

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 real-time 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 pictures to correlate with the instructions.

Setup Instructions (Dealer Key)

1. Log into ConnectWise Sell and go to the **Settings > Workflow Integrations > GreatAmerica Options**.
2. Enter your Dealer Key that you received from your GreatAmerica representative in the format shown. (#####-####-####-####-#####)
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

1. 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 not 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

1. 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:

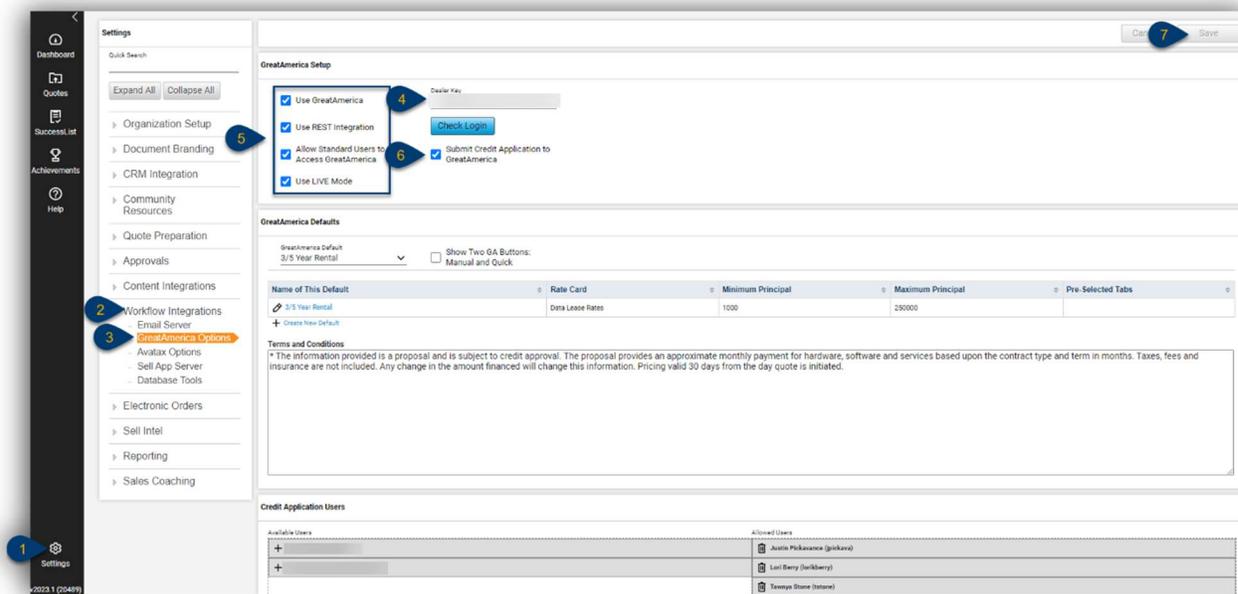
Settings > Document Branding > Order Porter Templates > Choose the Finance one we previously created. Paste the text from each file in their respective containers.

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



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

GreatAmerica Defaults

GreatAmerica Default Show Two GA Buttons: Manual and Quick

Name of This Default

-
-
-

+ Create New Default

Edit Default: New Default

Name of This Set: HaaR - 36 Months

Choose Rate Card: HaaR Rate Card

Principal: 10000

Refresh Rate Card List

Save

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

Add More Options Using Rate Card: HaaR Rate Card

Term Selection	Points Selection	Types Selection	Advance Payment Selection
<input type="checkbox"/> 12	<input checked="" type="checkbox"/> 0 pts	<input checked="" type="checkbox"/> \$1 Rental	<input checked="" type="checkbox"/> 0
<input type="checkbox"/> 24	<input type="checkbox"/> 1 pt	<input type="checkbox"/> FMV Rental	<input type="checkbox"/> 1
<input checked="" type="checkbox"/> 36	<input type="checkbox"/> 2 pts		<input type="checkbox"/> 2
<input type="checkbox"/> 39	<input type="checkbox"/> 3 pts		
<input type="checkbox"/> 48	<input type="checkbox"/> 4 pts		
<input type="checkbox"/> 60	<input type="checkbox"/> 5 pts		
<input type="checkbox"/> 63	<input type="checkbox"/> 6 pts		
	<input type="checkbox"/> 7 pts		
	<input type="checkbox"/> 8 pts		

Group Name for New Options
GreatAmerica

Preview Options

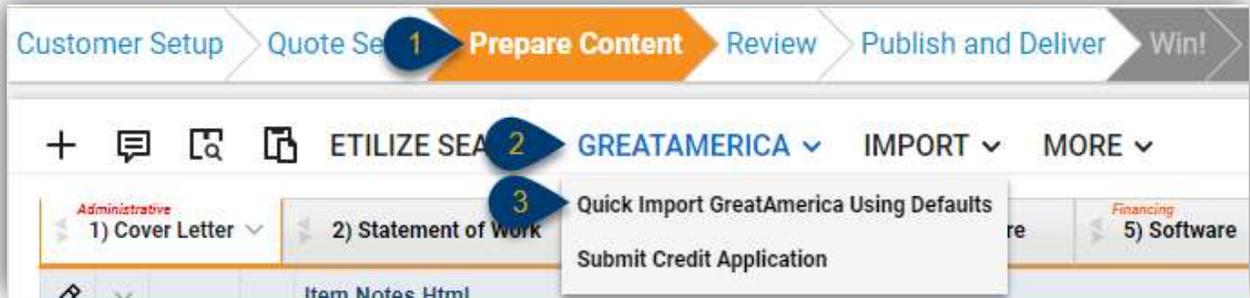
- Select as many options to add to the default, though we recommend not more than two options per quote as to not give the customer too many options. Pick a **Group Name for New Options** and click **Preview Options**

