



CONNECTWISE™

CONNECTWISE
EBOOK SERIES

The Unparalleled Integration: ConnectWise PSA + ConnectWise CPQ

SIMPLIFIED MANAGEMENT FOR
COMPLEX ENVIRONMENTS



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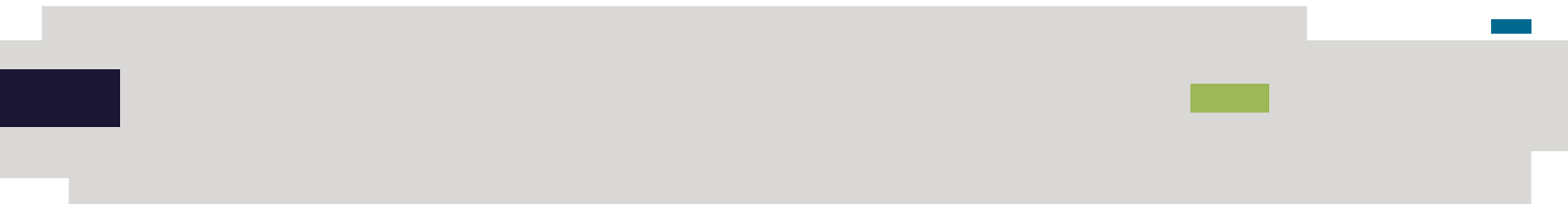
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Introduction

Many solutions providers use tools that aren't built to work together. This causes inefficiencies, wasted time, and dramatically increases the likelihood of mistakes.

At ConnectWise, we have a suite of products that feature the best integrations in the industry. How is that? It's because we built them to be that way. We know that meaningful integrations slash time. That time is money, and that money makes our partners happy.

That's what makes ConnectWise PSA® and ConnectWise CPQ® unique. The exclusive integration between the two solutions is designed to make your sales process efficient, automated, and fast. So, let's take a look at five reasons why the ConnectWise PSA and ConnectWise CPQ integration is truly unparalleled.

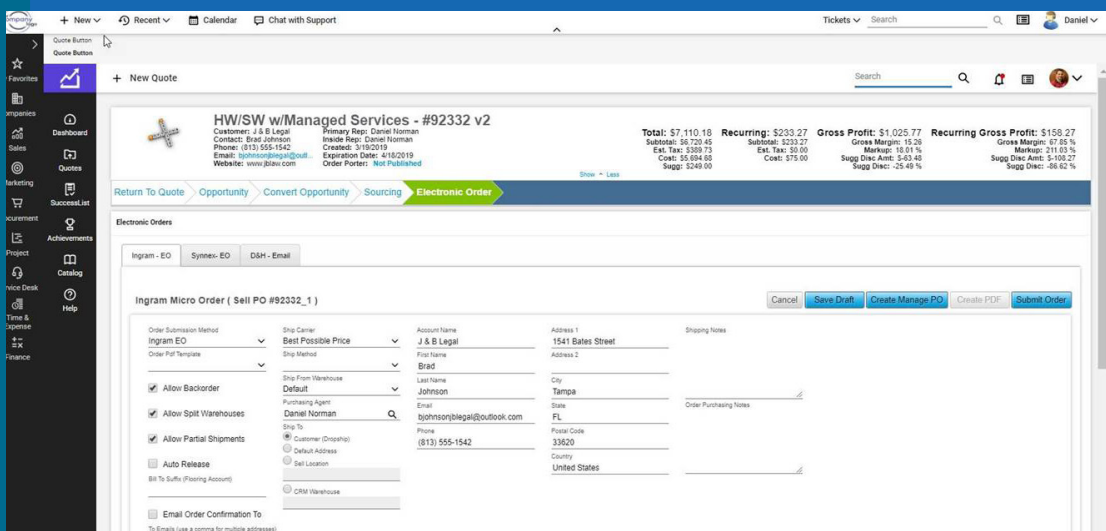
The screenshot displays the ConnectWise CRM interface for an opportunity titled "Server Install and Monitoring". The summary shows a revenue of \$15,118.17 and a margin of \$6,723.49. The opportunity is associated with the company "J & B Legal" and is managed by "Daniel Norman". A forecast table is visible on the right side of the screen.

