ConnectWise User Guide

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Contents

Document Information

History of Revisions

Revision	Date	By	Description
1.0	4/6/11	Rich V	Created document based on Keith W draft.

1 Preface

This document can be found by accessing the **Help** link and selecting **User Guides**.

2 Overview

ChannelOnline now offers customers the ability to integrate with ConnectWise. The new ConnectWise integration offers synchronization of customers, quotes and sales orders from ChannelOnline.

The ConnectWise application provides service agreement tracking, service ticketing, CRM, project manager and sales manager functionality. Many ChannelOnline customers are looking to leverage the quote and order functionality of ChannelOnline and the service and project elements of ConnectWise. To help these customers, CNET Content Solutions and ConnectWise have worked together to help get our clients the most out of the two applications. This effort has brought forth some effective ways to synchronize and exchange data between the platforms.

In general, a reseller would like to be able to have products on a ChannelOnline quote or sales order and move that information into the ConnectWise application as a product on an opportunity or as a sales order. These products can then be available as line items under the products tab from within an opportunity in ConnectWise.

BASIC USER & BACKEND FUNCTIONALITY

The main areas of functionality between the two applications include:

1. Import customer and contact data from ConnectWise into ChannelOnline: singly, bulk, or scheduled
    a. Import under the Customers tab on the view all customers page or on the jobs synchronization page
2. Export customer and contact data from ChannelOnline to ConnectWise: singly, bulk, or scheduled
    a. Export command on the customer view page or on the jobs synchronization page
3. Exporting a quote/sales order into ConnectWise and creating a new opportunity
4. Exporting a quote/sales order line items into an existing opportunity by assigning the ChannelOnline document an opportunity name from ConnectWise
5. Add products from multiple ChannelOnline Quotes into a single ConnectWise opportunity for the same company

6. Create products in the ConnectWise database when the category, sub-category and manufacturer name are present (backend process)
7. Map categories and sub-categories between the applications
8. Map Sales reps from ChannelOnline to Members in ConnectWise

See Basic Data Workflow (Appendix D)

3 Requirements

- ConnectWise integration in ChannelOnline enabled
- ConnectWise PSA service (Hosted or Local)
- ConnectWise Internet Client (www.connectwise.com/install)

4 Setup Instructions

4.1 ConnectWise Setup

Resellers must perform the following setup steps in ConnectWise in order to exchange data:

1. Download and install the Connectwise Internet Client from http://www.connectwise.com/install/ .
2. Login to your ConnectWise Client application with the credentials they have setup for you:
    a. Site
    b. Company ID
    c. Username
    d. Password
3. Enable the integrator login in ConnectWise. This login will be used by ChannelOnline to exchange data with the ConnectWise server.
    a. Go to Setup / Setup Tables / click on the “Category” dropdown menu and select “General”; click on <Enter> to refresh the page/ Integrator Login (setup table) / New.
    b. Check access level to make sure it is set to “All Records”
    c. Create a new login with default settings by creating a username and password. Remember this information because you will need to enter it into ChannelOnline.
4. Manually enter the ChannelOnline class/cat schema into the ConnectWise Setup Tables (a list can be obtained through the ChannelOnline support team). OR, map existing ConnectWise categories and sub-categories to those in ChannelOnline (see ChannelOnline Setup section below). This must be established in order for ChannelOnline to create products in ConnectWise. To enter the ChannelOnline cat / sub-cat values:
    a. Go to Setup / Setup Tables / Products / Category (or Sub Category).

    b. Create all categories before creating sub-categories.

5. Match the product Type from ConnectWise to ChannelOnline
    a. Go to Setup / Setup Tables / Products / Product Type.
    b. Check that product types are available to assign to the following types in ChannelOnline: Product, Service and Labor.

6. Resellers need to manually enter the ChannelOnline manufacturer names into the Manufacturers table in ConnectWise (case sensitive) for all manufacturers to be used coming from ChannelOnline. ConnectWise contains 300 default manufacturers in their table. TIP: check the table to make verify that all major manufacturers needed are covered and spelled as they appear in ChannelOnline.

Canadian Customer Setup:

7. Add Canadian Provinces to the States list in ConnectWise (see table in APPENDIX A)

4.2 ChannelOnline Setup

Resellers must perform the following setup steps in ChannelOnline in order to exchange data:

1. Create a custom header field to be used for assigning quotes and orders to opportunities in ConnectWise. To create this field go to the company section in admin, select the custom fields link and create a link in the header field area of the page. Recommended field names include: Opportunity Name, Opportunity ID, and CW Opp. Name.

2. Complete the Connection settings on the Connection tab under Integration / ConnectWise. To do this:
    a. Enter complete connection URL. This is the location of the ConnectWise PSA server that ChannelOnline will be exchanging data with.
    b. Enter the company name, Login ID and Password that was established in the ConnectWise Integrator Login setup table.
    c. To assign quotes and order line Items to ConnectWise opportunity select the field that you created in section 1 above.
    d. Decide to allow blank opportunity names (if the field above is left blank) to create new opportunities in ConnectWise. These new opportunities will be assigned the document number from within ChannelOnline.
    e. Decide to use the default store Sales Rep for all transactions or the logged in sales rep. By default ChannelOnline will use the default storesite sales rep for all transactions. This can be changed to the logged in sales rep by selecting this option.

    Note: If ChannelOnline cannot find an opportunity with the name entered in ConnectWise it will create a new opportunity with that entered name.

3. Make selections in the Settings section of the Connection page.

a. Map sales reps from ChannelOnline to members in ConnectWise by assigning them a user ID, user location and department (aka business unit). The information must be copied from ConnectWise (it can be found in ConnectWise by going to Setup Tables, Members under the Regular tab).

b. Choose how you want products to be categorized in ConnectWise. First map the product types to the corresponding product type from ConnectWise. Second, select to use either ChannelOnline's internal structure (they need to be added manually into ConnectWise), OR, you can assign categories that have already been created in ConnectWise to those in ChannelOnline.

c. Map customers that exist in ConnectWise to customers that exist in COL. This feature will scan the customer database in ConnectWise and attempt to match them to customers in ChannelOnline based on the Company ID from ConnectWise to the Account # from ChannelOnline. Companies without matches will appear in a table and can be mapped manually. Enter the name of the company from COL that corresponds to the Company ID from ConnectWise into the open text field to the right of that Company ID.

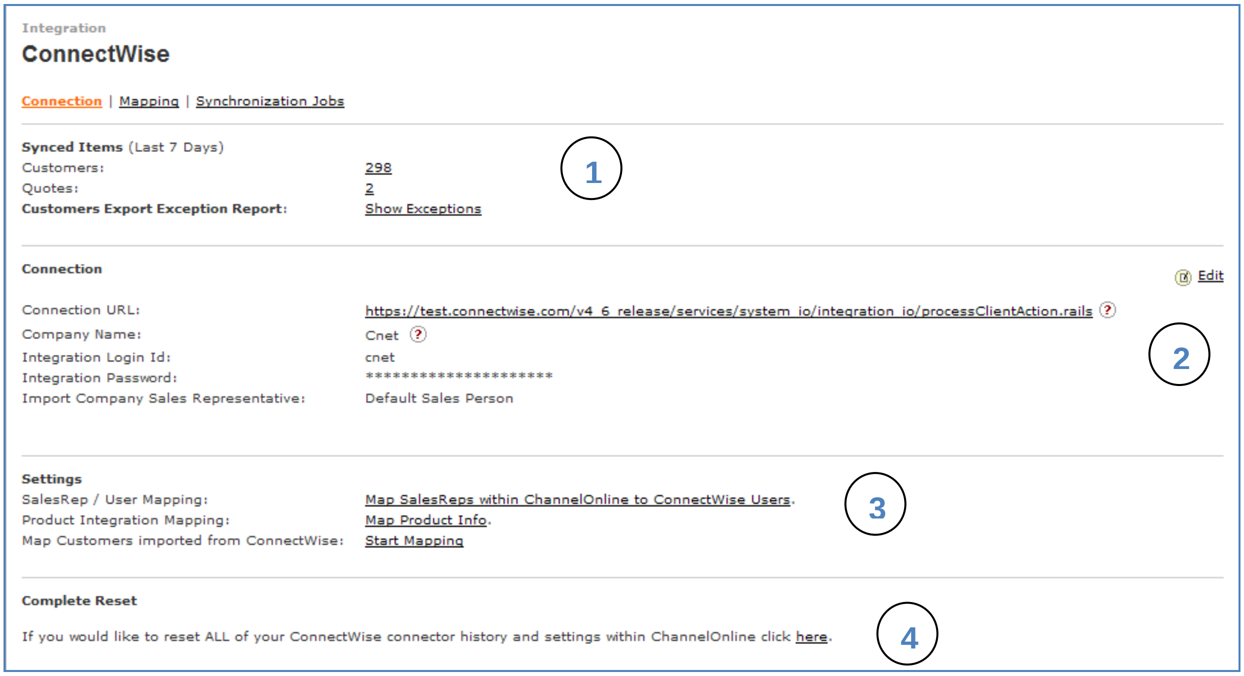
Note: Different ChannelOnline quote/sales orders can be added to the same opportunity that exists in ConnectWise: it can be a one-to-one or one-to-many relationship. To add products from multiple ChannelOnline quotes to a single opportunity just assign the same opportunity name to multiple quotes and export them to ConnectWise.

