

ConnectWise Manage & ConnectWise Automate

Better Together



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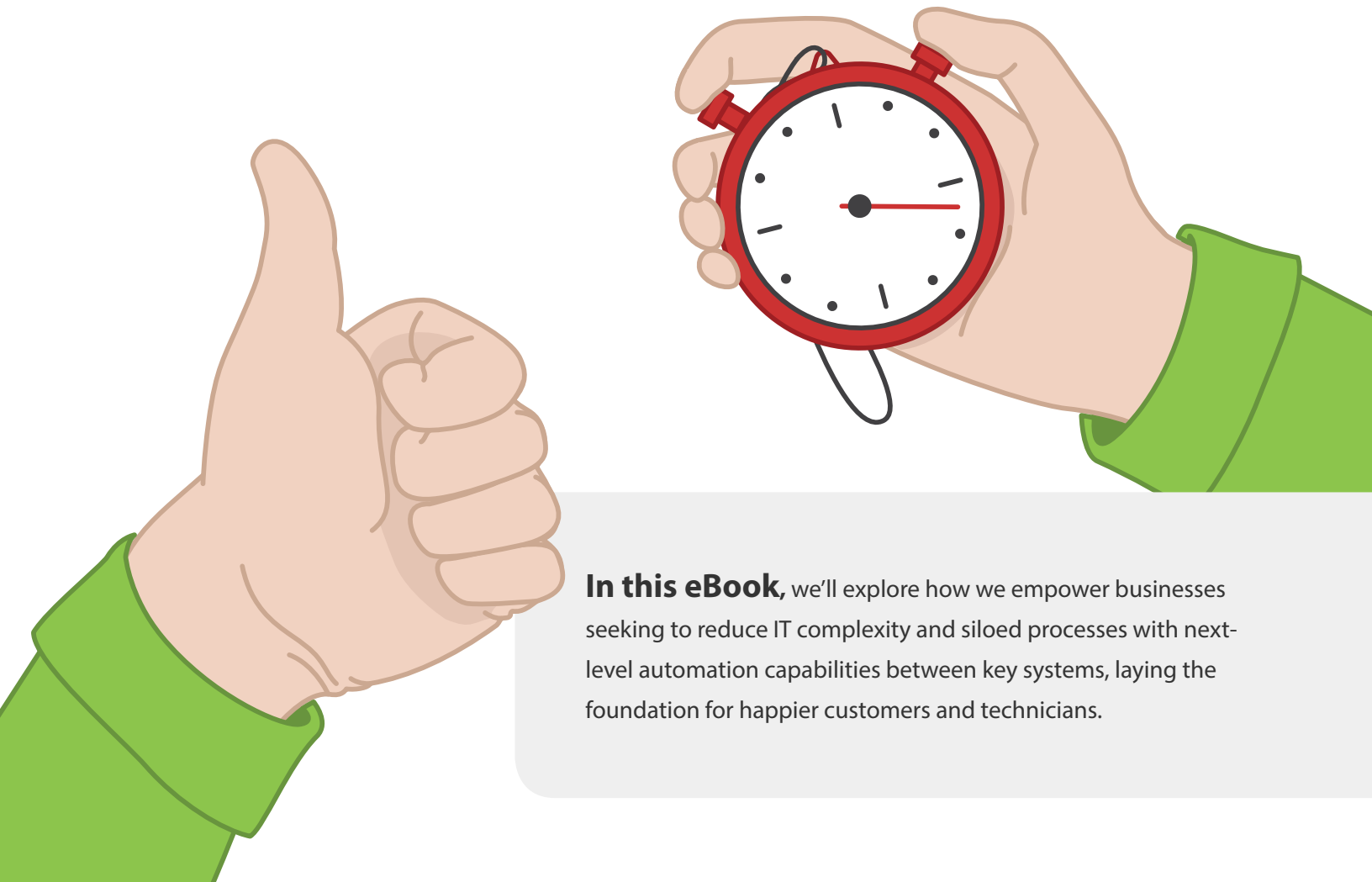
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Introduction

You're no stranger to what great solutions can do to help you better manage your business. But what if there was a simpler way to deliver even better service? Time wasted navigating between systems and tracking down scattered data not only slows response times, but the cumulative cost of this activity over a year can be mind-boggling.

The ConnectWise platform was created to solve these efficiency challenges, enabling our partners to up their service game without investing in more staff. With numerous integration points between client assets and the services provided to support them, ConnectWise Automate and ConnectWise Manage work side-by-side, giving you the power to drive virtually every aspect of your business from a single pane of glass.



