

How do I issue a refund?

Last Modified on 01/31/2024 3:48 pm CST

Exciting news! Our ConnectBooster Support documentation is moving to a new location. Be sure to bookmark the new link below.

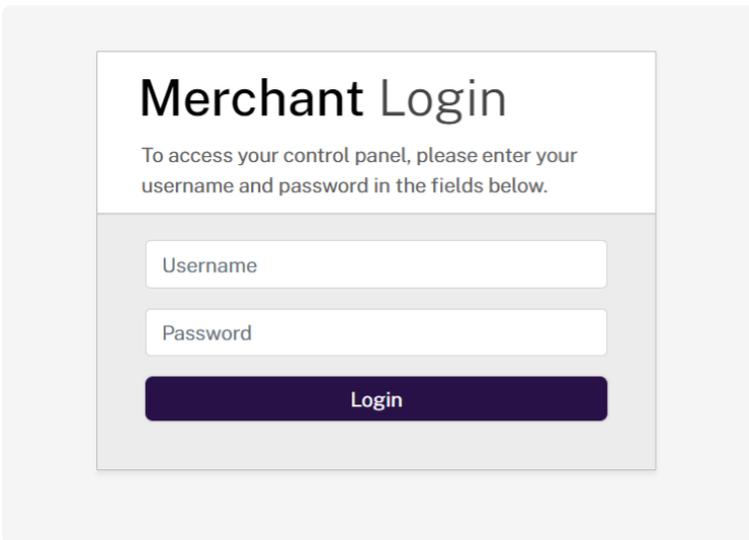
<https://help.cb.kaseya.com/help/Content/0-HOME/Home.htm>

Refunds are usually issued through the [BNG Gateway](#).

- This may differ depending on your particular processing integration

Log in at <https://secure.bngpaymentgateway.com/>

- If you are unable to login, please contact the main account holder or support@connectbooster.com to reset login credentials.

A screenshot of a 'Merchant Login' form. The form has a white background with a dark blue header area. The title 'Merchant Login' is in a large, bold, black font. Below the title, there is a smaller line of text: 'To access your control panel, please enter your username and password in the fields below.' There are two input fields: 'Username' and 'Password', both with light gray borders. Below the input fields is a dark blue button with the word 'Login' in white text.

Merchant Login

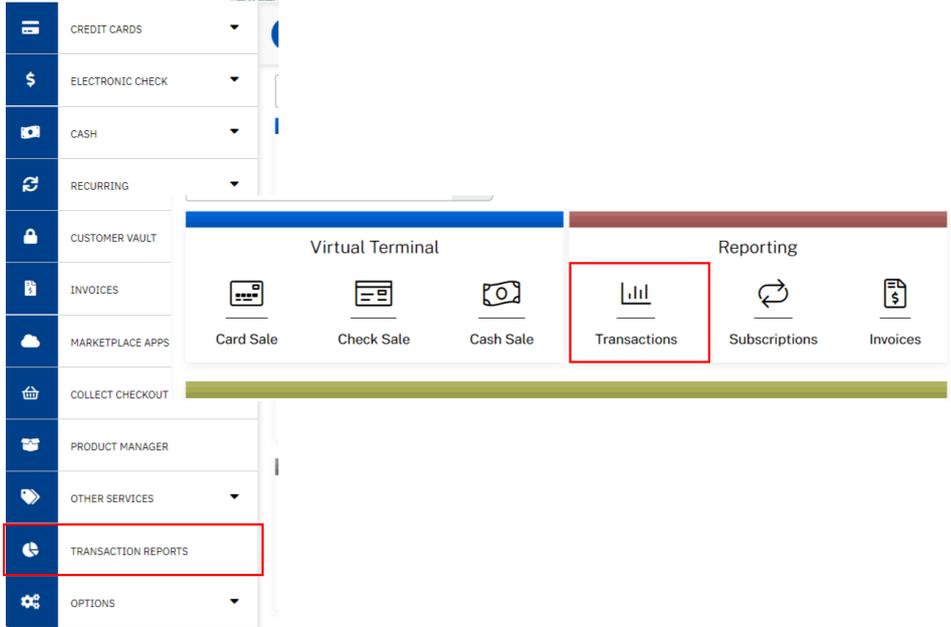
To access your control panel, please enter your username and password in the fields below.

