PayFabric eCheck/ACH Payments

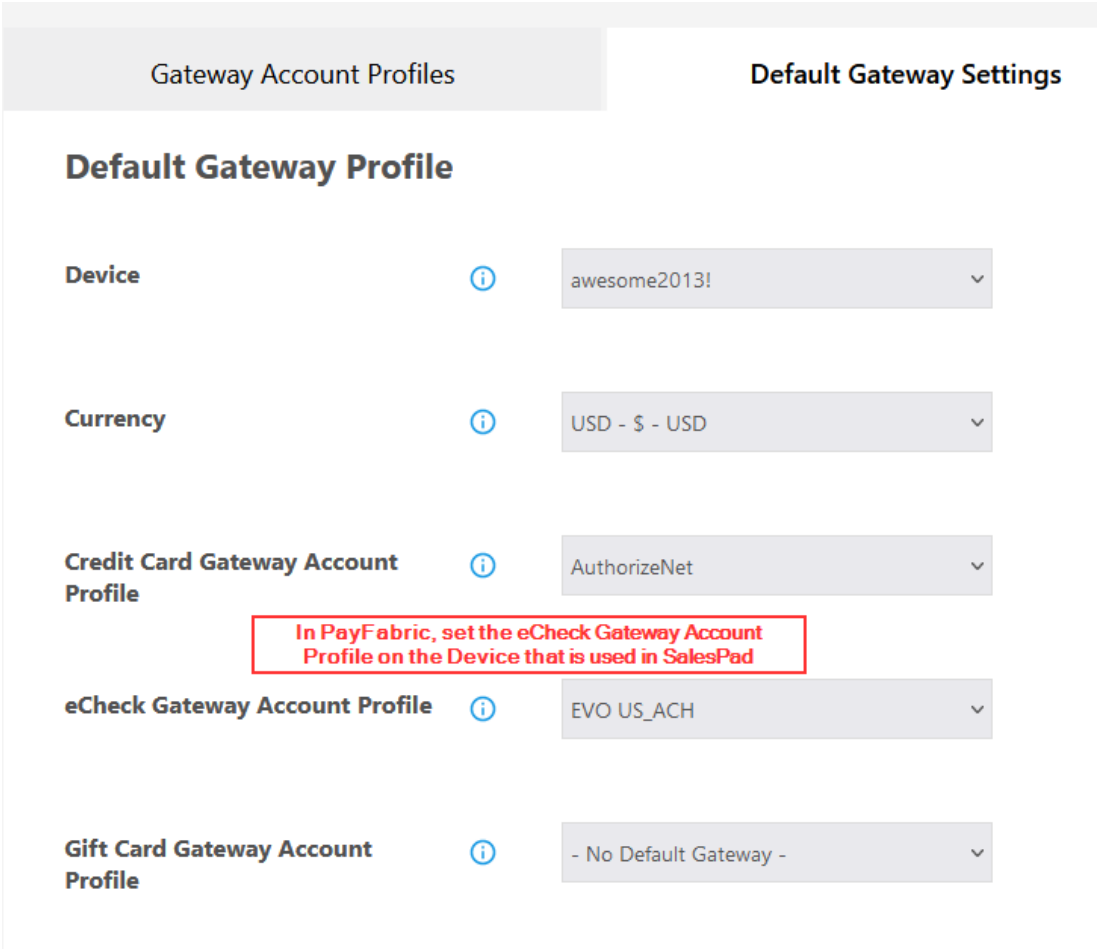
Cavallo Support - 2024-11-22 - PayFabric

Overview

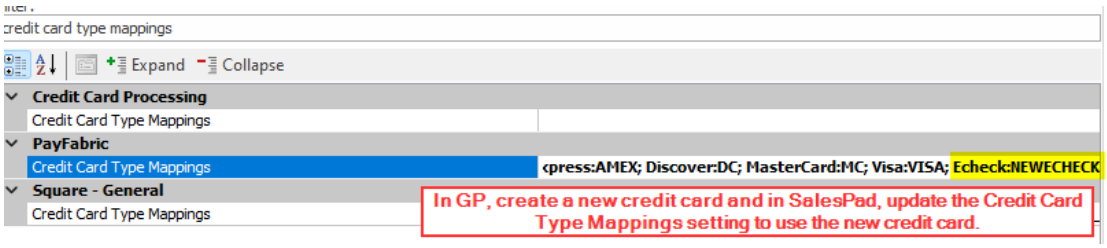
SalesPad's PayFabric integration supports eCheck/ACH payments, which requires specific configuration within PayFabric and SalesPad. Once a PayFabric gateway is set up for ACH payments, and a Dynamics GP "credit card" is created and mapped as an eCheck-type credit card within SalesPad, the PayFabric payments window in SalesPad will allow entering all of the fields necessary to create an eCheck/ACH payment.

