

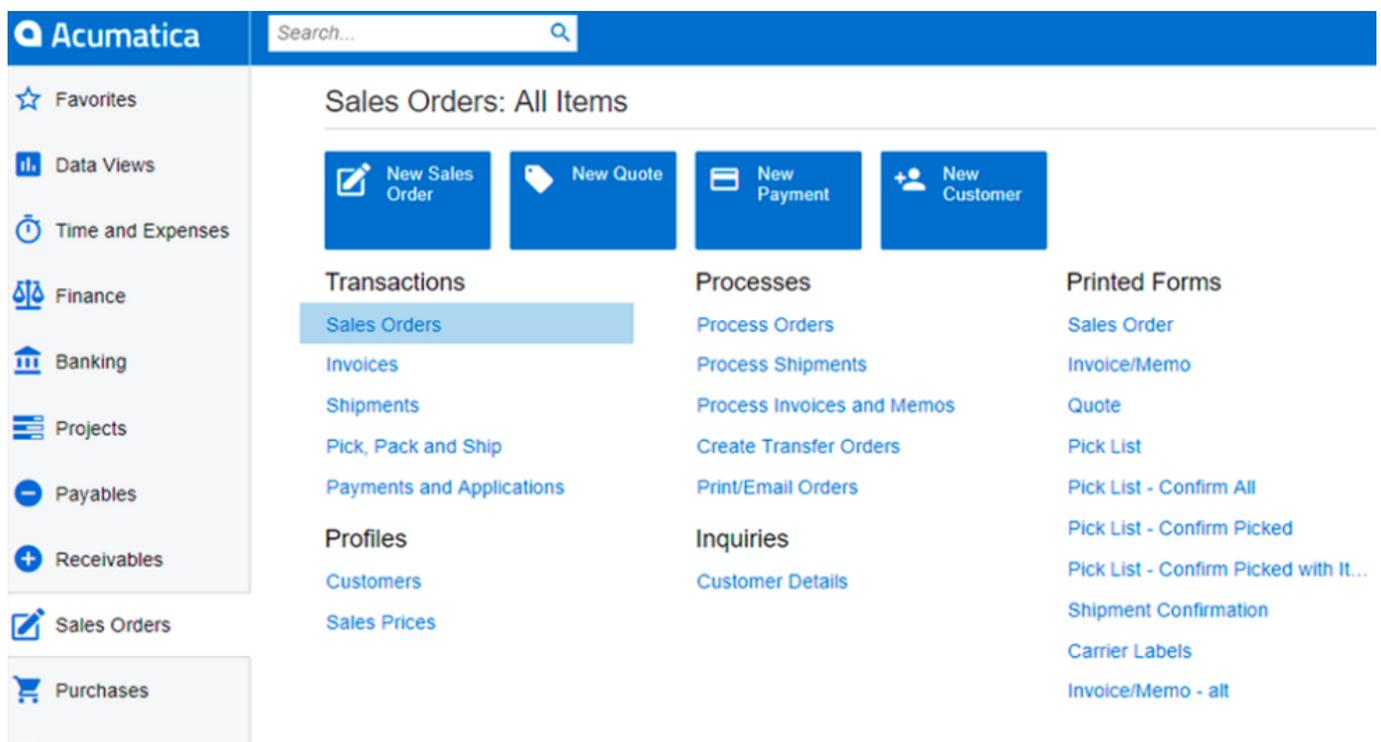
Payflow Payments via the Invoices Screen

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:

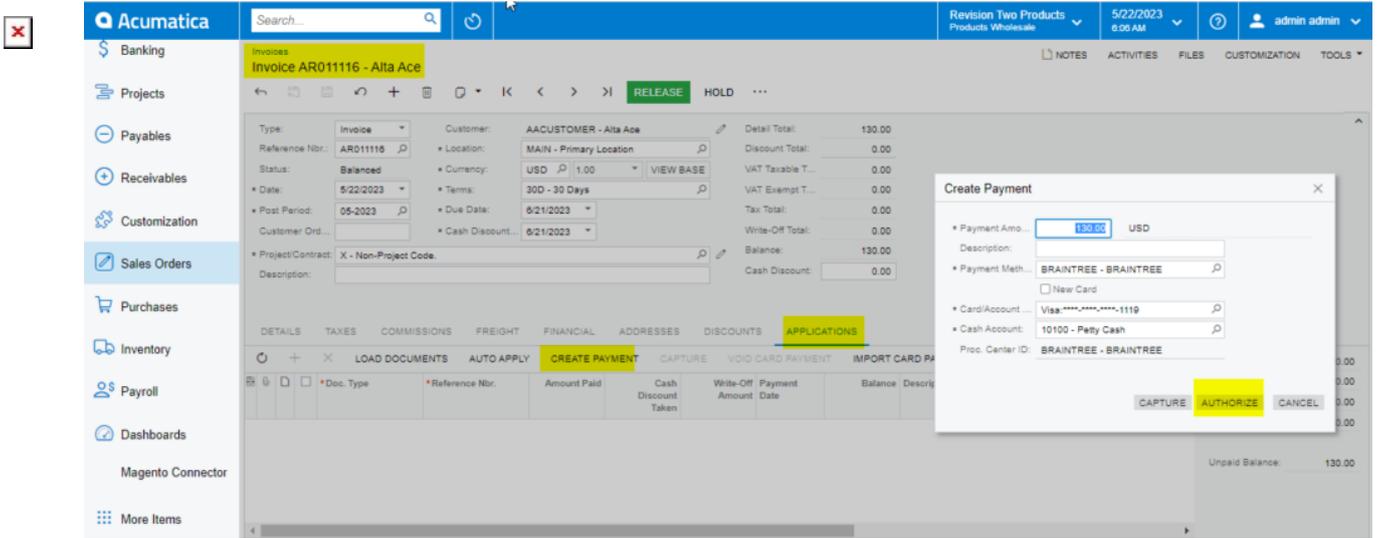
1. **Navigate to the left sidebar** of the Acumatica ERP and click Sales Order.



