PreAuth Setup

Megan De Freitas - 2024-11-22 - Setup
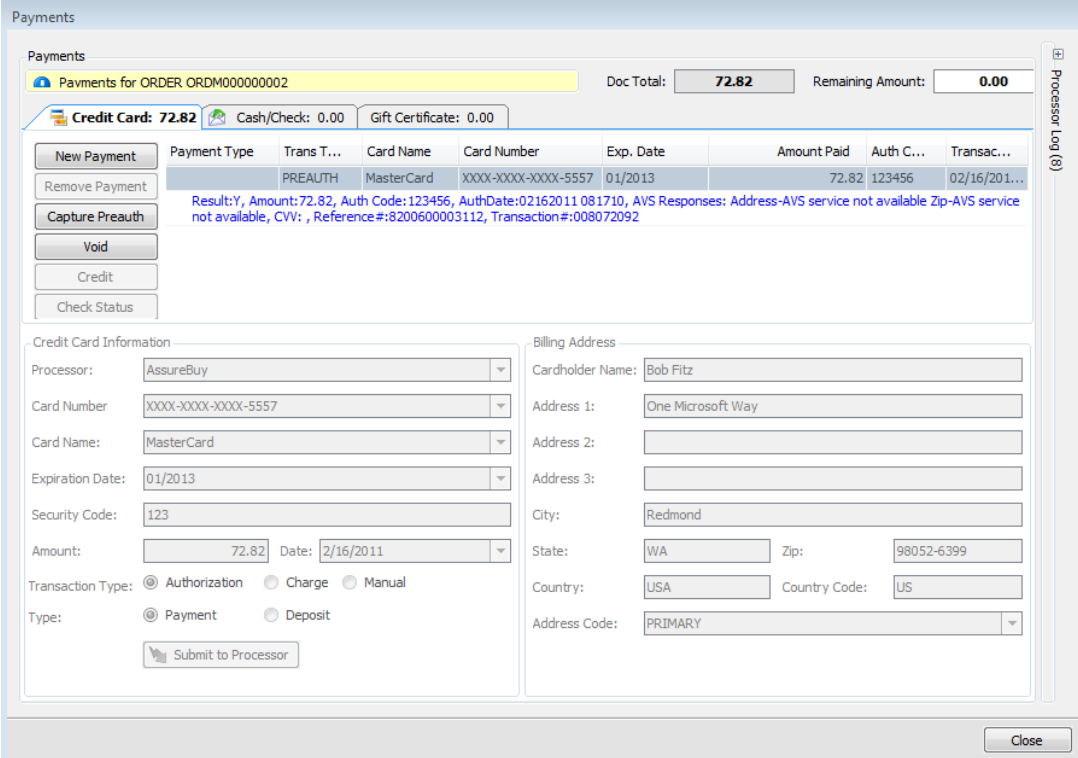
Overview

This document explains how to set up and process PreAuth credit card transactions.

Usage

Access the Payments screen from a sales document (Actions 🗒️> Payments or click the amount hyperlink in the "Payment" field).

If you process the payment as an Authorization transaction type, you will see a result like the blue text in the following screenshot:

This means the authorization has been placed on the card.

To do the final capture of the authorization, you can click the **Capture Preauth** button on the same payment window or open Modules > PreAuth Batch Processing, which displays all orders with a PreAuth on them:

In PreAuth Batch Processing, select the document(s) to finalize payments and click **Capture Charges**.

Once processed, the document will move to the lower portion of the window with an updated status indicating if the capture was sucessful:

Note: For more information on credit card payments in SalesPad, refer to the "Credit Card Processing Setup and Credit Card Payments" document.

Security and Settings

Security

Preauth Batch Processing* - Allows users to access the Preauth Batch Processing screen.

Settings

Preauth Hold Code - Enter a hold code to be used when a PreAuth transaction is processed. (Default is CC)