



Credit Card Payments with CardControl

Megan De Freitas - 2025-06-11 - Sales

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

This document covers setting up and using credit card functionality in SalesPad versions 4.1 and later with CardControl.

Use

Sales Document Payments

To create a payment on a sales document, first click the amount hyperlink on the Payment field:

Shipping Address	Additional Properties	Totals - GM: [\$0.00] [0.00%]
Aaron Fitz Electrical One Microsoft Way Grand rapids, MI 49888	Batch/Q: NEW ORDER Price Level: RETAIL	Misc Charge: 0.00
<input type="checkbox"/> Ship Complete	No Holds	Discount: 0.00
		Discount %: 0.00%
		Freight: 0.00
		Tax: 0.00
		Total: 0.00
		Payment: 0.00

This will save the document and open the "Payments" screen. On this screen, CardControl payments are managed on the "CardControl" tab:

Payments

Payments for ORDER ORDST2434

Document Total: **249.90** On Account: **249.90**

CardControl™ Manual: 0.00 Cash/Check: 0.00 CardKnox: 0.00

Actions

New Auth New Charge New Credit ☒ Payment ☐ Deposit

Capture Void Credit

Auth C...	CC Transactio...	Documen...	Document ...	Custom...	PO Num	CC Type	CC Expirati...	Amount	CC Processor ...	CC Transaction T...
No CardControl transactions exist for this document.										

Close

Any existing CardControl transactions on the document will be listed in the grid.

Note: The **New Credit** button is only available for Return documents and is the only enabled button for Returns.

When you click the **New Auth**, **New Charge**, or **New Credit** button to perform a transaction, the CardControl application will open. Be sure to first select Payment or Deposit as appropriate, if multiple options are permitted.

The CardControl “Login” screen may appear if you aren’t yet logged into CardControl:

Login

CardControl v3.0.23.0

Please Login

Connect To: TWO

User ID: salespad

Password

(please enter a password)

Copyright 2015 - SalesPad LLC.

Login Cancel

Log in if prompted. If you are asked to provide an email address for licensing, you may enter a single digit and ignore the licensing prompt.

When logged in, the "CC Transaction Entry" screen will open:

CC Transaction Entry

Customer / Document Properties

Customer Num AARONFIT0001 Aaron Fitz Electrical Document Date 11/29/2018

Document Number ORDST2434 Order 628 Document Total 249.90

Billing Address

Contact

Address 1 One Microsoft Way

Address 2

Address 3

City Grand Rapids

State MI Zip 49888

Country United States Country Code US

Email

Phone

Fax

Shipping Address

Contact

Address 1 One Microsoft Way

Address 2

Address 3

City Grand Rapids

State MI Zip 49888

Country United States Country Code US

Email

Phone

Fax

Copy From Billing

Credit Card Transaction

CC Number

CC Cardholder Name

CC Expiration Date 11/2018

CVV2

Amount 249.90

CC Processor ID Auth.net

Comments

Transaction

CC Transaction Type Authorization

Do not Save Card

Process Transaction

0 transactions have been processed for this document

TEST MODE

Close

Note: In the CardControl Security Editor, Credit Card Transaction Entry must be enabled to view this screen. Customer and document information will be populated on the screen and can be changed as necessary.

The transaction type chosen on the Payments screen (Authorization, Charge, or Credit) will display in the CC Transaction Type field under Transaction on the right.

Enter credit card information in the Credit Card Transaction section or select one of the customer's stored credit cards from the dropdown:

Credit Card Transaction

CC Number

CC Cardholder Name

CC Expiration Date

CVV2

Amount

CC Processor ID

Comments

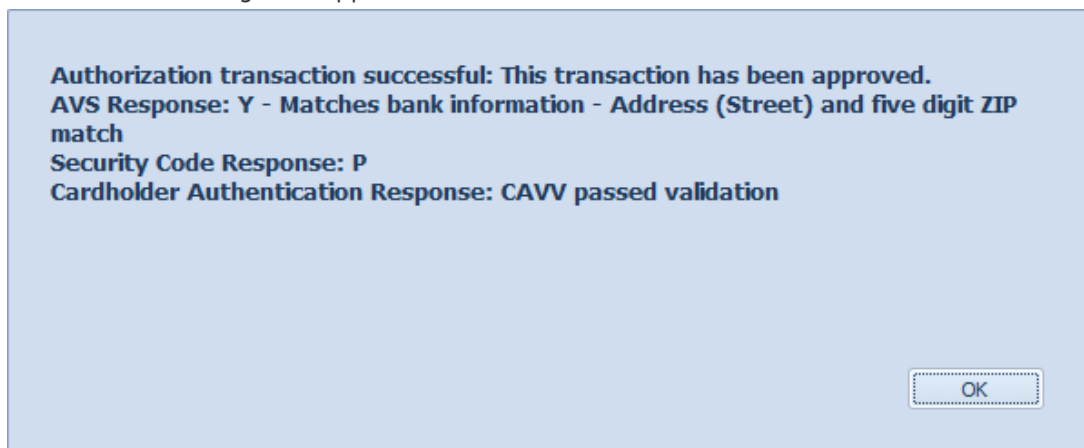
Transa

CC Tra

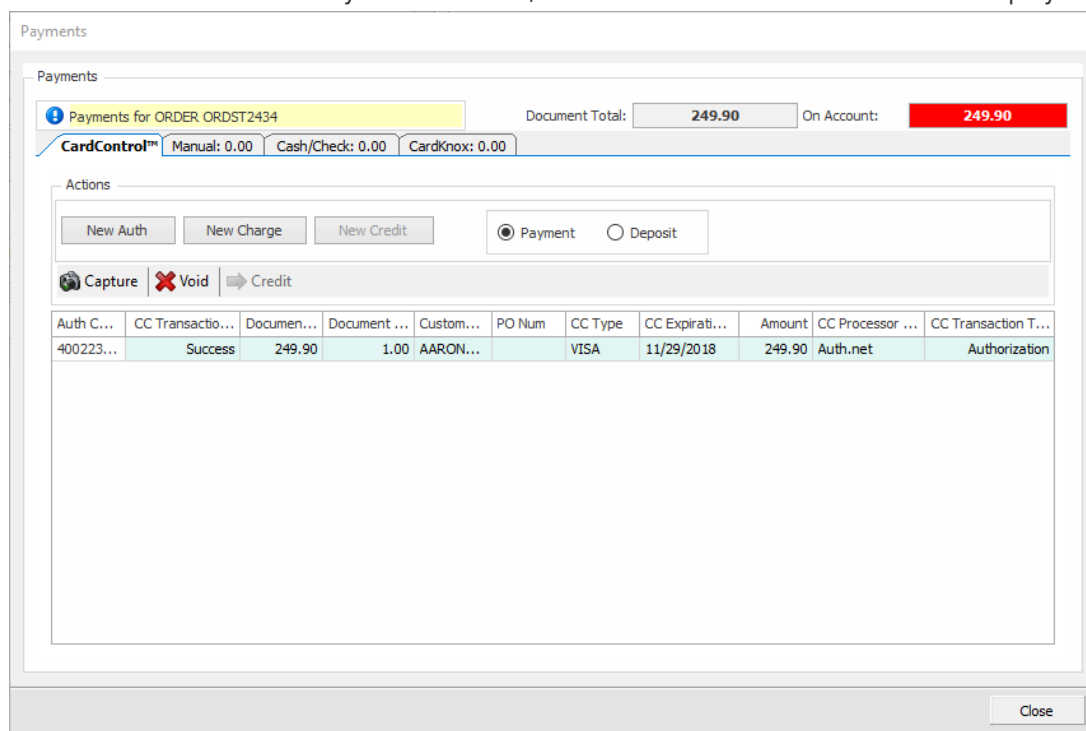
CC #	Exp Date	Desc
XXXX-XXXX-XXXX-1111 (VI)	11/2018	Company Card

Then click **Process Transaction** button in the Transaction section. The transaction will be

processed through the payment processor selected in the CC Processor ID field. A detailed confirmation message will appear:



Click **Ok** to return to the "Payments" screen, where the transaction record will be displayed:



The "Payments" screen displays transaction details for ORDER ORDST2434. It shows a Document Total of 249.90 and an On Account balance of 249.90. The CardControl section shows Manual: 0.00, Cash/Check: 0.00, and CardKnox: 0.00. The Actions section includes buttons for New Auth, New Charge, New Credit, Payment (selected), and Deposit. Below these are buttons for Capture, Void, and Credit. A table lists transaction details:

Auth C...	CC Transactio...	Documen...	Document ...	Custom...	PO Num	CC Type	CC Expirati...	Amount	CC Processor ...	CC Transaction T...
400223...	Success	249.90	1.00	AARON...		VISA	11/29/2018	249.90	Auth.net	Authorization

A "Close" button is located at the bottom right of the screen.

