PayFabric Integration

Cavallo IT - 2024-12-03 - Integrations

Overview

Nodus PayFabric is a safe and secure way for you to accept credit card payments from your customers, and connecting your SalesPad Cloud account to your PayFabric account is a simple process. By using PayFabric within SalesPad Cloud, SalesPad Cloud is out of scope for PCI requirements. SalesPad Cloud does not access or store any credit card information; it is all handled through PayFabric. Additionally, all PayFabric transactions run through SalesPad Cloud are card not present transactions, meaning that the physical card is not present for the transaction.

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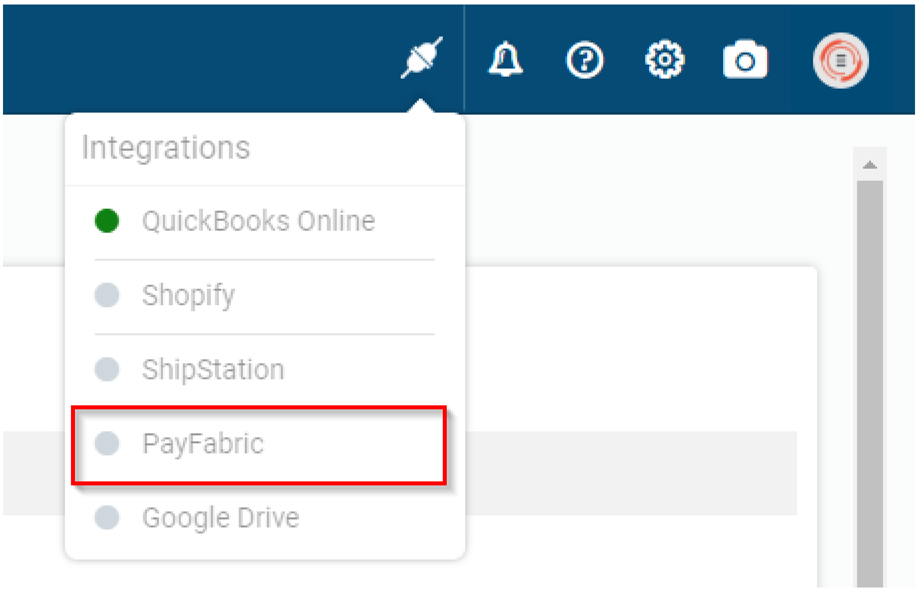
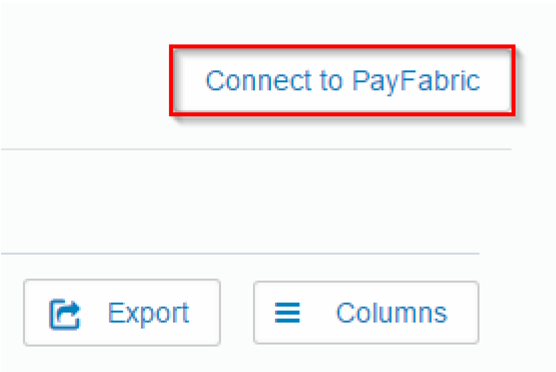
Connect to PayFabric

You have two options when setting up an account with PayFabric. You can use an existing gateway, if it's supported by PayFabric (click here to see supported gateways), or you can sign up with Nodus merchant services. Nodus Merchant services offers better pricing. Click here for more about PayFabric pricing.