5 ChannelOnline User Pages & Functionality

5.1 Connection Page

Details for communicating with ConnectWise are captured on the Connection Page (Image #1).

IMAGE 1: Connection Page



Synced Items (Image 1: Item #1)

For quick reference you will see the number of customers, contacts and quotes or sales orders that have been exported to ConnectWise from ChannelOnline for the last 7 days. Click on the number to view the list and expand the report.

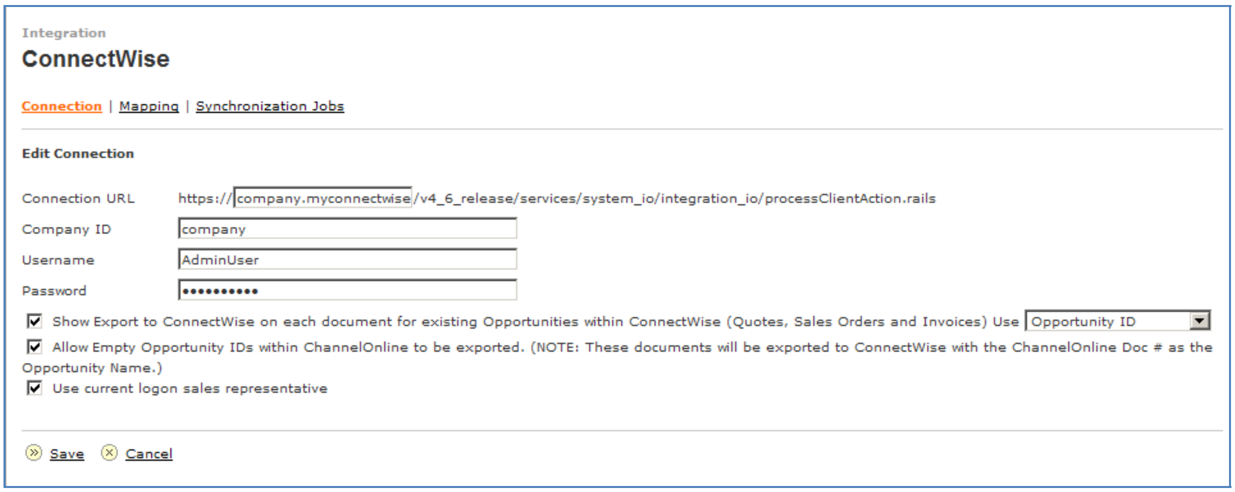
Connection Section (Image 1: Item #2)

1. Connection URL - Tell ChannelOnline where your ConnectWise application is running. The complete ConnectWise site URL must be entered into the URL field in the connection section. This is needed regardless of whether it is hosted by ConnectWise or it is installed at a reseller's location and is used by ChannelOnline to connect and access the ConnectWise application.
2. Provide ConnectWise Company ID in the Company Field and the Integrator Login credentials in the respective fields for Username and Password. These are used to connect to the ConnectWise server. Test connection button on page that runs a test and lets the user know if we were able to establish a connection with their server.
3. Connection Options (Image 2: Edit Connection):
    a. Show Export to ConnectWise on each document for existing Opportunities within ConnectWise (Quotes, Sales Orders and Invoices) Use <Select a Custom Field> to determine the field ChannelOnline will use to get the Opportunity Name from.   Select this option if you want to export quotes and orders into opportunities that already exist in ConnectWise. (See the In ChannelOnline portion of the Integration Settings above.)
    b. "Allow Empty Opportunity IDs within ChannelOnline to be exported." This allows quote and sales order documents to be exported to ConnectWise without an opportunity name assigned to it. These documents will be exported to ConnectWise with the ChannelOnline Doc # as the Opportunity Name.

c. Assign customers to the sales representative that is logged in and initiating the transaction from ChannelOnline." Selecting this option makes all imports and exports with ChannelOnline associated with the currently logged in Salesrep. Unselected, ChannelOnline will by default use the default Salesrep that is assigned to the default ChannelOnline storesite.

NOTE: Export and Import connections can be initiated from within the ChannelOnline Jobs Synchronization page or on the fly on a document or customer edit page. All jobs will terminate after the jobs are completed and statuses will appear on the Synchronization Jobs Page.

IMAGE 2: Edit Connection



Settings Section (Image 1: Item #3)

Here are links that take users to page that allow for the mapping of ChannelOnline SalesReps, product categories and customers with those in ConnectWise.

1. SalesRep / User Mapping: Map SalesReps within ChannelOnline to ConnectWise Members. Map your employees that are in ChannelOnline to the employee records that are in ConnectWise. To map, select the ChannelOnline employee and enter the ConnectWise user name, location and business unit (Group) exactly as they appear within your ConnectWise client. Fields are case sensitive (See Image 3: Employee Mapping).

NOTE: In ConnectWise the User Location and Business Unit fields may be named something different in the ConnectWise Members Setup table. In this example Location corresponds to “Caption for Locations” field and Business Unit corresponds to “Caption for Groups” field in the My Company settings. To find or modify the current setting, go the My Company Setup, Owners Tab, and look under the Corporate Structure Information Section. ConnectWise does NOT recommend changing these values because it will negatively affect an accounting integration. (See Image A: ConnectWise Locations and Groups)

2. Product Integration Mapping: To create products from ChannelOnline into ConnectWise the proper setup of product types, categories and sub-categories must be completed. Completion of the Product Type Mapping and Category Mapping sections must occur to enable the creation of products from ChannelOnline into ConnectWise when exporting quotes and sales orders.

    a. Product Type Mapping: For accounting purposes the Product Types must be paired between the applications. To find the product types available or create ones in the ConnectWise setup, go to Setup Tables / Products / Product Type. Map the correct types from ConnectWise into the Product, Service and Labor open text fields exactly as they appear in ConnectWise.

b. Category Mapping: Setup for assigning categories and subcategories for products that will be sent from ChannelOnline into ConnectWise. Resellers using the ChannelOnline cat/class table and have inputted it into ConnectWise can select the top radio button beginning "Use the names from ChannelOnline." For this option all CNET categories and sub-categories must be created by the reseller in the Product Category and Sub-category Setup Tables within ConnectWise. Or, users can select to use the categories that have already been created in ConnectWise to this in ChannelOnline. For this option, the second radio button starting with "Use the mapping below." Must be selected. The user then must map existing categories from their full catalog in ChannelOnline to the categories that they have crested in ConnectWise. (See Image 4: Product Mapping)

3. Import / Map Customers From ConnectWise: ChannelOnline can scan the ConnectWise company database and provide a list of all companies that are not associated with a company in ChannelOnline. This page allow those companies to be assigned or mapped to an existing company in ChannelOnline by entering the ChannelOnline company name into the right hand column. As you type the name in the text field ChannelOnline will search the list of unmapped companies and prompt you with potential matches. NOTE: if you select a company from ChannelOnline it will remain selected until you Clear Selection or refresh the page. (See Image 5: Mapping Companies)

4. Map Customers: If you have already ran Import / Map Customers From ConnectWise this link will bypass the import and take the user directly to the mapping page. Use this link when no new companies have been created in ConnectWise.

   TIP 1: For best results go through company records in both applications and remove any duplicate company entries. To merge duplicate companies in ConnectWise go to Setup / Mass Maintenance and select the Company Merge option. Select the from and to company, then select which elements will be the Master and which will be overwritten.

   TIP 2: The best recommended order for mapping customers data if ConnectWise is your master source is as follows:

   a) Use Import and Map feature in the ChannelOnline Integration/ Connection/ Settings section and save mappings

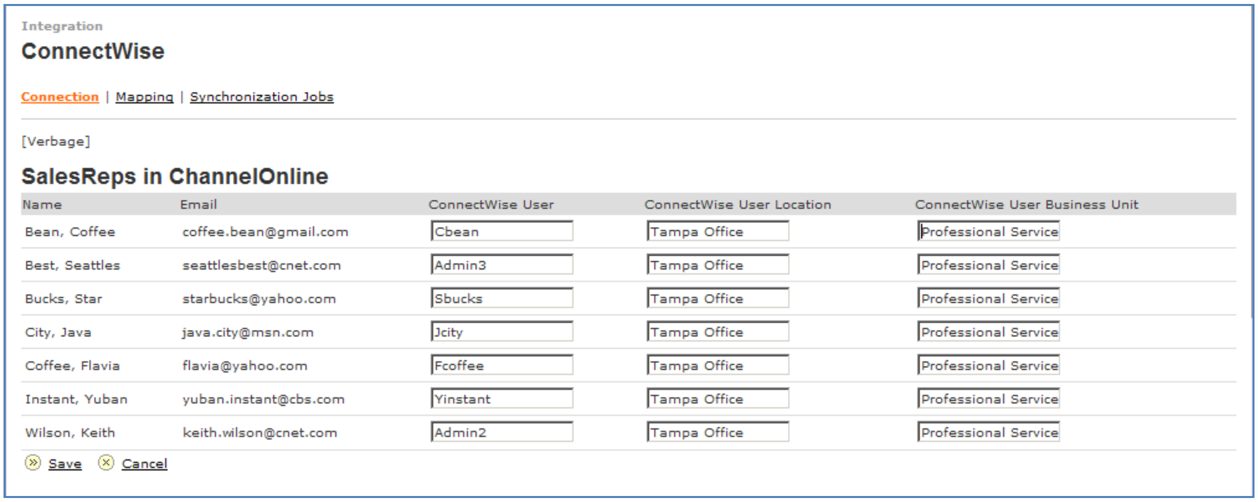
   b) Import company and contact information from ConnectWise

   c) Then if needed, export contacts from ChannelOnline via the Export to ConnectWise link on the customer page

   WARNING: Deleting previously synced companies can cause errors in trying to reconnect it with a new or different record. Never change the Account # in ChannelOnline after it has been mapped with a company in ConnectWise.

ChannelOnline User Pages & Functionality

IMAGE 3: Employee Mapping



Integration

ConnectWise

Connection | Mapping | Synchronization Jobs

[Verbage]

SalesReps in ChannelOnline

Name	Email	ConnectWise User	ConnectWise User Location	ConnectWise User Business Unit
Bean, Coffee	coffee.bean@gmail.com	Cbean	Tampa Office	Professional Service
Best, Seattles	seattlesbest@cnet.com	Admin3	Tampa Office	Professional Service
Bucks, Star	starbucks@yahoo.com	Sbucks	Tampa Office	Professional Service
City, Java	java.city@msn.com	Jcity	Tampa Office	Professional Service
Coffee, Flavia	flavia@yahoo.com	Fcoffee	Tampa Office	Professional Service
Instant, Yuban	yuban.instant@cbs.com	Yinstant	Tampa Office	Professional Service
Wilson, Keith	keith.wilson@cnet.com	Admin2	Tampa Office	Professional Service

Save Cancel

IMAGE A: ConnectWise Locations and Groups

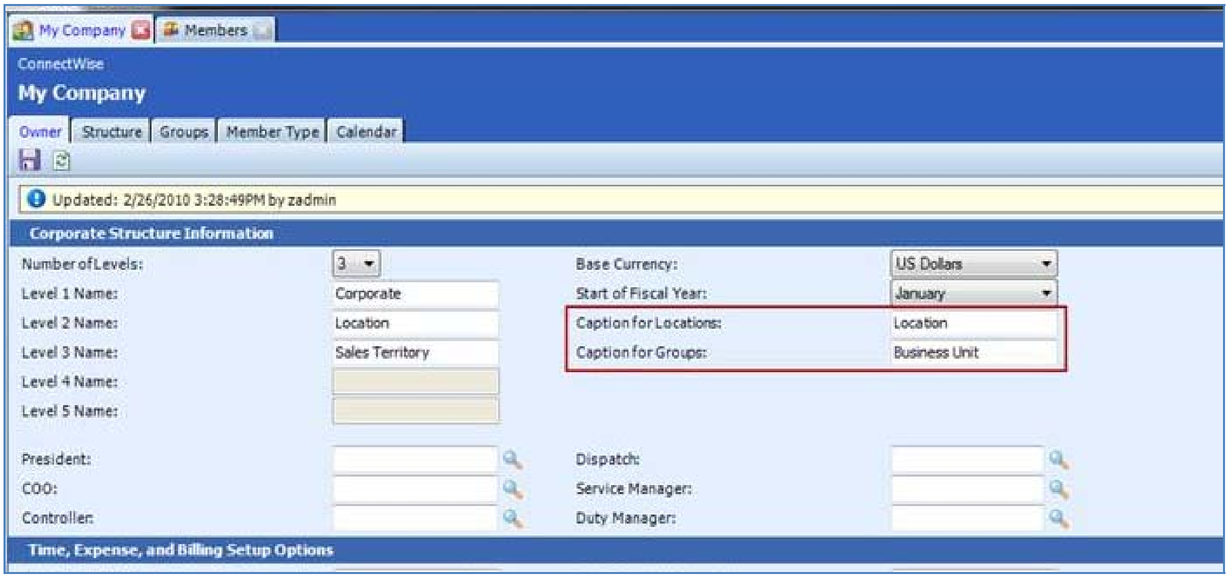


IMAGE 4: Product Mapping

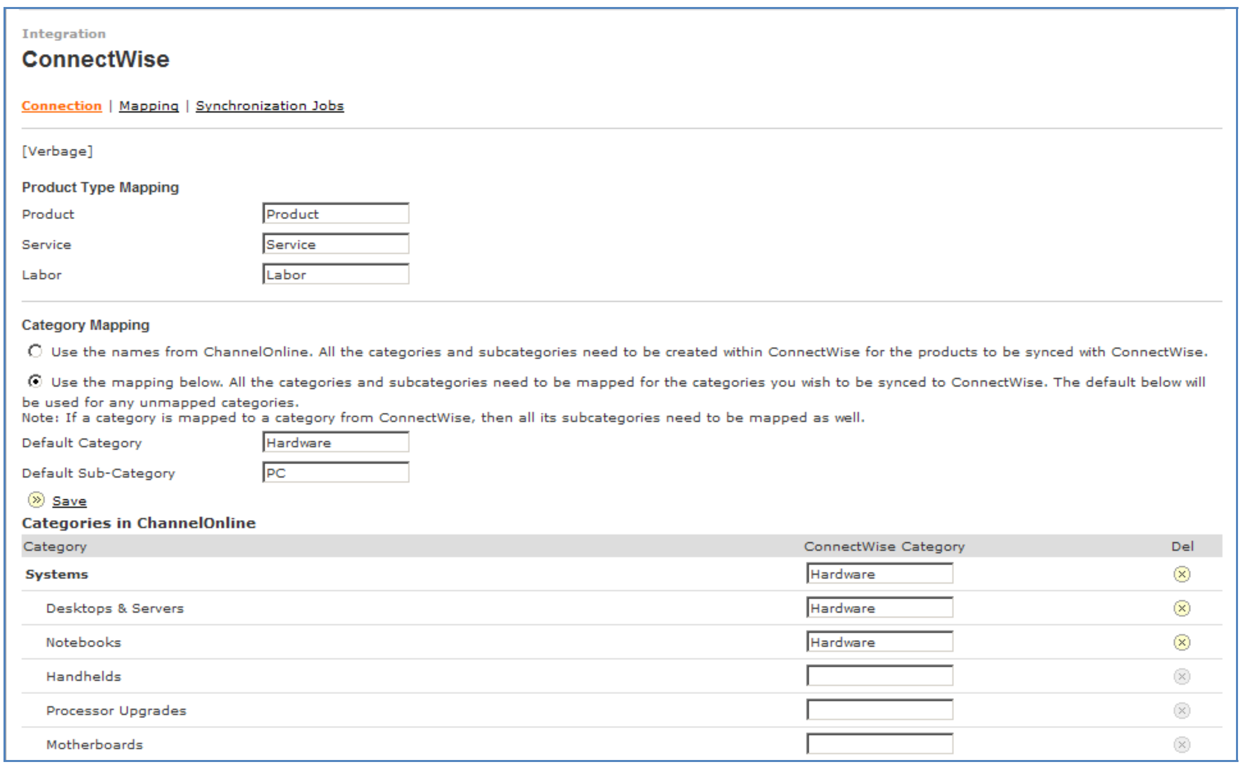
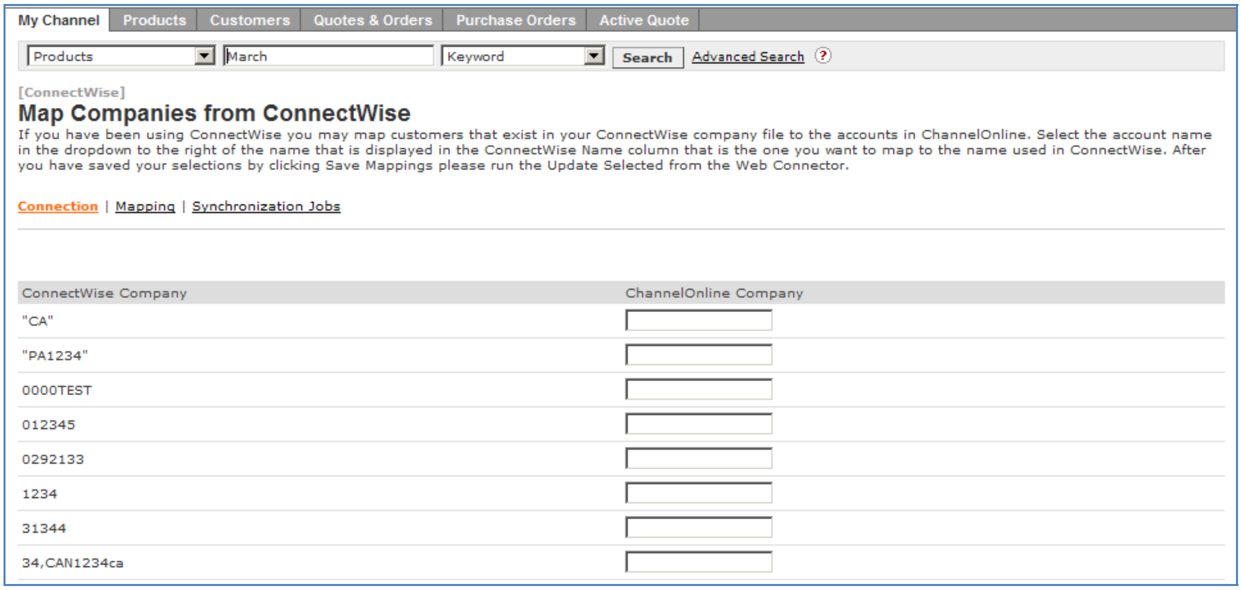


IMAGE 5: Mapping Companies



Reset Link (Image 1: Item #4)

The reset link allows you to reset ALL of your ConnectWise connector history and settings within ChannelOnline. This removes any known links between customer, contact, quote and sales order information.

5.2 Mapping Page and Sub Pages

This area of the application provides you with general information regarding which fields from ChannelOnline and ConnectWise are being synchronized between the two applications. Default fields have been defined together by CNET and ConnectWise based on all available and applicable ConnectWise integration points. Exceptions exist where choices have been presented to the reseller during the setup on ChannelOnline. The mapping pages cover data points synchronized on Company, Contacts and Quotes (IMAGE 6: Mapping Page)

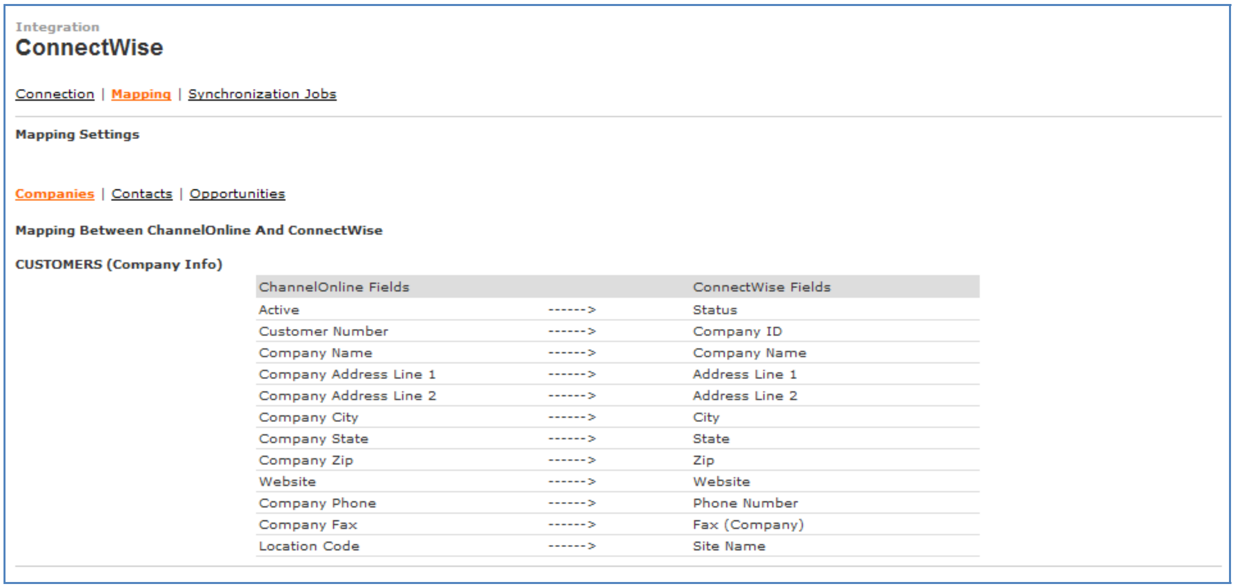
Transaction / Document Types

ChannelOnline	**ConnectWise**	**ACTIONS**
SalesReps	Member	Link
Company	Company	Add / update
Contacts	Contacts	Add / update
Quotes	Opportunity Integration	Adds ChannelOnline lines into ConnectWise
Sales Order	Opportunity Integration	Adds ChannelOnline lines into ConnectWise

Product Details	Product Object	Link / add

•***SEE APENDIX B FOR TRANSACTION TYPE DATA MAPPING***

IMAGE 6: Mapping Page



5.3 Data Synchronization Jobs

The integration between the applications has been designed to enable one-by-one imports and exports and/or scheduled synchronization jobs. To accommodate this flexibility there are links in the customer section, on quotes and orders, and special pages in the Integration section. Details on how to perform each of these operations are described below.

Main types of update jobs/tasks:

1. Company /contact info
2. Quote from ChannelOnline into ConnectWise as an Open opportunity (includes line level product info)
3. Sales Orders from ChannelOnline into ConnectWise as a Won opportunity (includes line level product info)

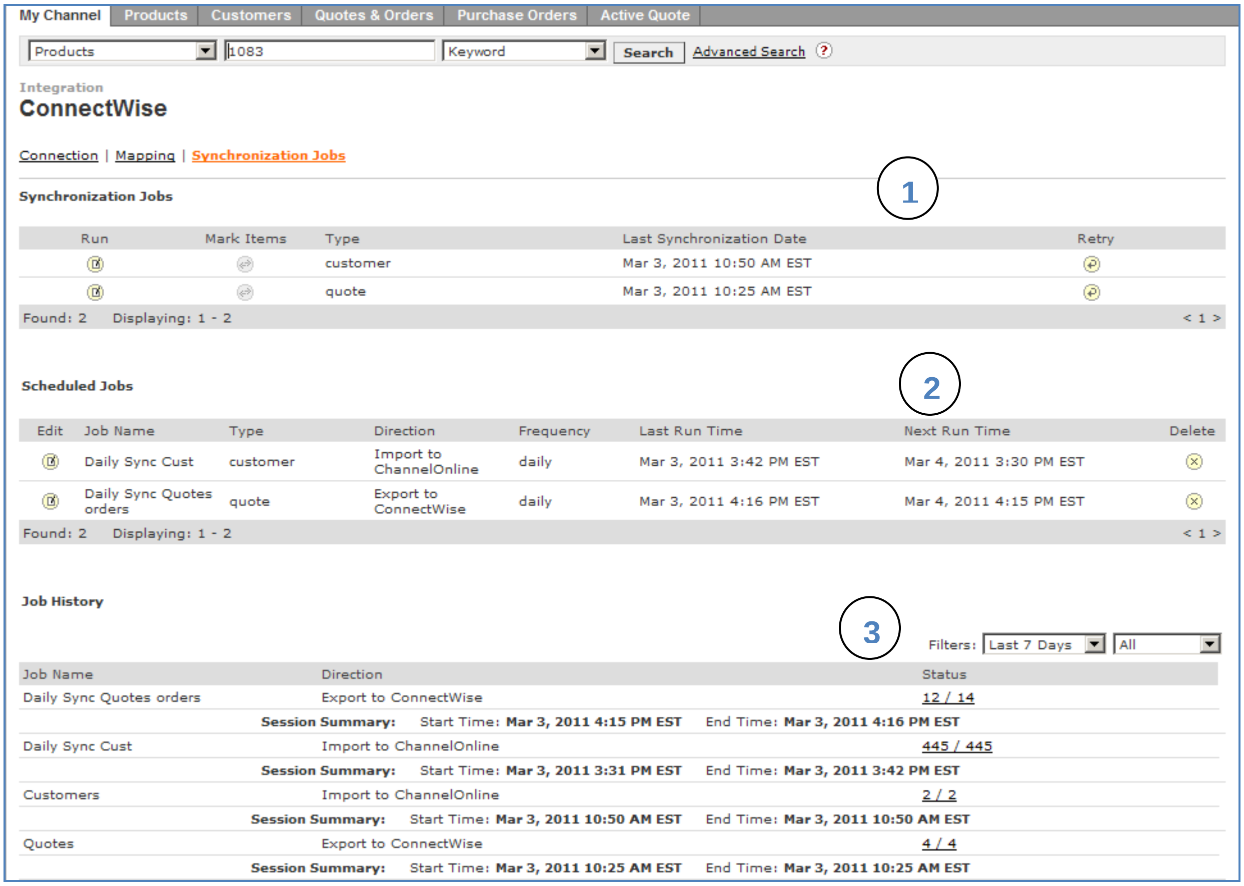
Synchronization Jobs Page Overview

The synchronization Jobs page (IMAGE 7: Synchronization Jobs Page) provides users following:

1. Job types that are available
2. Statuses on when jobs last ran

3. Access to mange scheduled jobs
4. Job history summary
5. access to job status logs

IMAGE 7: Synchronization Jobs Page



Synchronization Jobs (Image 7: Item #1)

All available types of synchronization jobs are listed in this section and provide access to each specific job through the edit icon under the Run column.

Customer Data Sync Job (Image 7: Item #2)

Customer data can be either imported or export from ChannelOnline to ConnectWise. Jobs can be run manual as a one time operation, scheduled, or as needed by a sales rep from within the customer tab section.

NOTE: It is advised to select one application to be the master source for all customer data for regularly scheduled jobs.

To run a single customer export synchronization job (IMAGE 8: Single Customer Job):

1. Select ChannelOnline as the source for the customer data

2. Select whether it is a specific customer, or all customers from within a date/time range

3. If a date/time range specify:

    a. Type (Last Modified & Created Date)

    b. Date range (Today, Last 7, Last 15, etc.)

    c. Select dates if custom (start and end)

    NOTE: Last Modified will look for a document that has been updated and saved in ChannelOnline within the defined date range. Where as Created Date only looks for documents that were originally created on that date or in that date range.

To run a single customer import synchronization job:

1. Select ConnectWise as the source for the customer data

2. Select whether it is a all customers or a specific customer

To schedule a customer synchronization job for automation (IMAGE 9: Scheduled Customer Synchronization Job):

1. Select the source for the customer data

2. Click on the "Schedule this job" checkbox

3. Name the job

4. Select the time, time zone and frequency (Daily, Weekly or Monthly)

IMAGE 8: Single Customer Job

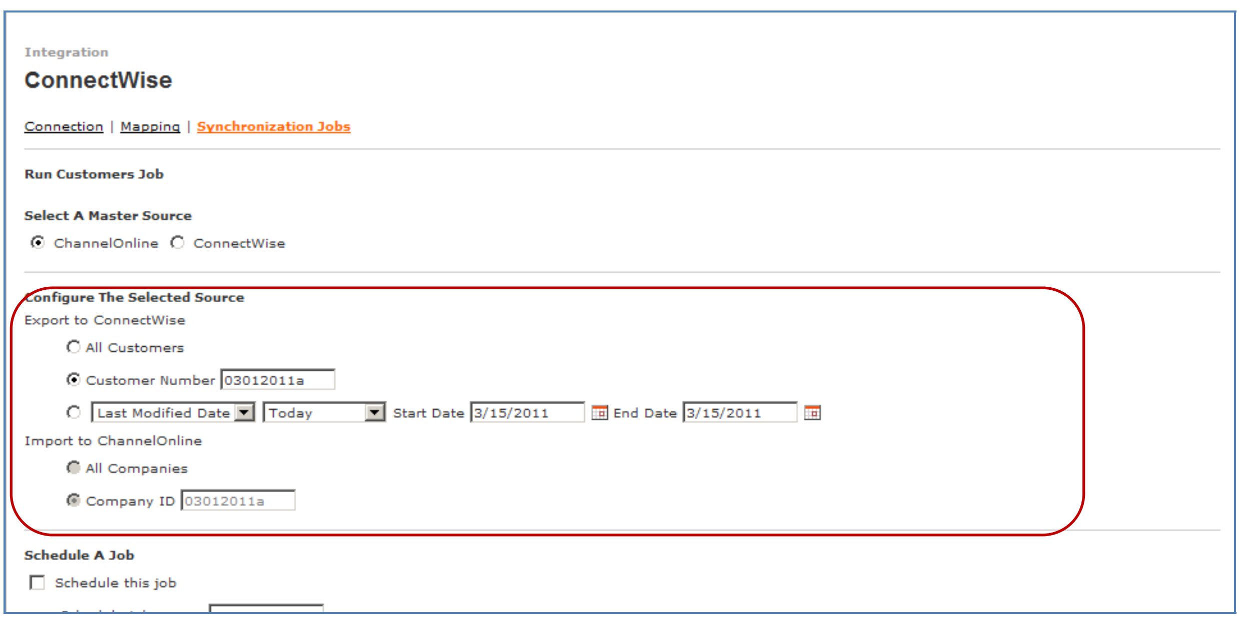
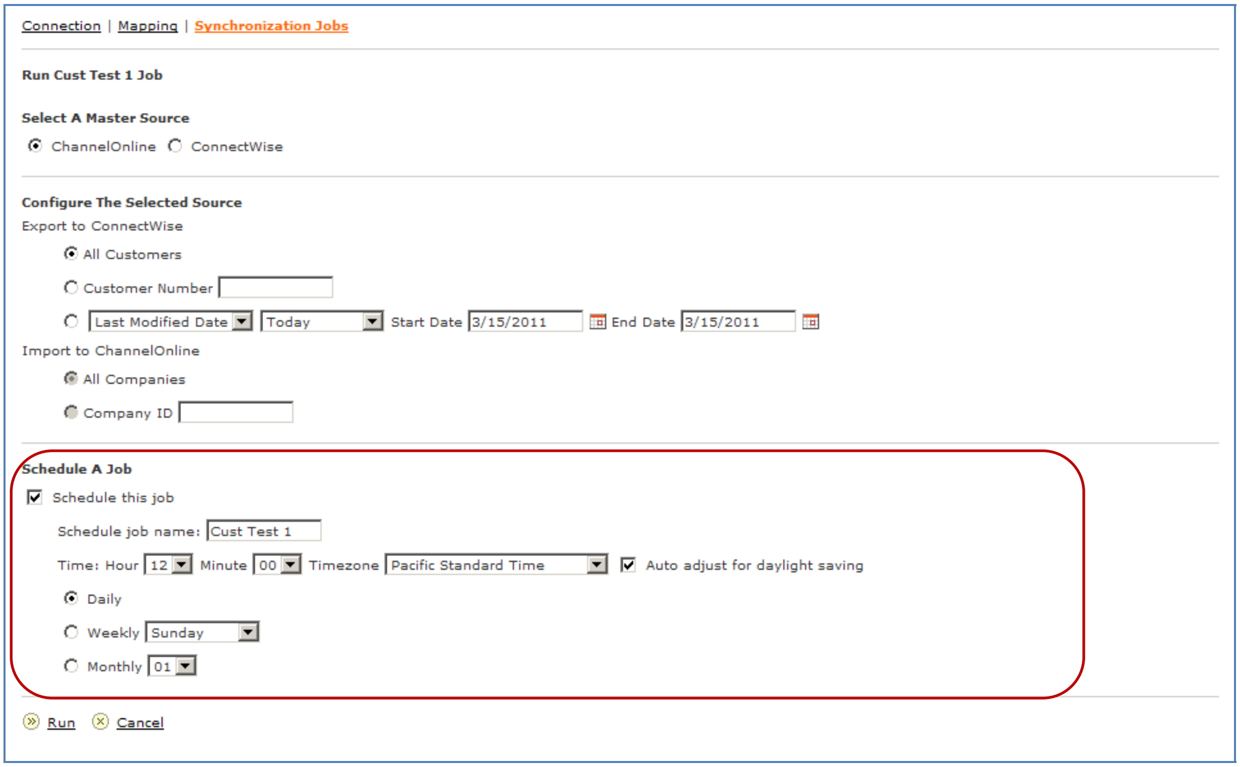


IMAGE 9: Scheduled Customer Synchronization Job



Quote Synchronization Job (Image 7: Item #2)

Quotes and Sales Orders are both included in the Quote Synchronization Job. The quote job is for export ONLY; there is no ability available to import opportunities from ConnectWise into ChannelOnline quotes.

<u>NOTE</u>: All exported documents will be converted to a “Locked” status in ChannelOnline. They can be unlocked to be modified or converted to sales orders by selecting the unlock link in the upper right hand corner of the document.

To run a single quote export synchronization job (IMAGE 10: Single Quote Synchronization Job):

1. ChannelOnline is auto selected as the source for the data
2. Select whether it is a specific quote, or multiple quotes from within a date/time range
3. If a date/time range, then specify:
    a. Type (Created Date, Last Modified* & Follow-up Date)
    b. Date range (Today, Last 7, Last 15, etc.)
    c. Select dates if custom (start and end)

* Reminder: last modified refers to the last time a change was made to the document and it was saved.

To schedule a quote synchronization job for automation (IMAGE 11: Scheduled Quote Synchronization Job):

1. Click on the “Schedule this job” checkbox
2. Name the job
3. Select the time, time zone and frequency (Daily, Weekly or Monthly)
4. Click on Run

NOTE: Multiple jobs can be scheduled for either customer or quote jobs.

IMAGE 10: Single Quote Synchronization Job

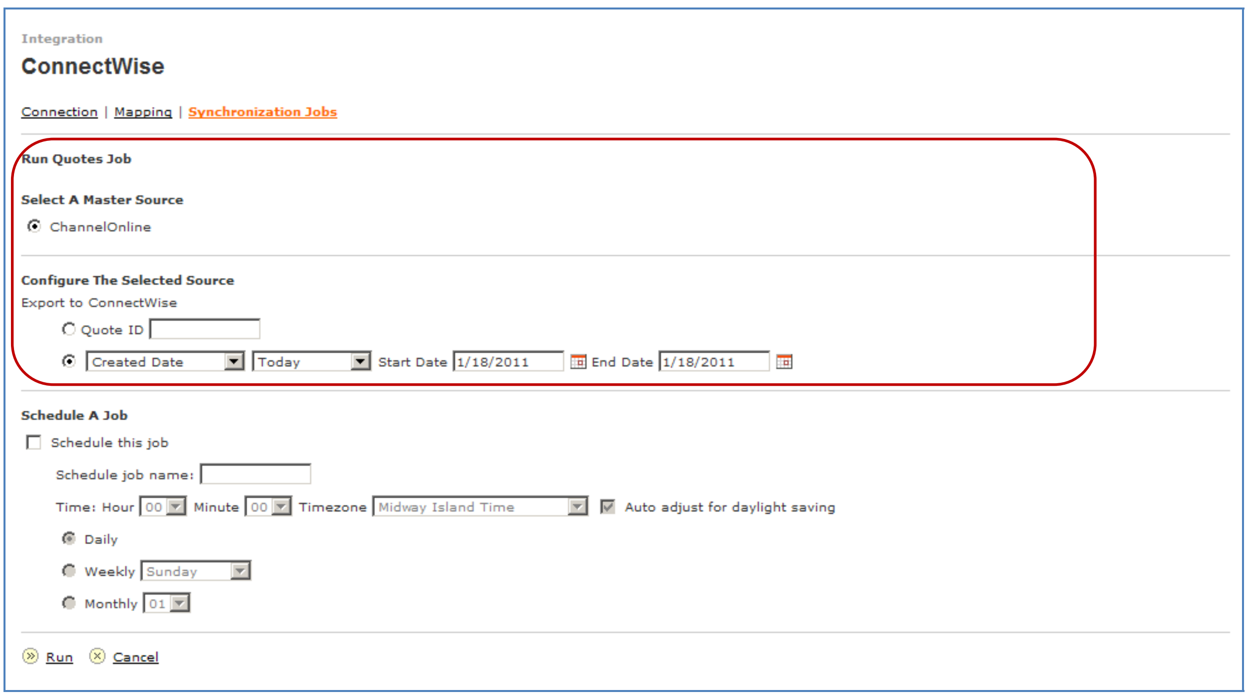
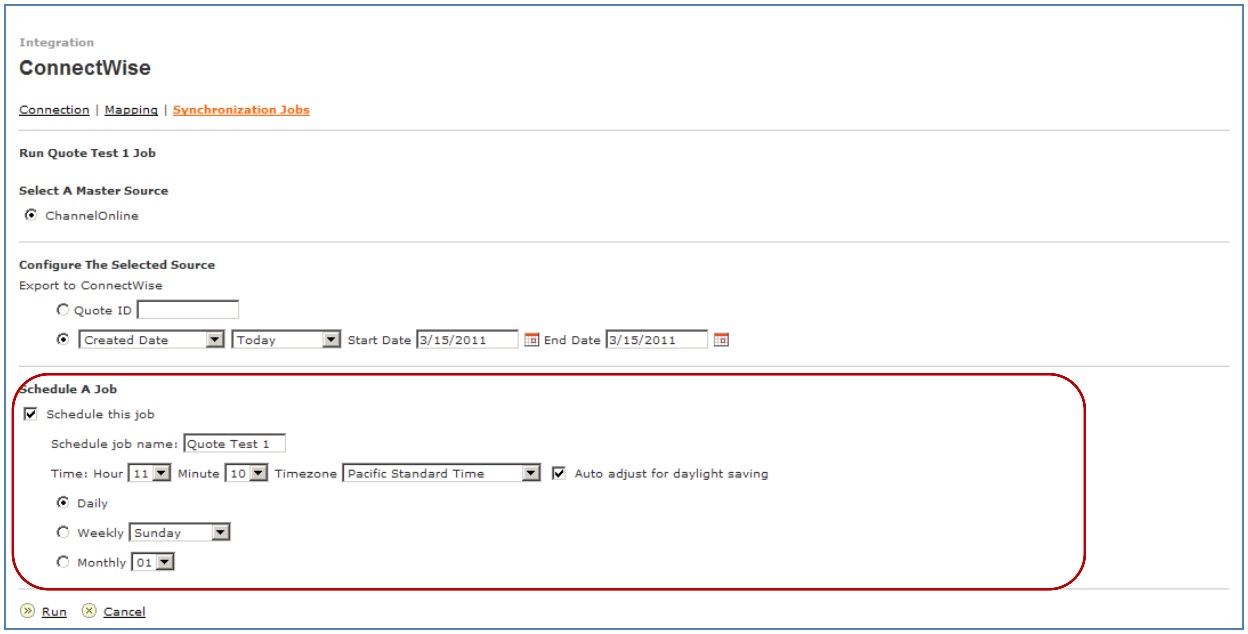


