Pay Now

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

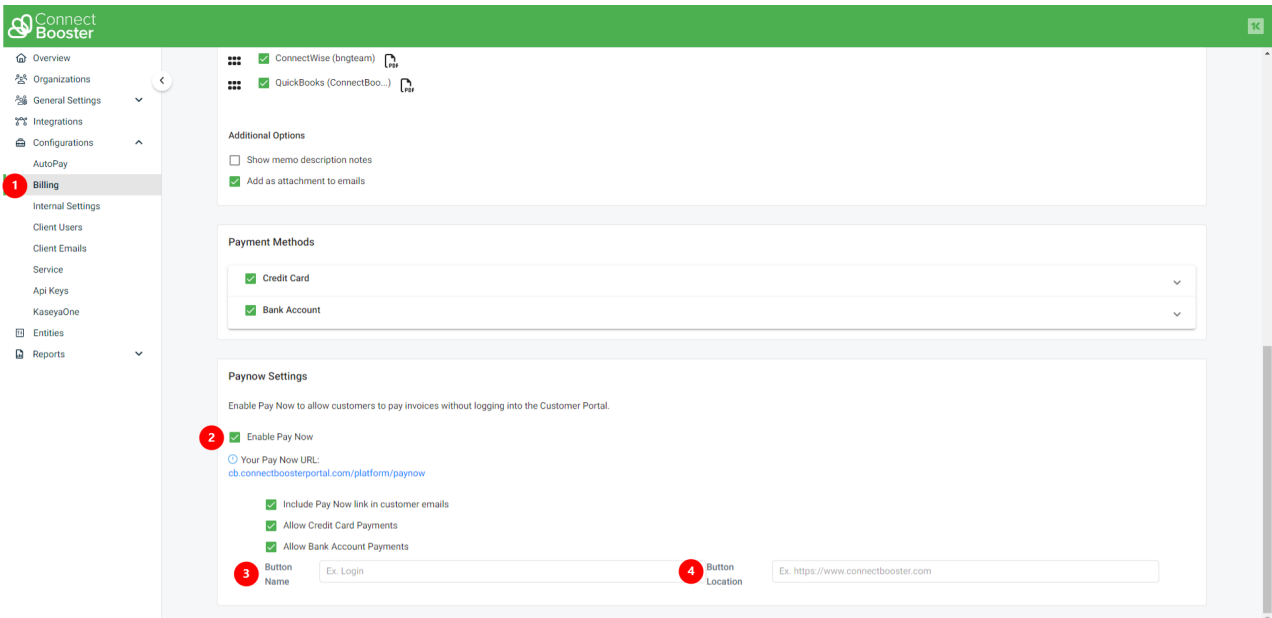https://help.cb.kaseya.com/help/Content/0-HOME/Home.htm

What is "Pay Now"?

"Pay Now" enables your clients to pay invoices online, without requiring login to your ConnectBooster portal. This means clients can still pay you on the ConnectBooster system, even if they don't have access to the customer portal today.

How to Enable "Pay Now"

1. Navigate to Configurations + Billing + Pay Now Settings
2. Check-mark and save "Enable Pay Now"
3. If you wish to rename the LOG IN text found on the Pay Now, you can so here
4. Here you can update where your clients are directed when selecting the LOG IN button, you can add your link here

Clients may now go directly to your Pay Now endpoint: https://yourprefix.connectboosterportal.com/PAYNOW

A great way to give exposure to this endpoint is to put a link on your main business website.

- I.e., a "Pay Bills Online" menu option!

Enabling the "Include Pay Now link in organization emails" option will give more exposure by updating 3 email templates:

- Past Due Notifications (if turned on)
- Account Summary (if turned on)
- Individual Invoice Notifications (if turned on)

The templates will have a "Pay Invoice" button added, or in the case of the Account Summary, individual "Pay" links.

"Pay Invoice" button:

Invoice:	Inv123
Date Due:	05-29-2023
Amount Due:	$100.00

Invoice is configured for automatic payment on MM/DD/YYYY.

PAY INVOICE

"Past Due" Email:

Invoice Past Due

Please note the below invoice is 30 days past due. Review any outstanding balance and remit payment at your earliest convenience.

Invoice:	Inv123
Date Due:	04-23-2023
Amount Due:	$100.00

PAY INVOICE

Please contact us if you have any questions.

Thank you for your business!

GO TO PORTAL

"Account Summary" Email:

Account Summary

Please review your Account Summary and take any actions needed in our customer portal.

Expiring Cards

STATUS	TYPE	NICKNAME	EXPIRATION
Expired	Mastercard	Test MasterCard	2/2023
Expiring Soon	AmericanExpress	Test Amex	6/2023

Test Company Invoices

STATUS	INVOICE	ISSUED	DUE	AMOUNT	BALANCE	
Past Due	Inv123	05-14-2023	05-14-2023	$200.00	$100.00	Pay
Open	Inv124	05-14-2023	06-03-2023	$250.00	$50.00	Pay
New	Inv125	05-14-2023	06-03-2023	$300.00	$300.00	Pay
				TOTAL	$450.00	
				OVERDUE	$100.00	

"Invoice Delivery" Email:

Pay Invoice Page

When your client clicks the "Pay Invoice" button, the needed information should be pre-filled.

If the client navigates to the Pay Now URL endpoint, they will simply need to enter three key pieces of information. After the invoice number, amount, and billing email address have been validated for what is already in the system, your client can proceed to enter their payment method of choice.

1. Billing Email Address MUST match a contact already in the system
2. Invoice Number must be EXACT, including alphanumeric characters
3. Amount to pay can NOT be greater than the invoice's remaining balance

Both Credit Card or ACH (bank account) can be utilized via Pay Now, if applicable in your portal.

**The payment method entered will NOT be stored for future use.

Confirmation Page

After clicking continue, the client will have one last confirmation screen before payment is attempted.

Payment Information   ✏ Edit

	Test Card		
	************5100	3 / 2028	

Billing Address
123 Test Ave
Fargo ND 58102
demo@example.com

✏ Edit

Invoice	Amount to Pay
A1034	$1.00
Grand Total	$1.00

By choosing Pay, you are authorizing the payment method for this transaction.

PAY $1.00

After a successful payment is made, it will still be reconciled to your Accounting package as normal (on the next system synchronization).

✓

Thank you for your payment!

A receipt was sent to demo@example.com

PAY ANOTHER INVOICE

LOG IN

Canadian Gateway systems are not supported at this time.