ConnectBooster Post Implementation Call Homework

Optimize Your ConnectBooster Portal

After your 2-hour ConnectBooster onboarding call, we recommend you further optimize your portal. Your team should complete the following. These steps will take approximately 1 hour or less to complete.

Administrative Set-up

- ☐ Grant access to the members of your internal team who will be involved in rolling this out to your customers. Assign appropriate profile levels per internal user.
  Go to Settings → Configurations → Internal Settings
  See how.

- ☐ Customize Client User profiles for level of access. This section allows you to control and manage the various security "Profile" levels and features for your end clients.
  Go to Settings → Configurations → Client Users → Client Profiles
  See how.

- ☐ Activate “Pay Now” feature. “Pay Now” enables your clients to pay invoices online, without requiring login to your ConnectBooster portal.
  Go to Settings → Configurations → Billing → Pay Now Settings
  Check the box and save "Enable Pay Now."
  See how.

We can help!
Our 100% U.S.-based support team is here for you Monday through Friday from 8 a.m.-7 p.m. CT. Email support@connectbooster.com.

- ☐ If you have existing customers’ payment information for recurring auto-payments, enter their payment information into ConnectBooster and create an autopay rule. **Important:** Be sure to cancel the former recurring charges from your legacy system.
  Go to
  See how.

- ☐ Refine the portal to match your business’ branding colors, logos and information.
  Go to Settings → General page
  See how.

- ☐ **Pro Tip!** Want to exclude some customers from using the payment portal? If using a PSA/CRM, you can hide companies based on Type or Status.
  Go to Settings → Configurations → Client Users
  See how.

- ☐ **Pro Tip!** Enhance your customers’ experience while showcasing relevant information with Custom Portal Ads. Review ad card ideas here.

Connect Booster

Customize Customer Emails and Notifications
Update email and notification templates to reflect your business' messaging. We recommend you also update the Past Due Notices message so an escalation of tone is conveyed as time passes.

- ☐ Review and customize customer email notices to match your business' communications.
  Go to Settings → Configurations → Client Emails
  See how.

- ☐ **Pro Tip!** If using the Custom From Address feature, assure your Sender Policy Framework (SPF) is configured.
  See how.

Open Accounts Receivable Review

- ☐ Identify customers with past due invoices that should not receive automated emails. For example, former customers with a balance.
  Open Invoice Review. Go to Main Menu → Reports → Open Invoice Report

  Pro Tip! You may then want to exclude these customers from automated invoice messaging found under Main Menu → Settings → Configurations → Client Emails

- ☐ **Pro Tip!** You may choose to write off old invoices against a "Bad Debt" account, or otherwise remove their balances in your accounting system.

If you're stuck, reach out!
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- ☐ **Pro Tip!** Clean up any outstanding deposits in your accounting package to ensure amounts and invoices are showing correctly in ConnectBooster.

PSA/CRM Set-up (outside of the ConnectBooster Portal)

- ☐ Update existing financial emails to include the Pay Now link.
  Go to Settings → Configurations → Billing
  See how.

Plan Your Roll-Out and Onboard Your Customers

☐ **Identify your customers.**
Ideally, you can identify a small group of customers who will be the first to utilize the new Payments Portal. This way, you can work out any issues with a small focus group and make necessary adjustments before launching the portal to your entire customer base.
- ☐ I plan to launch the payment portal to a small group of customers.
- ☐ I plan to launch the payment portal to all customers.

☐ **Start building your launch plan.**
Draft and discuss a launch plan with your identified team for promoting the portal, including a timeline. Review the example messages found in the Customer Kit on the ConnectBooster Academy that you can use with your customers. We recommend including the following in your roll-out plan:

- Announcement email to existing customers from your MSP
- Welcome email from the ConnectBooster portal inviting existing customers to create a profile with instructions
- Reminder email with effective date
- Personalized phone call to customers if needed

☐ **Notify your customers**

The message examples found in the Customer Kit on the ConnectBooster Academy can be adapted to your MSP to introduce the change in your billing process to your existing clients.