

Knowledgebase > Miscellaneous > Sales Batch Charge

# **Sales Batch Charge**

Megan De Freitas - 2024-12-02 - Miscellaneous

# Overview

This custom allows a user to mass charge a batch of documents. Specifically, every document in the selected batch will have the default card associated with that customer charged for the balance on the document. Documents with customers that are not in CardControl, or customers that do not have a default card setup will not be charged. Successfully charged documents will be forwarded to a user defined success batch, and the same will be true for unsuccessful transactions.

### Where is Sales Batch Charging located?

Microsoft Dynamics GP > Transactions > Sales > Sales Batches

# Security

In the Additions Security Editor, search for *Batch Processing - Charge* and enable it. In the sub-settings, enable *Allow Batch Charging*. The sub-setting fields *Failed Charge Forwarding Batch* and *Successful Charge Forwarding Batch* must be filled in with the appropriate batch names to forward documents to after a batch charge.

**Note**: The user must set up these batches in Dynamics GP before using Batch Charging in order for the documents to be forwarded to them.

Save the settings, and log out of Additions. Batch Charging is now ready to be used.

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Security Group Admin		
		Successful Charge Forwarding Batch
		Documents that are successfully charged are forwarded to this batch. Defaults to ".
Ready		( <sup>د</sup>

#### **Using Batch Charging**

On the Sales Batch Entry window, enter the desired Batch ID to charge and tab off. The Additions table will be populated with the documents that will be charged. To charge the current batch, click the **Charge Batch** button.

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After a Batch Charge, an informational window will display the number of successful and unsuccessful transactions and what the total amount attempted to be charged was. A more detailed outline of each transaction will also be displayed in CardControl.

Batch Processing Results ×							
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Upon completion of a Batch Charge, all documents will be moved out of the batch.