Credit Card Payments with CardControl

Cavallo Support - 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.

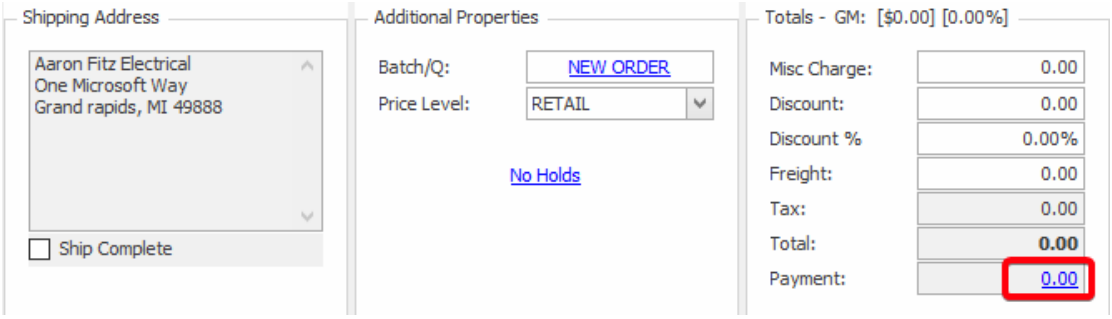
Overview

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

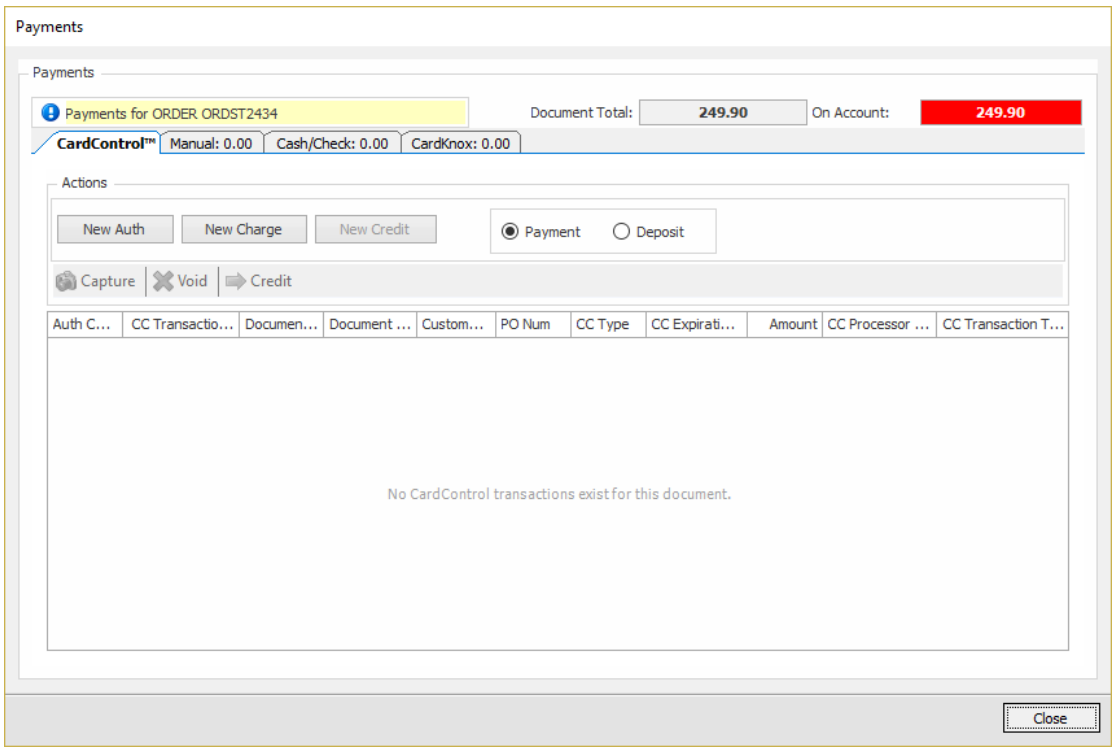
Use

Sales Document Payments

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



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

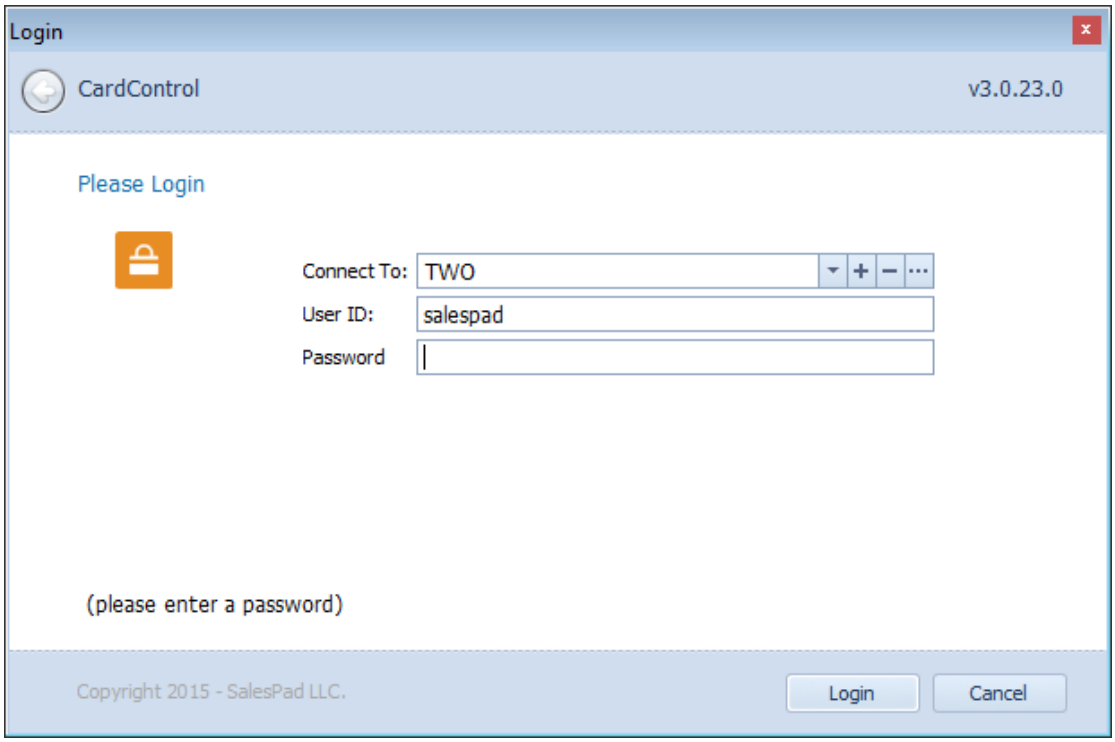


