PayFabric Migration

Cavallo Support - 2024-12-03 - PayFabric

Overview

PayFabric Migrator is a module within PayFabric that is used to transfer credit cards stored within CardControl to the PayFabric cloud for continued use when moving over to PayFabric. In this document, you will learn how to install and configure this module, and you'll be given basic instructions for using it.

Before beginning the installation, refer to the Security section at the end of the document for relevant securities and settings.

Preparation

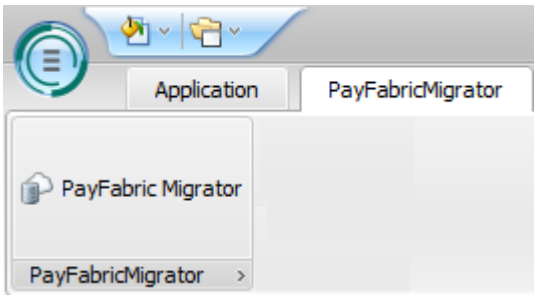
To begin this process, you will first need to request the SalesPad.Module.PayFabric.Migrator.dll file from SalesPad. Contact your sales rep to discuss your needs and request access to this extension.

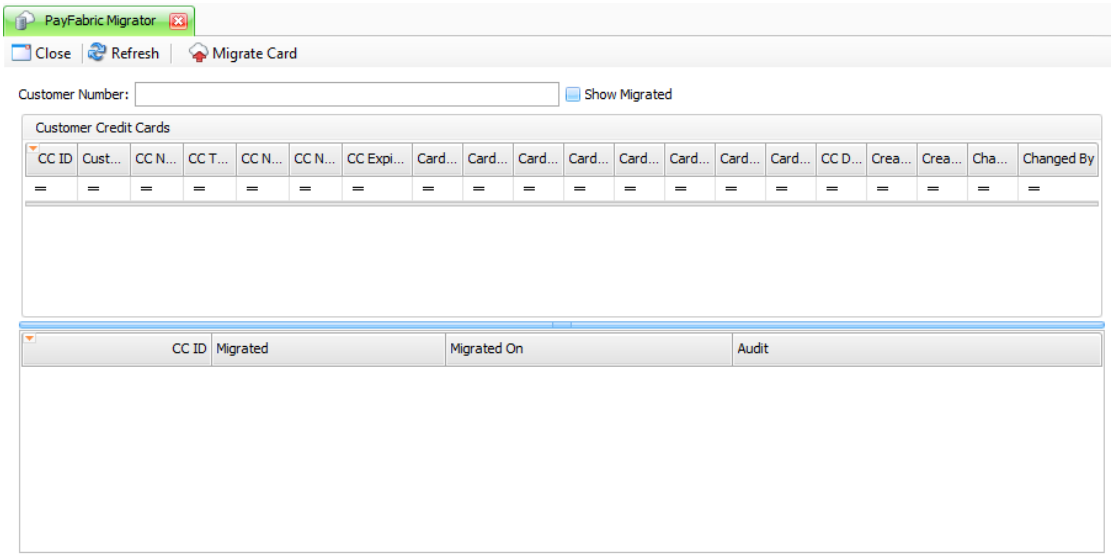
After receiving the dll, move it and the CardControl.API.dll file (found within your stand-alone CardControl software folder) to your SalesPad Desktop software folder where the other .dll files are stored. For most customers, this is usually found in a location such as:

- C:\Program Files (x86)\SalesPad.Desktop(4.6.4.7)\

After both files have been placed in the designated folder, log into SalesPad Desktop with an Admin account. This might prompt a database update. If a database update is required, all users should be off the system. Confirm that you've made a backup of your database to proceed.

After the update has been completed, there will be a new tab at the top of SalesPad Desktop called PayFabricMigrator.





Because PayFabric does not transfer various types information, including saved credit cards, it's important to move from a Sandbox to a Live account only after PayFabric testing is complete and the account has been updated to Live. This also means that the Live PayFabric account needs to be configured for use within the SalesPad Desktop environment that you are looking to transfer the stored credit cards from.

Usage

When you are ready to begin migration, open the PayFabric Migrator menu from the PayFabricMigrator tab. At this point, you can select **Refresh** to see all of the credit cards stored from CardControl, if they are not already visible.

Right-click any of the header fields in the top grid and select Show Auto Filter Row to enter criteria that will specify which cards you would like to migrate to PayFabric. Most customers generally enter criteria into the CC Expiration Date field to remove all cards that have already expired.

Once you have entered relevant criteria into the auto filter, highlight all cards you would like migrated and select the **Migrate Card** button near the top. We suggest that only a few cards are migrated at first, so that you can gauge how long this process will take. If a large quantity of cards need to be migrated, we recommend completing this process after business hours.

Securities

*PayFabric Migrator** - Allows users to access the PayFabric Migrator module.