Biller Genie
Frequently Asked Questions

How can I process a refund?

From Reports > All Transactions > click over the Transaction ID > and select Void/Refund from the top right of the screen.

Are there certain cards that we can't process with Biller Genie?

Biller Genie does not have any restrictions on card type.

Why did my transaction get declined?

From Reports > All Transactions > locate and click on the Transaction ID > click on Transaction Details and scroll down to see the Result code and error received. Biller Genie is simply displaying the response we received from the attempt to process a transaction and you may need to contact your bank for more information.

How do I edit the address and phone number that shows up on my invoices?

Visit the Billing tab by clicking on your username in the top right-hand corner of your Biller Genie account and click Billing. From there you will be able to edit your address and phone number for your account. To edit the DBA Name or email address, please contact support@billergenie.com for assistance.

Why does Biller Genie keep logging me out?

This is a security feature for the site to protect your sensitive invoice information. This cannot be changed or disabled.

How do I complete my PCI compliance?

PCI compliance is a requirement of the credit card companies that needs to be completed annually. Your payments provider who has set up your credit card processing account should be able to assist you with this.

How can I turn off technology fees for one invoice for my customer?

Tech fees cannot be disabled for a specific invoice, this would have to be disabled for the customer under Customers in the Advanced Options tab.

I just upgraded to QBD 2022; how can I make sure I stay connected with Biller Genie?

This would require generating a new token to connect to the new QBD file. Additionally, because it is 2022, we would ask them to remove any previous or other versions of QBD. Subscriber would have to be logged in as admin and in single-user mode.

When can I expect to get payments in my bank account?

Biller Genie does not handle the deposits you receive within your bank account. If you would like to know when you should expect funding or if you're concerned that you're not receiving the total deposit amount you are owed, you'll need to reach out to your payment provider. They should be able to investigate this issue for you and check on the status of the remaining deposit amounts.

What features are included if we upgrade to premium?

This is reseller specific since some premium features are included in plugin for specific resellers. Key features are customer portal and Reminders.

How can I send an invoice to my customer?

Go to Invoices > search and click over your Invoice ID > and select to Send Invoice from the top menu.

How do I perform a partial refund?

To perform a partial refund, please go to:

Reports > All Transactions.

Search for and click on the ID of the transaction you wish to refund.

Click Detach Transaction and OK (if linked to an invoice).

Click Refund > enter the amount you wish to refund > click Refund.

How do I allow for partial payments?

To enable partial payments, please go to:

Control Panel > Settings > set.

Enable Partial Payments to "Yes" > click Save Settings.

How do I see a record of the invoice messages and reminders sent out from my account?

To see a history of the invoice messages and reminders sent from your account, please go to Reports > Reminders History.

How do I pay a single invoice?

To pay a single invoice for a customer, please go to:

Invoices.

Search for and click on the invoice number you wish to pay.

Click Pay Invoice and select if you wish to pay with a stored payment method or create a new transaction.

Enter in the transaction's payment information > click Create Transaction.

How do I pay multiple invoices for a customer?

To pay multiple invoices for a customer, please go to:

Customers.

Search for and click on the customer you wish to pay invoices for.

Click Invoices.

Select the invoices you wish to pay for the customer by setting the Select For Payment toggle to "Yes".

Click Checkout.

Enter in the transaction's payment information > click Create Transaction.

How can I see my Biller Genie subscription invoices?

To access your subscription invoices, please click on your name in the top right-hand corner of the Biller Genie portal and select Billing. Here you'll have a table labeled Invoice History. This table be default only shows open invoices but you can select to view "All" invoices from the drop-down provided.

How do my customers set up their accounts and pay invoices?

Once you send the customer the invitation to your customer portal, they are prompted to sign up. At this page, your customers MUST us the email address that was sent the invitation to create their account. After they have set their password and sign in, they can see any invoices under their account name and select to make payments via your approved methods.

How do I turn on or off (feature X e.g. Late Fees) for one customer?

Once the Global setting is applied in customer defaults, you can make exceptions for specific customers by following this chart. Customer tab> (specific customer name)> Advanced Options> General settings> Edit> (feature X) to on or off.

Pay Proudly Support: 843-707-6110
Merchant Support https://helpcenter.billergenie.com/ 877.245.5374