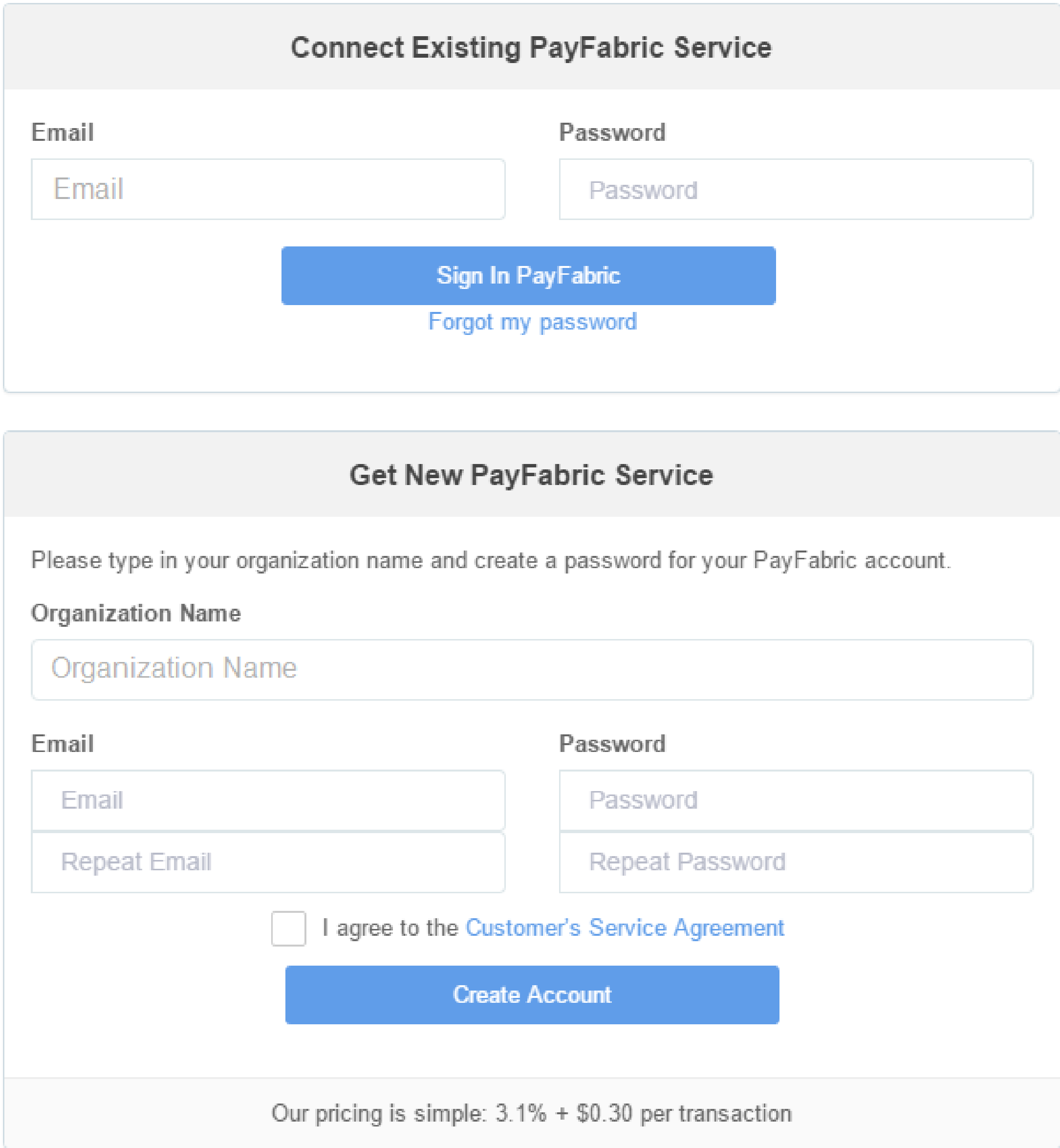
Once you've set up a PayFabric account, you need to connect that account to your SalesPad Cloud account. To connect your SalesPad account to your PayFabric account, or to create a PayFabric account directly from SalesPad Cloud, select **PayFabric** from the Integrations dropdown in the upper right-hand corner of the screen.



Click the **Connect to PayFabric** button that appears.

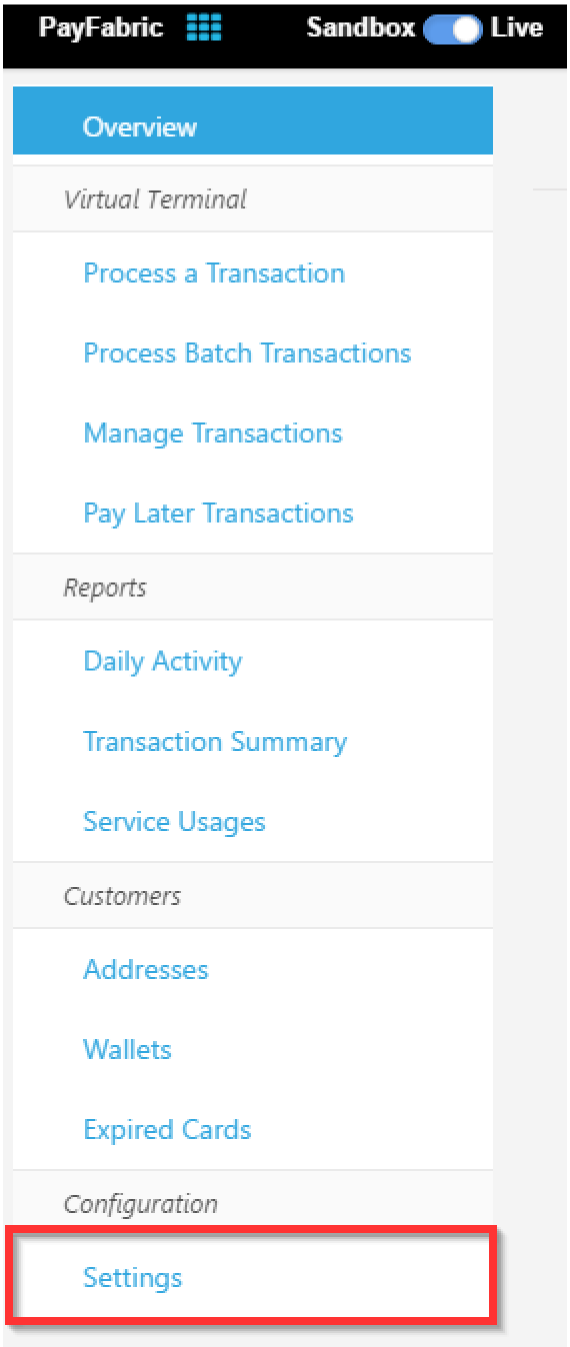


In the screen that appears, you can either sign in to your existing PayFabric account or create a new PayFabric account. Choose the option that best suits your current setup and follow the on-screen prompts.