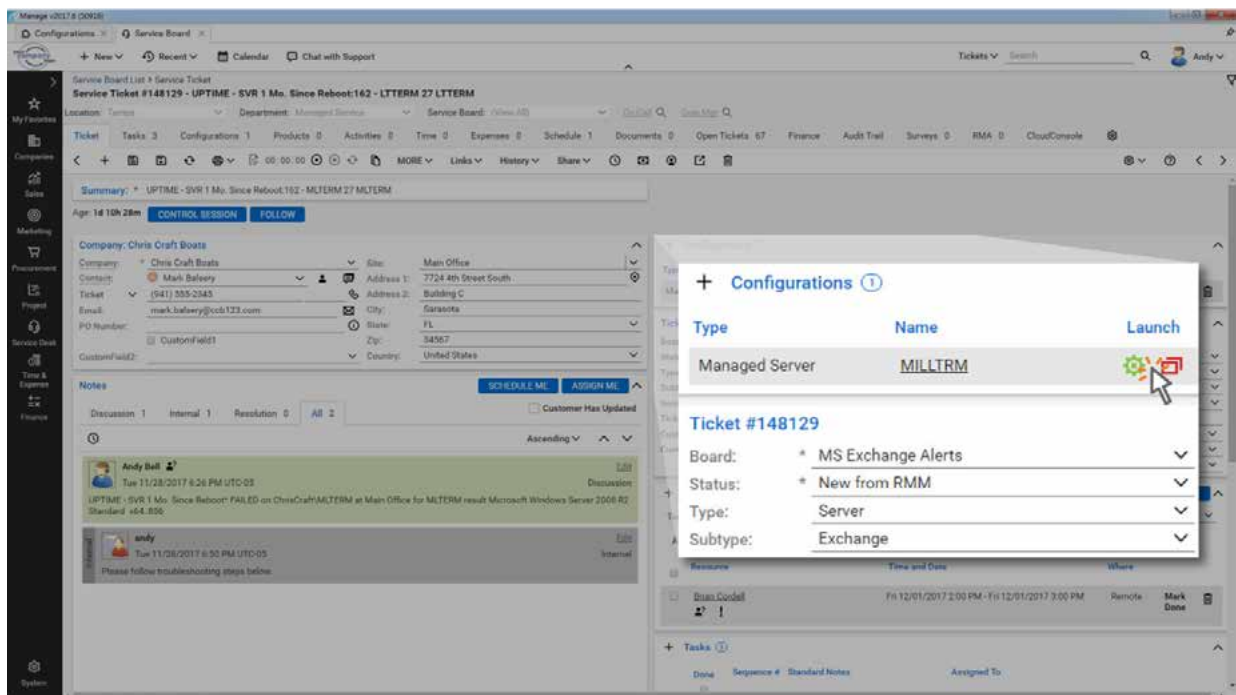
In this eBook, we'll explore how we empower businesses seeking to reduce IT complexity and siloed processes with next-level automation capabilities between key systems, laying the foundation for happier customers and technicians.

Create Consistency & Improve Resolution Times

How many hours do your technicians spend answering minor support tickets? How many of those tickets could you eliminate if customers were equipped to help themselves?

Say an end-user's email is down and they need a resolution quickly. Instead of your techs having to sit on the phone or wade through incomplete information, the end user can create a service ticket from their desktop system tray with a simple right click.

This ticket is automatically pushed to ConnectWise Manage so your techs have a full history of the client and the device immediately, saving them a ton of time. **They can even launch a remote-control session with ConnectWise Control, or dive into ConnectWise Automate for behind-the-scenes support, right from inside the ConnectWise Manage ticket.** No launching new programs, logging in to new systems, or waiting around. Problems are solved faster, customers are happier. Everyone wins.



Create Consistency & Improve Resolution Times [Continued](#)

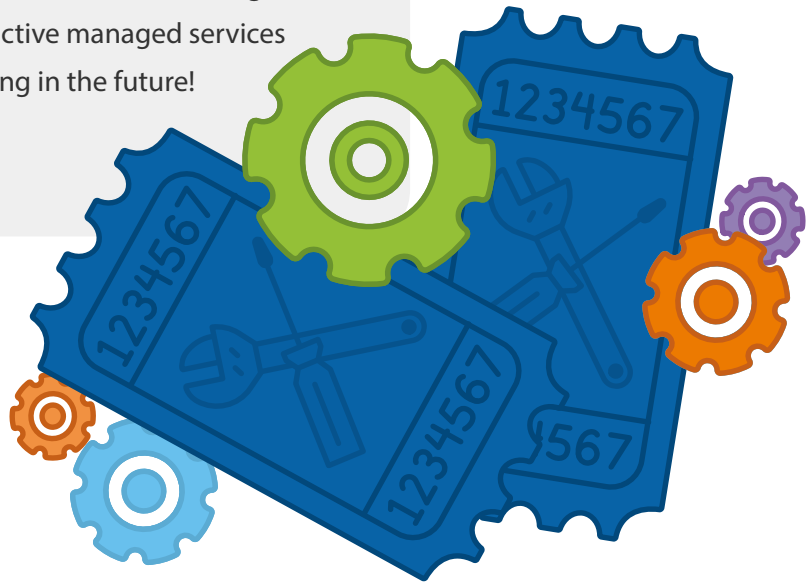
ConnectWise Automate also provides a multitude of corrective/auto-fix actions for self-healing right out of the box. Using pre-configured alert templates, these corrective actions run scripts when monitored conditions fail. Some common corrective actions include:

