Administration Overview

Last Modified on 01/31/2024 2:52 pm 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

The overview page gives you insight into your accounts receivable, upcoming payments, and system health.

If you would like to update the look and feel of this page, you can do so using the Customization Overview.

Connect Booster		ł									Q \$ (? 9
호 Organizations 얇 General Settings 양 Integrations	~	<	A/R by Company Total Outstanding Balance	Total Past Due	Open Invoices	Companies	Highest Balances		Total Due	E Part Due		
Configurations	~		\$18,879.33	\$18,879.33	16	7	\$6,000.00		Total Date	P an Duc		
Reports	~		Search A/R By Company				55,000.00					
			Q Company Name	Open Invoices 🗘	Balance ≑	Past Due 👙	\$3,000.00					
			BNG Design	1	\$5,740.00	\$5,740.00	\$2,000.00					
			Iowa Sports Central	5	\$5,505.00	\$5,505.00	\$1,000.00					
			Demo Company	4	\$3,003.00	\$3,003.00	\$0.00					
			XYZ Test Company	2	\$2,298.00	\$2,298.00	BNG Design	Iowa Sports Centr	ral Demo Company	XYZ Test Company	Ponderosa Ranch	RS Company
			Ponderosa Ranch RS Company	1	\$1,075.00	\$1,075.00	Payments Calendar					
			A. Datum Corporation	2	\$203.33	\$203.33			< August 2023	>		
			Showing 1-7 of 7 items		< 1	> 10 v rows per page	Schedu \$52,449		AutoPay \$501.33		AutoPay (Unappr \$1,800.00	oved)
				All Organizat	tions				Review Now	>	Review Now 3	>
			Synchronization Status 🗗				Sunday Mo	day Tue	sday Wednesday	Thursday	Friday	Saturday
			Synchronization Status 🗠						1 3	2 3	4	5

Please use the left hand side menu in order to navigate the other portal sections.

- Overview
- Organizations
- General Settings
- Integrations
- Configurations
- Entities
- Reports

A/R by Company

This section shows aggregate values of all your Accounts Receivable, including:

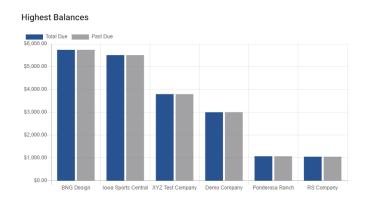
- Total Balance the total balance of all open invoices
 - **NOTE**: ConnectBooster only displays open invoices. Credits and unapplied payments are not included in displayed totals.
- Total Past Due the total balance of all past due invoices
- Open Invoices the count of all open invoices
- Companies the count of companies that have an open invoice balance

The company list allows you to search and sort companies with open A/R. To view all organizations, navigate to the Organizations page from the site navigation or "All Invoices" button, or use the global "Find Organizations" search feature in the upper right corner of the portal.

al Past Due),383.33	Open Invoices	Companies
383 33		
1000100	16	7
		۵
Open Invoices 🍦	Balance 🍦	Past Due 🍦
1	\$5,740.00	\$5,740.00
5	\$5,508.00	\$5,508.00
2	\$3,799.00	\$3,799.00
4	\$3,003.00	\$3,003.00
1	\$1,075.00	\$1,075.00
1	\$1,055.00	\$1,055.00
2	\$203.33	\$203.33
	< 1	$>$ 10 \sim rows per page
	1 5 2 4 1 1	1 \$5,740.00 5 \$5,508.00 2 \$3,799.00 4 \$3,003.00 1 \$1,075.00 1 \$1,055.00

Highest Balances

A visual interpretation of the top six organizations with past due and open invoice balances.



Payments Calendar

The calendar lists any upcoming payments on the day they are scheduled. This includes scheduled payments and AutoPay. Note, only invoices in the system will display on the calendar. Both unapproved and approved AutoPay will be shown - please see AutoPay setup for more information on AutoPay approval.

Payments Calendar

	AutoPay (Unapproved) \$1,999.00 Review Now >		AutoPay \$3.33 Review Now >			Scheduled \$52,419.00		
turday	Friday Sa	Thursday	Wednesday	Tuesday	Monday	Sunday		
ł	7	6	5	4	3	2		
1:	14	13	 12 1 1 	11	10	9		
2	21	20	19	18	17	16		

Synchronization Status

The three latest synchronizations are shown in this section. Details include:

- Sync Shows integration tied to sync
- Start Date The time and date the synchronization ran
- Info The status of the sync, possible values are Success, Running and Failed
- Status Statuses of sync such as, Finished and In Progress

Synchronization Status 🗗								
Sync	Start Date	Info	Status					
qb	04-12-2023 10:05 AM	Success (100.0%)	Finished					
\diamond	04-12-2023 10:05 AM	Success (100.0%)	Finished					
qb	04-12-2023 09:06 AM	Success (100.0%)	Finished					

Notifications

Items and warnings that require attention will be displayed at the top of the overview page. These notifications may include:

- Payments failing to sync
- Unresolved ACH/EFT returns
- AutoPay payments needing approval
- Locked payment methods

1 AutoPay Payments need Approval								
A/R by Company Total Balance \$20,383.33	Total Past Due \$20,383.33	Open Invoices 16	Companies 7	Highest Balances				