# **Release Payments**

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This feature must first be switched on for your site by Commerce Vision.

Release Payments allows authorised users to search for any order to check payment and manually change its payment status to and from Approved /Failed. The system will automatically update the order's status based on the change. **NOTE** - A payment status cannot be changed if the order has been integrated. You can also use Release Payments to add a transaction or receipt reference or note against a payment, e.g., receipt reference number.

# Features

- · Check payment details for any placed order
- · Approve or fail a payment (except when the order has been integrated)
- Enter a note against a payment, e.g., official receipt number
- Update the order based on changed payment status (unless order has been integrated)

### **Example Use Cases**

- Approve held bank transfer orders, e.g., EFT, BPay payments, when payments reach your bank account
- Approve or reject payment not automatically updated by the system for any reason
- Approve or reject a 'stuck' order finalise completed or failed payment to update order status accordingly
- Add the official transaction reference against a payment made but with missing receipt number

When the Release Payments page is first loaded, orders placed in the last 72 hours with the following statuses are automatically listed:

- Held orders placed on hold awaiting special payment release, e.g., payment type needs manual release or payment confirmation has not been
  received
- In progress orders awaiting automated release
- · Failed orders marked with a failed payment status

Use the Search to find any order by receipt or invoice number regardless of payment status.

# Release Payments

۹ Payment Search	
earch in Invoices, Orders and Receipts:	
Search	Q Search
Search	Q Search

# Step-by-step guide

#### 1. Check Release Payments enabled

When Release Payments is enabled, you can access the feature from Ecommerce Orders Release Payments. To check it has been enabled:

1. In the CMS, go to Settings Settings Feature Management Payment & Checkout.

<ol><li>Check Release Payments is ON. (If disabled, contact Commerce Vision)</li></ol>	on.)
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🖌 Content	(i) (i)	>	Feature	Available in CMS	Options	
🔗 Payment & Checkout	•	•	Buy Now, Pay Later Configure instalment payment options for your websits.			
🖋 Products & Categories	(i) 3	<b>&gt;</b>	Credit Card Verification Configure options related to Credit Card Verification.			
System	•	•	Customer Payment Token Management Configure options related to Customer Payment Token Management.			
L User	•	<b>&gt;</b>	Guest Checkout		• Configure	
Advanced	•	•	Order Approval			
			Payment Provider Select and configure the provider to use when making payments.			
			PayPal Express Configure PayPal Express checkout options for your websites.			
			Promotion Codes Create scenario-based promo codes quickly and easily.		• Configure	
			Release Payments			

#### 2. Find a payment

Payments for orders placed within the last 72 hours are displayed. But any payment for any order can be found with Search.

Orders that previously held an incomplete status but are now completed or rejected are not automatically displayed in the list but can be found
 by Invoice Number.

- 1. In the CMS, go to Ecommerce Orders Release Payments.
- 2. The Release Payments page automatically loads payments for orders placed in the last 72 hours with the incomplete payment status of 'In Progress' or 'On hold'.

😑 Release Payments										
Q Payment Search										
Search:										
Search			Q Search							
O Reset Search										
									Check Payment Status here	
Receipt Number † Customer Code User Name	Invoice Number	Order Number	Transaction Amount	Invoice Date	Date Stamp	Bank Receipt Details	Payment Type	Payment Status		
88448	37050272	37050272	\$39.07		21/01/2019 01:55 PM		BRDPARTY	In Progress	Approve	🕈 Reject
88450	37052084	37052084	\$22.63		24/01/2019 09:16 AM		3RDPARTY	In Progress	Approve	🕈 Reject
88455	37052716	37052716	\$28.42		24/01/2019 05:04 PM		3RDPARTY	In Progress	Approve	🕈 Reject
88456	37052723	37052723	\$12.83		24/01/2019 05:22 PM		3RDPARTY	In Progress	Approve	🕈 Reject
88457	37052827	37052827	\$300.99		24/01/2019 07:40 PM		3RDPARTY	In Progress	Approve	🖲 Reject
88458	37052830	37052830	\$66.98		24/01/2019 07:48 PM		3RDPARTY	In Progress	Approve	🕈 Reject
88459	37052838	37052838	\$300.99		24/01/2019 07:58 PM		3RDPARTY	In Progress	Approve	🕈 Reject
88460	37052844	37052844	\$383.79		24/01/2019 08:47 PM		3RDPARTY	In Progress	Approve	🕈 Reject
88461	37052875	37052875	\$326.80		24/01/2019 09:04 PM		SRDPARTY	In Progress	Approve	🕈 Reject
88462	37052944	37052944	\$383.79		24/01/2019 10:22 PM		3RDPARTY	In Progress	Approve	P Reject
★ 4 1 2 3 4 5 6 7 8 9 10 ▶ 1	н								1 - 10	) of 103 items
<ul> <li>Approve Fayments</li> <li>Reject Payments</li> </ul>										

