

Release Payments

 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

 Payment Search

Search in Invoices, Orders and Receipts:

 Search

 Reset Search

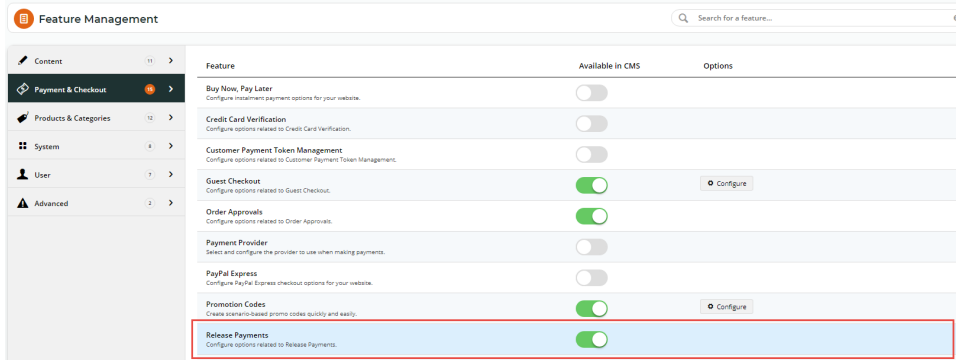
Step-by-step guide

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**.

2. Check **Release Payments** is ON. (If disabled, contact Commerce Vision.)



2. Find a payment

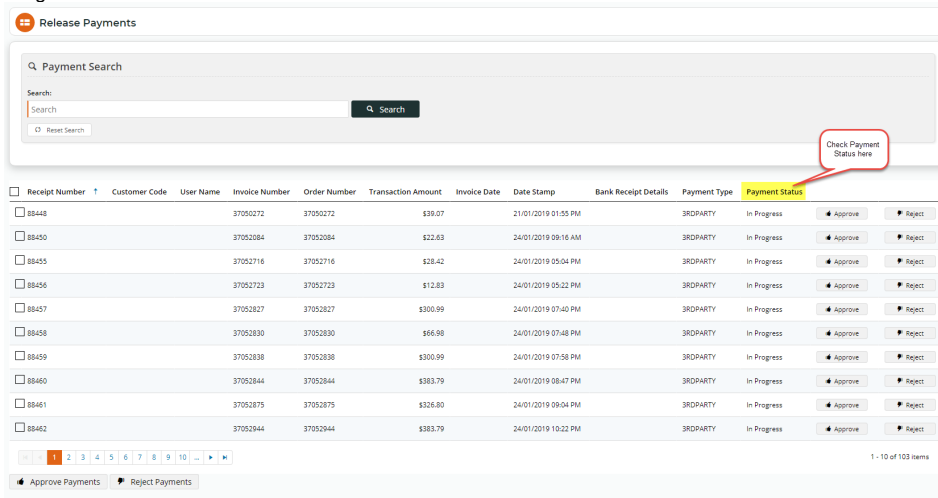
Payments for orders placed within the last 72 hours are displayed. But any payment for any order can be found with Search.



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'.



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.



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.

Approve Payment

Bank Authorisation Details

Bank Receipt Details

Note *

Cancel

Confirm

- 4. Click **Confirm**. A popup message confirms the payment status change was successful. Notice the order's Payment Status has changed to 'Successful Authentication and Payment':

Payment Status

Successful Authentication
and Payment

Approve Multiple Orders in One Go

- To batch approve multiple payments that are listed:
- 1. Tick each box for the payments to approve
 - 2. Click the **Approve Payments** button at the bottom of the screen

<input checked="" type="checkbox"/>	100159	WEBSALES	Jane Smith
<input checked="" type="checkbox"/>	100161	WEBSALES	Jane Smith
<input checked="" type="checkbox"/>	100167	WAFFA	Jane Smith

1

2

3

Approve Payments

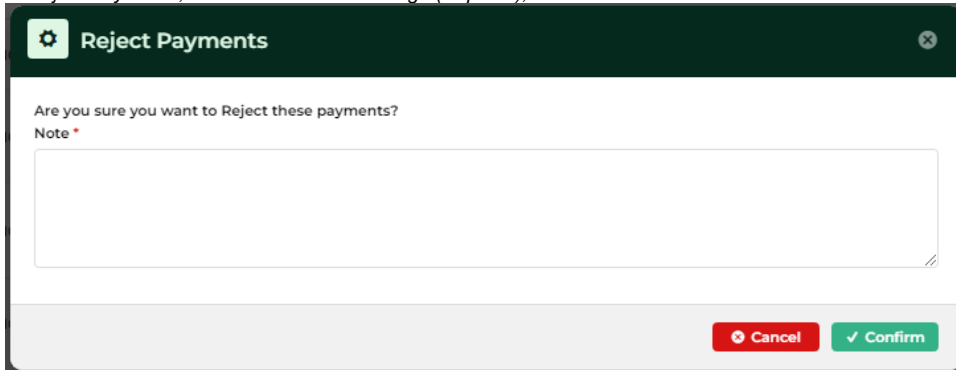
Reject Payments

- 3. **Confirm** approval of all selected orders. Check the popup message for successful changes.

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**.

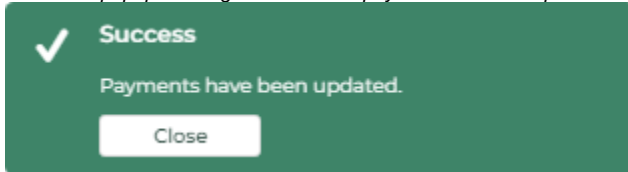
A modal window titled "Reject Payments" with a dark green header. Inside, it asks "Are you sure you want to Reject these payments?" followed by a "Note" label and a red asterisk. Below is a large text input area. At the bottom right are two buttons: "Cancel" (red) and "Confirm" (green).

Reject Payments

Are you sure you want to Reject these payments?

Note *

4. Check the popup message confirms the payment has been updated.



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

Payment Status

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. Click the **Reject Payments** button at the bottom of the page.

<input checked="" type="checkbox"/>	100159	WEBSALES	Jane Smith
<input checked="" type="checkbox"/>	100161	WEBSALES	Jane Smith
<input checked="" type="checkbox"/>	100167	WAFFA	Jane Smith

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👍 Approve Payments 👎 Reject Payments

3. 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](#)