Any existing CardControl transactions on the document will be listed in the grid.

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

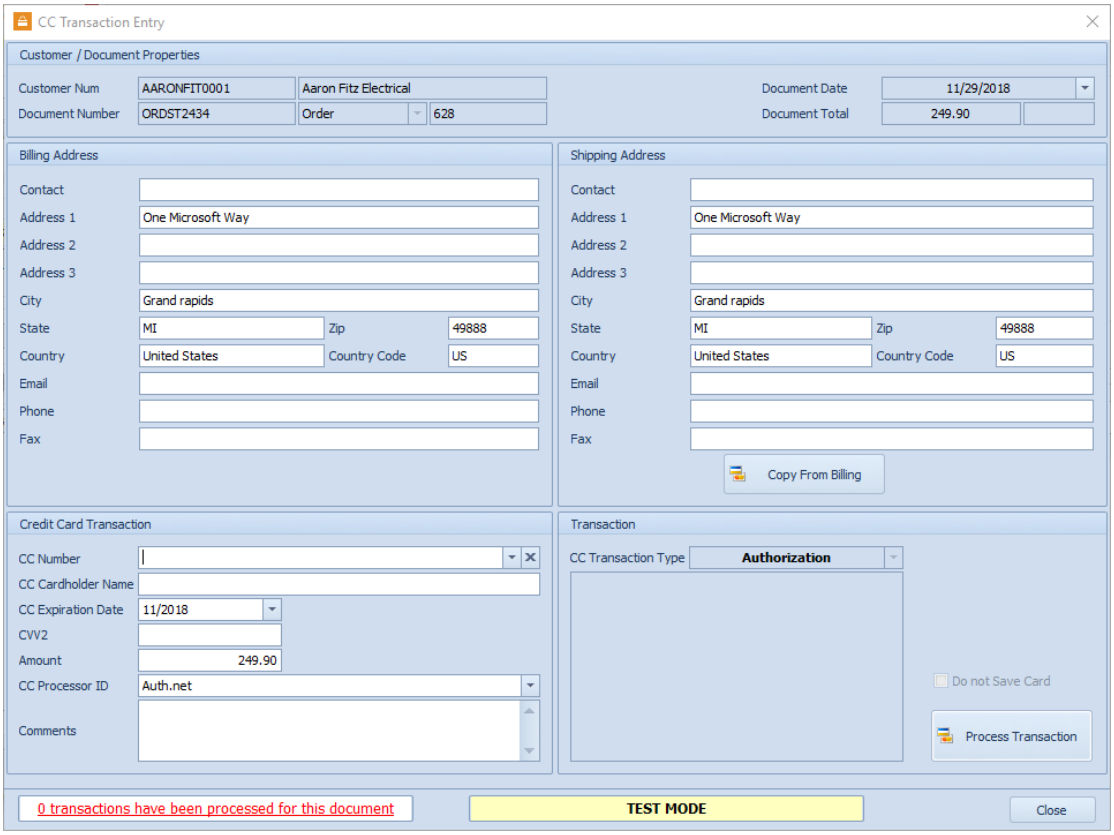
When you click the **New Auth**, **New Charge**, or **New Credit** button to perform a transaction, the CardControl application will open. Be sure to first select Payment or Deposit as appropriate, if multiple options are permitted.

