

Setting up default payment gateways per customer

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Starting in version 6.1.73, All Orders now allows you to setup a default gateway for each customer based on a custom field on the customer/document. By doing this the custom field value can drive which gateway is used. This is commonly implemented in environments in which orders come in from multiple channels. Here is how to do it:

- Setup a custom field for the Customer which is a pick list type. The values should match the Nicknames given to the gateways in the Payment Gateways profile list. Copy this custom field to the Sales Order and Ship Doc custom fields.
 - In the company preferences for Payment, select that custom field under the "Custom customer field used to select gateway" drop down.
 - Set the custom field for each customer and it will drive which gateway is pre selected on sales order and ship doc payments. Or set the custom field when creating new custom facing documents and when creating a new payment the correct gateway will be selected by default.
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