FAQs

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1. I received a request access email from a client. How do I grant them access to the portal?
    - Assigning Profile and Sending Welcome Email.pdf 📎
2. What is the best practice for rolling out Past Due Notices?
    - Best Practices for Invoice Past Due Notices.pdf 📎
3. What do the different icons mean for each integration and how do I know what companies have which ones?
    - Understanding the Integration Icons.pdf 📎
4. The invoice I'm searching for shows in the portal but is not listed under the company in ConnectBooster, why?
    - If you run into this instance, first check that the invoice in question has been batched to your accounting package and exists there. If not, you will want to batch the invoice(s) over to your accounting package then run the sync between your accounting package and ConnectBooster. If this issue persists, please reach out to our support team by sending an email to support@connectbooster.com.
5. I sent a welcome email to my client but they keep getting an error message that their password is not working. What should I do?
    - The first thing you will want to check is that a profile has been assigned to the client attempting to gain access to the ConnectBooster Portal. Direct to the Customer details for the specific contact requesting access. Expand their name and ensure that their is a Profile assigned and save.
6. How can I avoid emails being sent from CB going to my client's SPAM folder?
    - Email Best Practices
7. How do I pull a list of transactions from the BNG Gateway?
    - BNG Gateway Transaction Report.pdf 📎