




PreAuth Setup

Megan De Freitas - 2024-11-22 - Setup

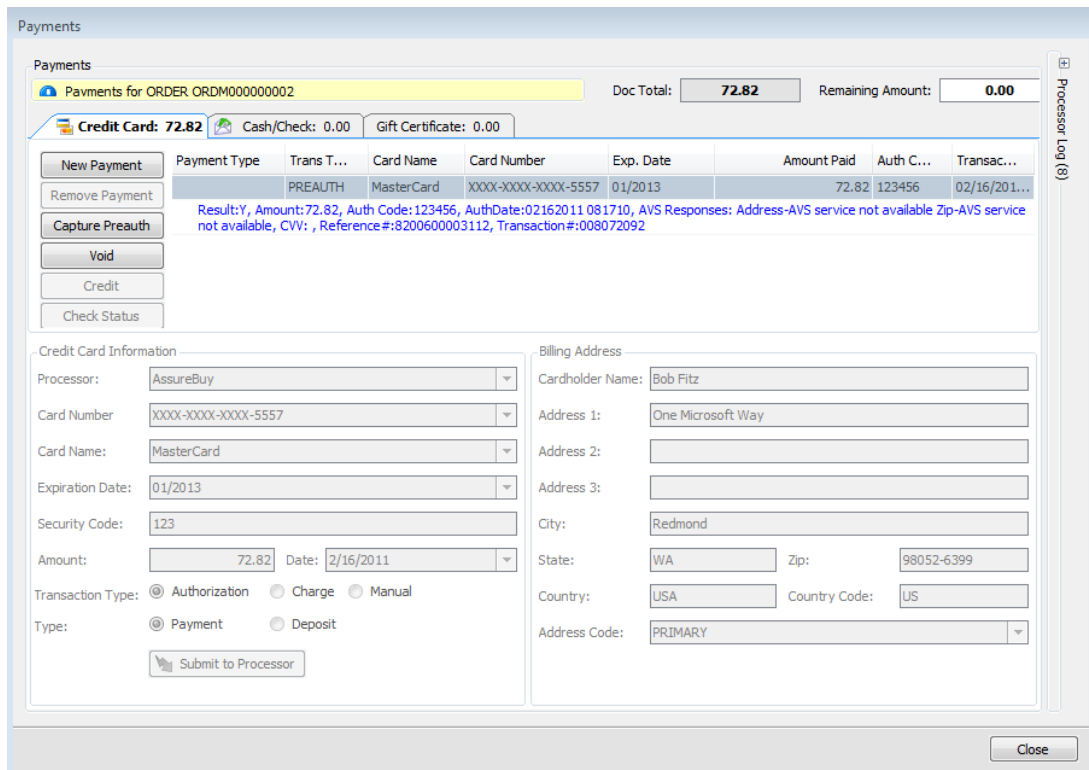
Overview

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 a sales document. At the top, it displays 'Payments for ORDER ORDM000000002' with a 'Doc Total' of 72.82 and a 'Remaining Amount' of 0.00. Below this, there are tabs for 'Credit Card: 72.82', 'Cash/Check: 0.00', and 'Gift Certificate: 0.00'. A table lists the payment details:

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...

Below the table, there is a blue text result: 'Result:Y, Amount:72.82, Auth Code:123456, AuthDate:02162011 08 1710, AVS Responses: Address-AVS service not available Zip-AVS service not available, CVV: , Reference#:8200600003112, Transaction#:008072092'. The form also includes sections for '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) and 'Billing Address' (Cardholder Name: Bob Fitz, Address 1: One Microsoft Way, City: Redmond, State: WA, Zip: 98052-6399, Country: USA, Country Code: US, Address Code: PRIMARY). A 'Submit to Processor' button is visible at the bottom left of the form.

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	ORDM0000000002			01/03	Aaron Fitz Electrical/A...	01/03	72.82			BO TRK

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

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

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

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	ORDM0000000002	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)