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**.

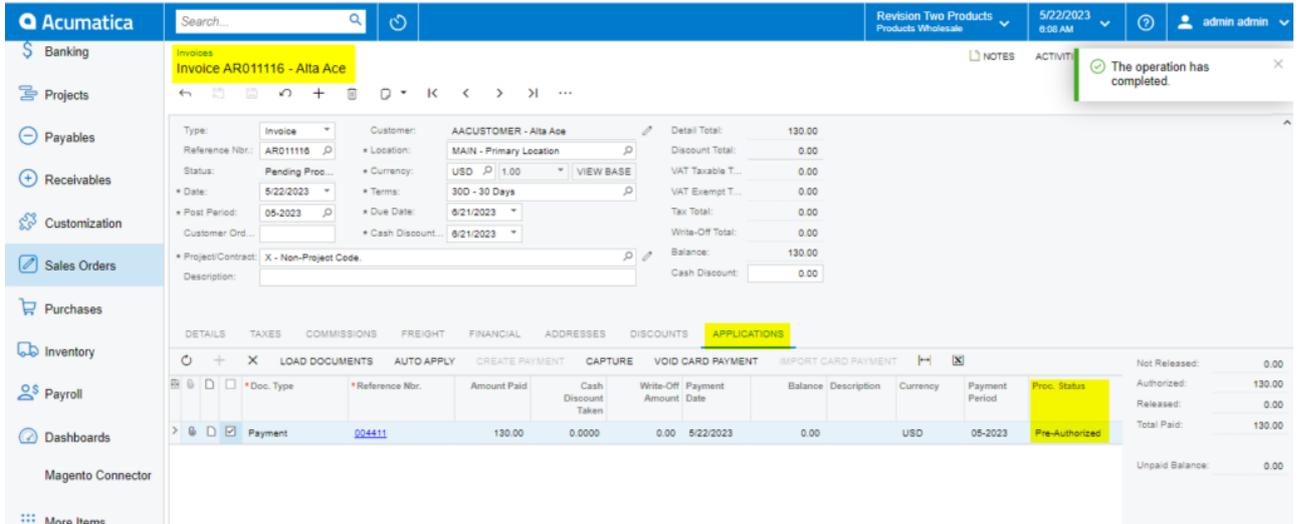


The screenshot shows the Acumatica software interface. The main window displays an invoice for 'Alta Ace' with a total of 130.00. A 'Create Payment' dialog box is open, allowing the user to enter payment details. The 'Payment Amount' is set to 130.00 USD. The 'Payment Method' is 'BRAintree - Braintree'. The 'Card/Account' is 'Visa **** * 1119' and the 'Cash Account' is '10100 - Petty Cash'. The 'AUTHORIZE' button is highlighted in yellow.