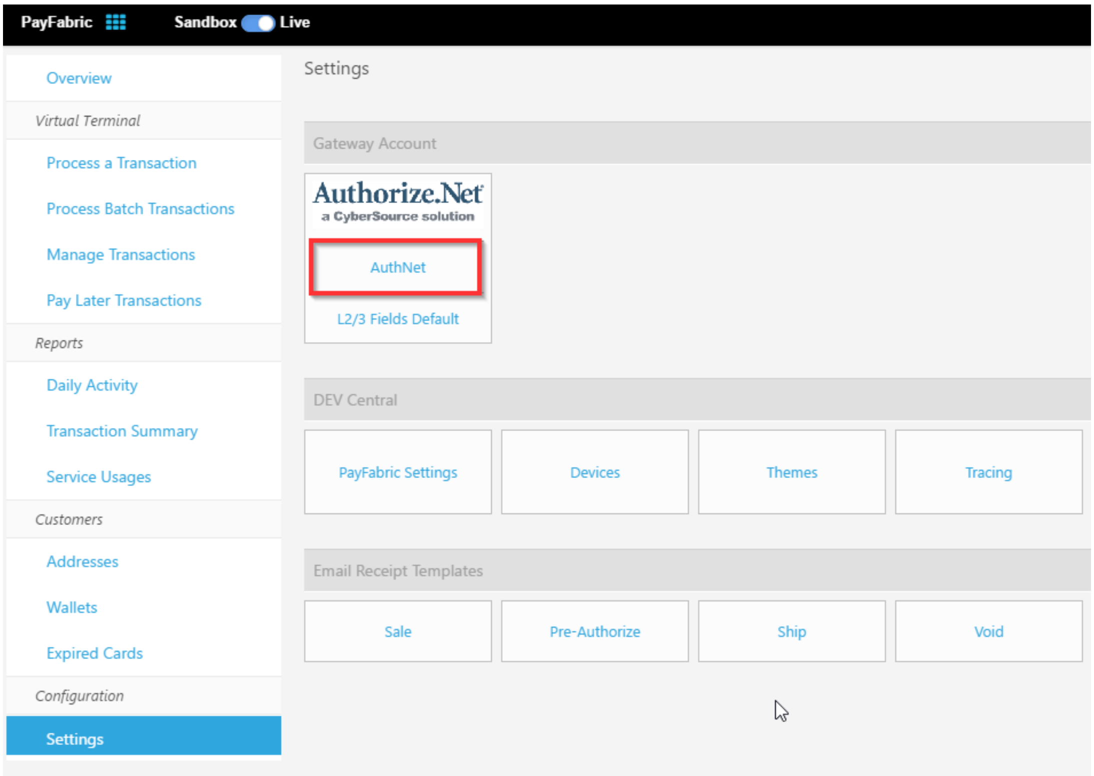


If you are using auth.net as your gateway, you need to complete a couple additional steps on the PayFabric portal.

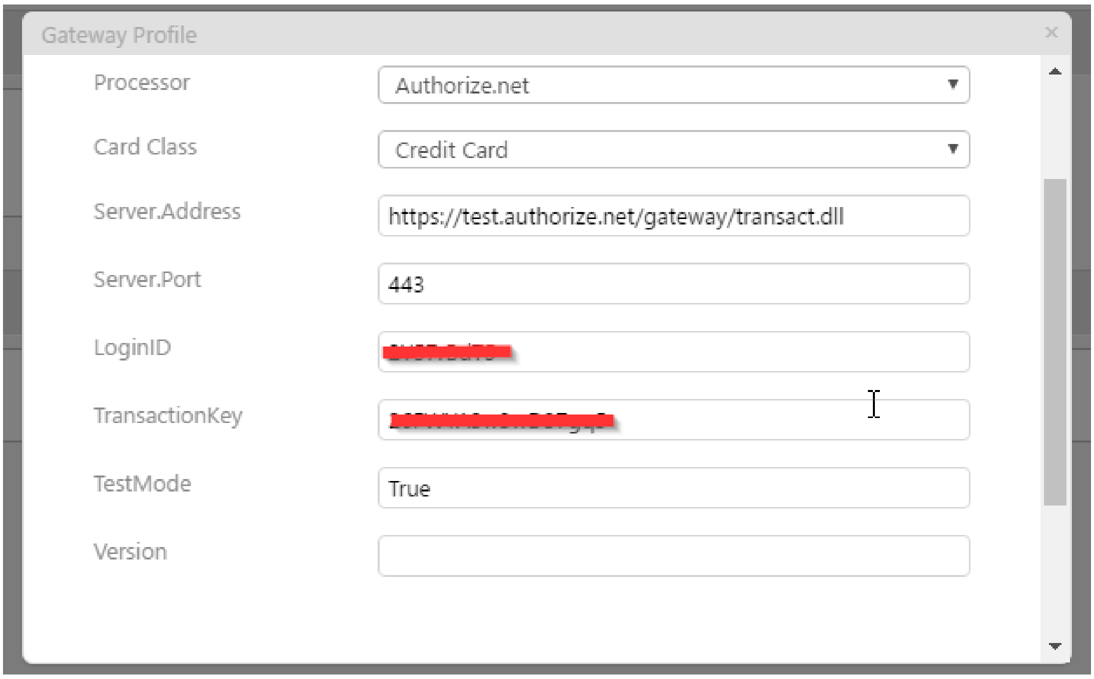
After logging in to the PayFabric portal, click on **Settings** in the lower left-hand corner.



