

ConnectWise Sell Integration

Your Quoting Success, Powered by ConnectWise Sell & GreatAmerica

This integration gives you the ability to stay in the system you use every day for quoting and proposing, and include a monthly finance payment on your quotes. The integration uses realtime finance rates to calculate monthly payments to fit the terms and purchase options you choose. Those terms are customizable for each client's quotes and can include your Managed Services monthly payment to present a Hardware as a Service-like solution.

Note: Below the instructions you will find <u>pictures to correlate with the instructions</u>.

Setup Instructions (Dealer Key)

- Log into ConnectWise Sell and go to the Settings > Workflow Integrations > GreatAmerica Options.
- 3. Make sure Use GreatAmerica, Use REST Integration, Allow Standard Users to Access GreatAmerica, Use LIVE Mode, and Submit Credit Application to GreatAmerica are checked.
- 4. Click Check Login.

Setting up Defaults

- While in the same screen (Settings > Workflow Integrations > GreatAmerica Options) click the + Create New Default link.
- 2. Name the Set, choose the Rate Card, ensure Clear Previous GreatAmerica Terms When Applying These is checked, click Save.
 - a. **EFA** = Equipment Finance Agreement. You will <u>not</u> want this checked unless your rep tells you otherwise.
- 3. You must have at least one option checked in each column. We recommend not more than two options per quote as to not give the customer too many options.
 - a. Optional: Rename the Term Option Name fields.
 - b. **Optional**: Rename the **Group Name**.
- 4. Click Preview Options. Click Add Options. Click Save.
- 5. Go back to the **GreatAmerica Options**.
- 6. Under the GreatAmerica Default dropdown, select the previously made default.
- 7. Do not check the Show Two GA Buttons: Manual and Quick.

Note – You can create multiple defaults. Ex. 36 & 60 Month FMV, 36 & 60 1\$, etc.

Setup Instructions (Credit Application)

- 1. Scroll to the bottom of the GreatAmerica Options
- 2. All users with accounts within your Sell organization will be listed under Available Users.
- 3. Click the + next to any users you want to have the ability to submit credit applications.
- 4. Click **Save** on the top right.





Using the Integration - Quoting

- 1. When you have the quote the way you want it, click on the **Prepare Content** tab and then the **GreatAmerica** drop-down where you will click the **Quick Import GreatAmerica Using Defaults** option.
- 2. On this screen, you will see a **Pick Tabs for Leasing** section, a **GreatAmerica Default** section, the **Minimum for This Default**, **Principal using Selected Tabs**, **Maximum for This Default**.
 - a. Pick Tabs These are the tabs that you want financed. All recurring amounts that are not optional will layer on top of our single monthly payment and will not be included in the finance calculation.
 - b. GreatAmerica Default should be prefilled, but you are able to change that out if you've made different ones.
 - c. The other three are not editable but are important to let you know the min/max of your rate card as well as what the subtotal is we're calculating for the monthly payment.
- 3. You now have two options, Choose Rate Card or Preview with Defaults.
 - a. **Choose Rate Card** is for one offs. It will take you through similar options you had when creating the defaults.
 - b. Preview with Defaults will continue and is recommended.
- 4. Assuming you went with **B**., this next screen will display your selected options, as well as the payment.
 - a. You're able to uncheck options on the left that you do not want to include in financing if you so choose.
- 5. Click Save.
- 6. Click the **Publish and Deliver** tab.
- 7. Select your **Available Attachments** by hitting the green **+** next to the document name. Click **Publish**.
 - a. If you're using **Order Porter**, ensure the correct template is selected.

Using the Integration – Submitting Credit Applications

- When you are ready to submit a credit application to GreatAmerica, click on the Prepare Content tab and then the GreatAmerica drop-down where you will click the Submit Credit Application option.
 - a. Click **Yes** on the approval prompt.
- 2. If you need to change the application (either to choose a different term, dollar amount, etc.) this can be done in the **WIN** tab.
- 3. To see the Credit Application Status, you'll need to add the field under **Quote Setup**.
 - a. Go to Quote Setup > Click the Pencil Icon in the top right corner of a POD > Once the screens turn yellow, click the Pencil Icon again > Find Great America Credit Application Status and check it > Click OK.