- Fix Windows Update
- Reboot Computer
- Kill Bad Process
- Restart Service

Pro tip:

Have you ever considered installing an agent on a client machine that hasn't expressed an interest in managed services yet? If the agent detects an issue, it can create a ticket for you to follow up with the client directly to see if they want it fixed (for a charge), and start the conversation of how proactive managed services can help prevent the issue from recurring in the future! Trust us...they will thank you!

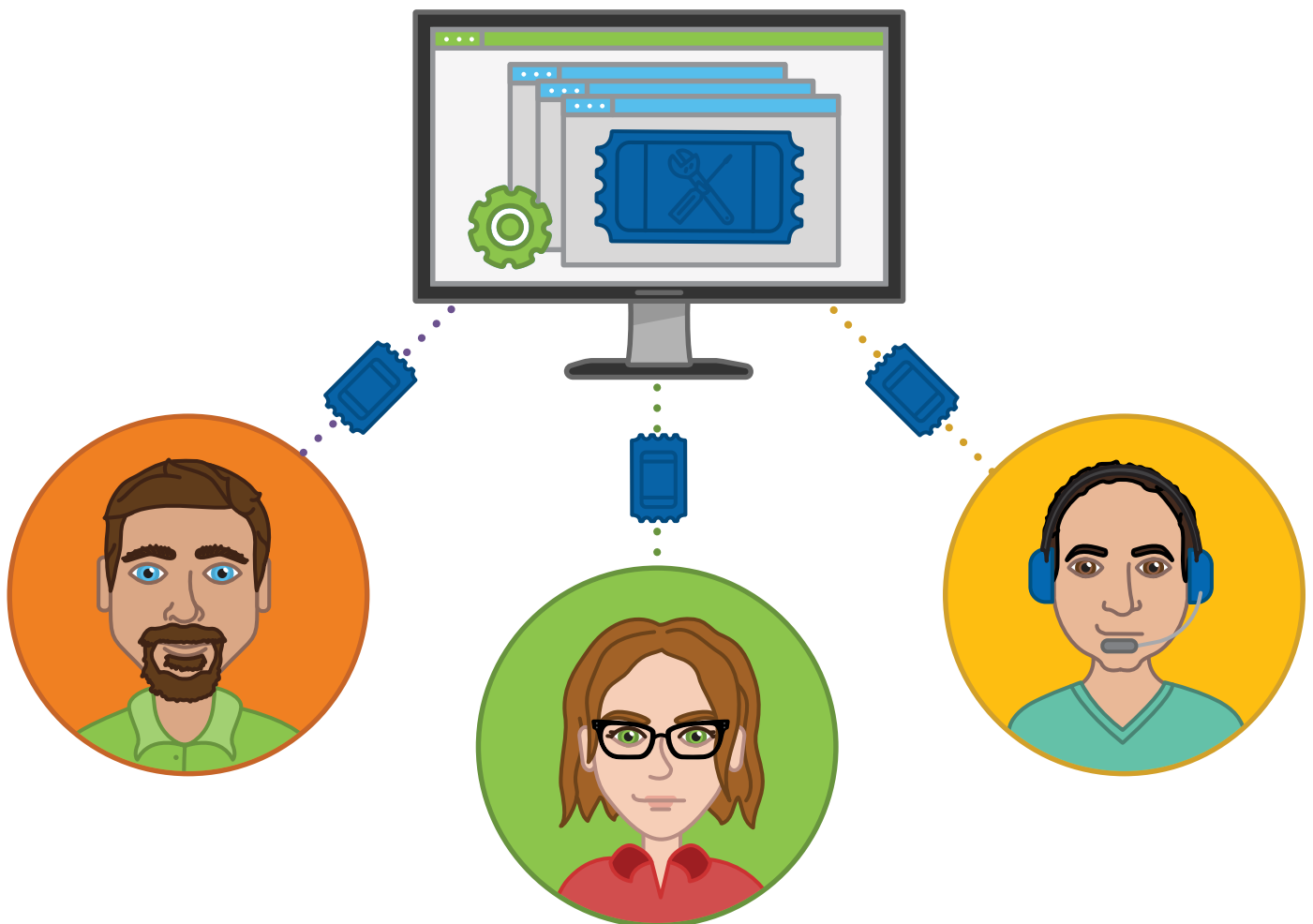
The best part? **All the automated fixes, updates, and other maintenance done by ConnectWise Automate is documented in ConnectWise Manage, bridging the gap between your finance team and your engineers.** The audit trail shows what work was done and when it was completed, without any human intervention at all, so you focus on more critical issues. Your techs will no longer feel bogged down, now that recurring client issues are automated every step of the way, from ticket generation and remediation to time entry and auto close. Now that's what we call true automation!



