



Credit Card Payments with CardControl

Megan De Freitas - 2024-11-25 - Sales

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:

The screenshot shows the SalesPad interface with three main sections: Shipping Address, Additional Properties, and Totals - GM: [\$0.00] [0.00%].

- Shipping Address:** Aaron Fitz Electrical, One Microsoft Way, Grand rapids, MI 49888. There is a checkbox for "Ship Complete".
- Additional Properties:** Batch/Q: NEW ORDER, Price Level: RETAIL. There is a link for "No Holds".
- Totals - GM: [\$0.00] [0.00%]:** A table showing various charges and discounts. The "Payment" field at the bottom right is highlighted with a red box and contains the value "0.00".

Totals - GM: [\$0.00] [0.00%]	
Misc Charge:	0.00
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:

The screenshot shows the "Payments" screen with the "CardControl" tab selected. The screen displays the "Payments for ORDER ORDST2434" and the "Document Total: 249.90". The "On Account" field is highlighted in red and contains the value "249.90".

Below the totals, there are buttons for "New Auth", "New Charge", "New Credit", "Payment" (selected), and "Deposit". There are also buttons for "Capture", "Void", and "Credit".

A table with the following columns is shown: Auth C..., CC Transactio..., Documen..., Document ..., Custom..., PO Num, CC Type, CC Expirati..., Amount, CC Processor ..., CC Transaction T....

The table is empty, and a message states: "No CardControl transactions exist for this document."

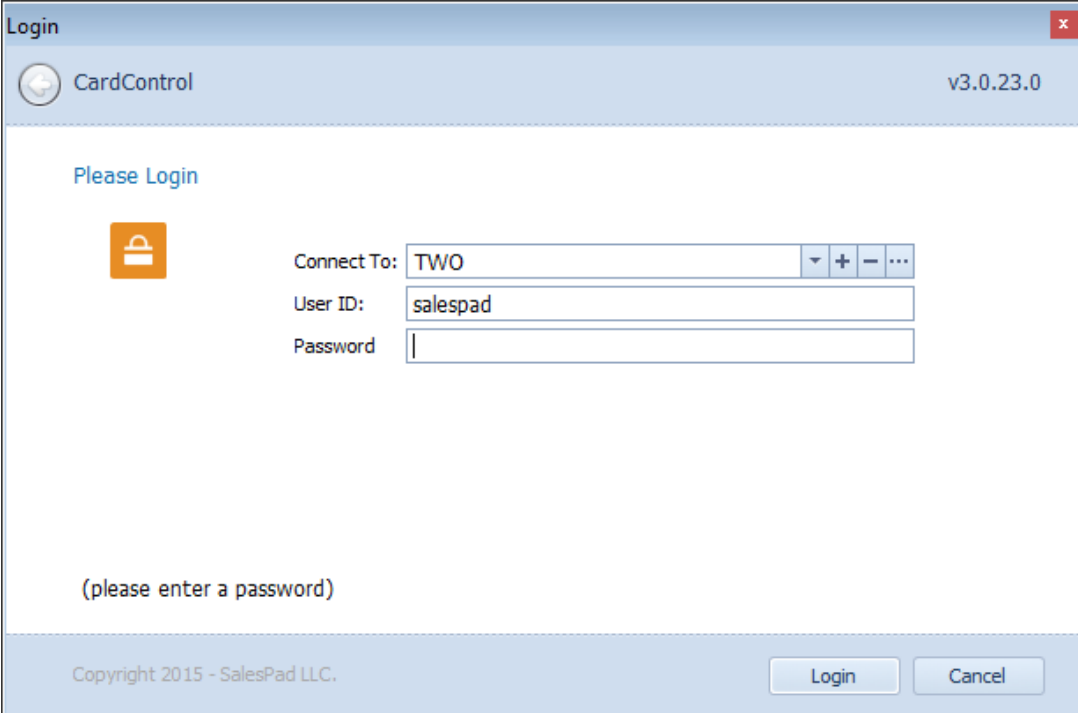
A "Close" button is located at the bottom right of the screen.

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:



The image shows a "Login" dialog box for the CardControl application. The title bar is blue and contains the text "Login" and a close button. Below the title bar is a header bar with a "CardControl" logo on the left and the version number "v3.0.23.0" on the right. The main area of the dialog is white and contains the text "Please Login" in blue. Below this text is an orange icon of a padlock. To the right of the icon are three input fields: "Connect To:" with a dropdown menu showing "TWO", "User ID:" with the text "salespad", and "Password:" with an empty field. Below the input fields is the text "(please enter a password)". At the bottom of the dialog is a blue bar containing the copyright text "Copyright 2015 - SalesPad LLC." and two buttons: "Login" and "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: 49688
 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: 49688
 Country: United States Country Code: US
 Email: _____
 Phone: _____
 Fax: _____

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

0 transactions have been processed for this document

TEST MODE

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: _____

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:

Authorization transaction successful: This transaction has been approved.
AVS Response: Y - Matches bank information - Address (Street) and five digit ZIP match
Security Code Response: P
Cardholder Authentication Response: CAVV passed validation

OK

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

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...
400223...	Success	249.90	1.00	AARON...		VISA	11/29/2018	249.90	Auth.net	Authorization

Close

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

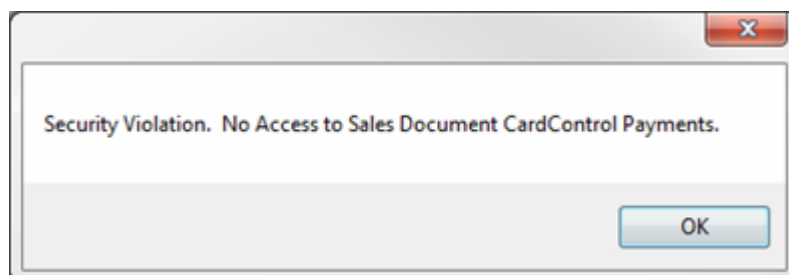
The CardControl Transactions tab on the customer card lists all of the customer's CardControl transactions.

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).