

ConnectWise Sell Setup

Last Modified on 02/02/2024 11:55 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>

This document is broken down into a 5 part setup process, which should take less than 10 minutes.

Once complete, you will be able to utilize ConnectWise Sell with the same BNG Gateway/ConnectBooster back-end you are using today.

One of the major benefits to this allows your clients to pay directly from their Quote acceptance page!

This includes paying by **credit card**, and **electronic check** (if currently accepted through your ConnectBooster interface today). Additionally, any payment methods clients use can be automatically saved, and then later used within ConnectBooster without re-entry.

Part 1 - 2: Creating A New BNG Gateway User, and Private Security Key.

While creating a new BNG Gateway User (**Step 1**) is not 100% required, we *highly recommend* doing so. Creating a dedicated BNG Gateway user account for any new integration gives greater flexibility with reconciliation reports, and email notifications.

To start Step 1 & 2, visit and finish this [supporting article](#) *before* proceeding to Step 3.

<https://docs.connectbooster.com/help/bng-gateway-api-security-key>

Part 3: Tokenization Public Security Key

The next step is very similar to what was done previously, with the notable distinction of creating a **'Public'** Key, rather than private.




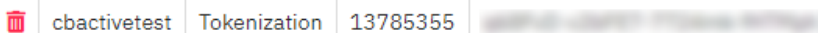
Inside the BNG Gateway, navigate to the Options + Settings+ Security Keys, and scroll down to the "Public Security Keys" section.

Select "Add a New Public Key"

Public Security Keys

Public Keys are designed to be used in places where a customer might be able to see them. For example, using these keys in the HTML on your website is the expected use case for these keys.

Tokenization: Used with Collect.js.

Description	User	Source	Key ID	Key
	cbactivetest	Tokenization	13775808	
	cbactivetest	Tokenization	13785355	

Add a New Public Key

1. Enter a Key Name
2. Select the user previously created in Part 1.
3. Tokenization needs to be selected on the drop-down.
4. Complete key creation using the button

New Public Key

Key Name: *

Username Associated with key: *

Key Permission

Close

Create

Part 4: ConnectWise Sell Configuration Steps

Login to your Sell instance as an Administrator.

Navigate to Settings + Document Branding + Order Porter Setup. Click on "ConnectBooster / BNG Payments"

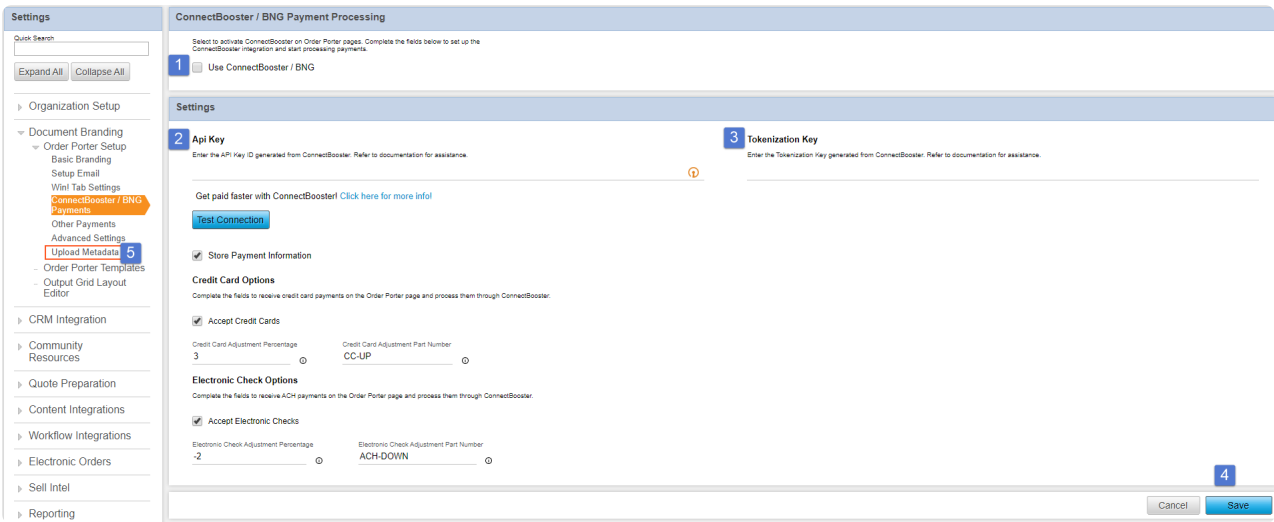
The screenshot shows the ConnectWise Sell interface. The top navigation bar includes 'Dashboard', 'New Quote', 'Open Quote', 'SuccessList', and 'Settings'. The left sidebar is titled 'Settings' and contains a search bar, 'Expand All' and 'Collapse All' buttons, and a menu with categories: 'Organization Setup', 'Document Branding', and 'CRM Integration'. Under 'Document Branding', 'Order Porter Setup' is highlighted with a green box and an orange arrow. Other options include 'Basic Branding', 'Setup Email', 'Win! Tab Settings', 'ConnectBooster / BNG Payments', 'Other Payments', 'Advanced Settings', 'Upload Metadata', 'Order Porter Templates', and 'Output Grid Layout Editor'. The main content area is titled 'Sell Dashboard' and shows 'Database Statistics' with the following information:

- Current Size of Database:** 15 MB
- Quote Count:** There are 5 quotes in the database.
- Users:** There have been logins/quotes from 2 unique users in the past 30 days.

Name	Number of Logins
XXXXXXXXXX	2
XXXXXXXXXX	1

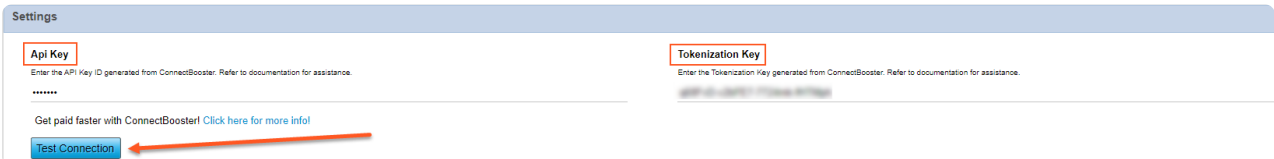
Here you will need to:

1. Activate the option
2. Enter the BNG Gateway Private Key - **(API)**
3. Enter the BNG Gateway Tokenization Key - **(Public)**
4. Save your settings
5. Upload Metadata



API Key: known as "Private"

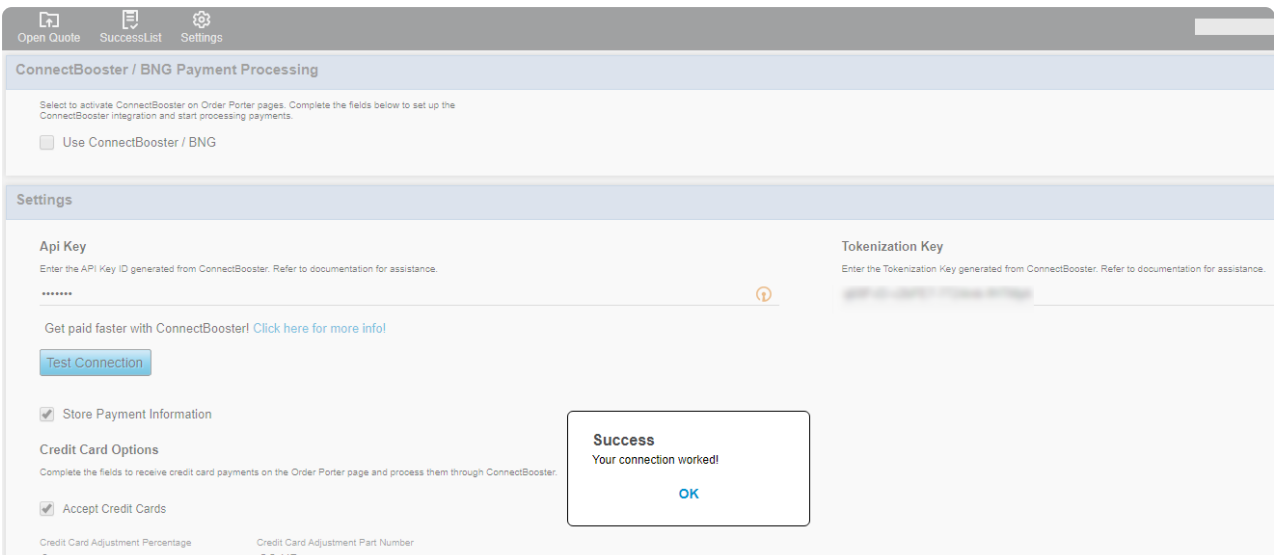
Tokenization Key: known as "Public"



Copy and paste the respective keys into the correct fields. Save your changes.