Username

Password

Login

Find the transaction using the Transaction Reports in the left-hand menu, or by selecting Transactions under Reporting



The screenshot displays the ConnectBooster interface. On the left is a vertical navigation menu with the following items: CREDIT CARDS, ELECTRONIC CHECK, CASH, RECURRING, CUSTOMER VAULT, INVOICES, MARKETPLACE APPS, COLLECT CHECKOUT, PRODUCT MANAGER, OTHER SERVICES, TRANSACTION REPORTS (highlighted with a red box), and OPTIONS. The main content area is divided into two sections: 'Virtual Terminal' and 'Reporting'. Under 'Virtual Terminal' are 'Card Sale', 'Check Sale', and 'Cash Sale'. Under 'Reporting' are 'Transactions' (highlighted with a red box), 'Subscriptions', and 'Invoices'.

Use the "Search Transactions" Report set of criteria.

Search Transactions

Show Today's Transactions

Transaction ID	<input type="text"/>	Order ID	<input type="text"/>
First Name	<input type="text"/>	Last Name	<input type="text"/>
Email Address	<input type="text"/>	Account Number	<input type="text"/> (Credit/Checking)
Status	<input type="text" value="Any"/>	Transaction Type	<input type="text" value="Any"/>
Processor	<input type="text" value="Any"/>	Device	<input type="text"/>
Customer ID	<input type="text"/>	Company	<input type="text"/>
PAR	<input type="text"/>	Platform ID	<input type="text"/>
Min. Amount	<input type="text"/>	Phone Number	<input type="text"/>
Max. Amount	<input type="text"/>	PAR	<input type="text"/>
Start Date	<input type="text" value="04/01/2023 12:00 AM"/>	End Date	<input type="text" value="04/14/2023 11:59 PM"/>

Submit

We like to include the Amount Range and Start/End Date criteria to narrow the search results

Click on the "Transaction ID" link to access the details page.

Home / Reports / Transaction Report

Transaction Report

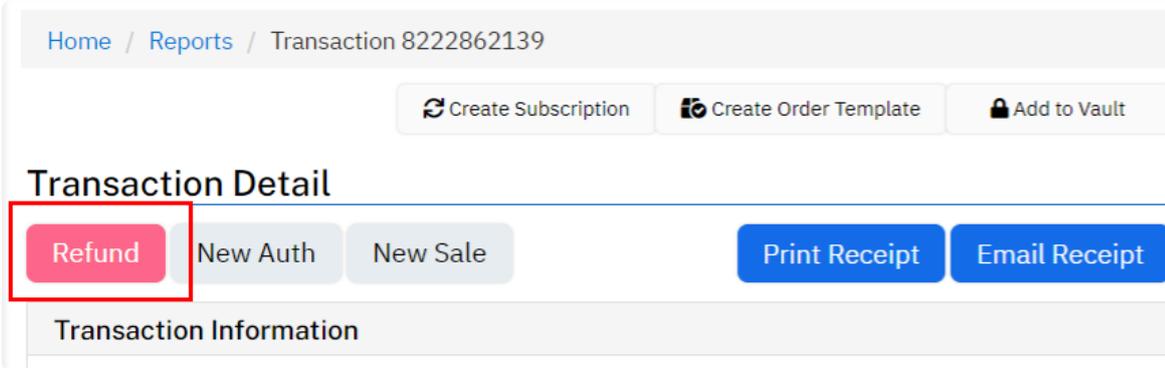
Re-Run Report

04/01/2023 12:00 AM CDT To 04/14/2023 11:59 PM CDT
Sorted from oldest to newest.

Type	Status	ID	Customer	Details	Time	Amount	PO Number
Card Sale	Approved	2139		4...8730	4/6/2023 2:06:26 AM		
Card Settle					4/6/2023 8:06:39 PM		

Once on the details page, select and confirm "Refund" from the top left corner.

- If you have the option to "VOID", that is usually preferred as it stops the transaction from fully committing!
- You will have the option to send an E-Mail Receipt



Home / Reports / Transaction 8222862139

Create Subscription Create Order Template Add to Vault

Transaction Detail

Refund New Auth New Sale Print Receipt Email Receipt

Transaction Information

With this complete you will need to **manually update** QuickBooks and zero out or delete the original payment receipt created by ConnectBooster. Doing so will re-open the invoice and allow it to be paid again at a later date!

NOTE: If the invoice was originally paid by Auto-pay, it will be again if you do not turn off the auto-pay on the affected client's CB portal settings.

A video walking through this process can be found [HERE](#).