



3. Authorisation and Pre-Authorisation

When you process a transaction using ePDQ on the internet or for a mail or telephone order, it can be processed in either “Authorisation” or “Pre-Authorisation” mode.

Other factsheets available to help you make the most of ePDQ:

1. Internet Authentication Service
2. Passphrase mismatch
4. Processing a new sale
5. Unable to Read Configuration File
6. Encrypted data not present
7. Common ePDQ error messages
8. Full refund/ Partial refund
9. Mandatory information not present
10. No data posted to ePDQ CPI
11. Not a Valid Allowed URL
12. Referred transactions

We send the customer’s card details to the Card Issuer to check if there are sufficient funds available, and that the card has not been reported lost or stolen. This is the ‘authorisation’ stage.

ePDQ keeps a record of all the details entered and the results of the transaction from the card issuer. At the end of each day, ePDQ batches together all the authorised transactions in the ‘current batch’. Our authorisation system then collects the authorised payments from each card issuer and the amounts are deducted from your customers’ cards.

There are two ways of processing:
a) Authorisation (‘Auth’)
b) Pre-authorisation (‘PreAuth’)

Authorisation

This is the preferred way to authorise a transaction and is useful if you are fulfilling orders immediately.

Pre-Authorisation

This type of transaction is useful if you are not able to fulfil an order immediately. You may wish to authorise the card to ensure that funds are available, but not collect the money from the cardholder (ie. settle the transaction) until you have the goods ready for distribution.

When you actually send out the customer’s goods, this is known as ‘shipping’ the order. Once you’ve informed the ePDQ system that you’ve shipped an order, it will put the details into that day’s batch of transactions and send it for settlement at the end of the day.

Pre-Authorisation codes are only valid for up to seven days. If you realise it is going to take you more than seven days to ship an order, you’ll need to carry out a ‘RePreAuth’ a day before you ship the goods, to request a new Authorisation code.

The card schemes state that you must not collect the money from the card until the goods have been sent out. This means that if your business does trade by only sending out the customers’ products after the day the transaction has take place, then you must ‘PreAuth’, rather than ‘Auth’, the transaction.

Download more details

For more details about the services and processes outlined in this fact sheet, please read your ePDQ User Guide, or log on to the NextSteps website at www.epdq.co.uk/nextsteps/lite.htm

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