Click on the name of the gateway you created during the SalesPad Cloud onboarding process to open the Gateway Profile screen.



The Gateway Profile pop-up will appear. Enter 443 into the Server.Port field, and enter True or False, depending on whether or not you want to be in test mode or not, in the TestMode field.



Before closing the Gateway Profile pop-up, make sure the Server Address is correct. If you have a sandbox account with auth.net the Server Address should be https://test.authorize.net/gateway/transact.dll. If you have a live account, it should be https://secure.authorize.net/gateway/transact.dll.

Verify that the LoginID and Transaction Key fields are populated correctly, then exit

PayFabric Portal and return to SalesPad Cloud.

Once you've connected your PayFabric account to your SalesPad Cloud account, you will be able to accept credit card payments from your customers. For more help with your PayFabric account, please visit the PayFabric help page.

Note: Payment options will vary depending on the Sales Document Type. Payments are not permitted on estimates/quotes, and the preauth option is currently only available for orders in SalesPad Cloud. If your PayFabric integration is successful but you do not see payment options on a sales document, check to make sure that the **Payments Allowed** box is checked for the Sales Document Types you want to be able to take payments on.

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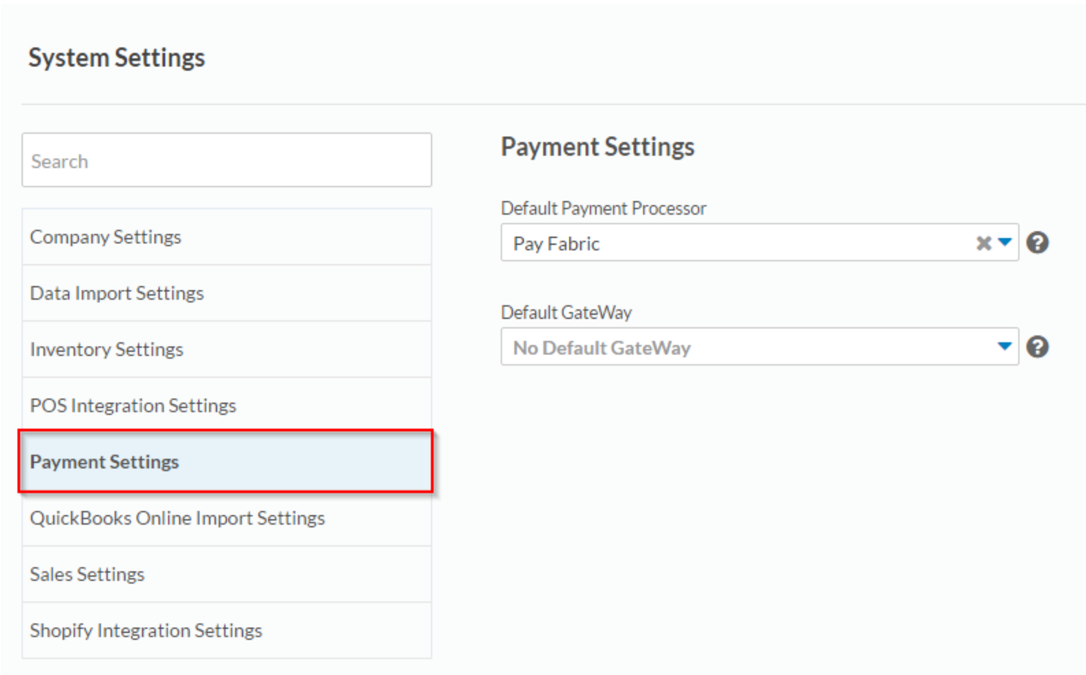
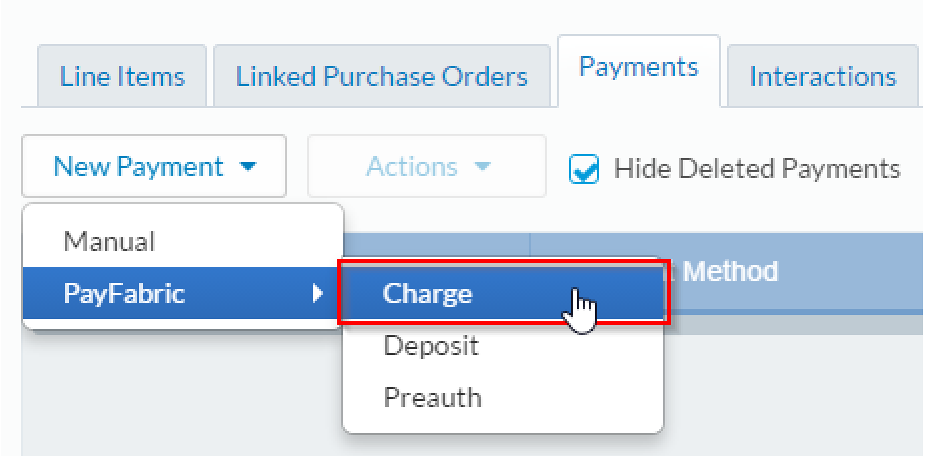
See it In Action

Before running a charge through PayFabric, make sure to visit the Payment Settings section of your SalesPad Cloud's System Settings and ensure that your Default Payment Processor and Default GateWay are set correctly.



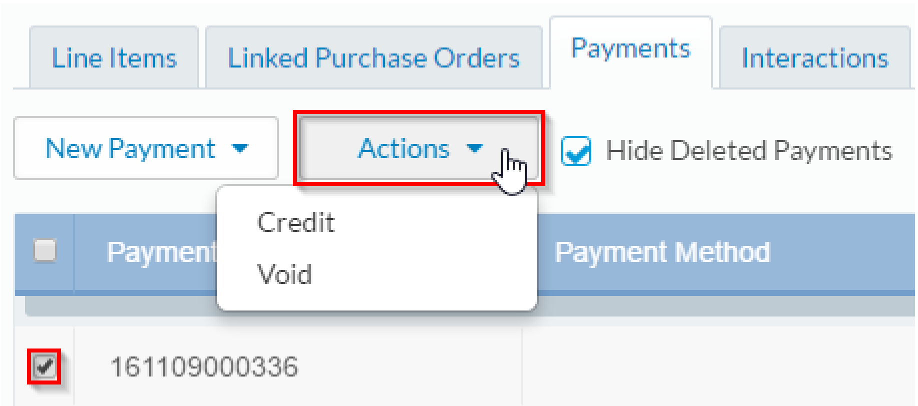
Running a Charge

A charge is a payment where all funds are received immediately. To take a charge payment, open the Payments tab on your sales transaction, click the **New Payment** button, and select the **Charge** option from within the PayFabric dropdown.



Fill out the information fields that appear in the Process Transaction window. If the customer for this order has a card stored in their PayFabric Wallet, that card information will populate by default. Click the card dropdown to change cards, or enter information for a new card. When you're finished, scroll down the page until the **Back** and **Process Payment** buttons are visible, then click **Process Transaction**.

Once the charge has been processed, it will appear on the grid in your Payments tab. To take further action on the transaction, check the box next to the payment and click the **More Actions** dropdown.



The **Credit** option will allow you to apply the funds captured by the charge to the customer's account for use on other transactions. The **Void** option returns the funds captured to the customer.

Note: Clicking the **Void** button in the upper right-hand corner of the screen will not void payments. SalesPad Cloud does not allow you to void sales transactions that have active payments on them. To void a sales transaction with an active payment on it, you must first void the payment.

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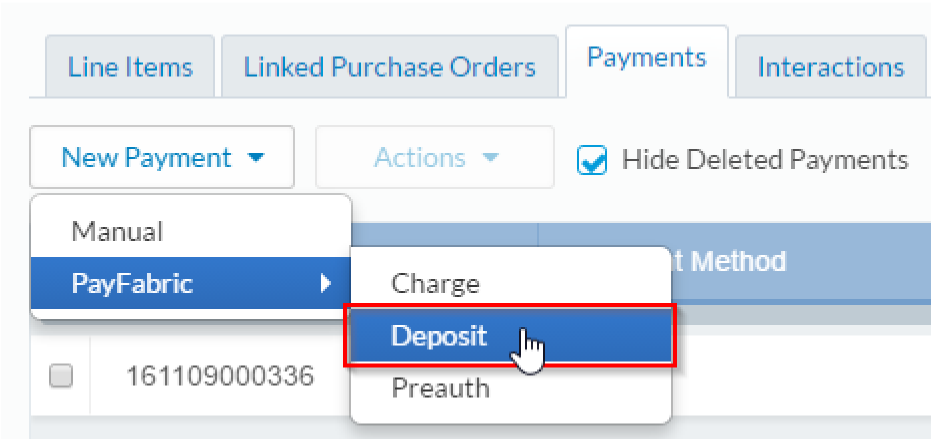
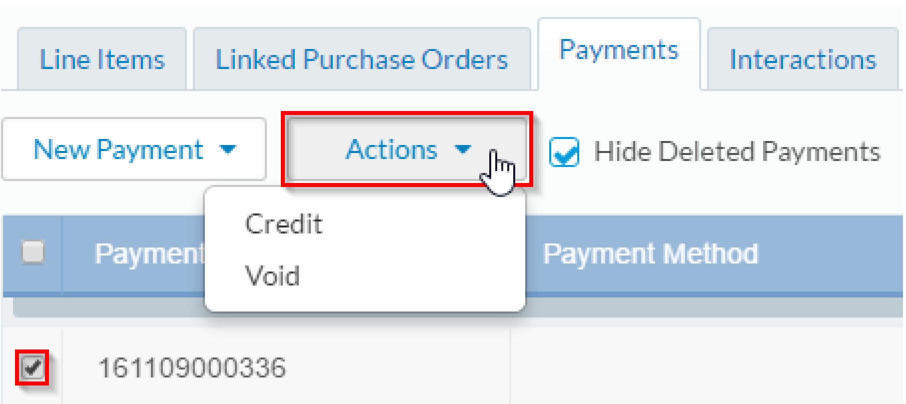
Running a Deposit

A deposit is typically a set amount that is paid before the [Payment Terms](#) have resolved. For example, if the customer owes you $1000 over the course of 14 days, but $150 is due up front, the $150 payment would be run as a deposit. To take a deposit payment, open the Payments tab on your sales transaction, click the **New Payment** button, and select the **Deposit** option from within the PayFabric dropdown.



