

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		Д 🔅 ×
New Sales Order Quote	Payment New Customer	
Transactions	Printed Forms	Reports
☆ Sales Orders 에너 + NEW	Sales Order	Sales Order Summary
Invoices	Invoice/Memo	Sales Order Details by Customer
Shipments	Blanket Sales Order	Sales Order Details by Inventory
Picking Worksheets	Quote	Blanket Sales Order Summary
Automated Operations	Pick List	Blanket Sales Order Details
Pick. Pack, and Ship	Pick List - Confirm All	Shipment Summary
	Pick List - Confirm Picked	Daily Sales Profitability
Profiles	Pick List - Confirm Picked with It	Sales Profitability by Salesperso
Customers	Pick List - Confirm Picked with B	Sales Profitability by Item Class

Sales orders





Sales Orders

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	Orde	er Ty	pe: All 👻	Status: All 🝷 Da	te: All - Customer:	All 👻			V 🛱	Q,
	0		Order Type	Order Nbr.	Status	D	ate Sched. Shipment	Customer	Customer Name	Ordered
>	0		SO	<u>SO006798</u>	Open	5/17/20	23 5/17/2023	ABARTENDE	USA Bartending School	
	0		SO	<u>SO006797</u>	Open	5/10/20	23 5/16/2023	ABARTENDE	USA Bartending School	
	0		ER	AR010735	Open	5/9/20	23 5/9/2023	ECOMGUEST	eCommerce Guest Customer	1
	0		SH	<u>SO006796</u>	Completed	5/9/20	23 5/9/2023	ECOMGUEST	eCommerce Guest Customer	
	0		ER	AR010734	Open	5/9/20	23 5/9/2023	ECOMGUEST	eCommerce Guest Customer	(
	0		SH	<u>SO006795</u>	Completed	5/9/20	23 5/9/2023	ECOMGUEST	eCommerce Guest Customer	
	0		ER	AR010733	Open	5/9/20	23 5/9/2023	ECOMGUEST	eCommerce Guest Customer	1
	0		SH	<u>SO006794</u>	Completed	5/9/20	23 5/9/2023	ECOMGUEST	eCommerce Guest Customer	
	0		RC	AR010731	Completed	5/5/20	23 5/5/2023	AACUSTOMER	Alta Ace	;

Create a new sales order

Sales Orders SO ← 🖺 🗒	Ś	+ 🔟	⊡NOTES ACTIVITIES FILES CI	USTOMIZATION TOOLS -
* Order Type:	SO	Q	stomer: Ordered Qty.: 0.00	^
Order Nbr.:	<new></new>	Q	lect - Customer	$\square \times$
Status:	Open			
* Date:	5/23/2023	-		Q
* Requested On:	5/23/2023	•	Customer ID † Customer Name Address Line 1 Address Line 1	ddress Line 2 P
Customer Ord				
External Refer			000008 ptest	
			000009 Spencer S 2557 Pine Street	(
			000010 test cust10 Add sample A	App test
DETAILS T/	XES C	COMMISSIC	000011 sandeep Kumar 14th Avenue	(
O + O	×	ADD ITEM	AACUSTOMER Alta Ace 156 10th Ave	
Branch		* Inventory	ABARTENDE USA Bartending School 201 Lower Notch Rd	(
		inventory		Þ
				K < > >I

Search customer on a new sales order





	,	Customer:		P / 0	rdered Qty.:	0.00	^
×		Select - Customer					\square ×
		SELECT 🕐	⊷ + 7				Q
		E Customer ID †	Customer Name		Address Line 1	Address Line 2	P
		> 000008	ptest				
		000009	Spencer S		2557 Pine Street		(
		000010	test cust10		Add sample	App test	(
3	SIC	000011	sandeep Kumar		14th Avenue		(
	M	AACUSTOMER	Alta Ace		156 10th Ave		
)	ry	ABARTENDE	USA Bartending School		201 Lower Notch Rd		
		•					+