When a transaction has been created, the **Capture** button will be accessible on the "Payments" screen. This button will also open the "CC Transaction Entry screen", where you can click **Process Transaction** to process the capture. The CC Transaction Type field for the record will change to **Capture** on the "Payments" screen.

After a transaction has been captured, the **Void** and **Credit** buttons become available. Click **Void** to void the selected transaction, or **Credit** to credit the amount on the selected transaction.

Customer Card

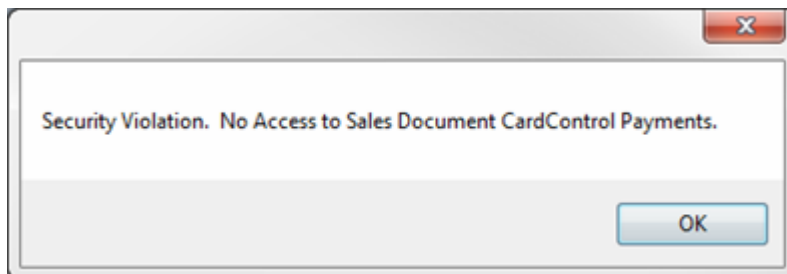
The CardControl Transactions tab on the customer card lists all of the customer's CardControl transactions.

Contact Addresses	CRM	Note	A/R	Item History	Sales Documents	CardControl Transactions	User Fields	Sales Graph	Extended Pri
Sales Doc Num	Transaction Type	Card Type	Cardholder Name	Card Number Masked	Card Expiration Date	Amount	Created On		
ORDST2387	Void	VISA		XXXX-XXXX-XXXX-1111	9/19/2018	28.05	9/19/2018		
Void transaction successful: This transaction has been approved. AVS Response: P - AVS not applicable for this transaction Security Code Response: ...									
ORDST2387	Void	VISA		XXXX-XXXX-XXXX-1111	9/19/2018	28.05	9/19/2018		
Void transaction successful: This transaction has been approved. AVS Response: P - AVS not applicable for this transaction Security Code Response: ...									
ORDST2387	Authorization	VISA		XXXX-XXXX-XXXX-1111	9/19/2018	28.05	9/19/2018		
Authorization transaction successful: This transaction has been approved. AVS Response: Y - Address (Street) and five digit ZIP match Security Code...									
ORDST2434	Authorization	VISA	Aaron Fitz	XXXX-XXXX-XXXX-1111	11/29/2018	249.90	11/29/2018		
Authorization transaction successful: This transaction has been approved. AVS Response: Y - Address (Street) and five digit ZIP match Security Code...									

Security

Customer CardControl Transactions - Enables the CardControl Transactions tab on the Customer Card.

Sales Document CardControl Payments - Enables users to access CardControl Payments from a sales document. If this is not enabled, the following message will appear when the amount hyperlink in the Payment field on the sales document is clicked:



Allow Authorize - If True, a user can authorize a payment on a sales document.

Allow Capture - If True, a user can capture a payment on a sales document.

Allow Charge - If True, a user can charge a payment on a sales document.

Allow Credit - If True, a user can credit a payment on a sales document.

Allow Decrypted Credit Card Lookup - If True, a user can look up a full credit card number.

Allow Manual - If True, a user can manually charge a payment on a sales document.

Allow Void - If True, a user can void a payment on a sales document.

Allowed Payment Options - Sets options for the allowable payments (Deposits, Payments, or Payments and Deposits).

Default Checkbook ID - Sets the default checkbook ID to use.

Settings

Allow Authorizations Above Document Total - If True, new transactions will be allowed after the document total has been captured.

Can Capture Less Than Auth - If True, SalesPad will capture only the On Account amount. If False, the full Authorization will be captured.

CardControlLocation - Enter the location of the CardControl EXE that will be used to process

credit card transactions.

Default CC Trxs To Deposits - If True, credit card transactions will default to deposits.

Default Credit Card Payment Type - Sets the default payment type that will be used when inserting a credit card payment into GP (payment or deposit).

Months Limit - Enter the number of months back from the current date that transactions will be displayed on the customer card.

PreauthHoldCode - Sets the process hold to apply to a sales document when a preauth transaction is processed.

Sales Entry Overrides Authorization Up Charge Percent - Sets the percentage to upcharge credit authorizations (this allows room for freight charges added later, to ensure that the credit authorization will clear).