

# Provider Settings

Last Modified on 02/02/2024 2:14 pm CST

Exciting news! Our ConnectBooster Support documentation is moving to a new location. Be sure to bookmark the new link below.

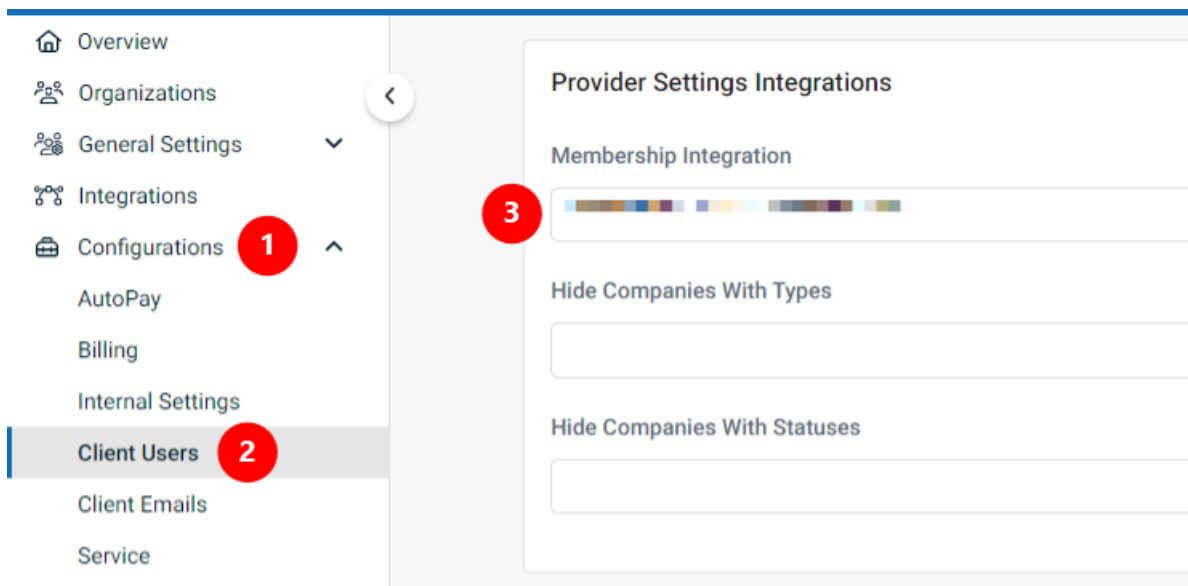
<https://help.cb.kaseya.com/help/Content/0-HOME/Home.htm>

## Setting the primary CRM Integration.

Navigate to Configurations + Client Users

**NOTE: \*\* Changing the primary Membership Integration without first contacting support can have data consequences \*\***

Membership Integration determines what contacts and email addresses are shown in the portal (available to give portal access).



## Hiding Companies With Types or Statuses

Ability to hide prospects, vendors, former clients, etc., en masse. This will help clean up your portal searches if your organization has many records. However, simply leaving non-clients doesn't hurt the system.

Helpful prior to sending a "Mass Welcome Email" to make sure it only goes to active organizations.

When determining whether to hide records based on type or status, it is best to choose only one or the other, based on which property your team is most likely to update as relationships with your organizations change.

If an organization was previously hidden but changes to a type or status that is NOT hidden, it should automatically become visible once again.