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**

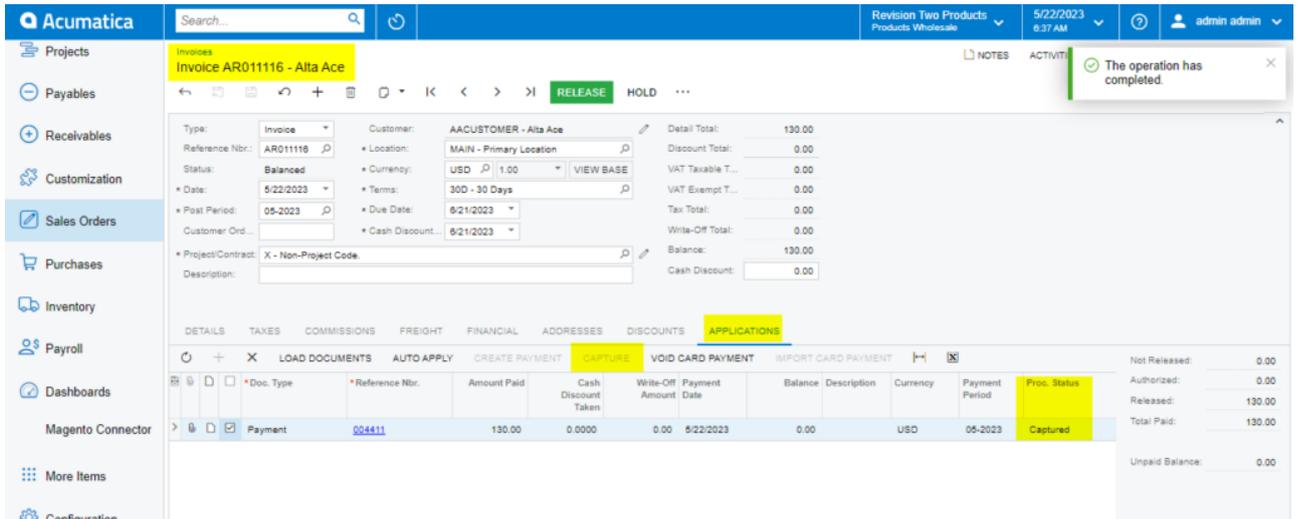


The screenshot shows the Acumatica interface for an invoice (AR011116 - Alta Ace). The 'APPLICATIONS' tab is active, and the 'Payment' row is selected. The 'Proc. Status' column shows 'Pre-Authorized'. A notification at the top right states 'The operation has completed.' The table below shows the payment details:

Doc. Type	Reference Nbr.	Amount Paid	Cash Discount Taken	Write-Off Amount	Payment Date	Balance	Description	Currency	Payment Period	Proc. Status
Payment	004411	130.00	0.0000	0.00	5/22/2023	0.00		USD	05-2023	Pre-Authorized

Authorize Payment action in Invoice Screen

Capture CC Payment

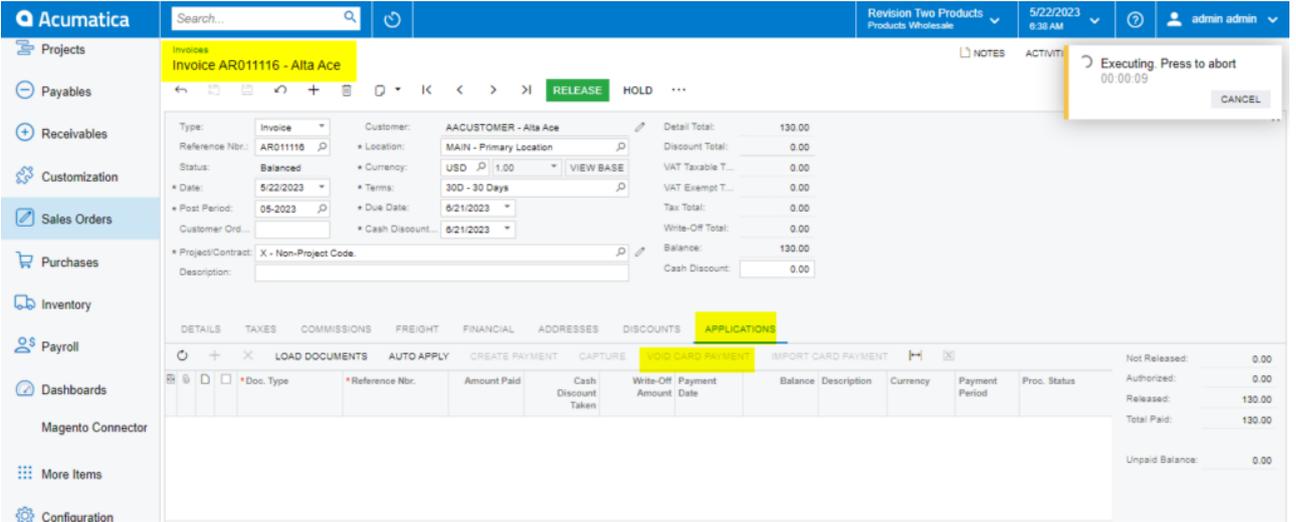


The screenshot shows the Acumatica interface for the same invoice (AR011116 - Alta Ace). The 'CAPTURE' button is highlighted in the 'APPLICATIONS' tab. The 'Payment' row is selected, and the 'Proc. Status' column now shows 'Captured'. A notification at the top right states 'The operation has completed.' The table below shows the payment details:

Doc. Type	Reference Nbr.	Amount Paid	Cash Discount Taken	Write-Off Amount	Payment Date	Balance	Description	Currency	Payment Period	Proc. Status
Payment	004411	130.00	0.0000	0.00	5/22/2023	0.00		USD	05-2023	Captured

Capture CC Payment Action in Invoice Screen

Void CC Authorized/Payment



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.