Company Preferences - Payments

Payments

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

> 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:

- Mask credit card number & only show the last 4 digits. (e.g. xxxx-xxxx-xxxx-5678)
- Enable 'Send Payment Request
    - Prevent changing status after Payment Request is processed.

- **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.
- **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

- 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.
- Put Gateway transaction on test mode.
- Allow the admin role to delete processed payments or refunds.

Admin ▸ Company Preferences

Company Preferences   Save   Reset

Section	Payment
General	☑ Mask credit card number (e.g. xxxx-xxxx-xxxx-5678)
Activities	☑ Enable 'Send Payment Request'
Doc #s	☐ Prevent changing status after Payment Request is processed.
Items	**Processing Requirements**
Inventory	◉ Allow saving credit card payment without processing.
Sales	○ Block unprocessed credit card payments from being saved.
Shipping	**AV Requirements for processing credit cards**
Payments	○ Require both Billing Address and Zip
Purchasing	○ Require Billing Address
Receiving	◉ Require Zip
Production	○ Require either Billing Address or Zip
Lot / Serial #s	○ Require neither Billing Address nor Zip
Repair Orders	☑ When creating a payment, allow the checked transactions to determine the payment amount. Uncheck to enter payment amount independent of the transactions checked.
Rentals	☐ Show Ship Doc instead of Sales Orders when one or more payments are applied.
Mobile	☑ Confirm payment gateway before submitting
Mail and Calendar Integration	☑ Put Gateway transactions in test mode.
	☐ Allow the admin role to delete processed payments or refunds.

Click **Save** when done.