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PreAuth Setup

Megan De Freitas - 2024-11-22 - <u>Setup</u>

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:

Pavments for	ORDER ORDM000000	02			C	Doc Total:	72.82	Remainin	g Amount: [0.00
🖥 Credit Car	d: 72.82 🖄 Cash/	Check: 0.00	Gift Certificate	: 0.00						
New Payment	Payment Type	Trans T	Card Name	Card Num	ber E	xp. Date	Am	ount Paid	Auth C	Transac
Remove Paymen	t	PREAUTH	MasterCard	XXXX-XXX	(-XXXX-5557 0	1/2013		72.82	123456	02/16/201
Capture Preauth	not available,	CVV: , Referen	nce#:820060000	3112, Trans	saction #:00807	10, AVS Respon 2092	ses: Address-A	/S service no	ot available 2	IP-AVS service
Void										
Credit										
Check Status										
Credit Card Inform	ation				Billing Address	5				
rocessor:	AssureBuy			T	Cardholder Na	ame: Bob Fitz				
ard Number	XXXX-XXXX-XXXX-555	7		T	Address 1:	One Micro	soft Way			
Card Name:	MasterCard			-	Address 2:					
xpiration Date:	01/2013			Ŧ	Address 3:					
ecurity Code:	123				City:	Redmond				
mount:	72.82	Date: 2/16/2	2011	-	State:	WA	71):	98052-	6399
ansaction Type:	Authorization	Charge	Manual		Countrus	LICA		untru Cada	110	
mer	Payment	Deposit			Country:	USA		Junitry Code:	05	
					Address Code	PRIMARY				Ŧ
γpe,		a or								

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:

Close	Refresh Refresh Man	nually • Last	Refresh: 8:17 AM Sear	rch:	🐚 Capture Charges				
1}									
atch	Doc#	Batch Hours	Entered Batch	Doc Date	Customer	Req Ship Date	Total PO#	Rep	Stat
IDER	ORDM00000002			01/03	Aaron Fitz Electrical/A	. 01/03	72.82		BO 1
		1					72.82		
rt: 2/16/2	011 ▼End; 2/16/2011	1 V @Refresh					72.82		

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:

🖊 🙇 🛛 Cu	stomer Search	Set Workflow Set	tup 🔁 🔁 PreAuth	Batch Process	ing 💣 Sett	ings 🛛 🗛 Security Ed	litor	🔏 Card: [AAR	ONFIT0001] Aaron Fitz Electrical	
Close 📑	🍣 Refresh	Refresh Manual	ly 🝷 Last F	Refresh: 8:19 AN	1 Search:	Mar (Captu	re Charges		
{1}										
Batch	Do	c#	Batch Hours	Entered Bat	tch Do	c Date	Custo	omer	Reg Ship Date	
			-							
			D							
;tart: 2/1	6/2011 - E	nd: 2/16/2011 🔻	🤁 Refresh							
Date/Time		Sales Doc Num	Customer Num	CC Name	CC #	Transaction Amount	Sta	atus		
12/16/2011	08-19-18 AM	ORDM00000002	AARONETT0001	MasterCard	5557	72	82 CA	PTI IRE transaction	successful: Result:Y_Amount: 72.82_Auth C	nde 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)