

GiveBig: How to Credit a Transaction

Click & Pledge customers can login to your Click & Pledge customer portal, Connect, to credit transactions.

Credit a Transaction Using Connect

The following definitions apply:

Settled Transaction: Transactions are settled at midnight on the day of the transaction. All transactions are settled at midnight.

Credit: Settled transactions may be credited. A credit appears on the card holder's credit card statement in 7-10 days depending on the issuing bank. Transactions credited prior to the statement closure date, at the end of the month, incur the authorization fee. Transactions credited after the statement closure date incur both the percentage and authorization fee.

Void: Transactions that have not yet settled, voided prior to midnight of the transaction date, incur only the authorization fee and not the percentage fee. Voided transactions, since they have not yet settled, will not show up on the card holder's credit card statement and will never settle.

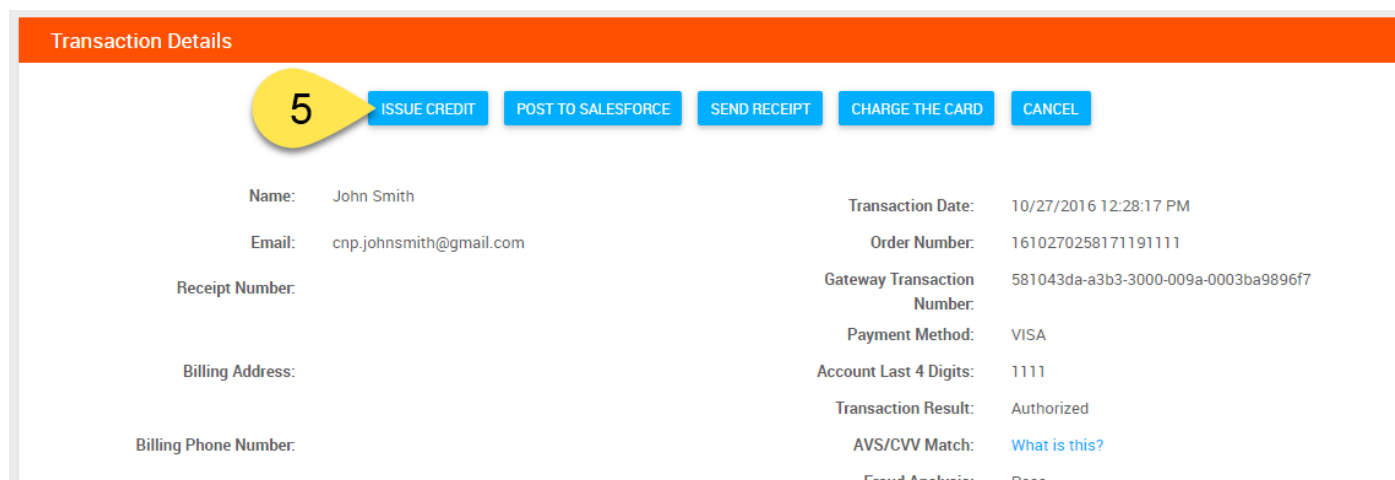
Step-by-Step Procedure to credit a transaction:

The screenshot shows the Click & Pledge MYCONNECT interface. The top navigation bar includes the logo, user profile information, and a Launcher menu. The main content area displays a list of transactions with columns for Order Number, Transaction Date, First Name, Last Name, Email, Method, Payment, Campaign, Salesforce, Recurring, and \$Total Charged. Callouts 1-4 highlight specific UI elements: 1 points to the Launcher menu, 2 points to the Transactions & Reports option, 3 points to the Transactions link in the left sidebar, and 4 points to the Order Number column header.

Order Number	Transaction Date	First Name	Last Name	Email	Method	Payment	Campaign	Salesforce	Recurring	\$Total Charged
161115103927794 11164409	11/15/2016				VISA-1111	Authorized	John Smith	Posted	Yes	\$11.00
161027025817119 1111	10/27/2016	John	Smith	cnp.johnsmith@gmail.com	VISA-1111	Authorized		Posted	No	\$300.00
161027025454356 1111	10/27/2016	John	Smith	cnp.johnsmith@gmail.com	VISA-1111	Authorized		Posted	No	\$250.00

1. [Login](#) to your Connect instance.
2. Select 'Transactions & Reports' from Launcher (Top Right).
3. Click 'Transactions'.
4. Select the desired order number to which you want to issue credit.

NOTE: Issue Credit feature is ONLY available for Credit Card and Custom Payment.



The screenshot displays the 'Transaction Details' page. At the top, there is an orange header bar with the text 'Transaction Details'. Below the header, there is a row of five blue buttons: 'ISSUE CREDIT', 'POST TO SALESFORCE', 'SEND RECEIPT', 'CHARGE THE CARD', and 'CANCEL'. A yellow callout bubble with the number '5' is positioned over the 'ISSUE CREDIT' button. Below the buttons, the page is divided into two columns of transaction information. The left column contains: Name: John Smith, Email: cnp.johnsmith@gmail.com, Receipt Number, Billing Address, and Billing Phone Number. The right column contains: Transaction Date: 10/27/2016 12:28:17 PM, Order Number: 1610270258171191111, Gateway Transaction Number: 581043da-a3b3-3000-009a-0003ba9896f7, Payment Method: VISA, Account Last 4 Digits: 1111, Transaction Result: Authorized, AVS/CVV Match: [What is this?](#), and Fraud Analysis: Pass.

5. In Transaction Details page, click 'Issue Credit'.

Transactions

Home / Transactions

Issue Credit

Transaction Date : 10/27/2016

Order Number : 1610270258171191111

First Name : John

Last Name : Smith

Billing Address :

Shipping Address :

Payment Method : VISA-1111

Total Charge : \$300.00

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Internal Note: Internal Note

Welcome Email

✓ Send Confirmation Email

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The following wild-card texts may be used in the body of the email.

- First name: {FirstName}
- Last name: {LastName}
- Order Number: {OrderNumber}
- Payment Name: {PaymentName}
- OrganizationName: {OrganizationName}

Email Address:

cnp.johnsmith@gmail.com

Subject:

A credit has been applied to your account.

Rich text editor toolbar with icons for Source, Cut, Copy, Paste, Undo, Redo, Bold, Italic, Underline, Bulleted List, Numbered List, Indent Left, Indent Right, Decrease Indent, Increase Indent, Font Color, Background Color, Link, Unlink, Table, Format, Font, Size, and Text Color.

Dear John Smith,

A credit has been issued to your account for 300.00 to your VISA-1111-xxxx xxxx xxxx 1111 for Order Number 1610270258171191111 transacted on 10/27/2016

Please allow 7-10 days before the credit appears on your statement.

CANCEL

ISSUE CREDIT

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6. Add an 'Internal Note' for future reference.

7. To send a credit notice to the card holder click on 'Send Confirmation Email' and review the email.
8. Click 'Issue Credit'.

Credited transactions will settle automatically at midnight and will take 7-10 days to appear on the card holder's statement depending on the issuing bank. Voided transactions will never settle and as such will never appear on the statement.