

Basic Information

Last Modified on 02/02/2024 11:22 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>

General Settings + Basic Information

This section of the general settings drop-down is used to set and edit basic information about your company. These fields are all used in the rendering of invoices from provided data, and are automatically inserted as variables on the various [email template](#) footers.

Basic Information ⓘ

Company Name
Demo Company

Primary Contact
Test Contact

Email
support@connectbooster.com

Company Website
<https://www.connectbooster.com>

Phone
701-555-1234

Technical Contact Name
Ron Swanson

Technical Contact Email
ron@democompany.com

Technical Contact Phone Number
123-456-789

Toll Free Phone
888-888-8888

Address Line 1
123 Test

Address Line 2
Suite 123

City
Fargo

State
ND

Postal Code
58102

Company Name

- Should be set to the company name that organizations recognize you as.

Primary Contact

- We recommend this is filled with a generic department, like “Accounting Department” or “Billing Department” unless there is a specific person who makes more sense.

Email

- We recommend this is filled with a matching generic department email to the “Primary Contact” field above.
- This is also the default "reply to" address, if [Custom FROM](#) or [Custom SMTP settings](#) are not used.

Company Website

- Your company website goes here. NOTE: This will be organization facing in the footer section of any client emails sent from the portal.

Phone

- A local number where organizations can contact you.

Technical Contact Name / Technical Contact Email / Technical Contact Phone Number

- These fields are required as they denote who the best contact will be for ConnectBooster to contact for technical questions, concerns, or updates that may take place in the portal.

Toll Free Phone

- A toll-free number where organizations can contact you.

Address

- An address where your company can receive mail if an organization were to mail you a check. NOTE: This will be organization facing in the footer section of any organization emails sent from the portal. If you do not want your physical address to be client facing, it is recommended to update to your PO Box or remove address lines all together.