# **Company Preferences - Payments**

Last Modified on 07/28/2025 4:17 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)
  - Generate payment link instead of emailing a payment request

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
- Require Address for card payments
- Save new customer credit card or bank account info
- Limit Number of Payment Methods on File per Customer

# Other Gateways (tab)

<b>OrderTime</b>	Search		Q				MoMarks	Logout	0
者 Home 🕶	🛷 Sales -	🐂 Purchasing -	🕸 Production 🕶	🏞 Rentals 🕶	🛷 Repairs 🕶	🗑 Warehouse 🕶	🕒 Reports -		
Admin 🕨 Company	Preferences								
Company Pre	erences						l	Save Res	et
Section		General	OrderTime Pay	Other Gateways					
General		Other Gateways							
Activities		✓ Mask credit card number (e.g. xxxx-xxxx-5678)							
Doc #s									
Items		AV Requirements for processing credit cards							
Inventory		Require both Billing Address and Zip							
Sales		O Require Billing Address							
Shipping		Require	Zip						
Payments		Require either Billing Address or Zip							
Purchasing		Require neither Billing Address nor Zip							
Receiving		Put Gateway transactions in test mode.							
Production		_	,						
Lot / Serial #s									
Repair Orders									

# **Other Gateways**

• Mask credit card number & only show the last 4 digits. (e.g. 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.