ConnectWise Manage Submit Credit App Integration

This integration gives you the ability to stay in the system you use every day and pass information through a ConnectWise Opportunity to GreatAmerica to start the credit application process. Streamline your sales process and eliminate double entry by taking advantage of this integration.

Note: *Below the instructions, you will find pictures to correlate with the instructions*.

Obtaining your API Keys

All new integration users must set up an API member to generate the necessary API Keys. However, you only need to have one GreatAmerica API member to use any of our ConnectWise integrations. Before you create a new one, look to see if you already have a GreatAmerica API member set up. If you do, skip to the next steps section, and contact your GreatAmerica Strategic Technology team. integrations@greatamerica.com

Note: *If you have already setup permissions for another integration, you will need to amend the security permissions from this document into your previously created*

To set up a new API Member, you must first navigate to the System Module and open the Members page. After accessing the Members page, click on the API Members tab. The purpose of filling out this information is to receive the public and private keys that are generated because of creating this member.

1. Open **ConnectWise Manage** > Expand **System** > Click **Security Roles** > Click the **+**
2. Name the role GreatAmerica. Click **Save and Back**.
3. Click into the new security role. Assign permissions based on the permissions starting on page 10 down below.
4. Expand **System** > Click **Members** > Click on the **API Members** tab.
5. Click the **+** next to **Search** & **Clear** to create a new **Member ID**. Once filled out, click **Save**.
    a. **Member ID** = GreatAmerica
    b. **Member Name** = GreatAmerica (Does not really matter)
    c. **Role ID** = GreatAmerica (This is the recently created security role)
    d. **Level** = Corporate
    e. **NOTE**: There are more required fields, these are the only ones that we need filled out as described.
6. On the newly created GreatAmerica **Member ID**, click on the **API Keys** tab and hit the **+** to create a new **Public API Key**.
7. Type GreatAmerica into the **Description** field and click **Save**. This will generate your **Public** and **Private Keys**. Do not leave this page. You will need to copy and paste the keys into the **GreatAmerica Integrator Setup Page** in the next section.

GreatAmerica Integrator Setup

1. Go to the **GreatAmerica Integrator Setup Page** here: https://www.info-zone.com/_layouts/InfoZone.Open/cwadmin.aspx
2. Fill out your company information to connect the integration.
    a. Check the **Cloud Based** box if you are using the cloud version of ConnectWise. The **Site URL** for your cloud instance is in the browser's address bar. If you are using the on-premises version of ConnectWise, the URL can be found in the ConnectWise login screen.
    b. Enter your ConnectWise **Company** Name and copy and paste your **Public** and **Private Keys** from ConnectWise.
    c. Click on **Test Connection**
    d. Once you have confirmed the connection is successful, provide the names and contact information for two of your team members that we can work with regarding this integration.
3. Check the box under **Credit Application** and then click **Submit Settings**.

Congratulations!

You are done with the setup! GreatAmerica will contact you with the next steps, but feel free to peek ahead for best practices. Just know that you will be unable to proceed until GreatAmerica contacts you.

Setting Defaults for the Submit Credit Application Integration

This step is so your reps only must remember to change the status and not have to select terms and the purchase option each time. For example, if you mostly do a 36-month term and a purchase option of $1 or FMV those would be ideal to set as the defaults.
You can also customize the drop-down information. For example, if you never want your reps to choose 12 months for a term simply take that option out of the list.

1. With **ConnectWise Manage** open, Expand **System** > Click **Setup Tables** > **Category**: General > **Table**: Custom Fields > Hit **Enter**/**Search** and click on the underlined **Custom Fields**.
2. **Screen**: My Opportunities > Click Search > Click on **Opportunity #** under the **Pod Description**.
3. Click on **Term** > Mark the one you use most often as **Default** and click **Save**.
4. Repeat these steps for **Lease Type**. If you have any questions do not hesitate to reach out to your team at GreatAmerica.

Using the Integration – How to Submit a Credit App

When you are in an opportunity look to see if the Term and Lease Type dropdowns have something selected. If they do not, you may want to have your ConnectWise admin set defaults, so you do not need to select those fields each time you submit for credit approval. If the defaults are correct for this opportunity, you simply change the **Status** of the opportunity to **Submit for Credit Approval** and click on **Save**.

When we receive that application, you will have a status in the **CreditStatus** field and an **ApplicationID** will be passed to that field as well.

