

Scheduled

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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>

A Scheduled Payment is a payment that has been **manually** arranged to process on a selected date.

- This does not include payments set to pay via Autopay

The screenshot shows a sidebar menu on the left with options like Customer Details, Balance, Open Invoices (1), Customer Credits, Pending Payments, Scheduled Payments, Payments Calendar, Payment Methods (2), AutoPay (0), Invoice History, and Transaction History. The main content area displays a 'Scheduled Payments' table with columns for Transaction, Total Payment, Date, and Payment Method. A single row is visible with transaction ID CB25f95fab21, a total payment of \$10.30, a date of 09-29-2021, and a payment method of VISA ****-1111. A calendar icon in the rightmost column of this row is highlighted with a red box. Below the table is a 'Payments Calendar' section showing the current month as May 2023.

A payment can be rescheduled, or cancelled by clicking the transaction number of the scheduled payment.

This detailed view shows the transaction ID CB25f95fab21 at the top left. To its right, a table lists details: PROCESS (Scheduled), TRAN. ID (--), and GATEWAY AUTH (--). Below this, another table shows SCHEDULE DATE (09-29-2021), AMOUNT (\$10.30), and PAYMENT METHOD (****-1111). A 'Created By:' field is partially visible. A calendar icon is located at the bottom left of this section.

Two buttons are shown: 'Reschedule' and 'Cancel Scheduled Payment'. The 'Reschedule' button is highlighted with a red box and is accompanied by a calendar icon in a dropdown menu. The 'Cancel Scheduled Payment' button is also highlighted with a red box.

Transaction	Amount	Payment Method
09-29-2021	\$10.00	VISA ****-1111

Close

- Selecting **RESCHEDULE** you will need to select the calendar icon and adjust to the updated date you would like this payment to process.

CB25f95fab21

Created By: [Redacted]

PROCESS	TRAN. ID	GATEWAY AUTH
Scheduled	--	--

SCHEDULE DATE	AMOUNT	PAYMENT METHOD
09-29-2021	\$10.30	****-1111

Calendar icon

Reschedule

Cancel Scheduled Payment

Amount: \$10.00

Payment Method: visa ****-1111

Close

Calendar: May 2023, 24 selected

- Selecting "Cancel Scheduled Payment", will stop the payment from processing. A confirmation dialog box will be prompted.

Confirm

Are you sure you want to cancel this scheduled payment? You can not undo this action.

Cancel Confirm