

MKT Credit Card Version 7.6 Release Notes

This document describes the changes that have been performed to MKT Credit Card Processing Add-on for each specific release.

Supported AccountMate Versions

Determine your AccountMate version before using the MKT Credit Card Processing Add-on. Check our web site to get the latest information about supported versions and product updates.

The following AccountMate versions are supported by MKT Credit Card Processing:

- AccountMate SQL/MSDE Version 6.04a through Version 6.07a
- AccountMate SQL/MSDE Version 7.02a through Version 7.06a

If you have a version that is not listed above do not use MKT Credit Card Processing Add-on against your company data and contact our Technical Support staff at support@tamlinsoftware.com or call us at 214-739-6576.

If you have any questions regarding the changes listed in this document please contact our Technical Support Department support@tamlinsoftware.com or 214-739-6576.

Build 1001 (01/21/2010)

- **General Enhancements**
 - Added support for AccountMate SQL Version 7 Build MS706a
 - Added a Pre-Authorization Add-on and functionality
 - Change Customer Maintenance to allow access to customer credit card information
- **Fixes**
 - Control # [109846] (Fixed)
 - Fixed credit card encryption in MKT Credit Card Tables, previous encryption may have encrypted credit card numbers with non numeric characters such as dashes and spaces.
 - Fixed the Merchant Email notification for sale transactions, to ensure it is properly sent out if so marked in the MKT Credit Card Setup Screen
 - Fix Credit Card list saying Card # [] is invalid message and improperly displayed credit card numbers.
 - Fix MKTCCOCR table is not getting deleted when sales orders are shipped for the [-1] NSEQ records.
- **MKT Credit Card Processing Setup Screen**
 - Settings Tab
 - System Settings (Based on provider)
 - Added a “Pre-Auth Expire Days” (default 30 days)
 - Added a Results Field Separator (default [,])
 - Added a Results Field Encapsulation (default [“”])
 - Processing Tab
 - Change the Verification Option to default “Verify Credit Card Only” and to only allow this selection if the Pre-Authorization Add-On has been installed
 - Added a “Require Sales Order Pre-Authorization” checkbox option
 - Email Tab
 - Added a “Send Merchant Email Receipts for Pre-Authorization Transactions”

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checkbox

- Saving
 - When saving, if the user disables credit card processing or disables processing in the Sales Order module, give the user an error if any pre-authorizations exist. They must void the pre-authorizations first.
 - When saving give the user an error if they turned off any pay codes for credit card processing and any pre-authorizations exist on an order with that pay code.
 - When saving, warn the user about credit card encryption correction if applicable, then correct the encryption.
- **Customer Maintenance**
 - Add a new MKT CC Maintenance button to the Customers Settings Tab screen. When clicked a new credit card maintenance screen will appear. The user will be able to add, delete, or amend a customer's credit card information.
- **Pre-Authorization Changes**
 - **Credit Card Posting Data Entry Screen**
 - If the transaction has been pre-authorized all fields on the screen will be read-only and the Save and Verify buttons will be disabled.
 - Show the Pre-Authorization Amount. If a pre-authorization exists, display the value in red.
 - **Create Sales Order Screen**
 - When amending a sales order give the user a warning when selecting a sales order if a pre-authorization exists for the order, the user will be asked if they wish to continue.
 - Do not allow the user to Void/Cancel a sales order if a pre-authorization exists for the order.
 - Do not allow the user to save any changes if the user changed the pay code of an order to a non-credit card processing pay code and a pre-authorization exists.
 - Do not allow the user to save any changes if the order total exceeds the pre-authorization amount.
 - **Cancel Sales Order Open Order**
 - Give the user an error if they try to cancel the open line items of a sales order that has a pre-authorization.
 - **Ship Sales Order**
 - Give the user an error if the "Require Pre-Authorizations for SO Shipments" is marked and no Pre-Authorization exists for the sales order at the time they select the sales order.
 - Give the user an error when saving if the total shipment amount exceeds the pre-authorization amount
 - Do not allow the user to save the shipment if the pay code of the order was changed to a non-credit card processing pay code and a pre-authorization exists.
 - If the pre-authorization add-on is not installed do not capture any previous pre-authorization transactions to be a sale, instead perform a regular charge transaction.
 - When saving, even if a pre-authorization is done, if the user chose to use applied credits, the applied credits would be used first. If the customer's credit card never had to be charged the pre-auth transaction would be voided.
 - **Pre-Authorize Sales Orders**
 - This new function will have two modes "Post Pre-Authorization" and "Void Pre-Authorization"
 - The function will prompt the user for a sales order to post or void a credit card pre-authorization.

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- When saving warn users if the order has no freight amount and that the pre-authorization should contain an estimated freight amount and ask if they want to continue.
- Give users an error if customer is not setup to generate invoice on shipment.
- NOTE: If preauthorizing a sales order, then partially shipping, and then pre-authorizing again, each pre-authorization will always default the entire sales order amount.
- **Credit Card Transaction Log Report**
 - Change “Include Sale Transactions” to also include captured Pre-Authorizations
 - Add an option to include Pre-Authorization Transactions
 - Change the report to also have a Pre-Auth Amt column. This column will have pre-authorization amounts, but will not be included in the Charge Amt column.
 - Change the report to include Captured Pre-Authorization amounts in the Charge Amt column
- **Credit Card Pre-Authorization Status Report**
 - Type
 - Detail
 - Sort By
 - Customer #
 - Transaction Date
 - Criteria
 - Customer # (All / Range / Individual)
 - Order # (All / Range)
 - Transaction Date (All / Range)
 - Layout (General)
 - Include Customer #, Order #, Trs Type, Company, PO #, Ord Date, Trs Date, Freight Amt, Tax Amt, Order Total, Pre-Auth Amt columns
 - Total the Freight Amt, Tax Amt, Order Total, and Pre-Auth Amt columns
- **ACCU-DART Ship SO/Ship Carton**
 - Give the user an error if the “Require Sales Order Pre-Authorization” is marked and no Pre-Authorization exists for the sales order at the time they select the sales order.
 - Give the user an error when saving if the total shipment amount exceeds the pre-authorization amount
 - Do not allow the user to save the shipment if the pay code of the order was changed to a non-credit card processing pay code and a pre-authorization exists.
 - If the pre-authorization add-on is not installed do not capture any previous pre-authorization transactions to be a sale, instead perform a regular charge transaction.
 - When saving, even if a pre-authorization is done, if the user chose to use applied credits, the applied credits would be used first. If the customer’s credit card never had to be charged the pre-authorization transaction would be voided.

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