

Organization Details

Last Modified on 02/02/2024 10:02 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>

Organization Details > **1**

ADDRESS	CONTACTS	LAST LOGIN	EMAILING
Pawnee Parks Dept. 1 Main St Pawnee, IN 47555	2		Send Account Summary 4 View Email History

DEFAULT NOTIFICATION EMAILS

2 lknope@pawnee-indiana.gov rswanson@pawnee-indiana.gov

3 Organization Notes >

Leave A Comment

Ex. Jane from accounting will be out until October, our new contact will be Bob from accounting.

[Save](#)

1. Here you may grant a organization access to the portal, view and individually manage all of an organization's associated contacts.
2. This will show the contact(s) listed as the default contact(s) for that company.
3. Here you can enter internal facing notes specific to that company that may be relevant information for other members of your team.
4. [View Email History](#) allows you to view all email communication sent to contacts of that organization.

1 Contacts

Sort By

Find Contact

Demo Owner ★ ▼

- The "Sort By" and search field will assist when many contacts are listed.

Organization Details

ADDRESS	CONTACTS ↻	LAST LOGIN	EMAILING
Test Address TestCity, ND 58103	1	03-08-2018 11:34:41 PM @example.com	Send Account Summary View Email History
DEFAULT NOTIFICATION EMAILS			
demo@example.com @example.com			

Click on "Send Account Summary" to send an account statement to the default billings contact(s). You can also view the audit trail of emails that have been sent to this organization by clicking "View Email History", along with a description of any errors that may have occurred.

Emails

05-23-2023 **Payment Method Expiration Notice**
08:02 PM

demo@example.com

[View](#) [Resend](#)

05-23-2023 08:00 PM QueueTriggeredEvent:
05-23-2023 08:00 PM QueuedEvent:
05-23-2023 08:02 PM ProcessEvent:

05-23-2023 **Payment Method Expiration Notice**
08:02 PM

05-21-2023 **Payment Method Expiration Notice**
08:01 PM

05-21-2023 **Payment Method Expiration Notice**
08:01 PM

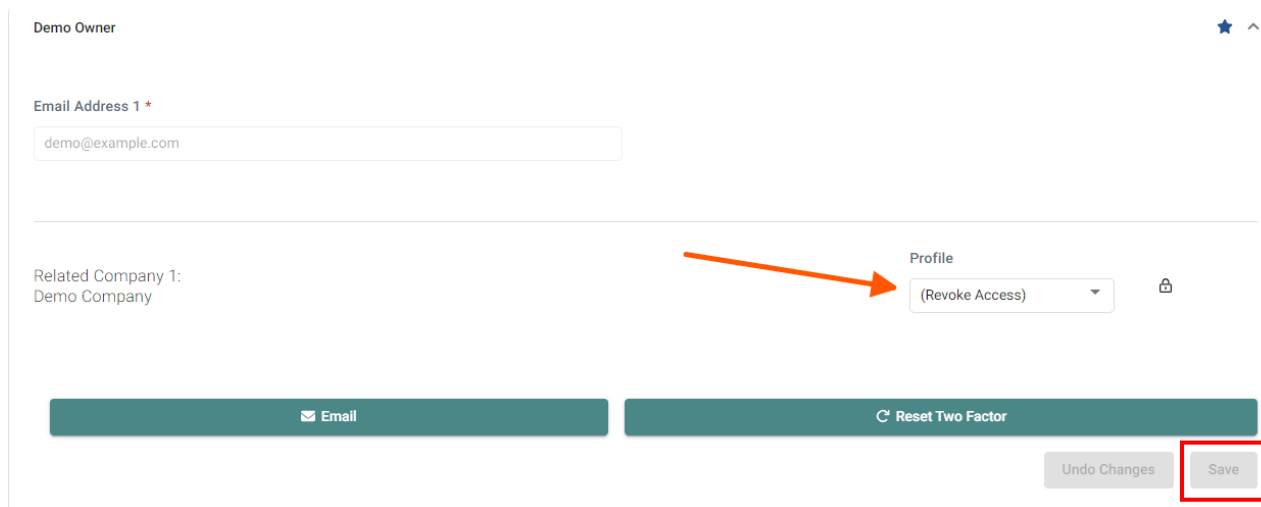
05-16-2023 **Payment Method Expiration Notice**
08:01 PM

05-16-2023 **Payment Method Expiration Notice**
08:01 PM

[Close](#)

Each contact can have a unique level of access. This will control what a given contact can see and do once logged into the portal.

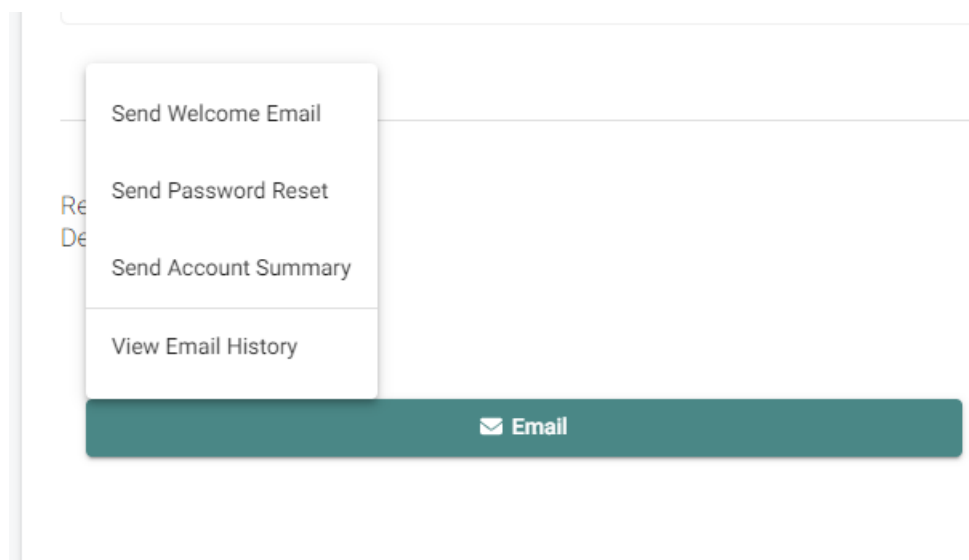
- If a client mentions they can't see any open invoices, make sure their security level is high enough!



In the image example, we clicked on Gandalf to expand the card. Under the "Profile" option we used the drop down to "Revoke Access".

- When making changes, don't forget to "Save"!

Click on "Email" to send a Welcome Email, Password Reset, or Account Statement. You can also View Email History (only pertaining to THIS specific contact).



****The various access levels are defined and managed under Configurations + Client Users section.****