



CardControl Security and Application Settings

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Important Notice

After October 29, 2019, SalesPad will no longer be supporting CardControl.

Additionally, the application will cease to be a PA-DSS validated solution as of this date, and therefore CardControl customers would no longer be PCI compliant.

Instead, SalesPad Desktop now offers built-in credit card processing via [Nodus PayFabric](#). If you have questions or want more information on our credit card processing services, [please contact your sales rep.](#)

Overview

Security for CardControl 3.0 is managed, by group, in the Security Editor. For information on using the Security Editor, including setting up security users and groups, refer to [CardControl Configuration](#). Global settings applicable to all user groups are managed in the Application Settings module. All settings have defaults set that are selected based on what typical CardControl install would use for greater security and reduced PCI requirements.

Usage

1. Click the **Actions** dropdown and select either Settings or Security Editor to bring up the respective tabs.



Security Settings

Security settings are set per group and only affect the group for which the setting was applied. Some security settings include a menu of child settings when highlighted. If a parent setting is disabled, the child settings will also be disabled.

API Key Manager (CardControl SDK) - Module for managing the system Application Programming Interface (API) keys that are used for connecting to the CardControl SDK.

- *Can Create API Keys* - If True, this allows the user to create new API keys for the system. Defaults to False.
- *Can Disable All API Keys* - If True, this allows the user to invalidate selected keys that are issued for the systems. Defaults to False.
- *Can Disable API Keys* - If True, this allows the user to invalidate selected keys that are issues for the system. Defaults to False.

Settings - Enables the Application Settings module, where global settings for CardControl

are managed.

Batch Processing - Enables the batch window, allowing SalesPad and the Additions plugin for using CardControl with Dynamics GP to process batch payments.

Credit Card Transaction Entry - Enables the Credit Card Transaction Entry/Payments screen for use with SalesPad and in the Additions plugin for using CardControl with Dynamics GP, effectively allows users to process payments.

- *Can Authorize Above Document Total* - If True, users can authorize for an amount greater than the document total. Defaults to False.
- *Can Capture Amount Less Than Authed* - If True, users can capture less than the amount on the original authorization transaction. Defaults to False.
- *Can Overcharge Document* - If True, users can capture or charge over the document total. Defaults to False.
- *Can Override Credit Card Save*- If True, users can check the **Do not save card** checkbox on the transaction entry form. Defaults to False.
- *Visible Processors* - Filters the Credit Card Processors that are visible based in the drop down. Defaults to an empty string.
- *Allows Credits Greater than Document Total* - allows a user to credit more than the document total. Defaults to False.

Credit Card Transaction List - Enables customer transactions to display on the Credit Card Transaction Entry screen.

Customer Card - Enables the Customer Card, where users can see customer properties, stored credit cards, and/or transaction logs (depending on other security settings below).

Customer Credit Cards - Enables the Customer Credit Cards tab, where users can see any stored credit cards for the selected customer.

- *Can Create Credit Cards* - If True, this allows users to create new credit card entries on the Customer Card. Defaults to False.
- *Can Delete Credit Cards* - If True, this allows users to delete credit card entries on the Customer Card. Defaults to False.
- *Can Edit Credit Cards* - If True, this allows users to edit credit card entries on the Customer Card. Defaults to False.
- *Can View Unencrypted Credit Card Numbers* - If True, users can view unencrypted credit card numbers on the Customer Credit Cards tab. If False, users will see the credit card number masked, with only the last four digits showing. Defaults to False.

Customer Properties - Enables the Customer Properties section of the Customer Card, where the Customer Number and Customer Name are visible.

Customer Search - Enables the Customer Search module, where users can search for customers and access Customer Cards (If *Customer Card* is enabled).

Customer Transaction List - Enables the Customer Transaction List.

Customer Transaction Log - Enables the Customer Transaction Log tab on the CardControl Customer Card. This tab allows users to view all CardControl transactions for the selected customer.

Data Cleaner - Enables the Data Cleaner module, where users can erase stored credit card data, credit card logs, and transaction history.

Data Migrator - Enables the Data Migrator module, where credit card, log, and transaction information from SalesPad can be migrated into CardControl.

Database Update - Enables database updates. To allow users to update the database, Can Update Database must also be set to True.

- *Can Update Database* - If True, users can update the database when prompted. Defaults to False.
- *Show Database Update* - If True, users will be notified upon login that a database update is available. Defaults to True.

Fields - Enables fields to be used in CardControl.

- *Allow Screen Layout Customization* - Users can move field around. Defaults to False.

Grids - Enables Grids in CardControl.

- *Can Export Grids* - Grids can be exported from the screen. Defaults to False.

Processor Setup - Enables the Processor Setup module, where Payment Processor Gateways are set up.

Security Editor - Enables the Security Editor.

System Log Search - Allows the user to search through the System Log.

Transaction Log - Allows the user to view all transactions for all customers within the system.

Application Settings

Application settings are set as global system level settings. They apply to all users no matter what group they are associated with.

Application

System In Use - Indicates the system that CardControl will be interacting with. Defaults to GP.

Authorize.net Processing

Additional Freight Info - Indicates the shipping method used. Defaults to True.

Batch Processing

Show Batch Processing Report - If True, this will show the Batch processing summary report

screen after processing a batch. Defaults to True.

Logging

Service Log Reset - Sets the amount of time, in minutes, between log refreshes on the server form. Defaults to 5.

Transaction Entry

Allow Manually Entered Card Numbers - This setting determines if a user is allowed to manually key in a credit card number to a card present processor. Defaults to True.

Require CVV2 - If True, users will not be able to process credit card transactions without entering the CVV2 Security code in the Transaction Entry Screen. Defaults to False.

Save Customer Credit Cards - If True, the system will save credit cards to the database for later use if the current transaction is successful. Defaults to False.

- **Note:** This setting greatly impacts the scope of Payment Card Industry (PCI) Requirements. Storing Credit Cards should only be enabled if there is a business reason for their use. Please consider using tokenization.

Save Unencrypted Tokens - If True the system will encrypted customer credit card tokens upon saving. Defaults to False.

- **Note:** Only set to True if you understand the full ramifications of doing so.

Update Billing Address From Card - If True the billing address for a customer will be updated based on stored customer card selection. Defaults to True.

Transaction Processing

Duplicate Transaction Protection Time - Checks new transactions against previously processed transactions and if the transaction is determined to be a duplicate within this timeframe the transaction will be canceled. Defaults to 500.

Number of Decimal Places - Sets the number of decimal places the amount includes for transactions sent to the processor. Defaults to 2.

- **Note:** Highly recommended that this setting be set to 2 decimal places. Most Processors do not support sub penny amounts.

Rounding Method Selection - Determines how the amount for a transaction is rounded to the Number of Decimal Places Setting. Defaults to Round.

- *Round* - Typical rounding. If the amount is greater than 5 round up (i.e. \$10.235 will round to \$10.24 or \$10.234 will round to \$10.23).
- *Round Down* - Always round down (i.e. \$10.235 will round to \$10.23).
- *Round Up* - Always round down (i.e. \$10.235 will round to \$10.24).