Misc. Tips, Tricks, and Error Solving

Koala Error Fix

Broken terms cause this error. They may be in either the individual quote or the template itself. If you run into this issue on every quote, please follow the second instruction. Otherwise, the top one should be enough to take care of it!

In Quote:

Quote Setup > More > Edit Terms > Click the terms you want to delete on the left > Click the Trash can icon (I would delete all of them and start over from the importing of GreatAmerica)

In Quote Template: Template Setup > More > Edit Terms > Click the terms you want to delete on the left > Click the Trash can icon

How to add a Total Purchase Option to your quote

In Quote:

Quote Setup > More > Edit Terms > + Name it Total Purchase (or whatever you want) > Save

In Quote Template:

Template Setup > More > Edit Terms > + Name it Total Purchase (or whatever you want) > Save

Note: The total purchase options needs to be under the same group as the finance options.

How to upload the XRPT and OrderPorter templates if you have us edit them To upload the XRPT: Settings > Quote Preparation > Manage Additional Content > Add on the top right.

To upload the AE & EP:

Settings > **Document Branding** > **Order Porter Templates** > Choose the Finance one we previously created. Paste the text from each file in their respective containers.

To upload the Metadata:

Settings > Document Branding > Order Porter Setup > Upload Metadata > Click Submit. You technically only need to upload the metadata for Order Porter Templates, however, if you haven't done this in a while – it can't hurt to do all.





One Time Setup Instructions - Pictures

•	Settings					Car 7	Save
shboard	Quick Search	GreatAmerica Setup					
() Juotes	Expand All Collapse All	Use GreatAmerica	×ey.				
E DessList	Organization Setup	Use REST Integration Ch	eck Login				
8	Document Branding	Allow Standard Users to 6 S	submit Credit Application to IreatAmerica				
vements	CRM Integration	Use LIVE Mode					
⑦ ₩₽₽	 Community Resources 						
	Quote Preparation	GreatAmerica Defaults					
	Approvals	GreatAmerica Default <u>3/5 Year Rental</u>	how Two GA Buttons: Aanual and Quick				
	Content Integrations	Name of This Default	Rate Card	Minimum Principal	Maximum Principal	Pre-Selected Tabs	
	2 Workflow Integrations - Email Server	3/S Year Rental + Create New Default	Data Lease Rates	1000	250000		
	- Avatax Options	Terms and Conditions * The information provided is a proposal and	is subject to credit approval. The proposal provides a	an approximate monthly payment for hardwar	e, software and services based upon the co	ntract type and term in months. Taxes, fees a	nd
	 Sell App Server Database Tools 	insurance are not included. Any change in the	amount financed will change this information. Prici	ng valid 30 days from the day quote is initiate	d.		
	Electronic Orders						
	P Electronic orders						
	 Sell Intel 						
	Sell Intel Reporting						
	Sell Intel Reporting Sales Coaching						
	Sell Intel Reporting Sales Coaching	Credit Application Users					
	Sell Intel Reporting Sales Coaching	Credit Application Users		Allowed Users			
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- 1. Go to Settings
- 2. Expand Workflow Integrations
- 3. Click GreatAmerica Options
- 4. Enter your Dealer Key
- 5. Make sure Use GreatAmerica, Use REST Integration, Allow Standard Users to Access GreatAmerica, and Use LIVE mode are checked.
- 6. Check Submit Credit Application to GreatAmerica.
- 7. Click **Save** on the top right





Setting up Defaults - Pictures

Name of This Default	GreatAmerica Default	~	Show Two GA Buttons: Manual and Quick
0 0 8	Name of This Default		
ð B	Ø		
B	Ø		
	Ø		

×			Ca 4 Save
dit Default: New Default			
Name of This Set HaaR - 36 Months	Clear Previous GreatAmeric	Choose Rate Card	•
Tab Names (Optional)		Principal 10000	
		Refresh Rate Card	List

- 1. Click Create New Default
- 2. Name the **Set**
- 3. Choose the Rate Card from the drop down
- 4. Click Save





Term Selection	Points Selection	Types Selection	Advance Payment Selectio
12	0 pts	S1 Rental	✓ 0
24	🔲 1 pt	FMV Rental	1
✓ 36	2 pts		2
39	3 pts		
48	4 pts		
60	5 pts		
63	6 pts		
	7 pts		
	8 pts		
Group Name for New Options			
GreatAmerica	Preview Options		

