

# Attach Payment Document to Order



For versions 4.37+

## Overview

Adding the Order Documents Widget in the Payments panel of the Checkout page lets users upload payment evidence when submitting an order. Just set document upload against the payment types documents are needed. Payment evidence can be mandatory for a payment type.

This feature is useful for orders that have been prepaid, third-party financed, or part-paid, or other payment scenarios where evidence of payment is needed. If made mandatory, a customer using this payment type cannot submit an order without uploading at least one document. (Multiple documents can be uploaded.)

The screenshot shows a payment interface. At the top, there's an 'Upload Files' section with a 'Select files...' button and a 'drop files here to upload' area. Below this is the 'Payment' section, which has a message: 'Document is required for the payment type BPay. Click here to upload.' There are five payment options: 'Account', 'Credit Card', 'PayPal', 'Direct Deposit', and 'BPay' (which is highlighted in orange). Below the options is a 'BPay' logo and a 'Process Payment' button.


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## Access to payment documents

Document files are stored on the server. They can be accessed by your team members and customers via a link on any order-related emails, e.g., Order Placed, Order Received. Just add the [Order Documents Widget](#) to the template.

The screenshot shows an 'Order Received' email template. It includes a 'Web Reference: 100019537' and a message from the Customer Service team. Below this is an 'Order Summary' table with columns: Item, Qty, Price (ex GST), Unit, Discount, and Total (ex GST). The table contains one item: 'I Need To Get Some Receipts' with a quantity of 1, a price of \$225.95, and a total of \$225.95. Below the table, there's a 'Download Files' link with a red arrow pointing to it.


Item	Qty	Price (ex GST)	Unit	Discount	Total (ex GST)
 I Need To Get Some Receipts <a href="#">Code: CV195</a>	1	\$225.95	Each	0.00%	\$225.95
Subtotal (ex GST)					\$225.95
Freight					\$12.73
1 Year GST					\$23.87
Total (inc. GST)					\$262.55

The screenshot shows a widget titled 'Uploaded Files' with the subtitle 'Files that have been uploaded'. It lists two files: 'Receipt1.pdf 29.5 KB' and 'Receipt2.pdf 30.4 KB'.

Users can also access the documents in [Order History](#).

## Customer Details

Customer Code AACAB  
Customer Name A & A Cabinets

Line	Product	Order Qty	Unit	Shipped Qty	Item Price (inc)	Per	Discount	Line Total	Shipped Total
1	 <b>Endurance T10HRC Treadmill</b> Code: CV100 (Each)	1	EACH		\$4,300.00	Each	5.00%	<b>\$4,697.75</b>	
Subtotal (Inc GST)									\$4,697.75
Charges									\$0.00
Toll Ipec									\$0.00
<b>Total (inc GST)</b>									<b>\$4,697.75</b>
Including GST									\$612.75

## Uploaded Files

- EndoffinancialYearClearanceltems.pdf 72.1 KB
- Test (11).pdf 73.9 KB

## Step-by-step guide

### 1. Add Order Document Widget to Checkout template

1. In the CMS, go to **Content Pages & Templates Checkout**.

2. Select the **Checkout** template.

3. Locate the **Checkout Payment Options Widget**. In the same zone, click **Add Widget**.



4. Search for **Order Documents** and click **Add Widget**.

5. **Edit** the widget. See: [Order Documents Widget](#).

- Enter document file types accepted. For multiple file types, separate each one with a comma, e.g., [.pdf](#), [.jpg](#).
- Ensure 'Show document link' is toggled OFF.