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	Sales Orders Linotes activities Files	CUSTOMIZATION TOOLS *
Projects		
Payables	* Order Type: SO ク * Customer: AACUSTOMER - Alta Ace ク グ Ordered Cty.: 1.00 Order Nbr.: SO007561 ク * Location: MAIN - Primary Location ク グ Discount Total: 0.00	^
Receivables	Status: Open Contact: Amelia Amstrong P V VAT Exempt T 0.00 * Date: 5/8/2023 * Currency: USD /P 1.00 * VIEW BASE VAT Taxable T 0.00	
🕺 Customization	* Requested On: 5/8/2023 * * Project: X - Non-Project Code. D d* Tax Total: 0.00 Customer Ord Order Total: 130.00	
Sales Orders	External Refer Description:	
Purchases	DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS RELATIONS TOTALS	
	🕐 🕂 X CREATE PAYMENT CREATE PREPAYMENT CAPTURE VOID CARD PAYMENT IMPORT CARD PAYMENT ¹⁻¹ Active 🔹 🦉	Not Released: 0.00
o intentory	Doc. Type Image: Second system Applied To Payment Status Proc. Status Transferred Balance Payment Ref. Nor. Order Method Method Status Proc. Status Transferred Balance Payment Ref.	Authorized: 130.00 Released: 0.00
S Payroll	B Payment D 004409 130.00 BRAINTREE Pending Proces Pre-Authorized 0.00 0.00 9bdhe2zw	Total Paid: 130.00
Dashboards		Total Transferr 0.00
Magento Connector		Unpaid Balance: 0.00
-		Unbilled Balan 130.00
More Items		

Authorized action on sales order screen

Capture on Sales Order Screen

\$ Banking	Sales Orders SO SO007561 - Alta Act	e					The operation has completed.	×
Projects	5 2 B 9 7			SS CREATE SHIPMENT	HOLD			^
Payables	* Order Type: SO Order Nbr.: SO007561	P * Customer: AA P * Location: MA	ACUSTOMER - Alta Ace P AIN - Primary Location P	Ordered Qty.: Discount Total:	0.00			
Receivables	Status: Open	Contact: An	melia Armstrong 🔎	VAT Exempt T	0.00			
<u></u>	* Date: 5/8/2023 * Requested On: 5/8/2023	Currency: US * Project: X ·	SD . 0 1.00 * VIEW BASE - Non-Project Code	VAT Taxable T	0.00			
😒 Customization	Customer Ord			Order Total:	130.00			
Sales Orders	External Refer	Description:						
🛱 Purchases	DETAILS TAXES CO	MMISSIONS FINANCIAL	SHIPPING ADDRESSES (DISCOUNTS SHIPMENTS	PAYMENTS	RELATIONS TOTALS		
Inventory	O + X CREATE	PAYMENT CREATE PREPA	AYMENT CAPTURE VOID CAR	D PAYMENT IMPORT CARD	PAYMENT ++	Active	* ? Not Released:	0.00
	B Doc. Type Arefer	rence Applied To Pa Order M	ayment Status lethod	Proc. Status	Transferred to Invoice	Balance Payment Ref.	Authorized: Released:	0.00
2 ^S Payroll	> Payment D 00440	29 130.00 B	RAINTREE Open	Captured	0.00	0.00 9bdhe2zw	Total Paid:	130.00
🕜 Dashboards							Total Transferr	0.00
Maganto Connector							Unpaid Balance:	0.00
inagono comiector							Unbilled Balan	130.00
More Items								

Capture on Sales Order Screen

Void on Sales Order Screen





• Acumatica	Search 🔍 🚫	Revision Two Products Products Wholesale	5/22/2023 5:49 AM ❤ ⑦	💄 admin
\$ Banking	Sales Orders SO SO007561 - Alta Ace	NOTES ACTIVITI	The operation has completed	×
Projects	← 🗄 🖆 🖉 + 🔟 D • K < > >I QUICK PROCESS CREATE SHIPMENT HOLD …		completed.	
Payables	* Order Type: SO P * Customer: AACUSTOMER - Alta Ace P Ordered City: 1.00			^
	Order Nbr.: SO007561 P * Location: MAIN - Primary Location P P Discount Total: 0.00 Status: Open Contact: Amelia Armstrong P VAT Exempt T 0.00			
Receivables	* Date: 5/8/2023 * Currency: USD P 1.00 * VIEW BASE VAT Taxable T 0.00			
👶 Customization	* Requested On: 5/8/2023 * * Project: X - Non-Project Code. D / Tax Total: 0.00			
Sales Orders	External Refer Description:			
Purchases	DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS	RELATIONS TOTALS		
lnventory	O + X CREATE PAYMENT CREATE PREPAYMENT CAPTURE VOID CARD PAYMENT IMPORT CARD PAYMENT	Active *	2 Not Released:	0.00
	B Doc. Type D *Reference Applied To Payment Status Proc. Status Transferred to Invoice	Balance Payment Ref.	Authorized: Released:	0.00
2 ^s Payroll			Total Paid:	0.00
Dashboards			Total Transferr	0.00
Maganta Connector			Unpaid Balance:	130.00
Magento Connector			Unbilled Balan	130.00
More Items				

Void Card Payment in Sales Order screen

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