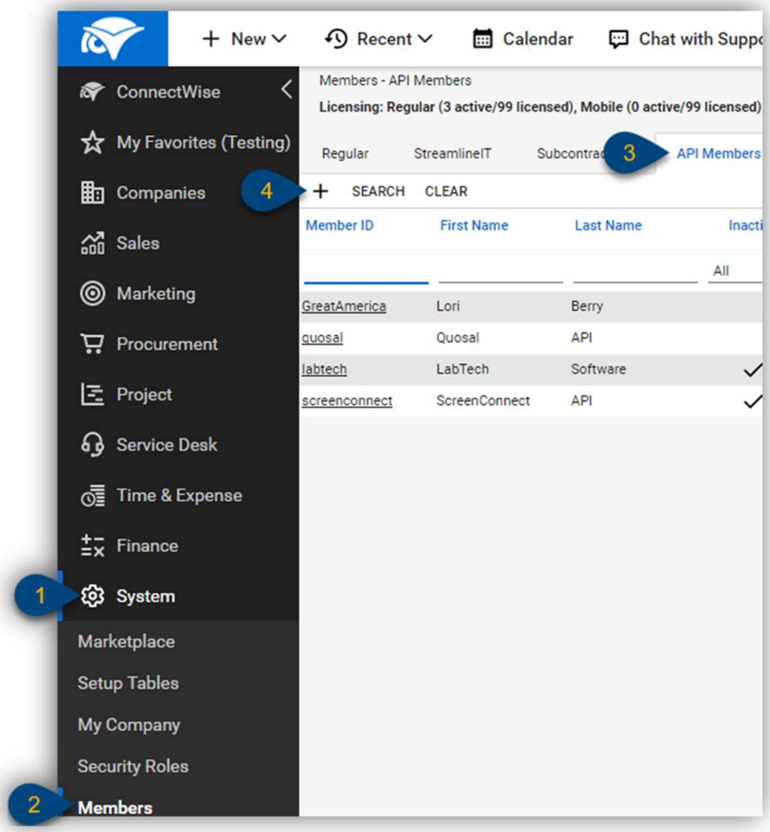
Once an opportunity is stamped with an application number any changes will be sent to us in a daily summary and our credit team will make the changes necessary in our system. We realize quotes change all the time and are happy to adjust the deal size on our side whenever that happens. We just want you to be aware that it is not real time after the first submission, so please call in if there is something that cannot wait.

GreatAmerica's credit team will also send an approval letter to the user who is logged into ConnectWise when that status is changed if we have their email address. If more information is needed, we will usually call that individual.
Four statuses are available if you want to build workflows around any of them:

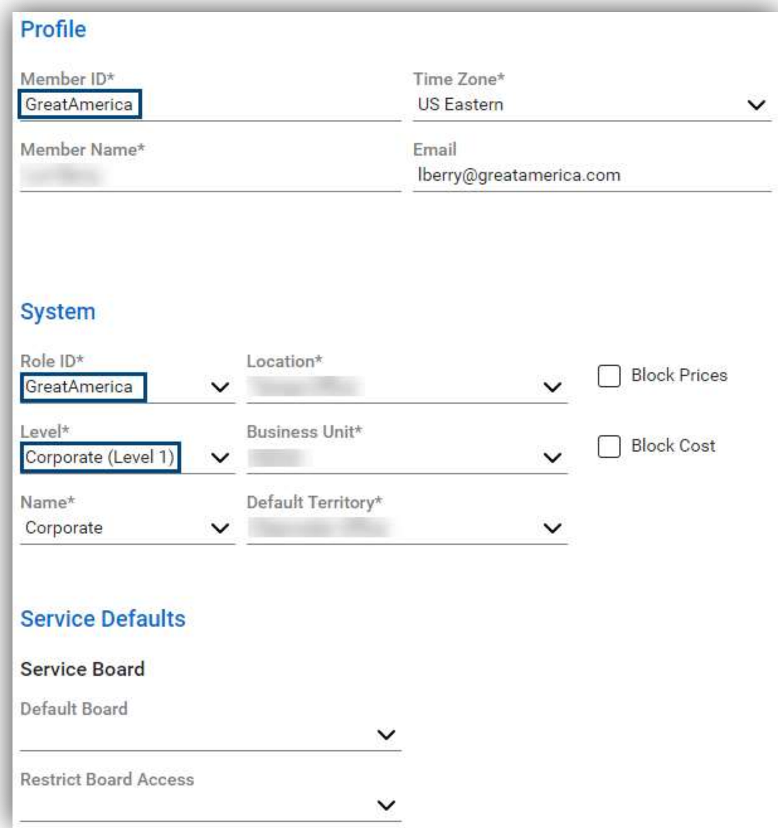
1. Status: Pending (Application ID: XXXXXXX)
2. Status: Approved (Application ID: XXXXXXX)
3. Status: Declined (Application ID: XXXXXXX)
4. Status: Booked (Application ID: XXXXXXX)

When the opportunity is in the closed status on your end, we can no longer update our status field, so depending on your workflow you may never see some of the statuses. When booked we will stamp that application number under the Account/Company Tab.