| Quantity | Status | Product ID | Product Description | Product Class | Revenue | Cost | Margin | % |
|------------|--------|-------------|------------------------|---------------|-------------|------------|------------|------|
| 1.00 | Open | 850202001 | HPE ProLiant 1 | Non-Inventory | \$4,798.54 | \$4,037.86 | \$600.68 | 12% |
| 1.00 | Open | 222208001 | HPE 9W10 Sma | Non-Inventory | \$145.08 | \$124.16 | \$18.92 | 13% |
| 1.00 | Open | 662210001 | HPE 1TB 2.5" | Non-Inventory | \$414.96 | \$362.37 | \$56.30 | 13% |
| 1.00 | Open | 224210001 | Total Micro B3 | Non-Inventory | \$296.42 | \$237.63 | \$36.69 | 13% |
| 1.00 | Open | 224202001 | HP H240 12GB | Non-Inventory | \$214.48 | \$186.50 | \$27.98 | 13% |
| 1.00 | Open | ESB12N10000 | AVG File Serve | Non-Inventory | \$576.29 | \$518.66 | \$57.63 | 10% |
| 1.00 | Open | SH04209 | Shipping | Non-Inventory | \$87.48 | \$0.00 | \$87.48 | 100% |
| 1.00 | Open | Service.TEM | Labor | Service | \$223.00 | \$105.00 | \$120.00 | 53% |
| 1.00 | Open | NDVC | Hardware Man Agreement | | \$8,397.62 | \$2,700.00 | \$5,697.62 | 68% |
| Subtotal: | | | | | \$15,118.06 | \$8,394.68 | \$6,723.38 | 44% |
| Sales Tax: | | | | | \$389.73 | | | |
| Total: | | | | | \$15,507.79 | | | |

Automatically Place Orders with Top Distributors

Product sourcing and procurement has always been a time-consuming and manual process. With ConnectWise CPQ and ConnectWise PSA, automation and workflows take over. The integration between the two solutions is designed to eliminate manual processes and reduce the time it takes to build quotes and procure inventory. Time is money, and the faster you can get quotes out, the sooner you'll close deals.

When the quote is delivered, signed, and processed, the information is sent to the opportunity in ConnectWise PSA. Then, ConnectWise CPQ places the order to top distribution integration partners, like D&H, Ingram Micro, Tech Data, and Synnex. The purchase order is created in ConnectWise CPQ and is sent to Procurement in ConnectWise PSA.



Rev Up Recurring Revenue: Integration with ConnectWise PSA Opportunities

Whether you're selling products in one-off deals, providing managed services with recurring revenue, or a little of both, ConnectWise CPQ simplifies quote building and management for all your sales needs. When the quote is created, the information is sent to agreements in ConnectWise PSA. With the automatic transfer of information, your reps save hours

each quote not worrying about time-consuming manual entry into multiple solutions. Think about how many quotes your team is building a day and the time they spend doing data entry. That's a lot of time you can devote to focusing on what's really important—selling.

The screenshot displays the ConnectWise PSA interface for an Opportunity record. The main view shows details for 'J & B Legal' with a revenue of \$2,150.00 and a margin of \$2,150.00. A forecast table is visible on the right side of the screen.

| Quantity | Status | Product ID | Product Description | Product Class | Revenue | Cost | Margin | % |
|------------|--------|------------|---------------------|---------------|------------|--------|------------|------|
| 1.00 | Open | MS-2025732 | Microsoft Off. | NonInventory | \$500.00 | \$0.00 | \$500.00 | 100% |
| 1.00 | Open | 8224 | Delivery Phase | Bundle | \$600.00 | \$0.00 | \$600.00 | 100% |
| 4.00 | Open | ..._eb3.1 | System Admin. | Service | | | | |
| 1.00 | Open | 229 | Planning Phase | Bundle | \$450.00 | \$0.00 | \$450.00 | 100% |
| 1.00 | Open | ..._eb1.1 | Evaluate sced. | Service | | | | |
| 2.00 | Open | ..._eb1.1 | Define new bu. | Service | | | | |
| 1.00 | Open | Doc25 | Documentatio | Bundle | \$600.00 | \$0.00 | \$600.00 | 100% |
| 1.00 | Open | ..._eb3.2 | User Documet | Service | | | | |
| 3.00 | Open | ..._eb3.3 | Resource brea | Service | | | | |
| Subtotal: | | | | | \$2,150.00 | \$0.00 | \$2,150.00 | 100% |
| Sales Tax: | | | | | \$129.00 | | | |
| Total: | | | | | \$2,279.00 | | | |