#### 3. Search for any order or payment

An order or payment can be found by Receipt Number or Invoice Number. In Search, enter either, then click the Search button.

Q Payment Search	
Search:	
Search	۹ Search
O Reset Search	

#### 4. Approve an order payment

If an order has not been integrated, the payment can be set to Approved (completed). Completed payment will release the order for processing. **NOTE -** If an order has been paid with more than one payment, all payments must be completed for the order to be released.

- 1. Find the payment you want to approve either in the list or by using the Search tool.
- 2. To approve the payment, click the **Approve** button for the order.
- 3. In the 'Approve Payment' box, enter any bank transaction details and note (required) on the change. **NOTE -** 'Bank Authorisation' is not displayed in Release Payments but 'Bank Receipt Details is displayed under its own column.

Bank Authorisation Details	5		
Bank Receipt Details			
Note *			3
	1000.00		Cancel ✓ Confirm
lick <b>Confirm</b> . A popup m	nessage confirms the payment ful Authentication and Payment	status change was succe	ssful. Notice the order's Pay
at the ingent of the the test			
Payment Status	5		
Successful Auther	ntication		
and Devenent			
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and Payment			
pprove Multiple Orders	in One Go		
oprove Multiple Orders	<b>in One Go</b> payments that are listed: ayments to approve		
oprove Multiple Orders batch approve multiple Tick each box for the pa Click the Approve Payr	i <b>in One Go</b> payments that are listed: syments to approve <b>ments</b> button at the bottom of t	he screen	
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## 5. Reject (fail) an order's payment

If an order has not been integrated, the payment can be set to Rejected (failed). Failed payment will cancel the order. **NOTE -** If an order has been paid with more than one payment, all payments must be failed to cancel the order.

- 1. Find the payment you want to fail either in the list or by using the Search tool.
- 2. Click the Reject button for the payment.
- 3. In Reject Payments, enter a note for the change (required), then click Confirm.

	Reject Payments	8
Are you Note *	u sure you want to Reject these payments?	
		1 Confirm
4. Check th	the popup message confirms the payment has been updated.	v comm
<b>v</b>	Success	
	Payments have been updated.	
	Close	
. Check th	Payments have been updated. Close	

5. Check the Payment Status for the order has changed to 'Failed':

Pay	/m	en	ıt	St	at	tu	s
_							

#### Failed

#### Reject Multiple Orders in One Go

To batch reject multiple orders listed: 1. Tick the box next to all payments you want to reject

2.0	lick the <b>Reject Payments</b> button at the	bottom of the page.	
	100159	WEBSALES	Jane Smith
	100161	WEBSALES	Jane Smith
	100167	WAFFA	Jane Smith
	₩ ◀ 1 2 3 ▶ ₩		
	Approve Payments	🕈 Reject Payment	ts
3. 0	Confirm rejection of all selected orders.		

# **Related Resources**

- Order Data for Eway Fraud Protection
  Attach Payment Document to Order

- Ordering Functions
  Order Tracking / Order History
  Carrier Track and Trace links
  Allow Users With Multiple Accounts to Track All Orders
  Order Shipped emails