOID CARD PAYMENT

IMPORT CARD PAYMENT

Active

Doc. Type	Reference Nbr.	Applied To Order	Payment Method	Status	Proc. Status	Transferred to Invoice	Balance	Payment Ref.

Not Released:

0.00

Authorized:

0.00

Released:

0.00

Total Paid:

0.00

Total Transferr...

0.00

Unpaid Balance:

130.00

Unbilled Balan...

130.00

The operation has completed.

Void Card Payment in Sales Order screen

Note: After void card payment action in Payment tab, the Void Card action is disabled.