

Quoter Setup

Last Modified on 02/02/2024 11:54 am CST

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

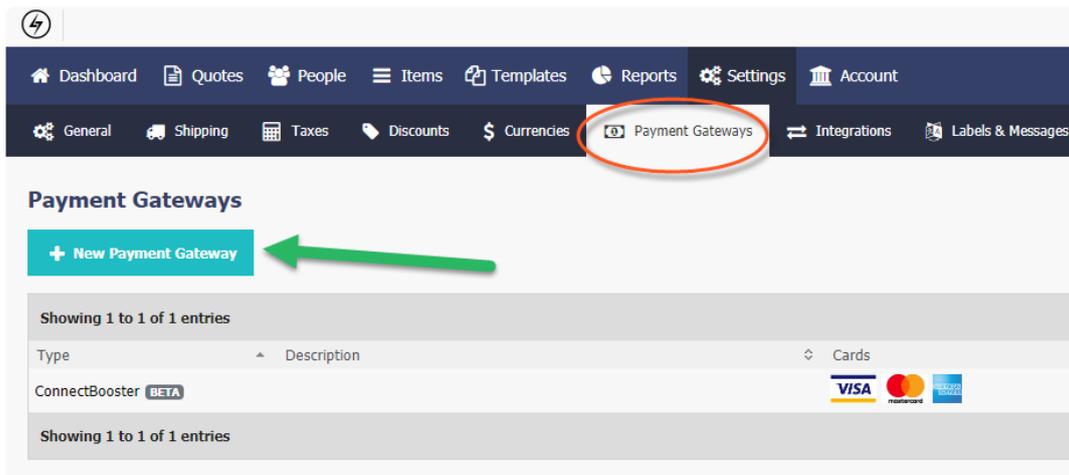
<https://help.cb.kaseya.com/help/Content/0-HOME/Home.htm>



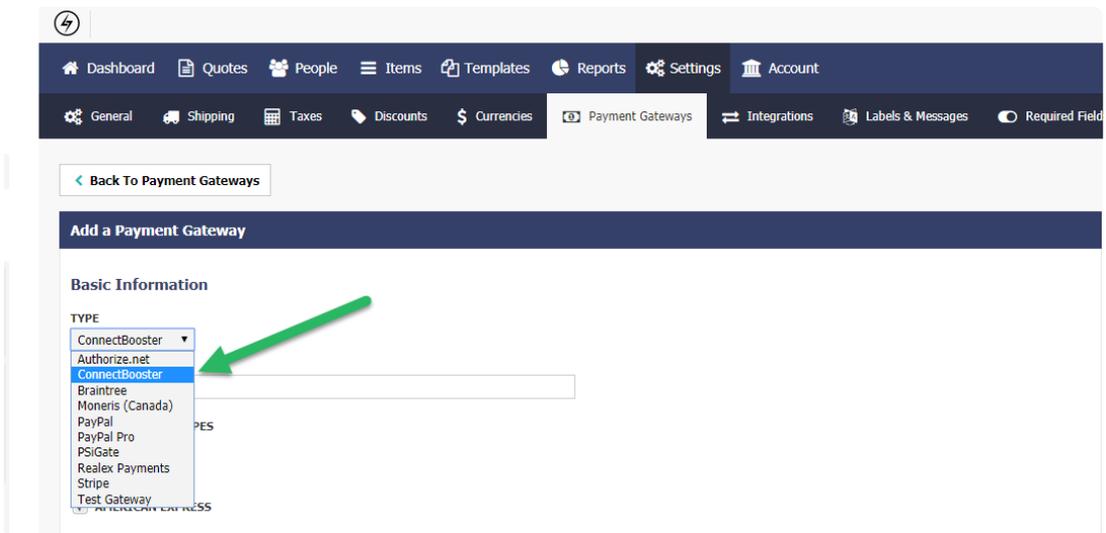
Quoter Setup

1. Navigate to Settings + Payment Gateways.

Select "+ New Payment Gateway".



2. On the drop down list, select "ConnectBooster".



3. Setup BNG Payment Settings. Here you will need to create an API Key.

Follow our integration guide on how to create a BNG Gateway integration key here

A screenshot of the 'Edit a Payment Gateway' form. The form is divided into several sections: 'Basic Information' with 'TYPE' set to 'ConnectBooster' and an empty 'DESCRIPTION' field; 'Payment Gateway Settings' with a yellow warning box stating 'The Person's Organization is required in order to use the BNG Customer Vault. Please set it as a required field in Settings > Required Fields.' and a note to 'Generate or find your ConnectBooster API Key in the ConnectBooster portal by navigating to Settings -> Configurations -> API Keys.'; 'BNG Payments Settings' with a blue information box stating 'BNG Payments currently only supports upfront payments.'; and 'API KEY' with a red-bordered text input field containing a masked key. Below this is a note: 'Generate or find your BNG Payments API Key in the BNG Gateway portal by navigating to Options -> Settings -> Security Keys.' The 'CURRENCIES' section has a checked box for 'UNITED STATES DOLLAR'. At the bottom is a 'Save Payment Gateway' button.

<https://docs.connectbooster.com/help/bng-gateway-api-security-key>

Create the key, and copy/paste into the API Key Field.

Congratulations!

Your clients can now re-use their payment methods on file for subsequent quotes, all while utilizing the same back-

end payment processing network powering your ConnectBooster portal!

Saved Payment Methods					
Type	Name	Confirm Last 4 Digits	Confirm Expiry		
Credit Card	Nathan Charrois	4xxxxxxxxx	MM	YY	Use Card
Bank	Mike Polga		-		Use Account

Another added benefit will enable organization's credit card or bank accounts to be automatically linked to your ConnectBooster portal! This means you, or your client can easily pay other outstanding invoices or even enroll in automatic payments!

XYZ Test Company

Customer Details

Balance

Open Invoices **2**

Payment Methods

+ New

Type	Friendly Name	Expiration (MM/YY)	Last 4	
	Test MC	12/23	1111	Manage

Note: transactions made will need to be **manually** received within your accounting system as the gateway will not automatically apply payment since the invoice does not yet exist.

Workflow Diagram: