

Business Management Prep

Have the best Business Management conversations at IT Nation Secure after you've reviewed this sheet!

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ConnectWise Business Management Solutions are designed to **save partners time, reduce costs, increase profitability, improve customer experience, and improve employee experience**. Please note that each of the announcements is tied to at least one of these benefits – please be sure to understand the benefit and work it into related conversations.

Product Updates

As we prepare for IT Nation Secure, we wanted to provide the team with insights into the exciting enhancements from Business Management, so that everyone feels comfortable talking about them. Each of our enhancements is designed so that partners can: **Save Time, Reduce Costs, Improve Customer Experience, and Improve Employee Experience** – all these things lead to *more profitability*.

In-Market Solutions

**Please note that below each enhancement description, there is a 'Release Status' - this is to indicate if the enhancement is available as of IT Nation Secure.

BrightGauge RELATED FOCUS GROUPS/NETWORKING SESSIONS/BREAKOUTS: N/A		
BrightGauge + SentinelOne Integration	The BrightGauge-SentinelOne integration takes partners beyond the reporting capabilities available within the SentinelOne today, enabling partners to not only report in more detail on SentinelOne analytics and data, but also combine this data with other BrightGauge data sources like their RMM tool. Has prebuilt dashboards available right out of the box! Release Status: RELEASED Partner Benefit: Saves Time, Improves Employee Experience	Check out the Feature Sheet
BrightGauge + ITBoost Integration	Partners will be able to use BrightGauge to create reports of the data in ITBoost (Asset Expiration, KB and SOP usage, Password Report, User Activity, User Login Activity, Documentation Snapshot, Documentation Leadership Board). This will enable them to access important documentation metrics directly from BrightGauge, ensuring their documentation is up to date and can act quickly on expiring items. *This is a free datasource to partners who pay for BG and ITB. Process doc on Seismic. Release Status: RELEASED Partner Benefit: Saves Time, Improves Employee Experience	Check out the Feature Sheet

Quick Sync Dashboards	<p>Quick Sync dashboards refresh near real time to empower our partners by providing the most up to date data on their respective dashboards – this is initially being released for CW RMM and ConnectWise PSA Cloud Ticketing dashboards.</p> <p>“Quick Sync” indicates dashboards that will refresh every ~couple minutes. Very close to real time; however, not exactly real time, hence the ‘quick sync’ nomenclature.</p> <p>Release Status: RELEASED (for PSA use cases, RMM coming soon)</p> <p>Partner Benefit: Saves Time, Reduce Costs, Improves Employee Experience</p>	Release Notes
Multiple Trend Lines	<p>We are excited to bring partners the ability to have multiple trend lines within their BrightGauge graphs. With multiple trend lines, partners can analyze the trends of multiple matrices present in different layers at the same time.</p> <p>Release Status: NOT RELEASED (coming soon)</p> <p>Partner Benefit: Reduce Costs, Improves Employee Experience</p>	Roadmap
Upload Custom Sounds	<p>Partners will soon have the ability to upload their own sounds for alerts from BrightGauge. This is important because some of the default sounds aren’t suitable for those with assisted hearing devices (can interfere). So this gives them the flexibility to customize the sounds, and accommodate those on their team.</p> <p>Release Status: NOT RELEASED (coming soon)</p> <p>Partner Benefit: Improves Employee Experience</p>	Roadmap
<p>SmileBack</p> <p>RELATED FOCUS GROUPS/NETWORKING SESSIONS/BREAKOUTS:</p> <p>N/A</p>		
Project Surveys	<p>ConnectWise PSA partners can now leverage SmileBack surveys throughout the Project lifecycle. These surveys will help our partners easily capture feedback at more touchpoints, helping them deliver exceptional customer experiences.</p> <p>Release Status: RELEASED</p> <p>Partner Benefit: Improve Customer Experience</p>	Release Notes
<p>ITBoost</p> <p>RELATED FOCUS GROUPS/NETWORKING SESSIONS/BREAKOUTS:</p> <p>N/A</p>		
ITBoost Overlay inside ConnectWise PSA	<p>ITBoost overlay will give partners the ability to access ITBoost data within Manage Tickets, the ability to link most of Manage assets with ITBoost data, and reverse linking to ITBoost. This <i>really</i> enhances the existing ConnectWise PSA integration by making the data much easier to get to without leaving PSA.</p> <p>Release Status: RELEASED,</p> <p>Partner Benefit: Reduce Costs, Saves Time, Improves Employee Experience</p>	More info

ITBoost in the PSA End-User Portal	<p>Partners will be able to share their Knowledge Base articles via the Customer Portal, so that customers can self-service. Articles are displayed at the partner’s discretion, so they can have specific articles show on each of their portals (should they have more than one).</p> <p>Release Status: RELEASED</p> <p>Partner Benefit: Reduce Costs, Saves Time, Improves Customer Experience</p>	More info
Time-based One-time Passwords	<p>Partners can now authenticate and generate TOTP for cloud apps directly within ITBoost. This was a huge competitive gap, and people were walking away from ITB because this was missing, so we’re VERY excited to offer this now.</p> <p>Release Status: RELEASED</p> <p>Partner Benefit: Saves Time, Improves Employee Experience</p>	More info
<p>ConnectWise PSA (previously known as Manage)</p> <p>RELATED FOCUS GROUPS/NETWORKING SESSIONS/BREAKOUTS:</p> <p>‘FOCUS GROUP: Let’s talk about time’ JUNE 7TH, 10:30 – 11:15 AM (ROOM: CAPTIVA 2)</p>		
Agreement Billing Date Flexibility	<p>Before this enhancement, all agreement invoices showed up in the Invoicing Queue on the first of the month, regardless of the billing start date. With this enhancement, agreements that are based on contract year will now bill on the billing start date and use that day for the rest of the invoices. This is great because it will become easier for partners to send invoices at the right time and cause less questions from their customers.</p> <p>Release Status: RELEASED</p> <p>Partner Benefit: Saves Time, Improves Customer Experience, Improves Employee Experience</p>	Release Notes
WisePay for PSA	<p>With Wise-Sync the company joining the ConnectWise family, we can extend payment functionality (regardless of Accounting Package solution being used) to our PSA partners. They can include payment links on their invoice emails and their customers can access the link to easily pay by credit card or bank debit.</p> <p>Release Status: RELEASED</p> <p>Partner Benefit: Saves Time, Reduces Costs, Improves Customer Experience, Improves Employee Experience</p>	More info
WisePay for PSA Payment Sync	<p>With WisePay for PSA, our partners can easily collect payment from their customers. In its current state, the payment is only reflected on the PSA invoice and the partner must reconcile the payment in the Accounting Package. Soon, PSA will have the capability to sync WisePay payments from PSA into QuickBooks desktop and Great Plains.</p> <p>Release Status: NOT RELEASED (coming soon)</p> <p>Partner Benefit: Saves Time, Reduces Costs, Improve Employee Experience</p>	

Expedited Agreement Addition Billing	<p>When an addition is added mid-billing cycle, ConnectWise PSA historically would wait until the next billing cycle (or require a mid cycle misc. invoice). Now, newly added additions will appear in the invoicing screen to be billed ASAP. This will help improve our partners' cash flow. Some partners have admitted that they've eaten the cost of these additions in the past, so this will relieve that burden!</p> <p>Release Status: ETA: June, 2023</p> <p>Partner Benefit: Reduce Costs, Save Time, Improve Employee Experience, Improve Customer Experience</p>	Roadmap
PSA Ticket Call To Enhancement	<p>PSA is adding TEL and CALLTO click to dial options so partners can tie into any phone integration that uses these protocols. Previously, this was limited to TAPI and Skype, so this will really extend this functionality to more partners, and they can easily contact their customers by phone from ConnectWise PSA.</p> <p>Release Status: ETA: June, 2023</p> <p>Partner Benefit: Reduce Costs, Save Time, Improve Employee Experience</p>	N/A
<p>ConnectWise CPQ (previously known as Sell)</p> <p>RELATED FOCUS GROUPS/NETWORKING SESSIONS/BREAKOUTS:</p> <p>'FOCUS GROUP: Guiding Sales in the Sales Process' JUNE 5TH, 3:00 – 3:45 PM (ROOM: CAPTIVA 1)</p>		
Location Based Wise-Pay Payments	<p>Partners can now set up WisePay at a location level while sending out a quote. Customers can credit payments in different accounts based on the location selected. When enabled, additional fields appear on each Location. To enable this setting, navigate to the new checkbox located in Settings > WisePay Payments > Use Location Based API Key. When disabled, and a partner uses Wise-Pay as a payment processor, CPQ (Sell) still refers to the Global API key when sending account information to WisePay through Order Porter. To learn more, refer to WisePay Payments documentation.</p> <p>Release Status: RELEASED</p> <p>Partner Benefit: Increase Profitability, Reduce Costs, Improve Employee and Customer Experience</p>	Release Notes Recorded Training (Time marker: 10:23)
Amazon Business UK Punchout Integration	<p>CPQ users can now integrate CPQ with Amazon UK to place punchout orders with Amazon UK. Amazon UK is defined as England, Wales, Scotland, Northern Ireland, Channel Islands, and Isle of Man, excluding BFPO and PO Boxes. Default values for Amazon UK are now included in the Amazon Punchout integration.</p>	Release Notes
Arrow Electronic Ordering	<p>Soon, partners will be able to electronically place their orders with Arrow in the same manner that CPQ users can with TD/Synnex, D&H, and Ingram Micro. This will further the story we can tell with ConnectWise + Arrow and is likely to be released within the June timeframe.</p> <p>Release Status: NOT RELEASED (coming soon)</p> <p>Partner Benefit: Reduce Costs, Save Time, Improve Employee Experience</p>	N/A

Wise-Sync + Wise-Pay

WisePay for PSA

RELATED FOCUS GROUPS/NETWORKING SESSIONS/BREAKOUTS:

FOCUS GROUP: Payment Security and Compliance in a Modern TSP' JUNE 6TH 2:00 – 2:45 (ROOM: CAPTIVA 2)

WisePay for PSA	<p>Payment functionality has been extended to all PSA users in supported regions (North America, AU/NZ) regardless of the accounting package they use. This functionality supports partners sending a payment link within the Invoice Emails. Their customers will be sent to a pay now screen where they can pay by credit card or bank debit. Partners can improve their cash flow with this tool by making it easy for customers to pay!</p> <p>Release Status: RELEASED</p> <p>Partner Benefit: Reduce Costs, Save Time, Improve Customer <i>and</i> Employee Experience</p> <p>Learn more: https://www.wise-pay.com/integrations</p>
Automatic Payments for WisePay for PSA	<p>In its current state, automatic payments are not available for WisePay for PSA, but it is on the way! With automatic payments, partners will be able to allow their customers to subscribe to automatic payments, making it a true set it and forget it payment system!</p> <p>Release Status: NOT RELEASED (eta June)</p> <p>Partner Benefit: Reduce Costs, Save Time, Improve Customer <i>and</i> Employee Experience</p>

Need more information about the difference between the Wise-Sync and Wise-Pay offering and the WisePay for PSA offering? Check this out (for internal use only): [WisePay + WiseSync vs. WisePay for PSA.pdf](#)

Asio Solutions for BMS

Project Management	<p>Our new Project Management inside Asio are being future-proofed by being built on modern architecture. We are reengineering existing concepts and approaches using partner feedback. Asio Projects already have a new look and introduce a new Work Plan structure. Over time, we will introduce more and more new features. So, your feedback is very valuable for us to build a powerful and easy-to-use solution.</p> <p>Release Status: NOT RELEASED</p> <p>Partner Benefit: Improves Employee Experience, Drive the Future of ConnectWise!</p> <p>**If the partner is interested in learning more, point them to the Virtual Community to engage with our Product Team. Projects will likely be available in Early Access in the July timeframe.</p> <p>*** The linked recording displays an outdated UI; however, the functionality and problem we're solving has not changed. Just know its even prettier – will be updated when available.</p>	Recorded Training
ConnectWise Catalog	<p>Our new Procurement management inside Asio is being future-proofed by being built on modern architecture. We are reengineering existing concepts and approaches using partner feedback. Over time, we will introduce more and more new features. So, your feedback is very valuable for us to build a powerful and easy-to-use solution.</p>	Recorded Product Catalog Training

	<p>Release Status: NOT RELEASED</p> <p>Partner Benefit: Improves Employee Experience, Drive the Future of ConnectWise!</p> <p>**If the partner is interested in learning more, point them to the Virtual Community to engage with our Product Team.</p>	
Ticket Sentiment	<p>Ticket sentiment is in early access, and is designed to give partners a real time look into how their customers are feeling about them. The machine learning that powers this function scans each email coming into a ticket and analyzes it to provide a customer sentiment score. This empowers partners to take appropriate action to ensure a great customer experience.</p> <p>Release Status: in early access</p> <p>Partner Benefit: Improved Customer Experience</p>	Recorded Training
Tax Service	<p>The new Asio tax service ensures the same tax calculation and reporting across the platform. This benefits partners by streamlining backed processes for setting up tax codes and calculations across multiple components and products.</p> <p>Release Status: NOT RELEASED</p> <p>Partner Benefit: Improved Employee Experience</p>	Recorded Training

BMS Focused Breakouts/Focus Groups/Networking Sessions

Session Name	Speaker (CW/ Third Party)	Products Featured	Date + Time
BREAKOUT: How ConnectWise Business Management Supports your Cybersecurity Business	CW: April Taylor + PARTNER: James Riley (JNR Networks)	PSA, CPQ	June 6 th 1:00 – 1:45 PM ROOM: TBD
FOCUS GROUP: Guiding sales in the sales process	April Taylor + Parker Trojanowski	CPQ	June 5 th 3:00 – 3:45 ROOM: Captiva 1
FOCUS GROUP: Payment Security and Compliance in a Modern TSP	Paul MacNeill + Justin Tuggle	Wise-Pay	June 6 th 2:00 – 2:45 ROOM: Captiva 2
FOCUS GROUP: Lets talk about time	April Taylor + Parker Trojanowski	PSA	June 7 th 10:30 – 11:15 ROOM: Captiva 2
FOCUS GROUP: The Integrated Experience	April Taylor + John Helms (SEC) + Jason Short (UMM)	Full CW	June 7 th 11:30 – 12:15 ROOM: Captiva 2

Don't know the answer to a question? Be comfortable with saying 'I'm not sure' and locating a colleague in the right line of business to help get you the answer! Walk the partner/prospect to the right colleague, and if no answer can be given, take a business card and follow up ASAP!

Don't forget: ConnectWise Manage is now [ConnectWise PSA](#) and ConnectWise Sell is now [ConnectWise CPQ](#).