Obtaining your API Keys - Pictures

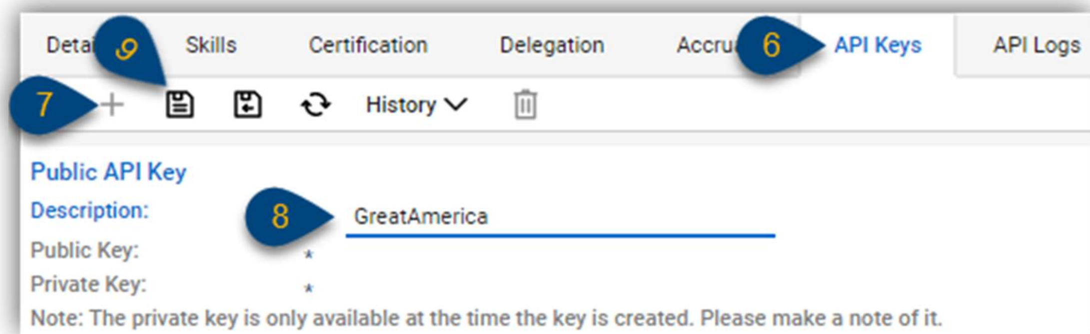


1. With **ConnectWise Manage** open, click **System**
2. Click **Members**
3. Click the **API Members** tab
4. Click the **+** to create a new API Member



- **Member ID** = GreatAmerica
- **License Class** = API
- **First Name** = API
- **Last Name** = Integration
- **Role ID** = Admin
- **Level** = Corporate

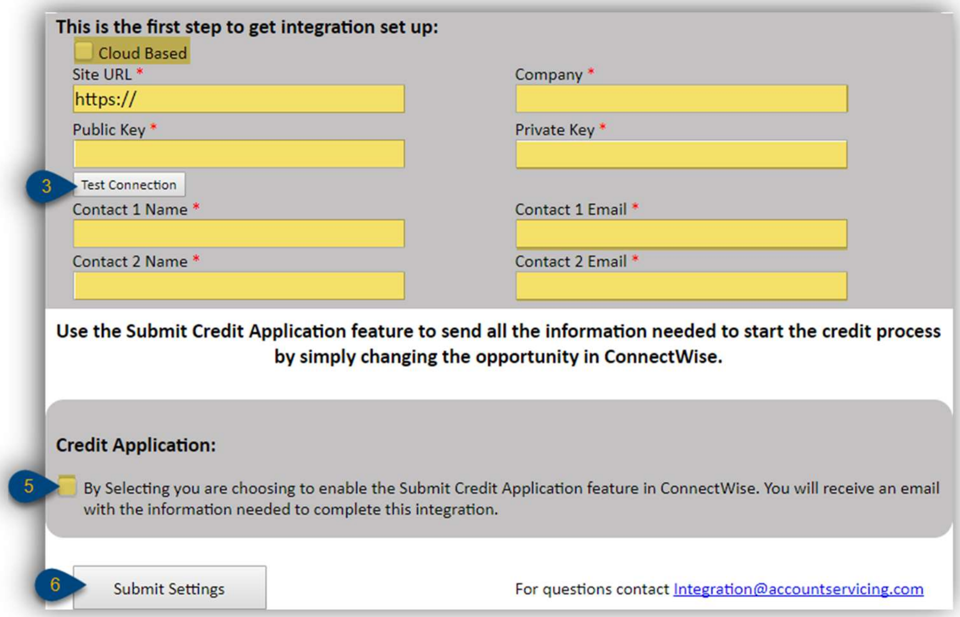
5. Click **Save**



6. Click the **API Keys** tab
7. Click the **+** to create a new API Key
8. Type GreatAmerica into the **Description** field
9. Click **Save**
10. **Stay on this screen while you follow the next page**