Fill out the information fields that appear in the Process Transaction window. If the customer for this order has a card stored in their [PayFabric Wallet](#), that card information will populate by default. Click the card dropdown to change cards, or enter information for a new card. When you're finished, scroll down the page until the **Back** and **Process Payment** buttons are visible, then click **Process Transaction**.

Once the deposit has been processed, it will appear on the grid in your Payments tab. To take further action on the transaction, check the box next to the payment and click the **More Actions** dropdown.



The **Credit** option will allow you to apply the funds captured by the deposit to the customer's account for use on other transactions. The **Void** option returns the funds captured to the customer.

Note: Clicking the **Void** button in the upper right-hand corner of the screen will not void payments. SalesPad Cloud does not allow you to void sales transactions that have active payments on them. To void a sales transaction with an active payment on it, you must first void the payment.

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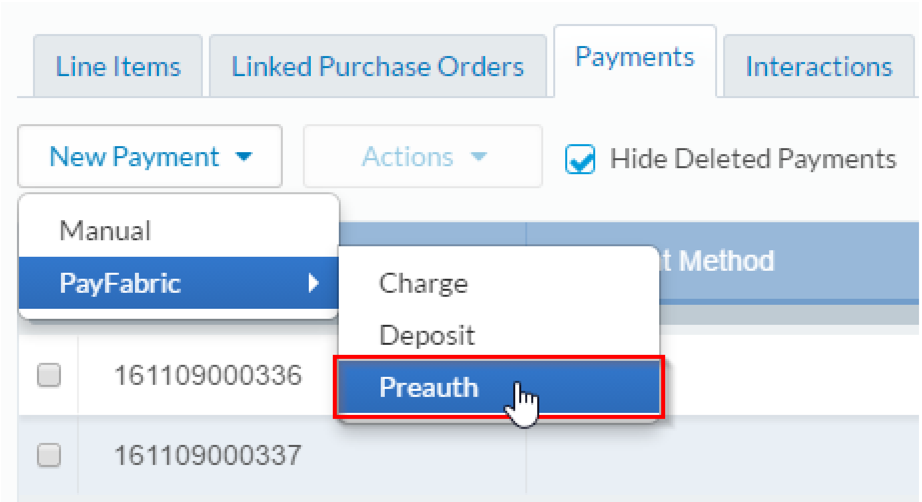
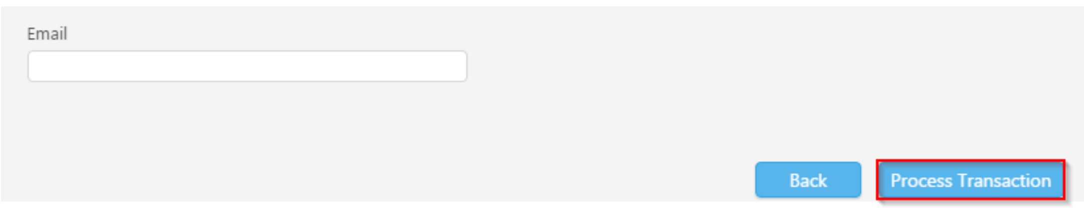
Running a Preauth

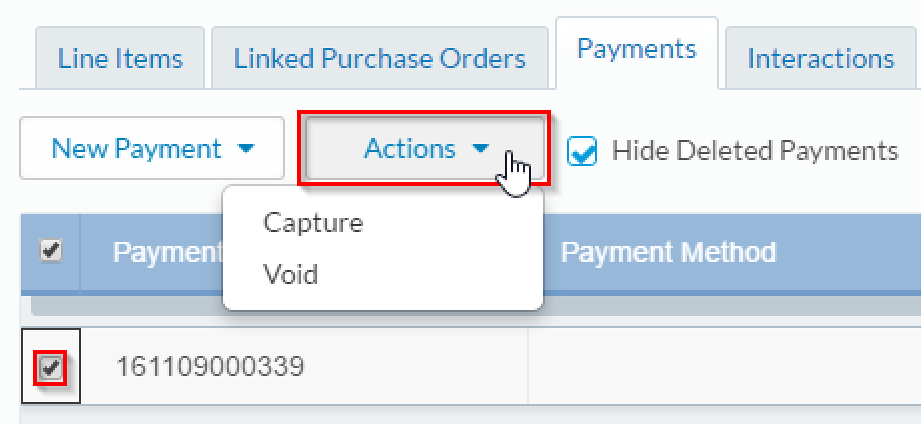
A preauth is the initial action taken for the payment, when card information is gathered and funds are reserved; no funds are transferred as a result of a preauth transaction. Preauths are only permitted on orders in SalesPad Cloud. To run a preauth transaction, open the Payments tab on your order, click the **New Payment** button, and select the **Preauth** option from within the PayFabric dropdown.



