A Guide to your ConnectBooster Roll-out

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1. Making the decision if you would like to do a soft roll-out or your full client base
    - Soft roll-out: this will include a few of your clients that are in good standing that you would like to 'test' the ConnectBooster portal with and get their feedback before you introduce to your entire client base
        - Determine the individuals on this list and send out communication that you will be introducing your new payments portal before sending any welcome emails from the ConnectBooster portal
    - Full client base roll-out: this will include a roll-out to your entire client base in full. Before this roll-out is put in motion, it is recommended that an announcement email be sent out to your client base from an email address they are used to receiving communication from you
        - Several templates to help with your roll-out emails and setup can be found in the customer care kit
2. Clean up any outstanding deposits in your accounting package to ensure amounts and invoices are showing correctly in ConnectBooster
3. Add any payment methods you have for your clients into the portal, and set up anyone currently on autopay in ConnectBooster (*be sure to turn off current auto pay so they are not charged twice*)
4. Update email templates to copy that reflects the message of your business (*if applicable*). It is recommended to update the verbiage on the Past Due Notices if you choose to use these so that an escalation of tone is conveyed as more time passes
5. Review Client Profiles to determine which one(s) you will be using.
    - Be sure to update permissions and profile names should you need to do so.
6. Review Internal Profiles and grant access to all individuals on your team that will require access.
    - Create any additional internal profiles with necessary access levels to ConnectBooster.
    - Ensure correct recipients are listed on each of the internal notifications you will be using. **NOTE** that Client Commented on Invoice and Request Access notifications should always be turned on as these notifications are your clients reaching out to you

If you have any questions or would like to discuss the points listed above in further detail, please schedule some time with a member of our Partner Success team at ConnectBooster.