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



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.

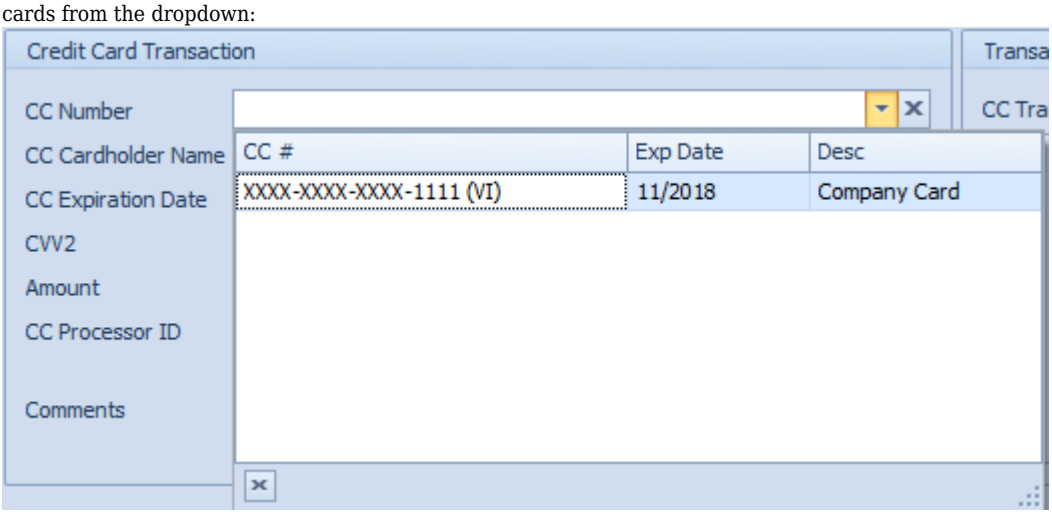
When logged in, the "CC Transaction Entry" screen will open:



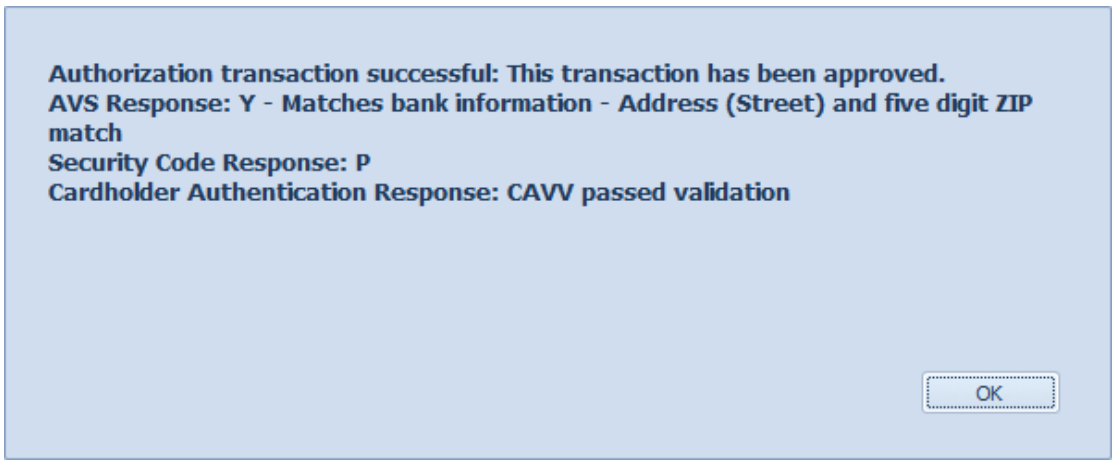
Note: In the CardControl Security Editor, Credit Card Transaction Entry must be enabled to view this screen. Customer and document information will be populated on the screen and can be changed as necessary.

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.