5. Select as many options to add to the default, though we recommend not more than two options per quote as to not give the customer too many options. Pick a **Group Name for New Options** and click **Preview Options**

Add	erm Option Name	Term	Lease Type	Number of Points	Advance Payments	Group Name
	laaR - 36 Months	36 Months	\$1 Rental	0	Number Down: 0	GreatAmerica

- 6. **Optional**: Rename the **Term Option Name** field(s). We recommend naming them after your program name.
- 7. Click Add Options.
- 8. Click **Save** in the top right corner.





Using the Integration – Quoting - Pictures

Customer Setup Quote Se 1 Prepar	e Content Review Publish and	d D	eliver Win!
	GREATAMERICA - IMPORT -		MORE 🗸
Administrative 1) Cover Letter V 2) Statement of Work	Quick Import GreatAmerica Using Defaults	re	5) Software
A Item Notes Html			

1. Click on the **Prepare Content** tab and then the **GreatAmerica** drop-down where you will find the **Quick Import GreatAmerica** option.

1	Hardware (subtotal: \$20,604.52)	GreatAmerica Default 3, 4 & 5 Year - HaaR 🛛 🗸	
1	Intel Hardware (subtotal: \$0.00)	Minimum for This Default	
1	Software (subtotal: \$8,800.00)	Principal using Selected Tabs	
1	Services (subtotal: \$5,600.00)	35304.52000000004	
1	Managed Services (subtotal: \$0.00)	Maximum for This Default 250000	
1	Shipping (subtotal: \$300.00)		

Click Preview with Defaults

							Cancel
d Term	s to Quote 🔞						
Clea Grea	r All Existing atAmerica Terms						
	Term Option Name 💠	Payment Description \$	Points \$	Lease Type	• Term +	Advance Payments 💠	Group Name
1	Term Option Name	Payment Description \$	Points ¢	Lease Type FMV Rental Contract Type	Term \$ 36 Months	Advance Payments Number Down: 0	Group Name GreatAmerica
2 1	Term Option Name A S Year HaaR 4 Year HaaR	Payment Description \$3,539.01 Payment \$3,344.48 Payment	Points ¢ 0 0	Lease Type FMV Rental Contract Type FMV Rental Contract Type	 Term + 36 Months 48 Months 	Advance Payments ÷ Number Down: 0 Number Down: 0	Group Name GreatAmerica GreatAmerica

Click Save





Using the Integration – Credit Application Submission - Pictures

Customer Setup Quote Se 1 Prepar	e Content Review Publish and	d De	eliver Win!
	GREATAMERICA - IMPORT -		More 🗸
Administrative 1) Cover Letter > 2) Statement of Work	Quick Import GreatAmerica Using Defaults	re	5) Software
A Item Notes Html			

- 1. Click on the **Prepare Content** tab and then the **GreatAmerica** drop-down where you will find the **Submit Credit Application** option.
- 2. Click Yes on the prompt.







Customize the Quote Form and Order Porter - Pictures Below are screenshots of ours.

Luoracion Nacion				Quote #: 000329v1
repared For		Pre	epared By	
ent 2 Us Now ick Gadaddy 234 Main Street mmetsburg, IA 50536		Director, Strate Direct: 3 LBerry@gre	Lori Berry egic Technology 19-261-4150 atamerica.com	
1. Your Proposal	PDF			Your Active Quotes:
Download and review your PDF document here:	Adobe			000329 Quotation Nation
				000329 Quotation Nation
2. Review and Select Your Optior	15		-	000329 Quotation Nation 000328 Managed Service Program
2. Review and Select Your Optior Your Available Options	15			000329 Quotation Nation 000328 Managed Service Program 000326 HaaR
2. Review and Select Your Option Your Available Options	15			000329 Quotation Nation 000328 Managed Service Program 000326 HaaR
2. Review and Select Your Option Your Available Options Hardware Software	15			000329 Quotation Nation 000328 Managed Service Program 000326 HaaR
2. Review and Select Your Option orur Available Options > Hardware > Software > Services	15			000329 Quotation Nation 000328 Managed Service Program 000326 HaaR
2. Review and Select Your Option Your Available Options Hardware Software Software Services GreatAmerica Financing	15 Periods	Payments	Amount	000329 Quotation Nation 000328 Managed Service Program 000326 HaaR
2. Review and Select Your Option Your Available Options Hardware Software Software Services Great/merica Financing 35 Months, \$1 Lesse, 0 Advance Payments	IS Periods Monthiy	Payments 36	Amount 53,646.08	000329 Quotation Nation 000328 Managed Service Program 000326 HaaR
2. Review and Select Your Option Your Available Options Hardware Software Software Services GreatAmerica Financing 35 Months, SL Lesse, 0 Advance Payments 48 Months, SL Lesse, 0 Advance Payments	15 Periods Monthly Monthly	Payments 36 48	Amount 53,646.08 53,400.34	000329 Quotation Nation 000328 Managed Service Program 000326 HaaR