Fill out the information fields that appear in the Process Transaction window. If the customer for this order has a card stored in their [PayFabric Wallet], that card information will populate by default. Click the card dropdown to change cards, or enter information for a new card. When you're finished, scroll down the page until the **Back** and **Process Payment** buttons are visible, then click **Process Transaction**.



Once the preauth has been processed, it will appear on the grid in your Payments tab. To take further action on the transaction, check the box next to the payment and click the **More Actions** dropdown.



The **Capture** option will take the funds reserved by the preauth transaction. The **Void** option will remove the reservation on those funds.

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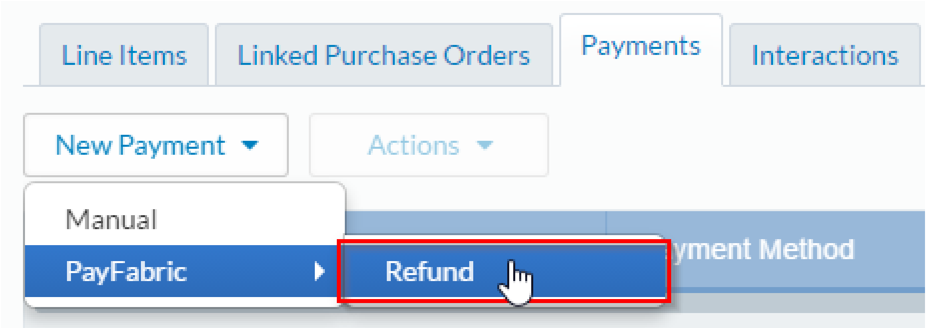
Running a Refund

A refund is a card transaction where funds are returned to the customer. Refunds are only available on return/refund Sales Document Types. To refund a customer, open the Payments tab on your return/refund, click the **New Payment** button, and select the **Refund** option from within the PayFabric dropdown.



Select the PayFabric payment to refund from the drawer that appears. If necessary, adjust the amount to refund, then click the **Refund** button to create the refund.

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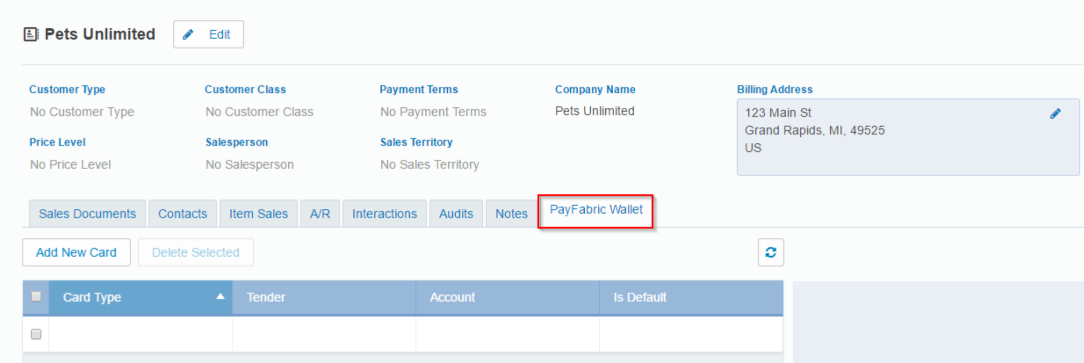
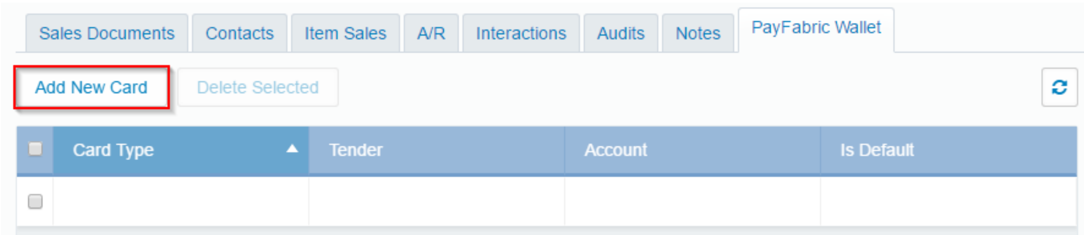
PayFabric Wallets