Project Templates and Handoffs

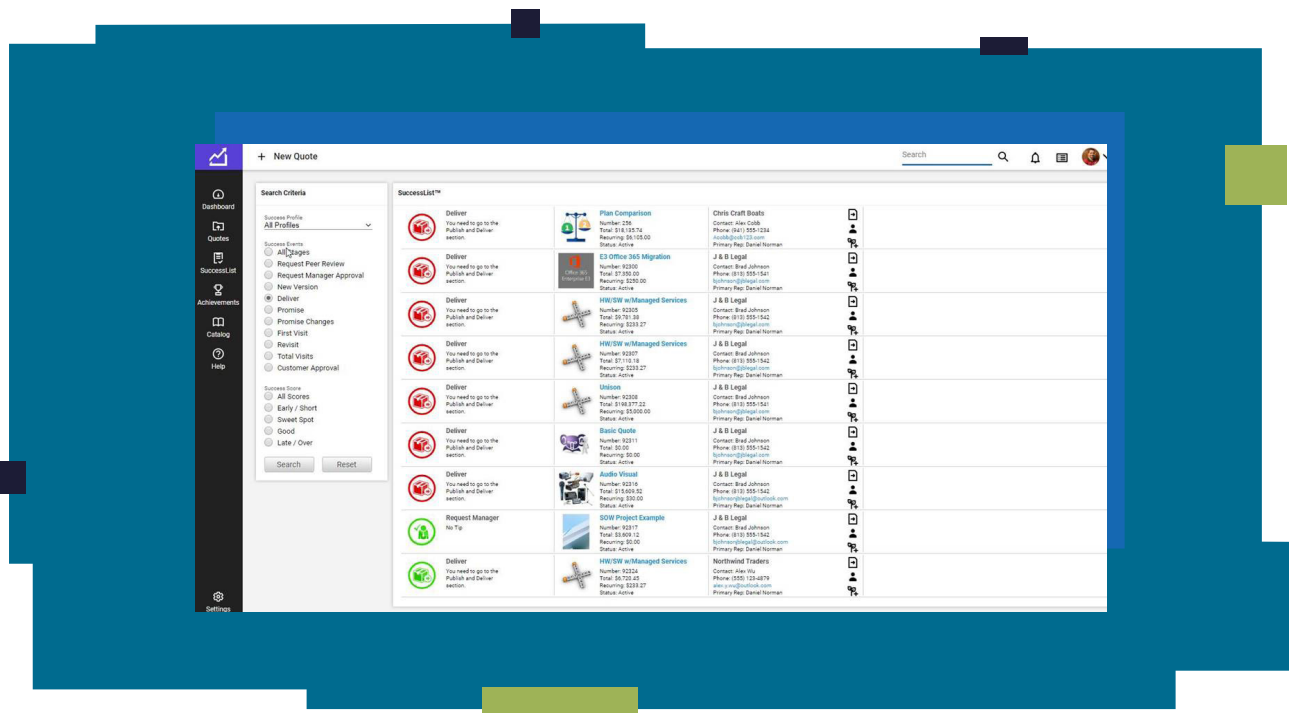
How many projects are your sales reps creating each day?
How long does it take to build them? Every minute your sales team spends doing manual tasks is a minute they aren't able to sell your services to new or existing clients. Project templates in ConnectWise CPQ let sales reps create projects with just a few clicks. Not only is it simple, but it also allows you to get

the right team members involved from the beginning stages of building out the project templates to ensure projects are quoted to fit the client's needs. After the quote is won, the project is passed into ConnectWise PSA. With this simple handoff, all the information is made available with no need for manual entry.

SuccessList: Leverage Quote Information for Automatic Activity Creation

A follow-up call or email at the perfect time could be the thing that turns a prospect into a client. Your sales team is busy and might need a little reminder from time to time. SuccessList in ConnectWise CPQ allows you to track specific milestones in

the quoting process. This then creates an activity within an opportunity in ConnectWise PSA for a follow up. A notification email will be sent to the sales rep who created the quote to help keep them on top of their deals.





Quote Demands: Never Miss a Renewal or Upgrade Opportunity Again

Improve the quoting process even further with quote demands. You can have quotes auto-generated right in ConnectWise PSA, either in configurations, tickets, or agreements. Let's say you have an agreement ending in 60 days. You can set a notification to be alerted of the approaching end date. This will trigger the quote demand to pull out all the data from the agreement, which then will modify the quote. You'll never miss a renewal opportunity again. Even better, techs can easily send information to sales that will need updating or enhancing.



Conclusion

As you can see, the integration between ConnectWise PSA and ConnectWise CPQ is pretty powerful. When used to its potential, your sales team can build and deliver quotes in just a few clicks, automate the purchasing process, track and follow up on potential deals, and so much more. The time your sales team saves with a streamlined sales process will finally let them become the sales team you built them to be. And it's all possible because of the seamless integration you'll only find with ConnectWise PSA and ConnectWise CPQ.



Check out the [ConnectWise PSA and ConnectWise CPQ integration demo](#) to see the power of this integration first hand.