Select Test connection to verify the setup is correct.

You should see:



Congratulations! You have configured Sell to utilize payment processing from the BNG Gateway. Don't forget to "Upload Metadata" for these changes to fully take effect.

Part 5: Order Porter Template Setup

At this point you need to ensure the proper template is used when Quotes are delivered to clients.

In our example, we have "Quosal Accordion" selected on the Publish and Deliver step.

The screenshot shows the 'Publish and Deliver' step in the Sell software. The 'Deliver Options' dropdown menu is open, and the 'Quosal Accordion CB.11.18.19' option is selected, indicated by a red arrow. The interface also displays financial metrics such as Total, Subtotal, Gross Profit, and Recurring Gross Profit, along with document and video attachment options.

Please verify your quote acceptance templates have the "Pay Now" option, for credit card and ACH (if available).


If missing this template, you likely need to download the latest Sell Accordion Order Porter template. This can be done using the "Content Vault", under the Community Resources tab.

Search for "Accordion". These Order Porter templates support payment processing with ConnectBooster.

The screenshot shows the 'Content Vault' search results in the Sell software. The search term '2019' is entered in the search bar. Two results are shown, both labeled as 'Order Porter Template'. A green arrow points to the 'Install Selected' button in the top right corner of the search results table.

Ensure that the "Payment Processing" option has ConnectBooster selected for your Order Porter Settings. This can be accessed on the "Publish Settings" during the Quote Setup step.

Customer Setup **Quote Setup** Prepare Content Review Publish and Deliver Win!

+ [Icons] SAVE AS TEMPLATE MORE 

Initial Setup

Quote Name Connectbooster Test Walkthrough	Location New Company	Expiration Date /2020	X
Quote Status Active	Primary Rep Colton Schumacher	Currency Dollar	▼
Post Status Unposted	Inside Rep Colton Schumacher		

Approver Options

- Audit Trail
- Edit Publish Settings**
- Edit Terms
- Process Success Tracks
- Export Quote
- Import Quote
- Expire Cache

Customer Setup **Quote Setup** Prepare Content Review Publish and Deliver Win!

Publish Settings

<input checked="" type="checkbox"/> Print Bundle Header Line	<input checked="" type="checkbox"/> Print Bundle Header Price	Order Porter Group	Default WIN! Doc Glass Letter 2018.xrpt
<input checked="" type="checkbox"/> Print Bundle Item Lines	<input type="checkbox"/> Print Bundle Item Prices	Order Porter Template Quosal Accordion CB_11_18_19	Approval Quote Form Glass Letter 2018.xrpt
		Order Porter Style (For New Sell Templates) Glass	Peer Review Quote Form Glass Letter 2018.xrpt

Order Porter Settings

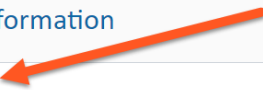
<input checked="" type="checkbox"/> Use E-Signature	<input checked="" type="checkbox"/> Show Line Item Details	Terms and Conditions Taxes, shipping, handling and other fees may apply. We reserve the right to cancel orders arising from pricing or other errors.	Payment Processing ConnectBooster
<input checked="" type="checkbox"/> Show Signature Box	<input type="checkbox"/> Show Item Image		Electronic Payment % Of Quote Total 100
<input type="checkbox"/> Show Tab Checkboxes / Radio Buttons	<input type="checkbox"/> Show Item Checkboxes / Radio Buttons		Electronic Payment Minimum Amount \$0.00
	<input type="checkbox"/> Show Editable Item Qty		Electronic Payment Downpayment \$2,100.00

If you are having difficulty with the template from here, we suggest contacting ConnectWise Sell support.

Conclusion:

From the client's perspective, selecting "Pay Now" on the quote acceptance page now displays the payment method form options.

3. Payment Information

Pay Now 

Address Information


Colton
 Schumacher
 123 Fake street
 Address
 Fargo ND 58104
 Country



Payment Information

[Submit Question / Comment](#)


Electronic Check (ACH) and Credit Card:


Enter Banking Information Below

 Name on Account*

 Account #*  Routing #*

Enter Credit Card Information Below

 Credit Card*

 MM / YY* CVV*

Note: transactions made will need to be **manually** received within your accounting system. This process does not change today.

Workflow Diagram: