Knowledgebase > SalesPad > Sales > Create a Manual Payment

## **Create a Manual Payment**

Cavallo IT - 2025-06-25 - <u>Sales</u>

## 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.

○ (ORDER) ORDST2226 Ⅰ											
📑 Close 🛛 🛃	Save   🍪 Print   🛄 💦 👗 Delete   🗅 Copy   🍰 Allocat	e 🛞 Unalloci	ate 🏼 🚈 Dynamics GP		🍪 Invoice 🛛 🛸 NEW ORDER						
Document Pro	perties		Shipping Address	Additional Pro	perties	Totals - GM: [-\$21.10] [-2.27%]					
Document #:	ORDST2226	ORDER (STDORD)			Aaron Fitz Electrical	Batch/Q:	RULE	Misc Charge:	0.00		
Customer #:	AARONFIT0001 ···· Aaron Fitz Electrical				11403 45 St. South	Price Level:	RETAIL	Discount:	0.00		
Cust PO:		Sales Rep:	PAUL W.	¥	Chicago, IL 60603-0776 P: (312) 555-0102			Discount %	0.00%		
Reg Ship:	4/12/2017 *	Sales Terr:	TERRITORY 1	*	F: (312) 555-0102		No Holds	Freight:	0.00		
Ship Method:	LOCAL DELIVERY *	Pay Terms:	NET 30	Ŧ	v.			Tax:	0.00		
Whee:	WAREHOUSE *	Doc Date:	4/12/2017	Ŧ	Ship Complete			Total:	930.20		
Currency:	Z-US\$ ~	Created By:	sa					Payment:	0.00		
	Bil To	4 11 1									

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

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yments												
Payments for INVOICE INVSP1343					ument	Total:	0.00	Amount Remaining:	Amount Remaining: -20.0			
🗧 PayFabric: (	0.00 📃	Credit Card:	20.00 🖄	Cash/Check:	0.00	CardKno	ox: 0.00					
New Payme	nt	Payment Type	Trans T	Card Name	Card	Number	Exp. Date	Amount Paid	Auth C	Transa		
Remove Payment			MANUAL	MasterCard	5024	ł	1/1/2020	20.00		4/3/20		
Capture Preauth												
Void												
Credit												
Check Statu	IS											
redit Card Information Processor: AUTH.NET						Billing Address Cardholder Nar	me: Bob Fitz	Bob Fitz				
Card Number: 5024					1	Address 1:	One Microsoft Way					
Card Name: MasterCa		ard				Address 2:						
Expiration Date: 01/2020			~		Address 3:							
Security Code: 002					City:	Redmor	Redmond					
Amount:		20.00 Date: 4	4/3/2018	~		State:	WA	Zip:	98052-	-6399		
Transaction Type:	O Autho	orization 🔾	Charge 🔘	Manual		Country:	USA	Country Code:	US			
ype: <ul> <li>Payment</li> <li>Deposit</li> </ul>					Address Code:	PRIMAR	PRIMARY					
	<b>M</b>	Save										
2												

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 <u>Not</u> <u>Supported.</u>