Check to Add	Term Option Name	Term	Lease Type	Number of Points	Advance Payments	Group Name
<input checked="" type="checkbox"/>	HaaR - 36 Months	36 Months	\$1 Rental	0	Number Down: 0	GreatAmerica

Add Options

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

Using the Integration – Quoting - Pictures



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

Pick Tabs for Leasing

<input checked="" type="checkbox"/> Hardware (subtotal: \$20,604.52)	GreatAmerica Default
<input checked="" type="checkbox"/> Intel Hardware (subtotal: \$0.00)	3, 4 & 5 Year - HaaR <input type="checkbox"/>
<input checked="" type="checkbox"/> Software (subtotal: \$8,800.00)	Minimum for This Default
<input checked="" type="checkbox"/> Services (subtotal: \$5,600.00)	1000
<input checked="" type="checkbox"/> Managed Services (subtotal: \$0.00)	Principal using Selected Tabs
<input checked="" type="checkbox"/> Shipping (subtotal: \$300.00)	35304.520000000004
	Maximum for This Default
	250000

Click **Preview with Defaults**

Add Terms to Quote

Clear All Existing GreatAmerica Terms

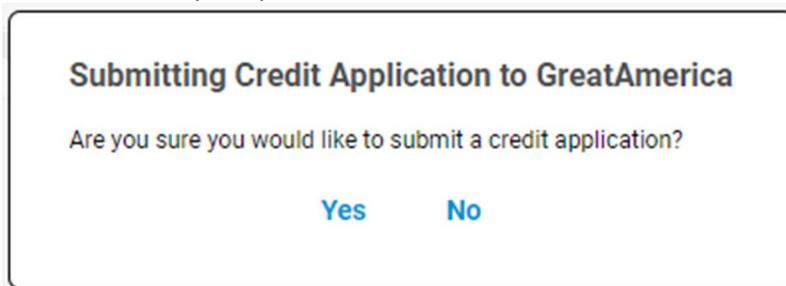
<input type="checkbox"/>	Term Option Name	Payment Description	Points	Lease Type	Term	Advance Payments	Group Name
<input checked="" type="checkbox"/>	1 3 Year HaaR	\$3,539.01 Payment	0	FMV Rental Contract Type	36 Months	Number Down: 0	GreatAmerica
<input checked="" type="checkbox"/>	2 4 Year HaaR	\$3,344.48 Payment	0	FMV Rental Contract Type	48 Months	Number Down: 0	GreatAmerica
<input checked="" type="checkbox"/>	3 5 Year HaaR	\$3,209.27 Payment	0	FMV Rental Contract Type	60 Months	Number Down: 0	GreatAmerica

Click **Save**

Using the Integration – Credit Application Submission - Pictures



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.

GreatAmerica FINANCIAL SERVICES

Quotation Nation Quote #: 000329v1

Prepared For
Rent 2 Us Now
Jack Gadaddy
1234 Main Street
Emmetsburg, IA 50536

Prepared By
Lori Berry
Director, Strategic Technology
Direct: 319-261-4150
LBerry@greatamerica.com

1. Your Proposal
Download and review your PDF document here:

2. Review and Select Your Options
Your Available Options

- Hardware
- Software
- Services

GreatAmerica Financing	Periods	Payments	Amount
<input checked="" type="radio"/> 36 Months, \$1 Lease, 0 Advance Payments	Monthly	36	\$3,646.08
<input type="radio"/> 48 Months, \$1 Lease, 0 Advance Payments	Monthly	48	\$3,400.34
Selected Payment			\$3,646.08

3. Approval and E-Payment
Taxes, shipping, handling and other fees may apply. We reserve the right to cancel orders arising from pricing or other errors.

Your Active Quotes:

- 000329 Quotation Nation
- 000329 Quotation Nation
- 000328 Managed Service Program
- 000326 HaaR

2. Review and Select Your Options
Your Available Options

Hardware

Qty	Description
3	HP ProLiant DL380 G7 2U Rack Server - 2 x Intel Xeon E5649 2.53GHz - 2 Processor Support - 8 GB Standard - DVD-Writer - Serial Attached SCSI (SAS) RAID Supported Controller - Gigabit Ethernet
1	HP Xeon DP X5690 3.46 GHz Processor Upgrade - Socket B LGA-1366 - Hexa-core (6 Core) - 12 MB Cache - 6.40 GT/s QPI
5	HP 32GB DDR3 SDRAM Memory Module - 32 GB (1 x 32 GB) - DDR3 SDRAM - 1333 MHz DDR3-1333/PC3-10600 - RegisteredDIMM
1	HP CN1000Q 10Gigabit Ethernet Card - Low-profile
1	HP StorageWorks D2D4112 SAN Array - 12 x HDD Installed - 12 TB Installed HDD Capacity - Serial Attached SCSI (SAS) Controller - RAID Supported - 12 x Total Bays - iSCSI, Fibre Channel - 2U Rack-mountable
1	HP Care Pack - 4 Year - 24 x 7 x 6 Hour - On-site - Maintenance - Parts & Labor - Physical Service
Subtotal	

Software

Services

GreatAmerica Financing	Periods	Payments	Amount
<input checked="" type="radio"/> 36 Months, \$1 Lease, 0 Advance Payments	Monthly	36	\$3,646.08
<input type="radio"/> 48 Months, \$1 Lease, 0 Advance Payments	Monthly	48	\$3,400.34
Selected Payment			\$3,646.08

