




PreAuth Setup

Megan De Freitas - 2024-11-22 - Setup

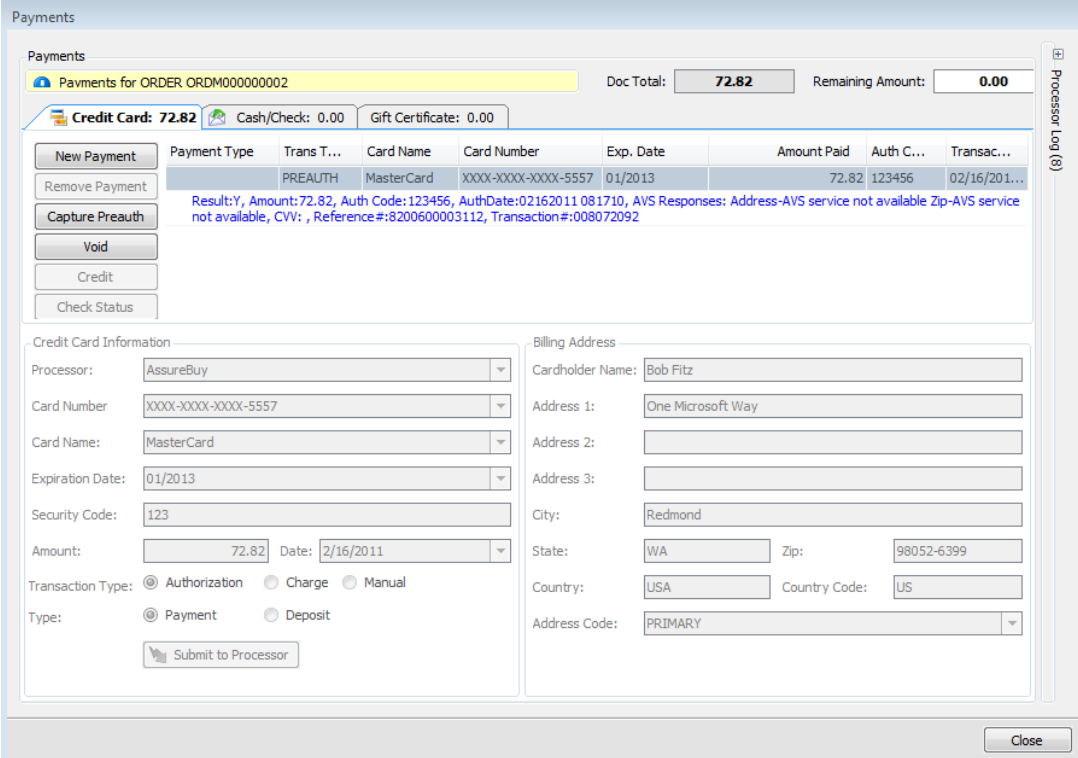
Overview

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:



The screenshot shows the 'Payments' window for order ORDM000000002. The document total is 72.82, and the remaining amount is 0.00. A credit card payment of 72.82 is shown, with a cash/check of 0.00 and a gift certificate of 0.00. The transaction is a PreAuth for a MasterCard, with card number XXXX-XXXX-XXXX-5557, expiration date 01/2013, and amount paid 72.82. The transaction type is Authorization. The result of the authorization is displayed in blue text: 'Result:Y, Amount:72.82, Auth Code:123456, AuthDate:02162011 081710, AVS Responses: Address-AVS service not available Zip-AVS service not available, CVV: , Reference#:8200600003112, Transaction#:008072092'. The credit card information section shows the processor as AssureBuy, card number XXXX-XXXX-XXXX-5557, card name MasterCard, expiration date 01/2013, security code 123, and amount 72.82. The transaction type is Authorization, and the type is Payment. The billing address section shows the cardholder name Bob Fitz, address 1 One Microsoft Way, city Redmond, state WA, zip 98052-6399, country USA, and address code PRIMARY. The window has a 'Close' button at the bottom right.

Payment Type	Trans T...	Card Name	Card Number	Exp. Date	Amount Paid	Auth C...	Transac...
PREAUTH		MasterCard	XXXX-XXXX-XXXX-5557	01/2013	72.82	123456	02/16/201...

Result:Y, Amount:72.82, Auth Code:123456, AuthDate:02162011 081710, AVS Responses: Address-AVS service not available Zip-AVS service not available, CVV: , Reference#:8200600003112, Transaction#:008072092

Credit Card Information

Processor: AssureBuy

Card Number: XXXX-XXXX-XXXX-5557

Card Name: MasterCard

Expiration Date: 01/2013

Security Code: 123

Amount: 72.82 Date: 2/16/2011

Transaction Type: ☒ Authorization ☐ Charge ☐ Manual

Type: ☒ Payment ☐ Deposit

Submit to Processor

Billing Address

Cardholder Name: Bob Fitz

Address 1: One Microsoft Way

Address 2:

Address 3:

City: Redmond

State: WA Zip: 98052-6399

Country: USA Country Code: US

Address Code: PRIMARY

Close

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:

Customer Search Workflow Setup **PreAuth Batch Processing** Settings Security Editor Card: [AARONFIT0001] Aaron Fitz Electrical (ORDER) ORDM000000002

Close Refresh Refresh Manually Last Refresh: 8:17 AM Search: Capture Charges

{1}

Batch	Doc#	Batch Hours	Entered Batch	Doc Date	Customer	Req Ship Date	Total	PO#	Rep	Status
ORDER	ORDM000000002			01/03	Aaron Fitz Electrical/A...	01/03	72.82			BO TRK

1 72.82

Start: 2/16/2011 End: 2/16/2011 Refresh

Date/Time	Sales Doc Num	Customer Num	CC Name	CC #	Transaction Amount	Status
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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 successful:

Customer Search Workflow Setup **PreAuth Batch Processing** Settings Security Editor Card: [AARONFIT0001] Aaron Fitz Electrical

Close Refresh Refresh Manually Last Refresh: 8:19 AM Search: Capture Charges

{1}

Batch	Doc#	Batch Hours	Entered Batch	Doc Date	Customer	Req Ship Date
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0

Start: 2/16/2011 End: 2/16/2011 Refresh

Date/Time	Sales Doc Num	Customer Num	CC Name	CC #	Transaction Amount	Status
2/16/2011 08:19:18 AM	ORDM000000002	AARONFIT0001	MasterCard	5557	72.82	CAPTURE transaction successful: Result:Y, Amount:72.82, Auth Code:1...

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)