Setup

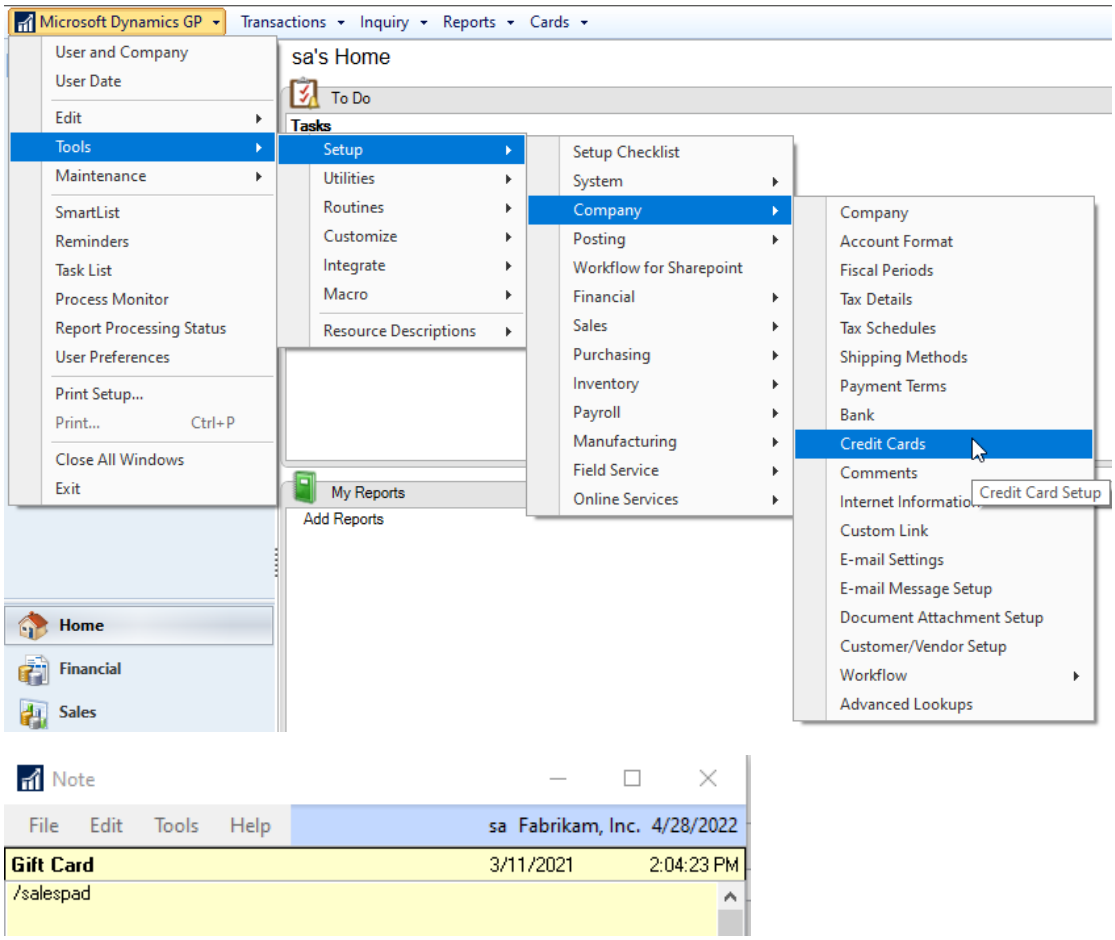
A specific gateway must be enabled for eCheck/ACH payments within the Nodus PayFabric interface and assigned to the device that is configured for SalesPad payment processing. This will allow the SalesPad interface to display the correct fields for eCheck/ACH payments. Your PayFabric partner must also set up the Merchant ID for that gateway, or you will see an error that "MerchantId is required".