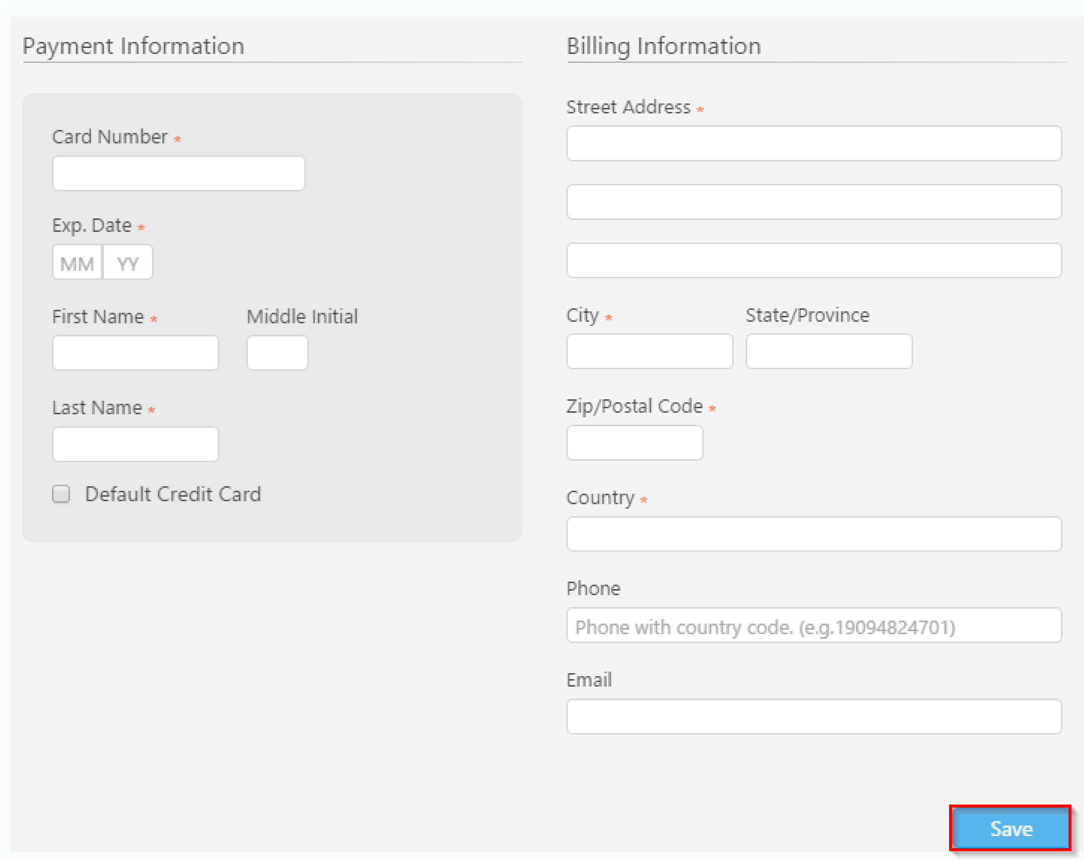
You can also set up a PayFabric Wallet for each customer. PayFabric Wallets allow you to store multiple credit cards per customer. Open a customer card and click the **PayFabric Wallet** tab.



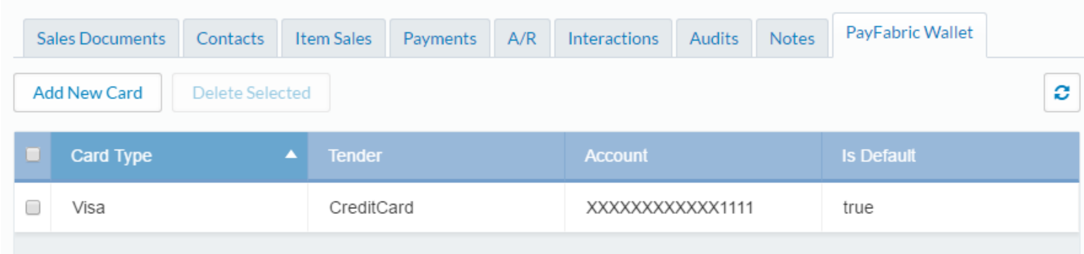
Click **Add New Card** on the left-hand side of the screen.



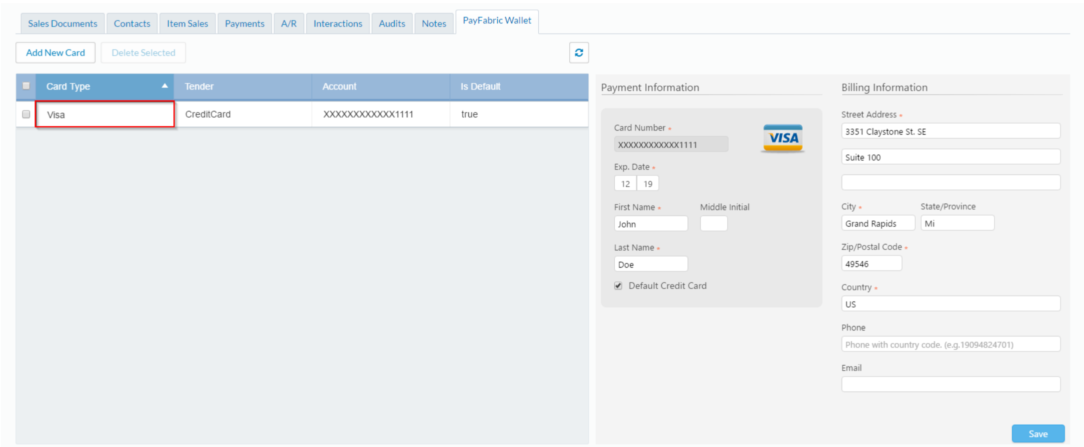
Fill in the information fields that appear to the right of the grid and click **Save** when you are finished.



Once you click **Save**, the card will appear in the PayFabric Wallet tab.



To view or edit card details, double-click on any of the column cells for that card. The card information from PayFabric will display on the right-hand side of the PayFabric Wallet tab.



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