

Company Preferences - Payments

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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)

The screenshot shows the 'OrderTime Pay' tab within the 'Company Preferences' section. The left sidebar lists various sections, with 'Payments' highlighted. The main content area has three tabs: 'General', 'OrderTime Pay', and 'Other Gateways'. The 'OrderTime Pay' tab is active, showing two checked options: 'Require CVV' and 'Save new customer credit card or bank account info'. 'Save' and 'Reset' buttons are visible in the top right corner.

OrderTime Pay

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

Other Gateways (tab)

The screenshot shows the 'Other Gateways' tab within the 'Company Preferences' section. The left sidebar lists various sections, with 'Payments' highlighted. The main content area has three tabs: 'General', 'OrderTime Pay', and 'Other Gateways'. The 'Other Gateways' tab is active, showing a checked option 'Mask credit card number (e.g. xxxx-xxxx-xxxx-5678)'. Under the heading 'AV Requirements for processing credit cards', there are four radio button options: 'Require both Billing Address and Zip', 'Require Billing Address', 'Require Zip' (which is selected), and 'Require either Billing Address or Zip'. Below these is another checked option 'Put Gateway transactions in test mode.'. 'Save' and 'Reset' buttons are visible in the top right corner.

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

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- Put Gateway transaction in test mode.

Click **Save** when done.