Business Management Solutions: Standard

Business Management Solutions purpose-built for IT Solution Providers

ConnectWise Business Management solutions are purpose-built for MSPs like yours, to ensure your organization is operating as efficiently as possible. The Standard Package is designed to supply you with the ConnectWise functionality you need including ticketing, project management, billing, agreement management, reporting, 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 Standard Package gives your team the tools that make it possible to automate and standardize processes the throughout your business.

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.

- **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.

**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

Standard 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 Management	Seamlessly bill for customer agreements and 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.
Cloud Billing for Office 365	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 created for products automatically when they are added to customer tickets or sales orders, and you have none in stock.

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BrightGauge *Reporting and Dashboarding*

KPI Dashboards and Reporting	Get immediate access to data on services, projects, sales, finance and more. Take the guesswork out of your business strategy with the data to drive real business growth. The Standard Package includes 3 data sources, 3 admin users, and unlimited dashboards & reports.

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 standard package includes 2 hours of Virtual Consulting per month

SmileBack *Customer Satisfaction Surveys | CSAT*

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.

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.

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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.