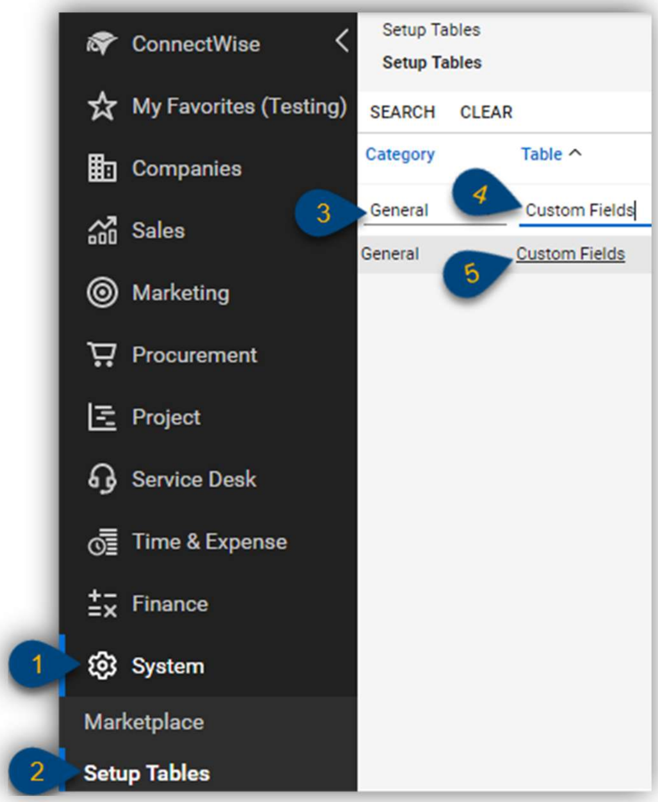
GreatAmerica Integrator Setup - Pictures

1. Go to the GreatAmerica Integrator Setup Page here: https://www.info-zone.com/_layouts/InfoZone.Open/cwadmin.aspx

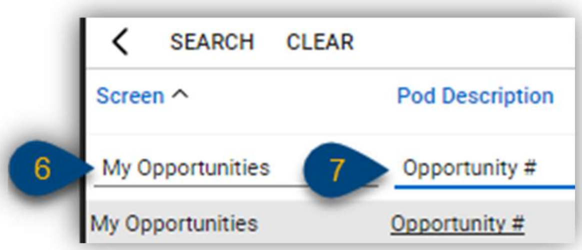


2. Fill out your company information to connect the integration
3. Click **Test Connection**
4. Fill out **Contact Names**
5. Check the box under **Credit Application**
6. Click **Submit Settings**

Setting Defaults for the Submit Credit Application Integration - Pictures

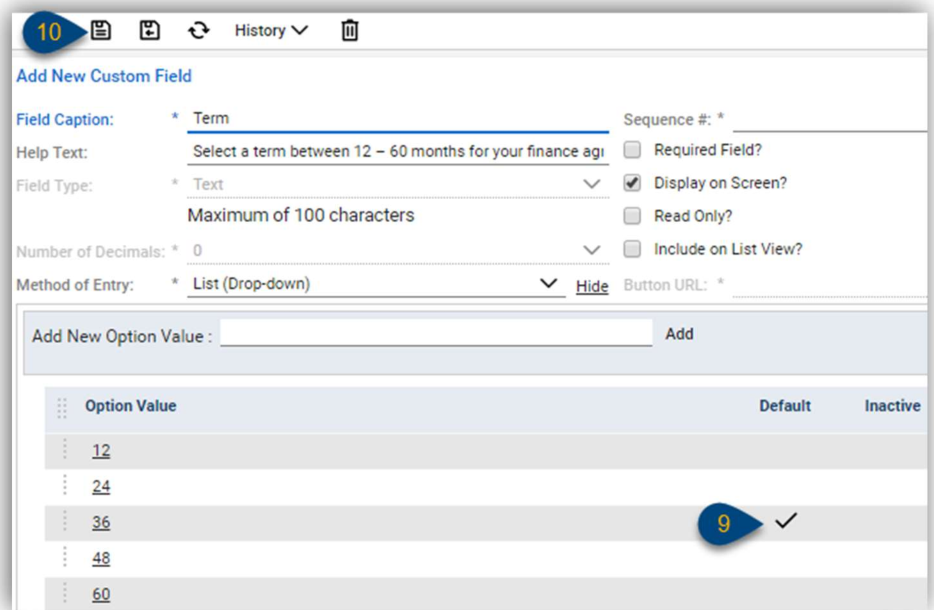


1. Expand **System**
2. Click **Setup Tables**
3. Type **General** under the **Category** column
4. Type **Custom Fields** under the **Table** column
5. Click **Custom Fields**



6. Select **My Opportunities** from the **Screen** column
7. Type **Opportunity #** in the **Pod Description** field and click on the underlined result

