

Payflow Payments via the Invoices Screen

Processing Payflow payments via the Invoices screen allows you to assign a payment method to a sales order(s). The purpose of this feature is to provide the ability to add, modify, or remove a sales order without having to exit the Invoices screen.

Process Payflow payments via the Invoices screen

Steps to be followed:

1. Navigate to the left sidebar of the Acumatica ERP and click Sales Order.



Sales Orders from Sales Orders Workspace

- 1. The application directs you to the Sales Order screen, where you can view the complete list of sales orders.
- 2. Create a new Sales Order or open an existing Sales Order.
- 3. Go to the Actions dropdown list.





a. Select Prepare Invoice.

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Payment Settings Tab

- 4. The Invoices screen will appear.
- 5. Click the **Payment Information** tab.
 - a. Update the Payment Method if necessary.
 - b. Select and choose a **payment process** based on the sales order stage.

Payment Process Options: Authorize CC Payment





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Authorize Payment action in Invoice Screen

Capture CC Payment

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Capture CC Payment Action in Invoice Screen

Void CC Authorized/Payment





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Void CC Payment at Invoices Screen

- a. The Processing Status field and **Credit Card Processing Info** grid will update based on the action performed.
- 6. Click Save.

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

