

Record Submission Setup

Record submission setup consists of three parts: Selection Screen setup, Confirmation Screen setup, and database information.

Selection Screen

The Selection Screen setup defines what the users sees on the Report page where they select the items for submission. Click the [**View Example**] button to see a generic version of a record selection screen.

1. Set Up Record Selection Screen [View Example](#)

☒ Add Editable field: Select one **numeric & visible** field which the user can edit and submit (Required for Payments)

Open Balance ☒ Show and submit the sum of this column (Required for Payments)

Choose an action-oriented label for the Submit and Reset Buttons

Submit Button Label: Reset Button Label:

1. The two checkboxes are required for payment processing
 1. The “Editable field” selection causes a field with the current value (the open balance of an invoice, for example) to be displayed on the selection page and allows the user to change the value (to pay less than the balance, for example).
 2. The “Show and submit ...” selection causes the values the user enters in the editable field for the selected records to be summed, the sum displayed at the bottom of that column and submitted to the next step in the process which is the confirmation screen.
 3. These two options can be used for non-payment processes if it makes sense.
2. “Submit Button Label” and “Reset Button Label” values are displayed on the corresponding buttons in the report.

Here is an example of how the selection page might look, followed by the confirmation page.

▶	📄	1036	2016/07/14	2016/08/15	77197.68	77197.68
▶	📄	1046	2016/08/03	2016/09/02	77259.69	5000.00
					Total :	140,614.28

Confirm

Invoice Num	Invoice Date	Invoice Due Date	Payment Total
1026	2016/07/14	2016/08/15	77,197.68
1046	2016/08/03	2016/09/02	5,000.00
Total			140,614.28

Confirmation Screen

The Confirmation Screen setup defines what the users sees on the page where they review the items selected for submission. This setup is required for payment processing. Click the **[View Example]** button to see a generic version of a confirmation screen.

2. Setup Confirmation Screen [View Example](#)

☒ Include a Confirmation Screen to review records before submission (Required for Payments)

Edit Confirmation Screen Title: (256 max)

Confirmation Screen Header

Edit Confirmation Screen Instructions: (256 max)

Confirmation Screen Instructions

Select up to 3 fields for the user to identify their selected records with

Invoice Num Invoice Date Invoice Due Date

Choose an action-oriented label for the Submit and Reset Buttons

Submit Button Label

Submit 2

Cancel Button Label

Cancel

1. Check the “Include a Confirmation Screen ...” checkbox to provide a screen with a summary of their selections.
 1. This option is required for payments processing and is optional for non-payment record submissions.
 2. The remaining values in this section are only available if the “Include ...” option is selected.
2. Enter a title for the confirmation screen.
3. Enter any user instructions you would like to include on the confirmation screen.
4. Select up to three (3) report fields to be displayed on the confirmation screen.
 1. These fields are in addition to the “Editable” field defined in the previous section.
5. Enter a label for the Submit and Cancel buttons on the confirmation screen.

Select Database

The final piece of the setup process is to define where the information selected by the user will be stored in the database.

3. Select Database

Select the database and name the table where records will be submitted to

Database

Table Name

VersagoData ▼

Demo_Payments_1

1. Select a database from the “Database” drop-down list.
 1. The process for defining databases is found **here** .
2. Enter a database table name where the information will be stored.
 1. The general rules for the name are no spaces or special characters other than an underscore as shown in the image above. The name should be something that will help other people understand its purpose.
 2. The table is created the first time the submission information is defined.
 3. If additional columns are added to the report, they are automatically added to the table the next time this step in the configuration is passed.
 4. If columns that are part of the table structure are removed in the report, they remain in the table.

Submission Database Table Structure Details

As noted earlier, a table to hold the information related to the selected records is stored in a table in the specified database. All record submission tables have the same basic structure as described below.

Column Name	Type and Size	Notes
User columns from initial setup appear first		
vgo_PaymentDate	DateTime	For payment processing
vgo_PaymentDetails	nvarchar(100)	For payment processing
vgo_CC_RespCode	nvarchar(50)	For payment processing
vgo_TransID	nvarchar(50)	For payment processing
vgo_PaymentType	Int	For payment processing
vgo_CreatedBy	nvarchar(50)	Creation information
vgo_CreateDate	DateTime	Creation information
vgo_CreatedById	Int	Creation information
vgo_PostingStatus	Int	Processing control
vgo_PostingDate	DateTime	Processing control
vgo_PostingId	Int	Processing control
vgo_BatchId	Int	Processing control
User columns added after initial setup appear last		

1. **Payment Processing** items are used by the internal payment process. These values are only populated for payment transaction.

2. **Creation Information** items are populated for all transactions.
3. **vgo_CreatedBy**: Versago user ID (email) that created the transaction.
4. **vgo_CreateDate**: Date and time the transaction was created.
5. **vgo_CreatedById**: Versago internal user ID number.
6. **Processing Control** items can be used to manage back-end processing using tools such as Bizweaver.
7. **vgo_PostingStatus**: Typically used to indicate if a record has been processed by the back-end.
8. **vgo_PostingDate**: Typically used to capture when a record has been processed by the back-end.
9. **vgo_PostingId**: Typically used to capture the ID number of the record created during back-end processing.
10. **vgo_BatchId**: A sequential number added by the application when a set of records is added to the database. This value can be used to process a group of records together during back-end processing.

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