

Single Sign-On - ConnectWise

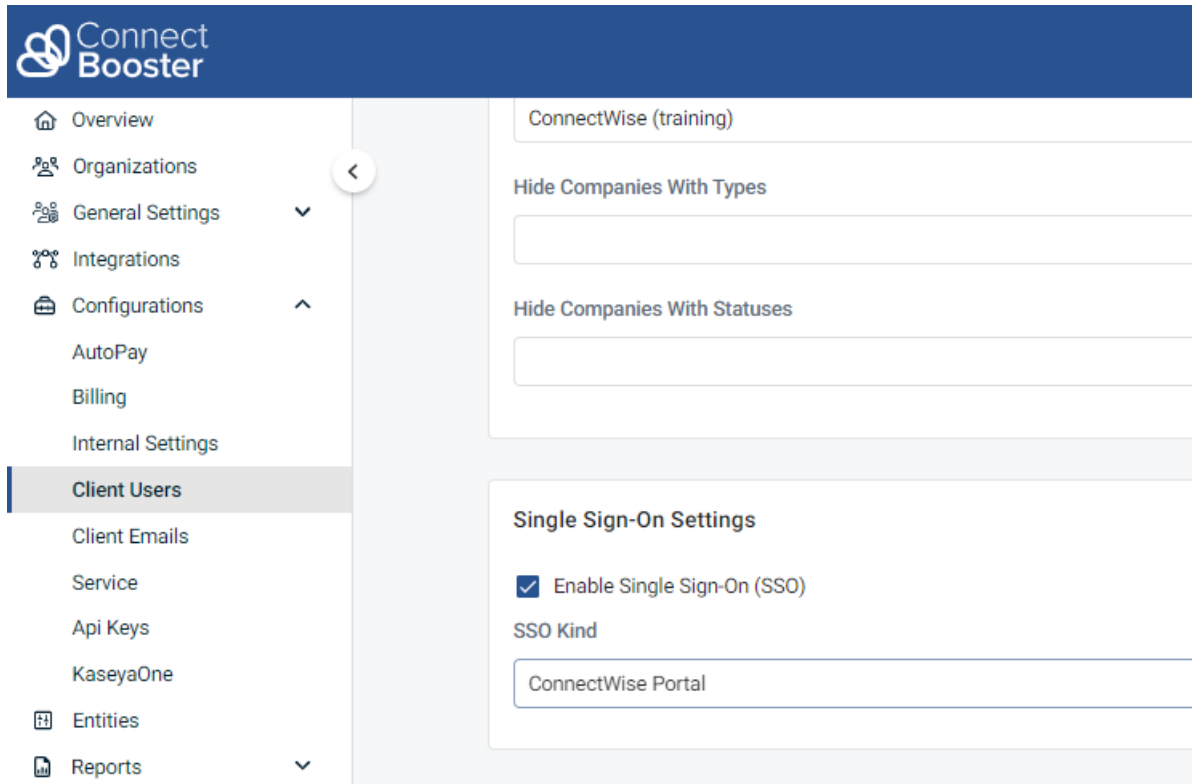
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Exciting news! Our ConnectBooster Support documentation is moving to a new location. Be sure to bookmark the new link below.

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

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 organizations as a one-stop-shop approach!