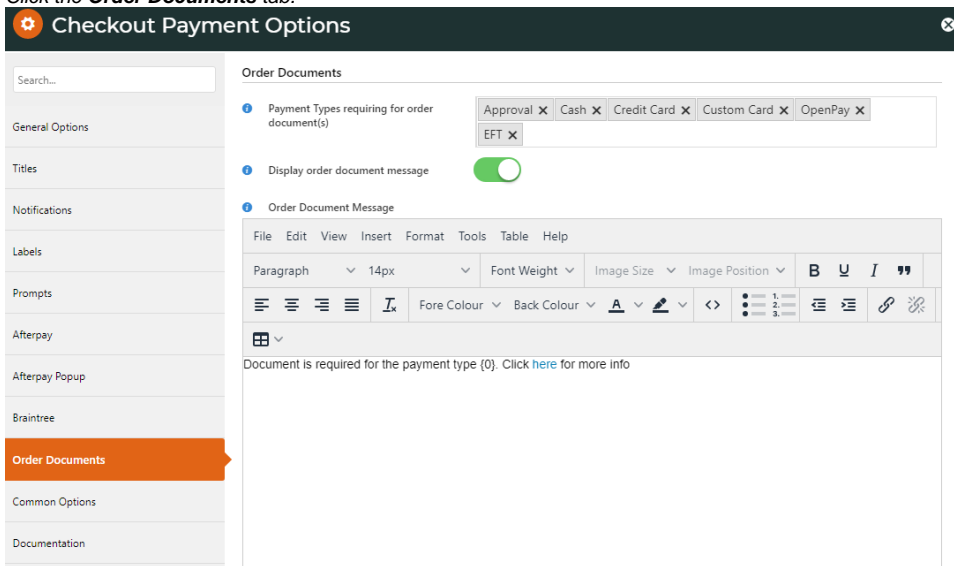
6. Save the widget.

7. **IMPORTANT** - Move the **Order Documents Widget** so that it is positioned just above the **Checkout Payment Options** Widget in the same zone.

Next, edit the Checkout Payment Options Widget.

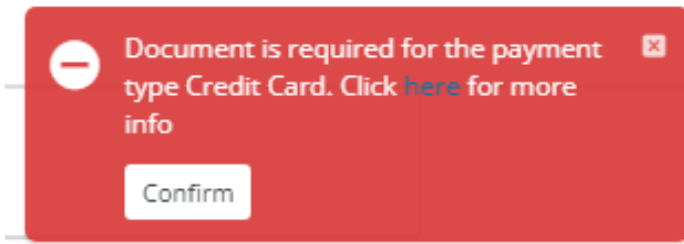
1. Click **Edit** for the **Checkout Payment Options Widget**.

2. Click the **Order Documents** tab.



3. In **Payment Types Requiring Order Documents**, add one or more payment types that need a document uploaded.

4. If required, edit the **Order Document Message**. **NOTE** - The default message contains a placeholder for the payment type.



5. Click **Save**.

## 2. Add Order Document Widget to Order Documents template

This step may have been done for your site already.

1. In the CMS, go to **Content Pages & Templates Orders**.
2. Select the **Order Documents Page** template.
3. Ensure the **Order Documents widget** has been added. If not, click **Add Widget**.
4. Search for **Order Documents** and click **Add Widget**.
5. **Edit the widget**. See: [Order Documents Widget](#).
  - Enter document file types accepted Format: [.pdf](#) For multiple file types, separate each one with a comma, e.g., [.pdf](#), [.jpg](#).
  - Ensure 'Show document link' is toggled OFF.
6. Save the widget.

## 3. Add Order Document Widget to an Email Template

This widget must be added to every email template you want the link to appear. For example, you may want the link to appear in the Order Received and Order Confirmation emails. The widget must be added to each template separately.

To add the Order Document Widget to an email template:

1. In the CMS, go to **Content Email**
2. Go to the email template.
3. In the location you want the link displayed, add the **Order Document Widget**.
4. **Edit** the widget. See: [Order Documents Widget](#).
  - Ensure document file types accepted are the same as those in the Checkout page's widget.
  - Enter document file types accepted Format: [.pdf](#) For multiple file types, separate each one with a comma, e.g., [.pdf,.jpg](#).
  - Ensure 'Show document link' is toggled **ON**.



Show document link (email templates only)



5. Click **Save**.

## Additional Information

<b>Minimum Version Requirements</b>	4.37
<b>Prerequisites</b>	--
<b>Self Configurable</b>	Yes
<b>Business Function</b>	Ordering
<b>BPD Only?</b>	Yes
<b>B2B/B2C/Both</b>	Both
<b>Third Party Costs</b>	n/a

## Related help

- [Release Payments](#)
- [Release EFT and BPAY Payments](#)

## Related widgets

- [Order Documents Widget](#)
- [Checkout Payment Options Widget](#)