ConnectWise Business Management Solutions: Advanced Package

Business Management Solutions purpose-built for IT Solution Providers

ConnectWise Business Management solutions are purpose-built for TSPs like yours, to ensure your organization is operating as efficiently as possible. The Advanced Package is designed to supply you with the ConnectWise functionality you need including ticketing, project management, billing, agreement management, reporting, quoting, and more. **ConnectWise is dedicated to helping you achieve your greatest vision of success and provides business management solution packages to meet you where you are, and help you get where you want to be.**

The Advanced Package gives your team the tools that make it possible to automate and standardize processes all the way from sales to reporting.

This package is powered by the following products and services:

- **ConnectWise PSA**: Manage and unify core aspects of your business such as ticketing, billing, and contract management into a single application to streamline business functions.

- **ConnectWise CPQ**: Shorten your sales cycle by easily generating, sending, and finalizing price quotes in a streamlined and organized system.

- **BrightGauge**: Generate internal business insights to help drive better business decisions or use them with customers to demonstrate business value.

- **Virtual Consulting**: Optimize your operations and keep processes running efficiently with ConnectWise experts.

- **SmileBack**: Receive instant customer feedback so you can save time and optimize your customer's experience.

- **ITBoost**: All-in-one IT documentation storage, password management, and customer feedback that can be shared with clients and colleagues.

- **Service Leadership**: With customized benchmarking, you can compare your business to others in your space and use the insights to continuously improve and grow.

**This package is Cloud Only. By leveraging the ConnectWise Cloud, you can enjoy a maintenance-free experience, ensuring you always have the most up to date functions and features

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Package Features

Want to learn more about what's included? Check out this broken-down feature list:

ConnectWise PSA *Professional Services Automation*

Service Ticket Management	Capture and track service issues from beginning to end, ensuring all time and communication is tracked along the way.
Project Management	Manage project resources, statuses, identify roadblocks, see timelines, and have full visibility throughout project lifecycles.
Sales Opportunity Management	Create and manage sales opportunities to drive them through the sales funnel.
Workflow Automation	Automate manual tasks throughout your entire business with Workflow Rules.
Billing and Agreement Management	Seamlessly bill and manage customer agreements that automate recurring billing and the coverage that is agreed upon. Easily bill for other billable time, expenses, and products. Use built-in automation to get invoices out the door on time, every time.
GL Integration	Easily transfer your invoices to your accounting package, ensuring the right kind of sales are hitting the right income accounts.
Billing Reconciliation	Use vendor files, spreadsheets, and ConnectWise Marketplace data to simplify billing reconciliation for your recurring billing, all from within ConnectWise PSA.
Cloud Billing for Office 365 and Cisco	Automate billing for subscriptions and usage, track license counts, prorate accounts that come online mid-billing cycle, and more.
User-Based Billing	Seamlessly sync customer Active Directory contacts with ConnectWise PSA contacts and agreements to automate user-based billing.
Change Approvals	Confidently manage changes requests for regulated processes, risk assessment, change scheduling, change approvals, and workflow automation.
ConnectWise Chat	Provide flexibility to your customers in how they can contact you with real time chat functions – hello, improved customer experience!
Procurement and Inventory Management	Create purchase orders, track orders, receive them into stock, track inventory counts, and ship them to your customers. Product demand is

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	created for products automatically when they are added to customer tickets or sales orders, and you have none in stock.
ConnectWise Campaign	Create professional emails and landing campaign pages using our easy-to-use HTML editor and couple it with lead scoring to grow your business efficiently.
Cloud Database Access	Query your database for reporting purposes using your own local reporting development and deployment solution like a local SSRS server, Microsoft Excel, Microsoft Access, or other solutions that support an Open Database Connectivity (ODBC) Read Only connection.
Sandbox	A sandbox environment provides you with an additional environment for testing purposes. The actions and operations you perform in the sandbox environment will not impact your production environment.

ConnectWise CPQ *Configure, Price, Quote*

Quote Templates	Preconfigured quote templates help standardize your sales process and make it even more efficient by putting common settings in place right away.
Product Sourcing	Build your quote with the right products every time. Distributor integrations make it easy to pull in the right products at the right costs.
Online Quote Approvals	Make your customer's experience even better with online quote approvals. Customers can review and sign off on quotes online. Your team will be updated so that work can begin!
Sales Track Automation	Let ConnectWise CPQ stay on top of your teams' quotes for you, ensuring you never miss important milestones.
Electronic Ordering	Place orders with Ingram Micro, Tech Data, D&H, and Synnex right through ConnectWise CPQ (and have the Purchase Order automatically created inside ConnectWise PSA).

BrightGauge *Reporting and Dashboarding*

KPI Dashboards and Reporting with the BrightGauge Enterprise + Plan	Reports and dashboards are taken to a new level, giving you more insight into your business. With BrightGauge Enterprise+, you can take advantage of up to five datasources, 150 snapshot gauges, and more.

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Virtual Consulting *Professional Services*

Virtual Consulting	Trust ConnectWise Experts to work with you and your team to train, implement, and answer your ConnectWise questions so you can continue to operationalize your organization. Examples of services included are product training, process consulting, and gauge, dashboard, and/or report creation or training. *The Advanced package includes 4 hours of Virtual Consulting per month

SmileBack *Customer Satisfaction Surveys | CSAT + NPS*

Customer Satisfaction Tracking (CSAT)	Gain a deep understanding of your customers feel about your service with CSAT tracking. Dashboards and client reports help you leverage feedback so that you can drive more meaningful, productive conversations.
Net Promoter Score (NPS) Tracking	Measure customer loyalty through NPS. With actionable insights, you can retain more customers and expand the reach of your business.

ITBoost *Automated IT Documentation Software*

Documentation	ITBoost brings all of your business-critical data and documentation needs into a single tool to become your go-to source for customer information and business intelligence.
Standard Operating Procedures (SOPs)	Increase productivity and boost efficiency with SOPs, designed to help streamline and standardize processes and save time.

Service Leadership *Performance Benchmarking*

SLIQ™	Assesses your current operational methods and provides you with a customized, detailed Action Plan including best practices assets such as tools, videos, and white papers to help improve your performance.
S-LI Quarterly Benchmark Reports	Confidentially compare your company's performance to the Best-in-Class in your business model each quarter. You'll get objective insights into how you're really doing, and where you have room for improvement

Please contact for more information -> ManagedServices@dandh.com

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Partner Benefits

Efficiency

Powerful workflow automation takes the burden of manual tasks off your team, giving them more time to focus on what matters. Additionally, with your teams' tools centralized, they will always have the information they need to do their jobs well.

Visibility

Better business decisions can be made when the right information is easily accessible. With ConnectWise dashboards and reporting, you'll have the data you need to make decisions that drive your success.

Profitability

With more efficiencies in place, and the data to make better decisions, you will have the tools to drive more profits within your business. Saved time, efficient operations, and detailed insights into your business all lead to a better bottom line.