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

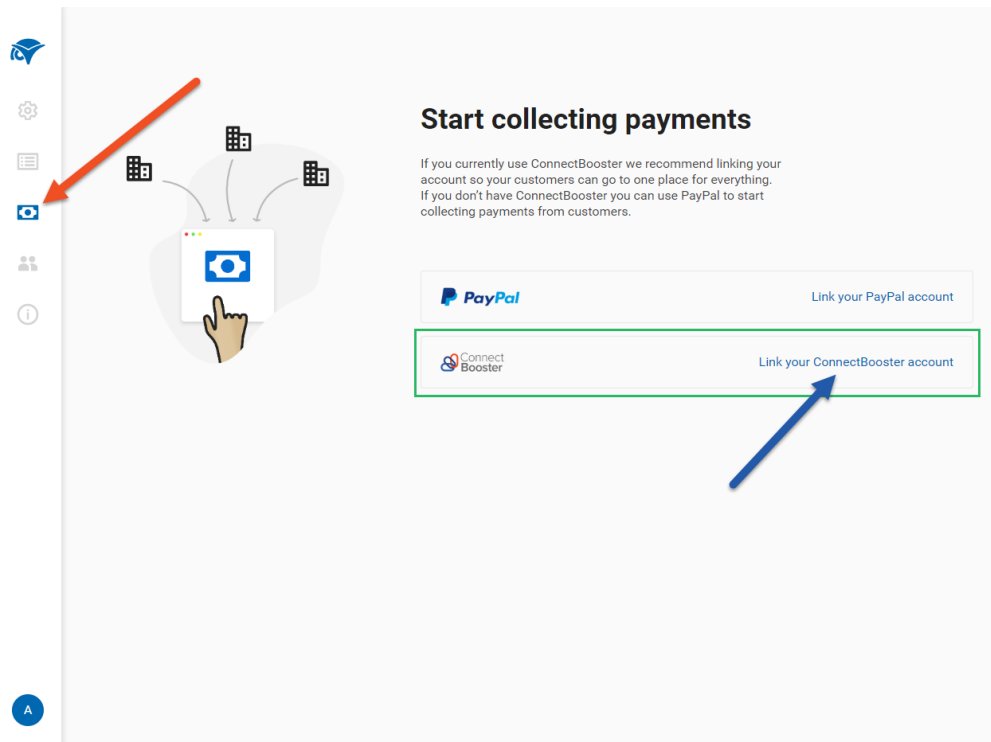


The screenshot shows the ConnectBooster interface. On the left is a navigation menu with the following items: Overview, Organizations, General Settings, Integrations, Configurations (expanded to show AutoPay, Billing, and Internal Settings), Client Users (highlighted), Client Emails, Service, Api Keys, KaseyaOne, Entities, and Reports. The main content area is titled 'Client Users' and contains a 'ConnectWise (training)' section with two input fields for 'Hide Companies With Types' and 'Hide Companies With Statuses'. Below this is the 'Single Sign-On Settings' section, which includes a checked checkbox for 'Enable Single Sign-On (SSO)', an 'SSO Kind' dropdown menu set to 'ConnectWise Portal', and a 'Save' button.

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.

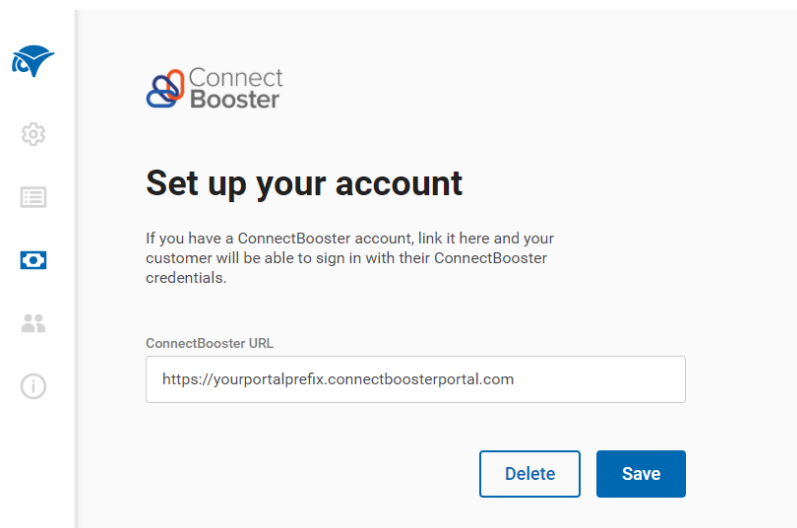
The ConnectWise University document on how to deploy that Customer Portal can be found [HERE](#).



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 organizations are set to "Billing Admin".

Permission Role

Change the permission role for:

User One

Full Admin	This role has full functionality for all administrative features
Ticket Manager	This user can create tickets for other users and comment on existing tickets
<input checked="" type="checkbox"/>	Billing Admin This user can pay invoices as well as submit their own tickets
Ticket Read Only	This user can only read their own tickets and

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 organization 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!

Demo Owner



Email Address 1 *

demo@example.com

Related Company 1:
Demo Company

Profile
(Revoke Access)

Email

Reset Two Factor

Undo Changes

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.
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