Entities

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

What is the Entities section?

The Entities section is used to view, map, edit, hide, or delete items within the portal. These include:

- Company
- Contact
- Profile
- Invoice
- CatalogItem
- Transaction
- Payments
- Credit Memo
- Term
- Accounting Account
- Accounting Class
- Contract
- Service Board

NOTE: If you are not sure of how to update these items, it is best to reach out to our team at support@connectbooster.com for assistance as updating items here can adversely affect how your data is displayed within the portal.

Entities can be found in the left-hand menu.
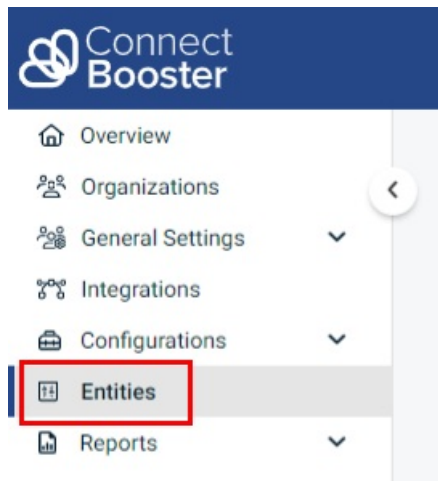
The Entities section explained

1. Select what you are looking to update in this section. This section will default to "Company"
2. Search field is handy when looking for specific information within Entities. This page is rather load intensive, so you will only see ~30 entity cards load at a time.
3. You can check the "Include Hidden Cards" and "Include Delete Cards" checkboxes which will then include any previously hidden/deleted entity cards.
4. Entity Card - an entity card signifies a separate company, invoice, contact, etc. record within the portal.
5. Entity Chip - an entity chip denotes what integration is tied to the company, invoice, contact, etc. within the portal.
6. Ideally you want to see all integrations (entity chips) tied on the same card as this represents successfully mapped data.