IMAGE 11: Scheduled Quote Synchronization Job



Job History (Image 7: Item #3)

Job history provides detailed information on what jobs have recently run, past 7 days is the default, from ChannelOnline. These include jobs that were scheduled or jobs that were manually run during the course of business.

5.4 As Needed Synchronization – Outside of the Synchronization Jobs Page

Import Company from ChannelOnline Customers Tab

From the Customers tab select All Customers. Above the search results header bar a link has been added for importing customers by ConnectWise Company ID into ChannelOnline (IMAGE 12). Selecting the link labeled "Import From ConnectWise" will initiate a popup window (IMAGE 13) for submitting the ConnectWise Company ID. After submission ChannelOnline with import the company and take the user to the Customer View page for that newly imported customer.

ChannelOnline User Pages & Functionality

IMAGE 12: Import Company from Customers Tab

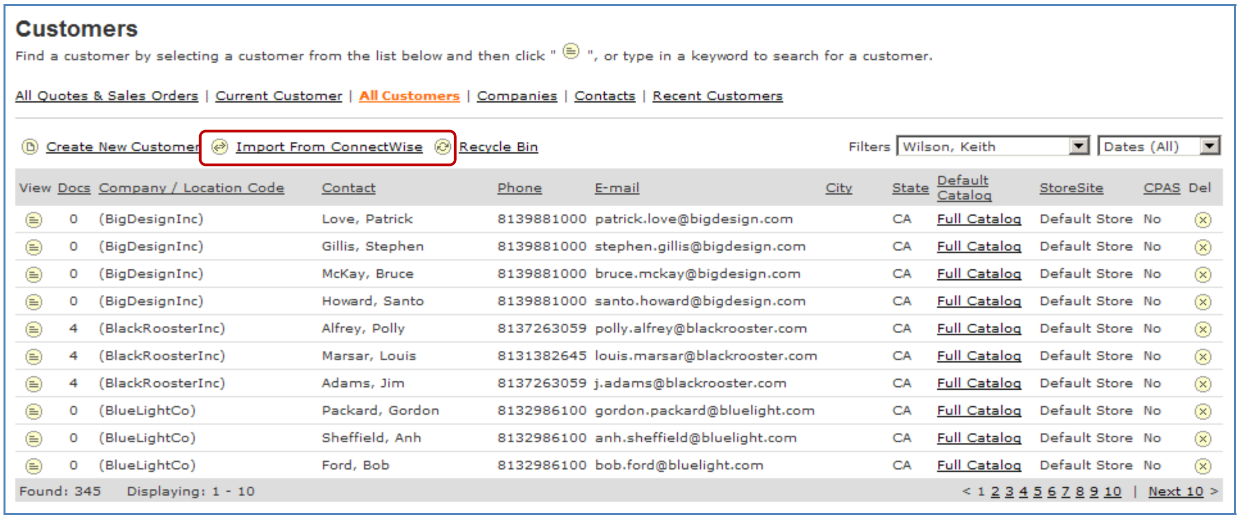
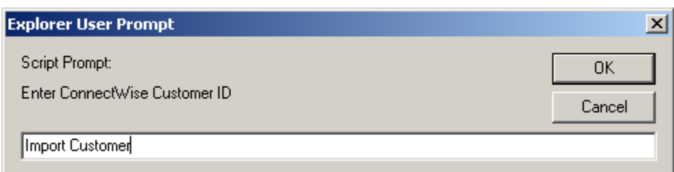


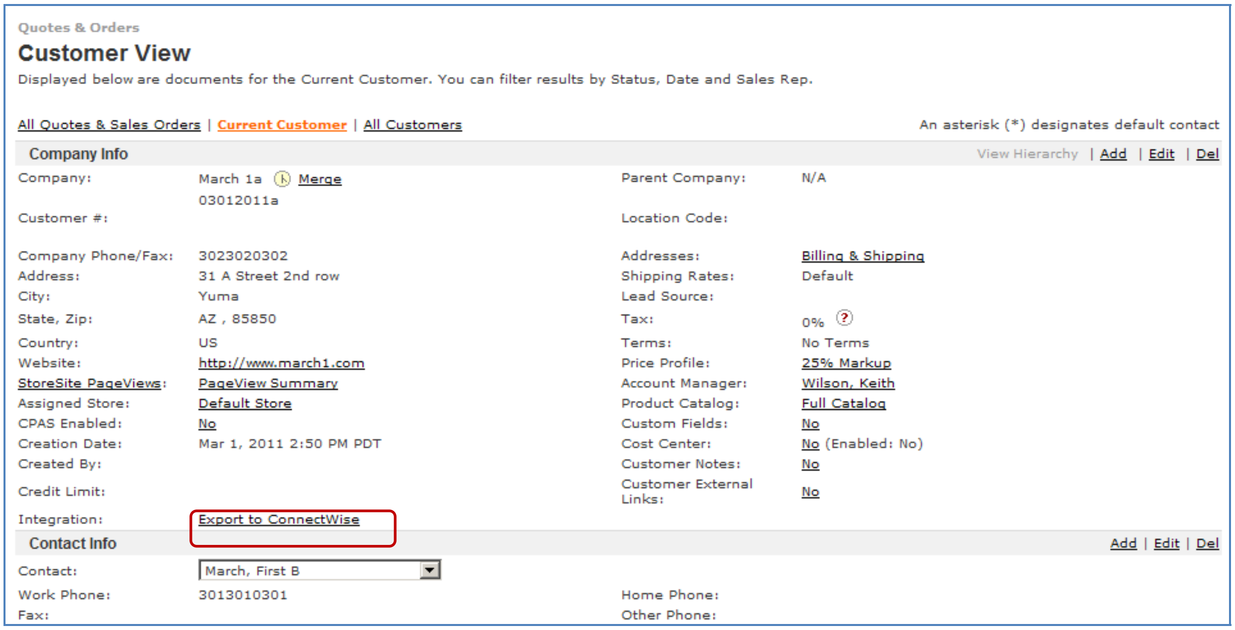
IMAGE 13: Import Customer Pop-up Window



Export Company from Company page in ChannelOnline

To export a single company and its associated contacts from ChannelOnline into ConnectWise select the Export to ConnectWise link on the customer view page (see Image 14: Export Company from Company View).

Image 14: Export Company from Customer View



Export Quote to an Existing or Create a New Opportunity

From a quote there are three different options for exporting information into opportunities into ConnectWise:

1. To an existing opportunity in ConnectWise with the opportunity name

2. To a new opportunity using the ChannelOnline document # as the name

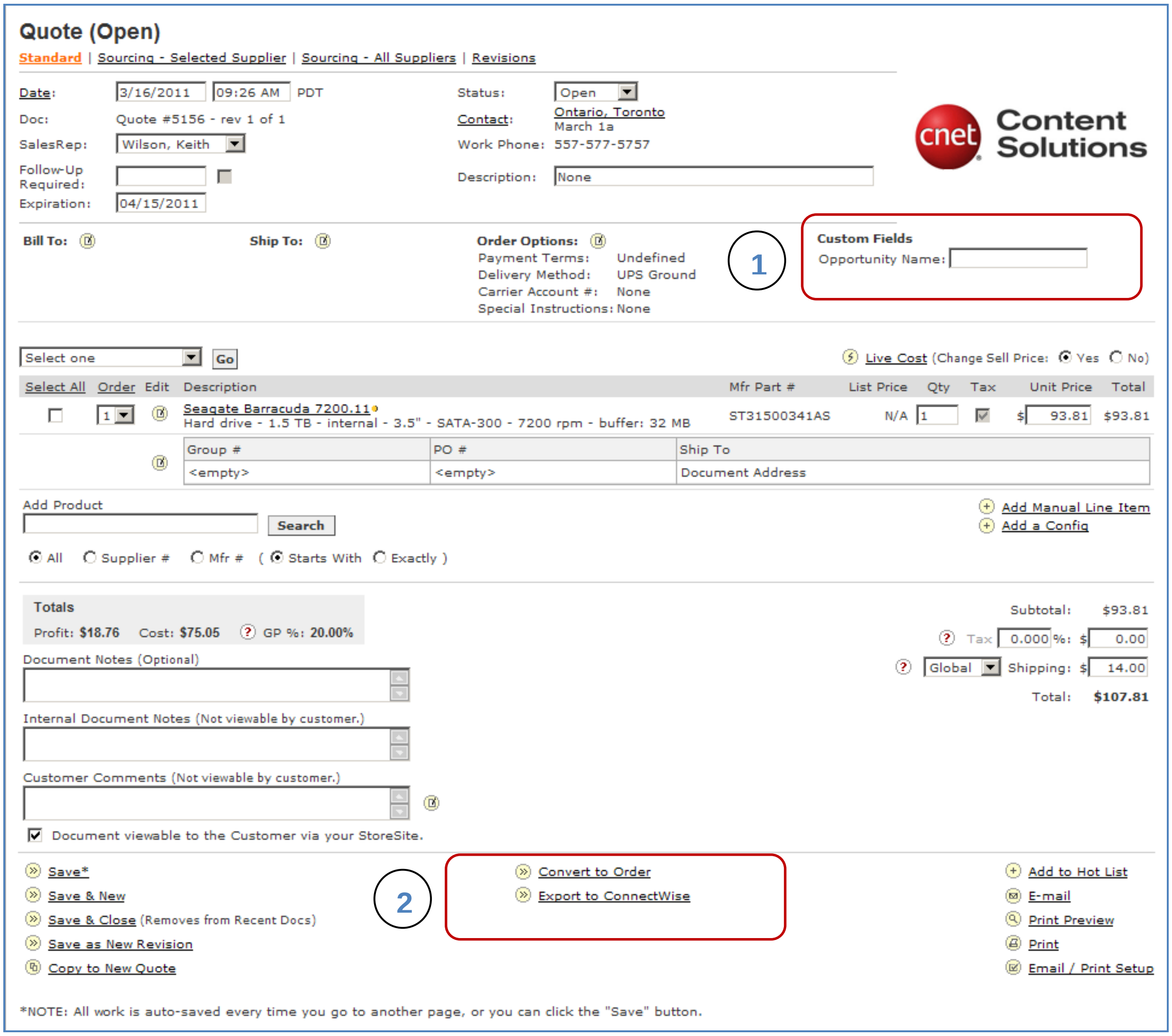
3. To a new opportunity with the name provided if that name does not match any already existing in ConnectWise

By using the custom field created in setup for the ConnectWise Opportunity Name in a ChannelOnline quote header, you can either add a quote or sales order to an existing opportunity, or, create a new opportunity with a new name. When a user enters a name in this selected field, ChannelOnline will look to add the quote or sales order to an opportunity with the same name in ConnectWise. The name's spelling and upper and lower cases must match exactly. If ChannelOnline cannot find an opportunity with this name in ConnectWise, then it will create a new opportunity with the name entered into that field.

Additionally, blank opportunity name fields can be used to create new opportunities. To enable this function the following selection on the edit connections settings page must be checked; "Allow Empty Opportunity IDs within ChannelOnline to be exported." With this selected ChannelOnline will use the document number as the opportunity name.

NOTE: Simple quotes converting to sales orders in ChannelOnline will update in ConnectWise to a "Won" status. This status change will not take place if there is more then one quote going to a single opportunity in ConnectWise.

Image15: Export from a Quote



Opportunity Name Field (Image 15: Item #1)

The custom field created during setup will appear in the header location of the quote and is the field that ChannelOnline will look at to get the opportunity name. ChannelOnline will use this name to add the quote products into the opportunity in ConnectWise

Export to ConnectWise (Image 15: Item #2)

Once the quote is ready for export the user can select the “Export to ConnectWise” link at the bottom center of the quote to have it instantly sent over to ConnectWise.

Appendix

APPENDIX A – Canadian Province Mapping

State ID		Description
AB	=	Alberta
BC	=	Company ID
MB	=	Manitoba
NB	=	New Brunswick
NL	=	Newfoundland and Labrador
NT	=	Northwest Territories
NS	=	Nova Scotia
NU	=	Nunavut
ON	=	Ontario
PE	=	Prince Edward Island
QC	=	Quebec
SK	=	Saskatchewan
YT	=	Yukon

APPENDIX B – Field Data Mapping

CUSTOMERS (Company Info)

ChannelOnline Fields		ConnectWise Fields
Active	------>	Status
Customer Number	------>	Company ID
Company Name	------>	Company Name
Company Address Line 1	------>	Address Line 1

ChannelOnline Fields		ConnectWise Fields
Company Address Line 2	------>	Address Line 2
Company City	------>	City
Company State	------>	State
Company Zip	------>	Zip
Website	------>	Website
Company Phone	------>	Phone Number
Company Fax	-----	Fax (Company)
Location Code	-----	Site Name

CONTACTS

ChannelOnline Fields		ConnectWise Fields
Title	------>	Title
First Name	------>	First Name
Last Name	------>	Last Name
Customer Number	------>	Company Id
Company Name	------>	Company Name
Address Line 1	------>	Address Line 1
Address Line 2	------>	Address Line 2
City	------>	City
State	------>	State
Zip	------>	Zip
Work Phone	------>	Direct
Mobile	------>	Cell
Home Phone	------>	Home (Phone)
Other Phone	------>	Pager
Email	------>	Email
Default	<------	Primary

OPPORTUNITIES (Quote / Sales Order)

ChannelOnline Fields		ConnectWise Fields
Customer Number	------>	Company ID
Company Name	------>	Company Name
Doc #	------>	Opportunity Name
SalesRep	------>	Sales Rep

PRODUCTS (on quote or order)

ChannelOnline Fields	ConnectWise Fields

ChannelOnline Fields		ConnectWise Fields
Line Item	------>	Item
Description	------>	Description
Qty	------>	Quantity
Cost	------>	Cost
Price	------>	Price

APPENDIX C – Error Codes, Meanings and Resolutions

CUSTOMERS (Company Info)

ConnectWise Error	Message	Possible Resolution
export customer	Customer export did not occur	Make sure that the Sales Rep is mapped

CONTACTS

ConnectWise Error Message	Issue	Possible Resolution

QUOTES

ConnectWise Error Message	Issue	Possible Resolution
export quote header	Both Customer and Contact need to exist in ChannelOnline in order to export the quote to ConnectWise.	Manually sync the specific customer from ChannelOnline to ConnectWise

ConnectWise Error Message	Issue	Possible Resolution

APPENDIX D – Basic Data Workflow