



SmileBack

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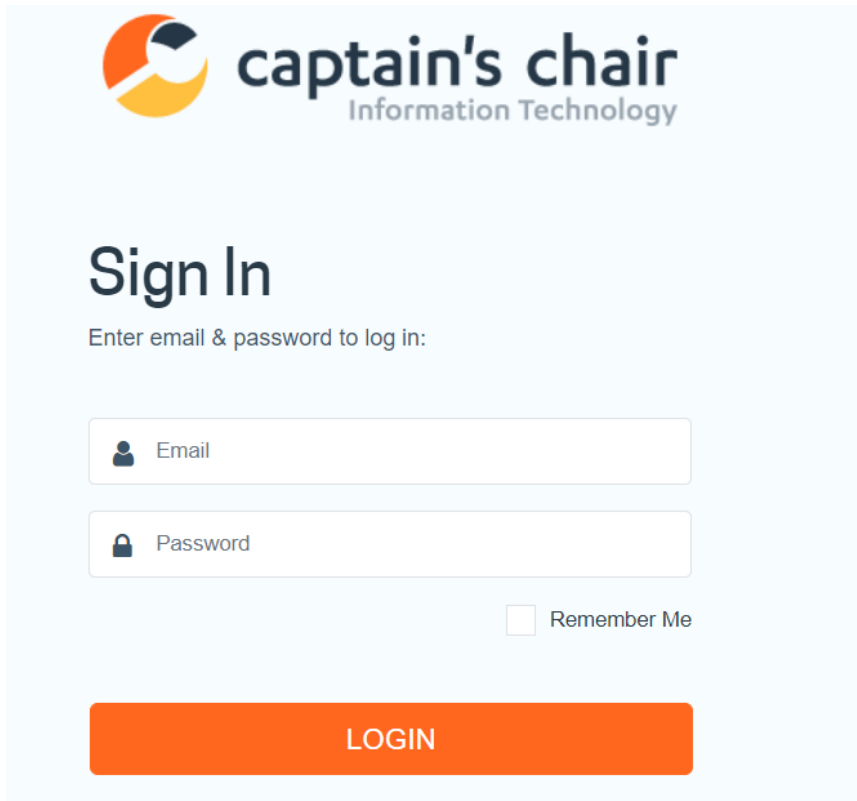
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This document is a step by step guide for setting up the SmileBack integration within Captain's Chair.

## Step 1 - Log in to your Captains Chair Partner Admin Account

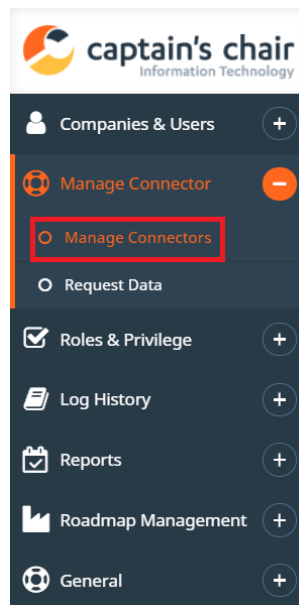
Login here with the Email and Password as Partner Admin.



The image shows the 'Sign In' page of the Captain's Chair Information Technology system. At the top left is the logo, which consists of a stylized orange and yellow circle with a white shape inside, followed by the text 'captain's chair' in a bold, dark blue font, and 'Information Technology' in a smaller, grey font below it. The main heading 'Sign In' is in a large, dark blue font. Below it, the text 'Enter email & password to log in:' is in a smaller, dark blue font. There are two input fields: the first is labeled 'Email' with a person icon, and the second is labeled 'Password' with a lock icon. Below the password field is a checkbox labeled 'Remember Me'. At the bottom of the form is a large orange button with the word 'LOGIN' in white capital letters.

## Step 2 – Go to Manage Connector Section

Click on the sub menu item “Manage Connectors” in the Left Menu, under “Manage Connector” as the Main Menu.



This will take to the Manage Connector Screen.

Application Logo	Application Name	↑↓ Companies
	Google Analytics	Cloud To Cloud Suite "Server Only Support", CompuLink, Wilson Dow Enterprise Corp, Mergly, ...
	Kaseya	
	Manual Backup Status	CompuLink
	Meraki	Adams Air & Hydraulics, Baby Face Products, CDF Sales Service, CompuLink, One Electronics, Prostar, ...
	New Relic	Adams Air & Hydraulics, All State Homes, American Mechanical Solutions, Baby Face Products, ...
	Office 365	Bayshore Capital Advisors, LLC, CompuLink, One Electronics, Full Circle Financial Services, LLC, ...
	Site24X7	Adams Air & Hydraulics, Baby Face Products, Captain's Chair, CompuLink, Leds Construction, ...
	Smileback	CompuLink
	Teamwork	Adams Air & Hydraulics, American Mechanical Solutions, Bayshore Capital Advisors, LLC, CDF Sales, ...
	Webroot	Adams Air & Hydraulics, All State Homes, American Mechanical Solutions, Bayshore Capital Advisors, ...

