




INDITION COMMERCE

Service & Repair

Release Notes — Payments & Workflow Update

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This release builds on Service & Repair 1.0. It is a **Payments & Workflow update** — the headline additions are secure customer payment links, card-on-file with address verification, automatic payment receipts, and a tighter repair workflow (Deposit Received, a single forward action, and a completion lock).

1. Highlights

- **Secure payment links** — email a customer a one-tap link to pay a deposit, the full balance, or a custom amount from their own phone. Single-use, expiring, and the amount is locked.
- **Card on file + address verification (AVS)** — charging a card now collects a billing address for AVS and can save the card to the customer (it appears on their Payment Methods, just like the storefront checkout).
- **Automatic payment receipts** — every online payment emails the customer a branded “Payment received” receipt.
- **Deposit Received status** — paying a deposit in full now advances the repair automatically, so the customer no longer sees “Deposit Requested” after they’ve paid.
- **One clear next step** — the work-order header shows a single forward action; every other move is on the status chip.
- **Completion lock** — a finished repair can’t be changed by accident.
- **Quick rich-text notes** — a floating note button on every tab with light formatting.

2. Payments & collection

Payment links (email)

From a work order's Payment tab, **Send payment link** emails the customer a secure link to pay a **deposit**, the **full balance**, or a **custom amount**. A custom request requires a "what is this for?" reason and supports an optional message, both shown to the customer. Each link is **unique, single-use, and expires** after a configurable number of days; the amount is **locked** (it can't be changed on the pay page). The send happens without a page reload and confirms the exact channel and recipient, and the action is logged to the work-order history.

Dedicated pay page

The link opens a minimal, secure pay page — greeting, locked amount, the reason and message, and a card form — with no extra steps and no unnecessary personal data. On success it shows a clear confirmation and a link to track the repair.

Address verification & card on file

Charging a card (virtual terminal or pay link) now collects a full **billing address** sent to the processor for **AVS**, with a **US state dropdown** and the address pre-filled from the customer's record. A **Save this card** option (on by default) stores the card as a reusable payment method and writes the billing address to the customer — both appear on the customer's admin record.

Receipts & routing

Successful online payments email a branded **payment receipt**. Payments continue to route to the repair location's mapped store and are stamped with a channel (manual / card-present / online).

3. Deposits & workflow

- **Deposit Received status** — when a deposit is paid in full while a repair sits in *Awaiting Deposit*, it auto-advances to a new **Deposit Received** status (customer-visible). Deposits paid in other statuses log a “Deposit received” milestone.
- **Single forward action** — the green next-step button always offers the next *forward* step (e.g. from QA it offers “Ready for Pickup,” never back to “Begin Work”), ending an accidental loop. All other transitions remain on the status chip.
- **Completion lock** — a completed/cancelled/declined repair blocks new quote lines, timers, and loaner check-outs (and hides the quick-note button), while still allowing manual time entry and loaner check-in. Re-open via the status chip to edit again.

4. The bench: notes, statuses & locking

- **Quick-note button** — a floating editor on every tab for internal notes, with bold/italic/underline, bullets, and text/highlight colour. Saved instantly without a reload.
- **Customer-visible history** — the progress timeline now correctly shows received payments and the deposit milestone, and no longer leaks internal “payment link sent” events to customers.
- **Send-link history** — sending a payment link adds a row to the History tab in place, without reloading.

5. Customer communications

- **Dedicated payment-receipt template** — a separate “Payment received — work order...” email with amount paid, work order, and remaining balance.
- **Install-seeded templates** — a default repair email template and the receipt template are created and assigned on install, so email works out of the box.
- **Token wiring** — repair emails carry the right tokens (tracking link, amounts, reason/message), and the “Current status” line is suppressed on payment requests so they read clearly.

6. Interface & usability

- **Card field shows immediately** — no second click to reveal it; accepted-card icons are shown.
- **State dropdown** on billing address (stores the standard 2-letter code).
- **Save-card toggle** defaults to on; clean post-payment success screen.
- **Auto-dismissing confirmations** — success banners fade after a few seconds; warnings and errors stay.
- **Tidier payment-link panel** — quick requests and custom amount in clear, separate cards.

7. Fixes

- Payment amounts no longer drop cents on any channel.
- Email-template install migrations seed correctly across active workflows.
- Email-template creation no longer fails during install (page-copy edge case handled).
- The card field renders on the first click on every pay surface.

8. In progress (preview)

SMS payment links — texting a payment link to a customer's mobile (in addition to email) is being finalised. It needs an SMS provider connected and the customer opted in. Until then, payment links go by email.

POS register payments — taking repair payments at the in-store register (look up by invoice/work-order/customer or scan the tag, then charge) is being finalised. Until then, use Record a payment, Charge a card, or a payment link.

9. Under the hood

- New shared **rich-text component in Xpress** (editor + server-side whitelist sanitiser), reusable by any module.
- New install migrations for the email templates, the payment-request table, and the Deposit Received status.
- Online charges align with the platform checkout: Stripe billing details for AVS, optional Stripe Customer + stored payment profile, and the customer address book.
- A headless automated test suite covers the sanitiser, history visibility, and payment-link expiry.

10. Upgrade notes

- Run the module's install/upgrade to apply the new migrations (email templates, payment-request table, Deposit Received status, and the payment-link expiry setting).
- To use payment links and receipts, confirm a **Default Email Template** and a **Payment Receipt Template** are set in Settings (the install seeds both).
- Set the **Payment Link Expiry (days)** in Settings (default 7).
- SMS and POS settings can be configured now; those flows activate as the integrations are completed.