

Entities

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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>

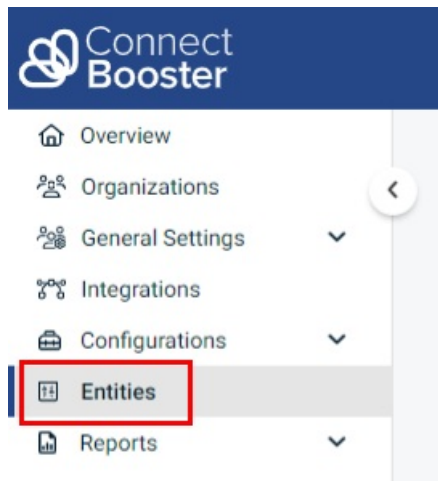
What is the Entities section?

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.

A screenshot of the 'Entities' section in the Connect Booster interface. The interface includes a search bar with a dropdown menu set to 'Company' (marked with a red '1'), and filters for 'Filter Has Integrations' and 'Filter Doesn't Have Integrations'. Below the search bar is a 'Filter Chip Statuses' dropdown (marked with a red '2') and a search input field. There are two checkboxes: 'Include Hidden Cards' and 'Include Delete Cards' (marked with a red '3'), and a 'Search' button. The main area is titled 'Pinned Cards' and contains a message: 'Drag entity cards here or click the card's checkbox.' Below this is a 'Search Results' section showing four entity cards. The first card (marked with a red '4') is for '1234567' with details '622132978e2b62516e1f8a07 622132978e2b62516e1f8a07 Greg's Eggs Tampa 33752'. The second card (marked with a red '5') is for '1234567' with a green 'qb' chip. The third card is for 'AdvanceAccounting' with details '5cd346d37a8e121e04dcf2af 5cd346d37a8e121e04dcf2af Advantage Accounting St. Petersburg FL 33712' and two chips: 'qb AdvanceAccounting' and 'Advantage Accounting'. The fourth card (marked with a red '6') is for 'AmericanFlagBank' with details '5cd346da7a8e121e04dcf2f9 5cd346da7a8e121e04dcf2f9 American Flag Bank New Port Richey FL 33596' and three chips: 'qb AmericanFlagBank', 'American Flag Bank', and 'AmericanFlagBank'.