

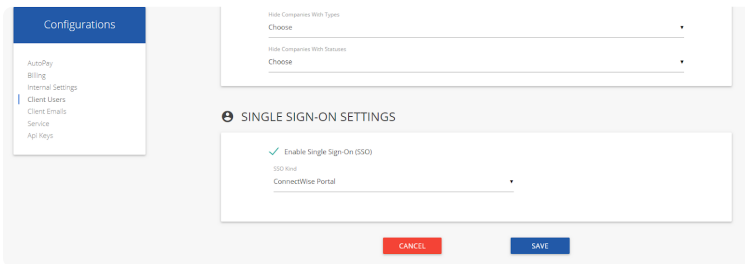
Single Sign-On - ConnectWise

Last Modified on 03/24/2021 10:25 am CDT

Single Sign-On

Follow the steps below to leverage ConnectBooster client functionality directly inside of the Manage Customer Portal. This allows for seamless service and billing functions for your customers as a one-stop-shop approach!

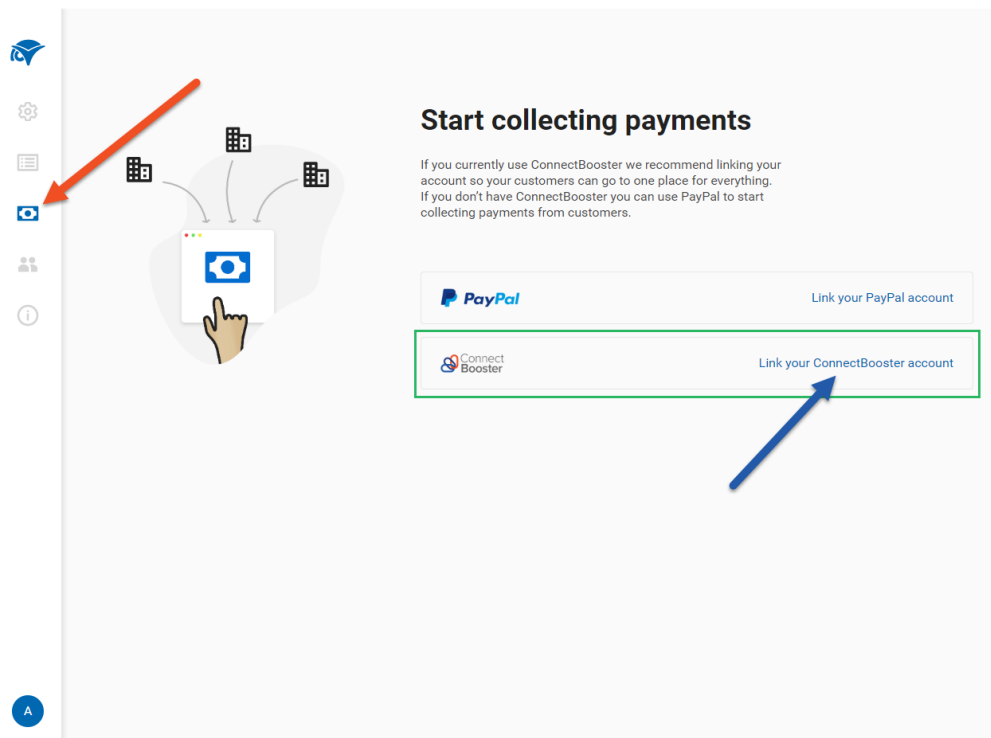
Within your ConnectBooster Portal, navigate to Settings --> Configurations --> Client Users.



In the Single Sign-On section: tick the enable box, select "ConnectWise Portal" and save.

On the Manage Customer Portal Administration side, select the payments icon and the "Link your ConnectBooster account" option.

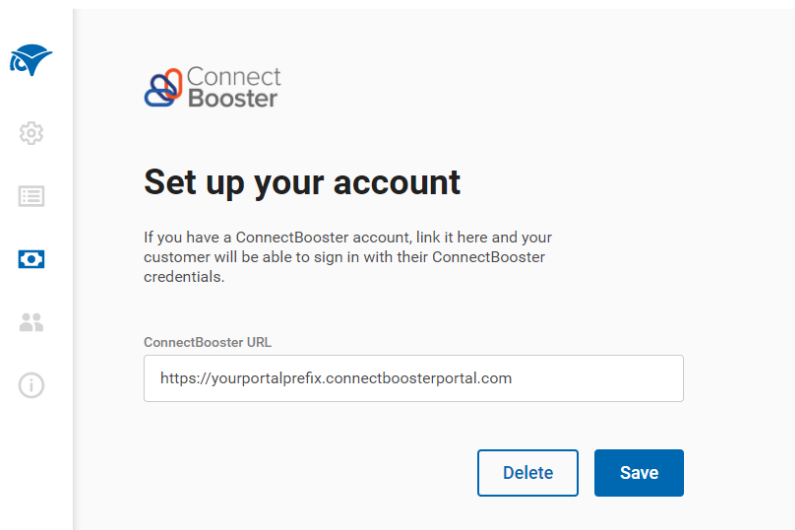
The ConnectWise University document on how to deploy that Customer Portal can be found [HERE](#).



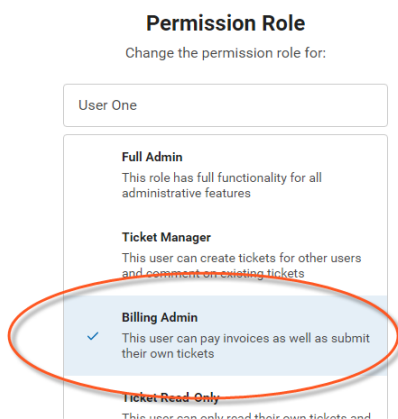
Enter and save your full ConnectBooster portal URL:

<https://portalsubdomain.connectboosterportal.com>

NOTE: Please ensure to not include a "/" at the end of the URL.



Lastly, ensure permissions for appropriate customers are set to "Billing Admin".



That's it!

Troubleshooting:

Below are a few common reasons for the SSO functionality to fail.

1. The contact and email address *needs to exist* in Manage *and have sync'd with a customer record* within your ConnectBooster portal.

- Please make sure this email is NOT also associated with an Internal User in ConnectBooster.

2. The ConnectBooster contact record can NOT be "Revoke Access".

- Ex. set the Profile as "Admin" in ConnectBooster.
- Note: this can be done via bulk update for all default Bill To contacts!

Colton Schumacher

Email Address 1
colton@connectbooster.com

Related Company 1
ConnectBooster

Profile
(Revoke Access)

EMAIL CHANGE PASSWORD UNDO SAVE

3. If a client reports they are *only seeing a login screen and no invoices*, double-check that the contact record exists inside of ConnectBooster.

- Also ensure this is not at the default "Revoke Access" level.