

Organization Profile Overview

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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>

This is where you manage the selected organization as a whole, or view the client facing version of the portal.

The screenshot displays the Organization Profile Overview interface. At the top right, there are navigation links: "Back to Organizations" (1) and "Customer Portal" (2). The main content area is titled "Organization Details" (3) and is divided into several sections: ADDRESS (Test Address, TestCity, ND 58103), CONTACTS (1), LAST LOGIN (03-09-2018 11:34:41 PM, @example.com), and EMAILING (4 Send Account Summary, 5 View Email History). Below these is a section for DEFAULT NOTIFICATION EMAILS (6) with two email addresses: demo@example.com and @example.com. There is also an "Organization Notes" section (7) with a "Leave A Comment" field and a "Save" button. A "Send Account Summary" button (4) and a "View Email History" button (5) are also visible. On the left side, there is a sidebar menu with various options: Organization Details (8), Balance, Open Invoices (4), Organization Credits, Pending Payments, Scheduled Payments, Payments Calendar, Payment Methods (6), AutoPay (4), Invoice History, and Transaction History.

1. "Back to Organizations" will take you back to your full organization list
2. "Customer Portal" will take you to the view your client's will see when accessing their Customer Portal
3. Selecting the arrow next to Organization Details will take you to the full list of contacts for that Company. To learn more about this section, take a look at our [Assign Profile and Send Welcome Email](#) article.
4. Send Account Summary - This will send the Account Summary to ALL default contacts listed for that company.
5. View Email History - This will show you the FULL email history for all email communications sent to all users of that company.
6. [Default Notification Emails](#) - These emails will pull from different places dependent on your integrations. Any automated client emails sent from the portal will be sent to any email(s) listed here. Take a look at our [Client Emails](#) article to learn more about these various email types.
7. Organization Notes - Add any internal notes you would like to share with other internal users of the portal (i.e., Only send account summary to [ap@testcompany.com](#)).
8. The three "chips" denote that this organization **has been properly linked** to each respective entity.

Meaning, for this company we have a ConnectWise company profile, QuickBooks company, and payment information from the BNG Gateway all related.

- If any of these "chips" are missing (regardless of your specific CRM/Accounting package configuration), open invoices or contacts **may not display**.
 - In such a case where some of your integration chips are missing, you may need to visit the [Entities](#) page.