Company Preferences - Payments
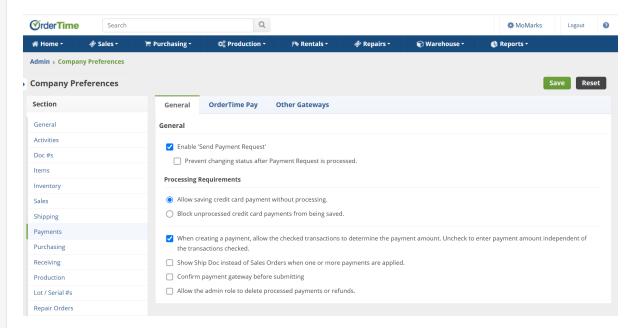
Last Modified on 03/14/2025 3:48 pm EDT

Payments

Under Payment company preference, you will be able to manage your credit card security settings.

Access by: Admin -> Company Preferences -> Payments

> Setting up credit card security is critical for preventing credit card fraud and avoiding losses to your business. This section adds a layer of security to your credit card transactions. Take time to review and make the appropriate choices.

Payments

Select the appropriate setting for your company's needs:

General (tab)

- Enable 'Send Payment Request
  - Prevent changing status after Payment Request is processed. (Checkbox)

Processing Requirements- (determine whether a GATEWAY is required when saving a payment)

- Allow saving credit card payment even without processing.

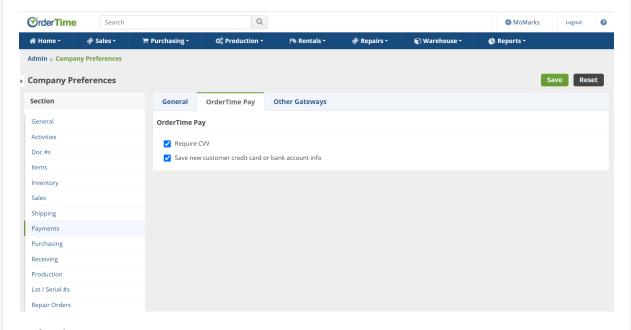- Block unprocessed credit card payments from being saved.

- When creating a payment, allow the checked transactions to determine the payment amount. Uncheck to enter

payment amount independent of the transactions checked.
- Show Ship Doc instead of Sales orders when one or more payments are applied.
- Confirm payment gateway before submitting.
- Allow the admin role to delete processed payments or refunds.

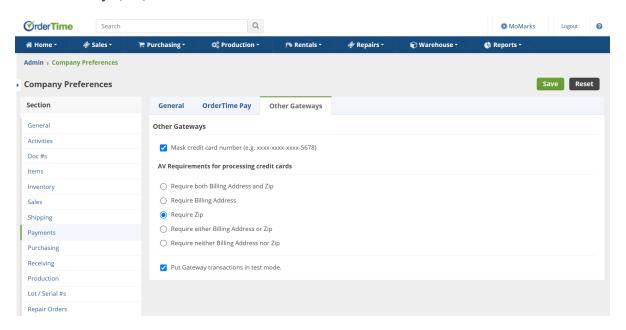---

OrderTime Pay (tab)

OrderTime Pay

- Require CVV
- Save new customer credit card or bank account info

Other Gateways (tab)

Other Gateways

- Mask credit card number & only show the last 4 digits. (e.g. xxxx-xxxx-xxxx-5678)

AV Requirements for processing credit cards

- Require both Billing Address and Zip
- Require Billing Address only
- Require Zip only
- Require either Billing Address or Zip
- Require neither Billing Address nor Zip

- Put Gateway transaction in test mode.

Click **Save** when done.