8. Click on **Term** in the **Custom Fields** section

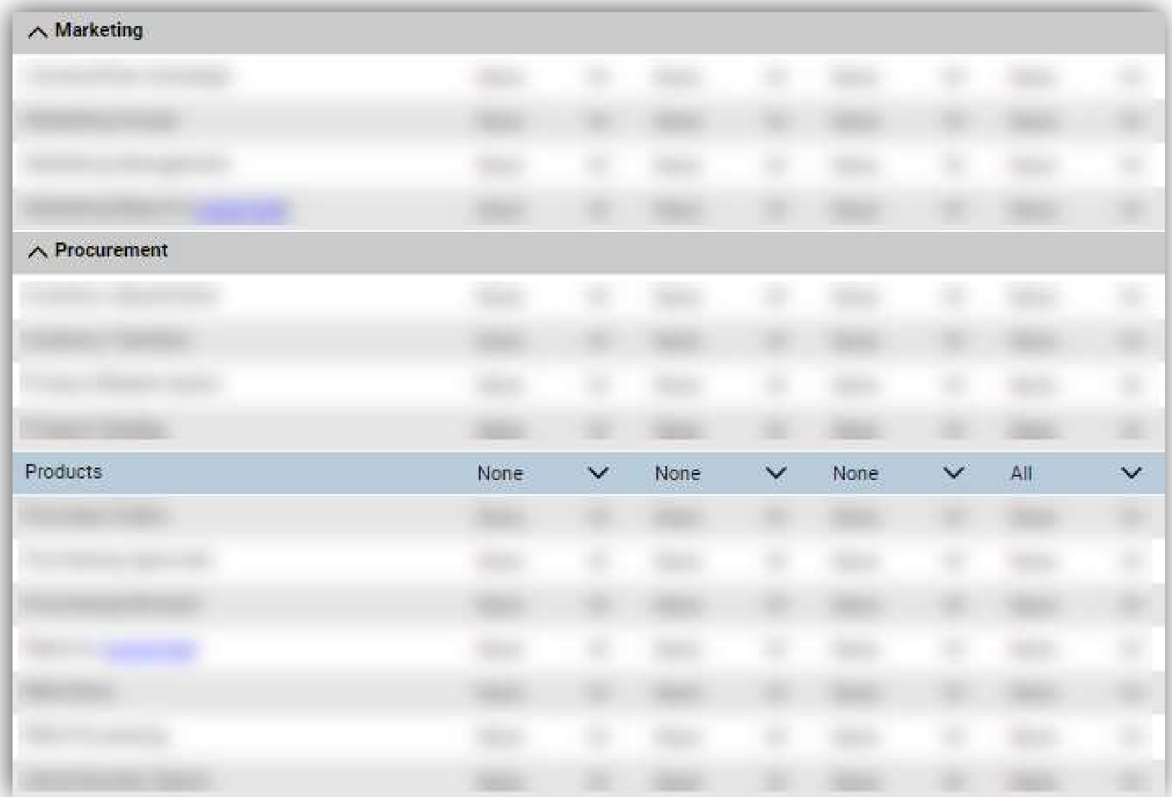


9. Mark your most used **Term** as the **Default**
10. Click **Save**
11. Repeat these steps for **Lease Type** and **Rate Card**

Security Modules for Role – GreatAmerica

^ Companies				
Company Maintenance	None	None	None	All
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Contacts	None	None	None	All
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Manage Attachments	None	None	None	All
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

^ Finance				
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Agreement Invoicing	None	None	None	All
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Company Finance	None	None	None	All
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Invoicing	None	None	None	All
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]


Marketing
Procurement
Products None None None All


Project

Sales				
Closed Opportunity	None	All	None	All
Opportunity	None	All	None	All
Opportunity Finance	None	None	None	All
[illegible]				
[illegible]				
[illegible]				
[illegible]				
[illegible]				

Service Desk				
[illegible]				
[illegible]				
[illegible]				
Close Service Tickets	None	None	None	All
[illegible]				
[illegible]				
[illegible]				
[illegible]				
[illegible]				
[illegible]				
[illegible]				
[illegible]				
[illegible]				
[illegible]				
[illegible]				
[illegible]				
Service Ticket - Dependencies	All	All	None	All
Service Tickets	My	All	None	All
Service Tickets - Finance	All	All	None	All
[illegible]				
[illegible]				

System

API Reports	None	None	None	All
System Reports (customize)	None	None	None	All
Table Setup (customize)	All	All	All	All

Time & Expense