



Create a Manual Payment

Cavallo IT - 2024-12-03 - Sales

Overview

Creating a manual payment through SalesPad Desktop is a pretty simple process. However, please be aware that this process does *not* check the validity of the payment information, and it does *not* mask the credit card number. Actual collection of the payment from the credit card is done via the credit card processor.

Usage

To create the manual payment, first click the hyperlink in the Payment field of the Sales Document screen.

The screenshot shows the SalesPad Desktop interface for a sales document. The 'Payment' field in the 'Totals' section is highlighted with a red box. The 'Payment' value is 0.00. The 'Total' value is 938.20. The 'Misc Charge' is 0.00, 'Discount' is 0.00, 'Freight' is 0.00, and 'Tax' is 0.00. The 'Batch/VQ' is 'DILE' and the 'Price Level' is 'RETAIL'. The 'Shipping Address' is 'Aaron Fitz Electrical, Bob Fitz, 11403 45 St. South, Chicago, IL 60603-0776, Pr: (312) 555-0102, Ft: (312) 555-0102'. The 'Document Properties' section shows 'Document #': ORDST2226, 'Customer #': AARONFIT0001, 'Res Ship': 4/12/2017, 'Ship Method': LOCAL DELIVERY, 'Whse': WAREHOUSE, 'Currency': Z-US\$, 'ORDER (STDORD)': Aaron Fitz Electrical, 'Sales Rep': PALL W., 'Sales Terr': TERRITORY 1, 'Pay Terms': NET 30, 'Doc Date': 4/12/2017, 'Created By': isa.

Open the Credit Card tab on the Payments screen that appears. Enter the credit card information and save the payment.

Payments

Payments

Payments for INVOICE INVSP1343 Document Total: 0.00 Amount Remaining: -20.00

PayFabric: 0.00 Credit Card: 20.00 Cash/Check: 0.00 CardKnox: 0.00

Payment Type	Trans T...	Card Name	Card Number	Exp. Date	Amount Paid	Auth C...	Transa...
MANUAL		MasterCard	5024	1/1/2020	20.00		4/3/20...

Credit Card Information

Processor: AUTH.NET

Card Number: 5024

Card Name: MasterCard

Expiration Date: 01/2020

Security Code: 002

Amount: 20.00 Date: 4/3/2018

Transaction Type: Authorization Charge Manual

Type: Payment Deposit

Billing Address

Cardholder Name: Bob Fitz

Address 1: One Microsoft Way

Address 2:

Address 3:

City: Redmond

State: WA Zip: 98052-6399

Country: USA Country Code: US

Address Code: PRIMARY

The payment information will be written to Microsoft Dynamics GP, and you will need to manually process the payment with your credit card processor outside of SalesPad.

Please note, Credit Card processing from the Credit Card tab in the Payment Window is Not Supported.