Then click on the SmileBack icon, which will open the Configuration window.

API Credentials	Action(s)	Company Name	Unmatched
<a href="#">Authorize in Smileback</a>	  	CompuLink	11

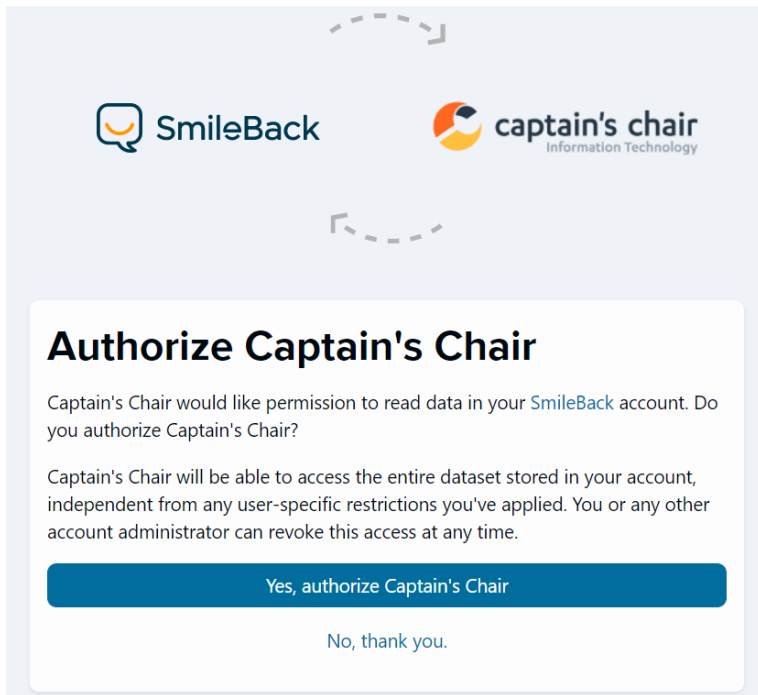
### Step 3 – Authorize SmileBack in Captain’s Chair

Click on the **black** button “**Authorize in Smileback**”, which will open a popup where you need to login with your SmileBack Login Username and Password. Please make sure that your login does hold Administrator Privileges.

Welcome back, please log in.

[Forgot password?](#) | [Sign up](#) | [Support](#)

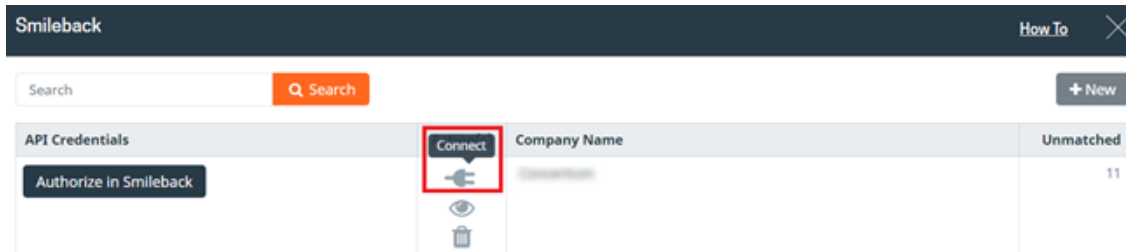
Once you are logged in with your SmileBack Login credential, another popup will appear here by closing the login popup. This popup will ask you to allow Captain's Chair access your data present in SmileBack.



Once you click on the button “Yes, authorize Captain’s Chair” required credential as well as permissions will be setup and this popup will be closed automatically.

## Step 4 - Test Connection and Save

Next step will be to **Test the Connection** and **Save** the connection Data. Click on the “Connect” plug icon as shown in the below picture.



On click, credential generated in the previous step will be saved in the database. Also, the connection will be established between Captain’s Chair and SmileBack. If the connection works successfully, then another mapping window will open. You need to set required mapping between SmileBack Organizations and your Clients in Captain’s Chair as shown in the below screenshot. Once mapping is complete, you need to press “Update” button to save the mapping in the Database.



Search

Search

## Exclude

## Organization

Adaptabiz

Bay Furniture

Beaver Lumber

Integra Design

Lechmere

Megatronic Plus

Showbiz Pizza Place

Source Club

Vista Finance

Wholesale Club, Inc.

Witmark

Back

## Company

Select options

Select options

Select options

Select options

Select options

Select options

Select options

Select options

Select options

Select options

Select options

Update

**Note:** Please note that, this authorization and Test Connection is a **one-time process**. 2<sup>nd</sup> time if you click on the “connect” icon, it will generate Failed message. Inf this happens, then you need to click on the button “**Authorize in SmileBack**” again and continue the remaining process till “**Connect**” and “**Save**” the credential step. All previous mapping and previous dataset will remain intact and will start working once the connection is made.

Once the above steps are done, **SmileBack integration** is ready in **Captain’s Chair**. Shortly, Captain’s Chair will start pulling data from SmileBack from your account.