

New Payments on Invoices

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There is an option for one-time use credit cards when creating transactions and for customer portal users to use when paying an invoice.

You can see this on the New Payment page (Accounts Receivable > Invoices > Pay Invoice button in the grid). This is the **Save Payment Details** switch:

The screenshot shows the 'New Payment' form with the following fields and controls:

- Transaction Type:** By Invoice, On Account
- Transaction Date:** 5/30/2025
- Email Receipt To:** [Redacted]
- Description:** [Empty]
- Payment Method:** Credit Card, eCheck
- Save Payment Details:** YES (switched on)
- Credit Card:** [Dropdown menu]
- Late Fee:** \$0.00
- Submit Payment:** [Green button]

By default, this is set to YES, which means that credit card details will be saved as usual. Setting this to NO will prevent the existing credit card/eCheck information from being selected by disabling the **Credit Card** field. When clicking the Submit Payment button, a new window opens and the entered credit card information will be submitted without saving it for the selected invoice amount.

The screenshot shows the 'New Payment' form with a modal window open for card details. The 'Save Payment Details' switch is now set to 'NO'.

Modal Window: TEST/AlarmBiller

- PAYMENT METHOD:** Credit or debit card
- Card number:** Card Number [Redacted]
- Exp date(MM YYYY):** Expiration Date
- Security code:** CVV [Redacted]
- Logos: VISA, DISCOVER

Background Form:

- Transaction Type:** By Invoice, On Account
- Transaction Date:** 5/30/2025
- Email Receipt To:** stephen.fisher
- Description:** test for save p
- Payment Method:** Credit Card, eCheck
- Save Payment Details:** NO (switched off)
- Credit Card:** [Dropdown menu]
- Late Fee:** \$0.00
- Submit Payment:** Submitting...

Payment Summary:

Payment Amount: \$2,239.90 (48% progress bar) | Total Due: \$4,685.80

Amount Due	Pay	Payment Amount
\$2,239.90	<input checked="" type="checkbox"/> YES	\$2,239.90
\$100.00	<input type="checkbox"/> NO	\$0.00
\$2,345.90	<input type="checkbox"/> NO	\$0.00

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