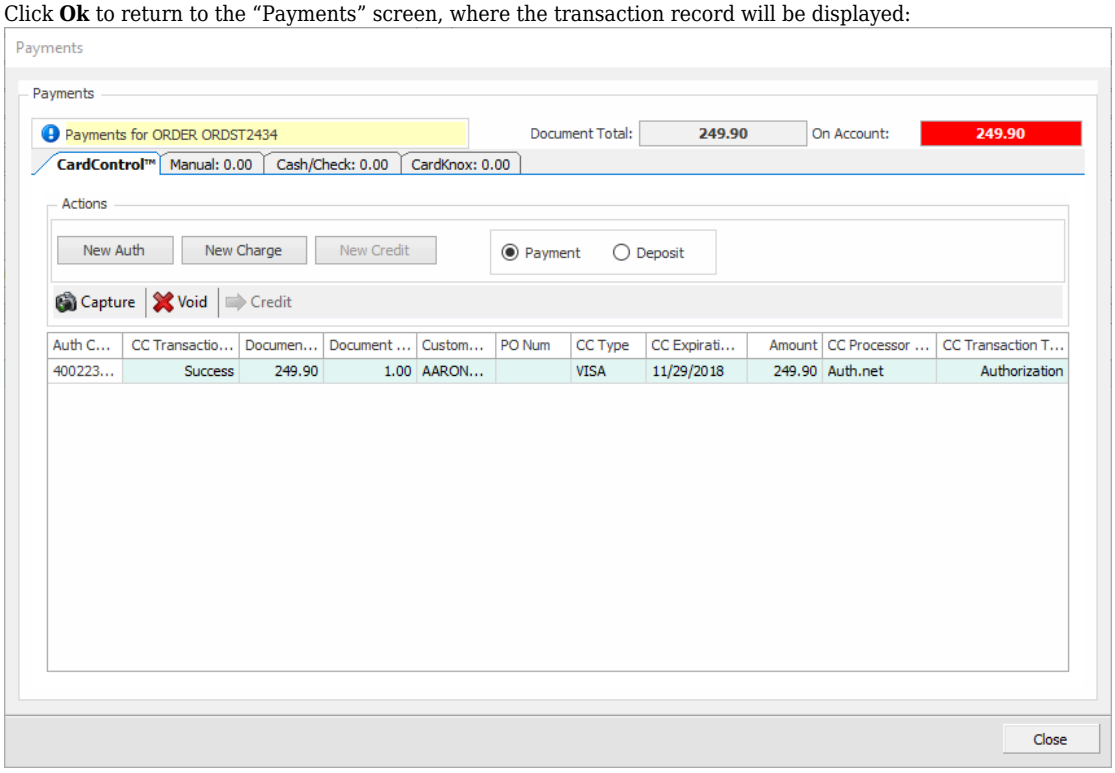
Enter credit card information in the Credit Card Transaction section or select one of the customer's stored credit cards from the dropdown:



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:

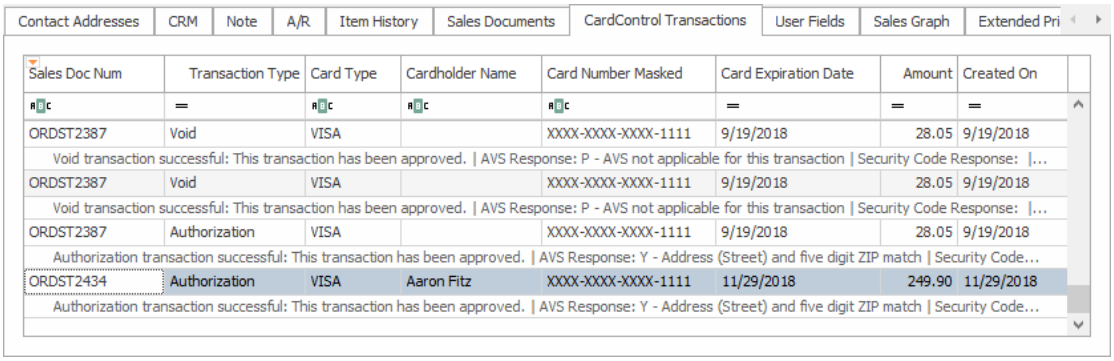


When a transaction has been created, the **Capture** button will be accessible on the "Payments" screen. This button will also open the "CC Transaction Entry screen", where you can click **Process Transaction** to process the capture. The CC Transaction Type field for the record will change to **Capture**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

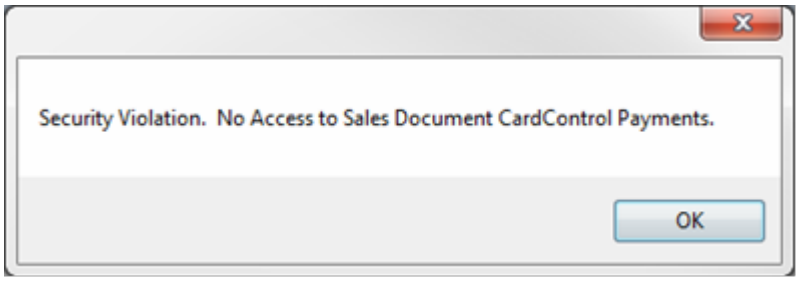
The CardControl Transactions tab on the customer card lists all of the customer’s CardControl transactions.



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).