*	Hardware						
	Qty	Description					
	3	HP ProLiant DL380 G7 2U Rack Server - 2 GB Standard - DVD-Writer - Serial Attach Ethernet	2 x Intel Xeon E5649 2.53 hed SCSI (SAS) RAID Supp	GHz - 2 Processor Su orted Controller - Gi	ipport - 8 igabit		
	1	HP Xeon DP X5690 3.46 GHz Processor Upgrade - Socket B LGA-1366 - Hexa-core (6 Core) - 1 MB Cache - 6.40 GT/s QPI					
	5	HP 32G8 DDR3 SDRAM Memory Module - 32 GB (1 x 32 GB) - DDR3 SDRAM - 1333 MHz DDR3 1333/PC3-10600 - ResisteredDIMM					
	1 HP CN1000Q 10Gigabit Ethernet Card - Low-profile						
	1	HP StorageWorks D2D4112 SAN Array - Serial Attached SCSI (SAS) Controller - Ri 2U Rack-mountable	12 x HDD Installed - 12 Ti AID Supported - 12 x Tota	8 Installed HDD Cap I Bays - ISCSI, Fibre	scity - Channel -		
	1	HP Care Pack - 4 Year - 24 x 7 x 6 Hour - Service	On-site - Maintenance - F	arts & Labor - Physi	cal		
	Subtotal						
×	Software						
•	Services						
Grea	tAmerica Fina	incing	Periods	Payments	Amount		
۲	36 Months,	\$1 Lease, 0 Advance Payments	Monthly	36	\$3,646.08		







Prepared Fo Rent 2 Us No Jack Gadado 1234 Main S Emmetsburg nadberna@a	r: by freet , IA 50536 countrenvision com	Prepared By Loni Berry Dreidor, Strategic Technology Phone: 310-32714/50 Email: Liberry@greatmenica.com
Quote ID: 0 Date: Expires:	100329 Tuesday, November 25, 2014 Tuesday, November 18, 2014	
Qty Des 3 HP Ser	rcription ProLiant DL380 G7 2U Rack Serv ial Attached SCSI (SAS) RAID Sup	er - 2 x Intel Xeon E5649 2.53GHz - 2 Processor Support - 8 GB Standard - DVD-Writer - ported Costroler - Gigalxt Ethernet
1 HP	Xeon DP X5690 3.46 GHz Process	or Uggrade - Socket B LGA-1366 - Hena-core (6 Core) - 12 MB Cache - 6 40 GT/n CPI
5 HP Rej	32GB DDR3 SDRAM Memory Mo gisteredDIMM	aule - 32 GB (1 x 32 GB) - DDR3 SDRAM - 1333 MH2 DDR3-1333/PC3-10600 -
1 HP	CN1000Q 10Gigabit Ethernet Card	- Low-profile
		Ť

Qty					
	Description				
1	HP StorageWorks D2D4112 SAN Array - 12 x HDD Ir - RAID Supported - 12 x Total Bays - iSCSI, Fibre Ch	istalled - 12 TB Installed HDD annel - 2U Rack-mountable	Capacity - Serial At	tached SCSI (SA	S) Controller
1	HP Care Pack - 4 Year - 24 x 7 x 6 Hour - On-site - Maintenance - Parts & Labor - Physical Service				
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-	111111				
Soft	tware				
Qty	Description				
20	Microsoft Office				
-					
Serv	vices				
Serv	Vices				
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