In SalesPad, the Credit Card Type Mappings setting must include a GP credit card with a type of eCheck, e.g. "Echeck:NEWECHECK". Note that this card name is the main identifier to know that the payment was an eCheck/ACH payment, as it otherwise looks like a typical credit card payment.



If a new GP credit card must be created for this purpose, this setup can be found in Dynamics GP via Microsoft Dynamics GP > Tools > Setup > Company > Credit Cards. Note that cards must have a note which contains the text "/salespad" in order to be usable within SalesPad.



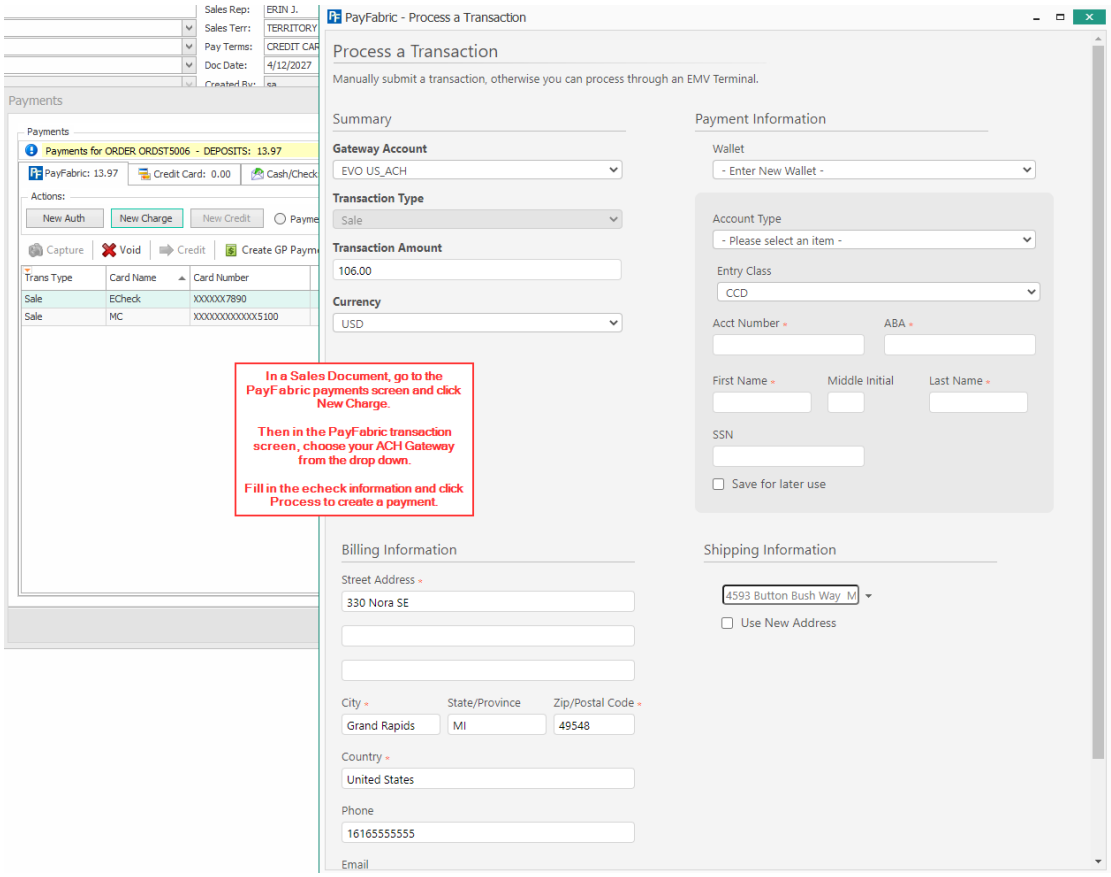
Nodus can provide a test Routing Number to use for testing eCheck/ACH payments.

Usage

To create an eCheck/ACH payment in SalesPad:

1. Launch a sales order
2. Click the Payment hyperlink to launch the Payments plugin
3. In the PayFabric tab, click the New Charge button to launch the PayFabric payment entry popup
4. Change the Gateway Account to the gateway that is enabled for eCheck/ACH payments, which will update the visible fields to show the eCheck/ACH payment fields
5. Fill in the eCheck/ACH information and click Process to create the payment

6. The payment will be displayed in the Payments window with a Card Name of “ECheck”



Note that eCheck/ACH payments can be voided, but they cannot be credited.