From Routing to Resolution: Fast-Track the Process

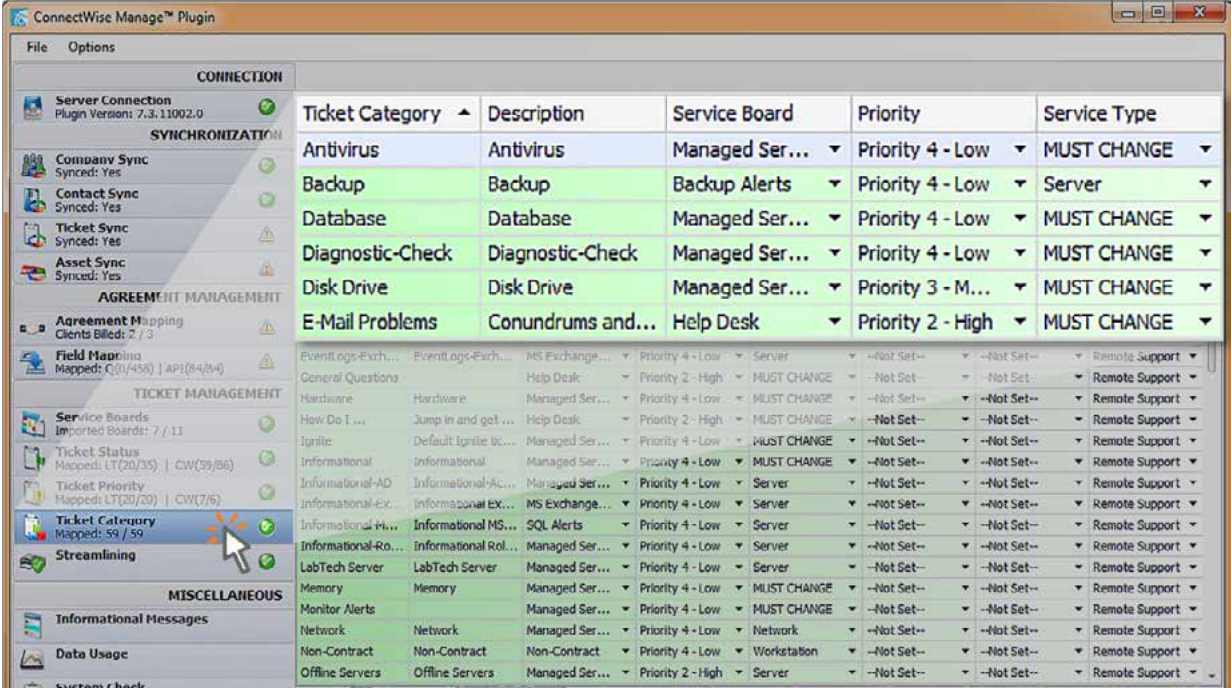
How many critical tickets have you missed on those days when your help desk board gets a little too full? How much time does your team spend manually routing and assigning tickets?

Real-time, automated ticket routing is the only way to make sure you're resolving issues quickly, assigning the right people to the right jobs, and customers' critical issues are bubbled to the top. ConnectWise Automate and ConnectWise Manage work together to do just that.



From Routing to Resolution: Fast-Track the Process [Continued](#)

To ensure your technicians are only working on actual trouble tickets, **you can easily map ConnectWise Automate monitors to informational service boards in ConnectWise Manage to control the noise.** You can also automatically route tickets generated from devices at high-priority clients to high-priority service boards in ConnectWise Manage, allowing you to level up your service delivery by keeping your techs focused on what matters most. Ticket statuses can be synched too, to keep updates aligned across systems.



The screenshot displays the ConnectWise Manage™ Plugin interface. On the left, there is a navigation pane with sections like CONNECTION, SYNCHRONIZATION, AGREEMENT MANAGEMENT, TICKET MANAGEMENT, and MISCELLANEOUS. The main area shows a table with columns: Ticket Category, Description, Service Board, Priority, and Service Type. A mouse cursor is pointing at the 'Ticket Category' column header.

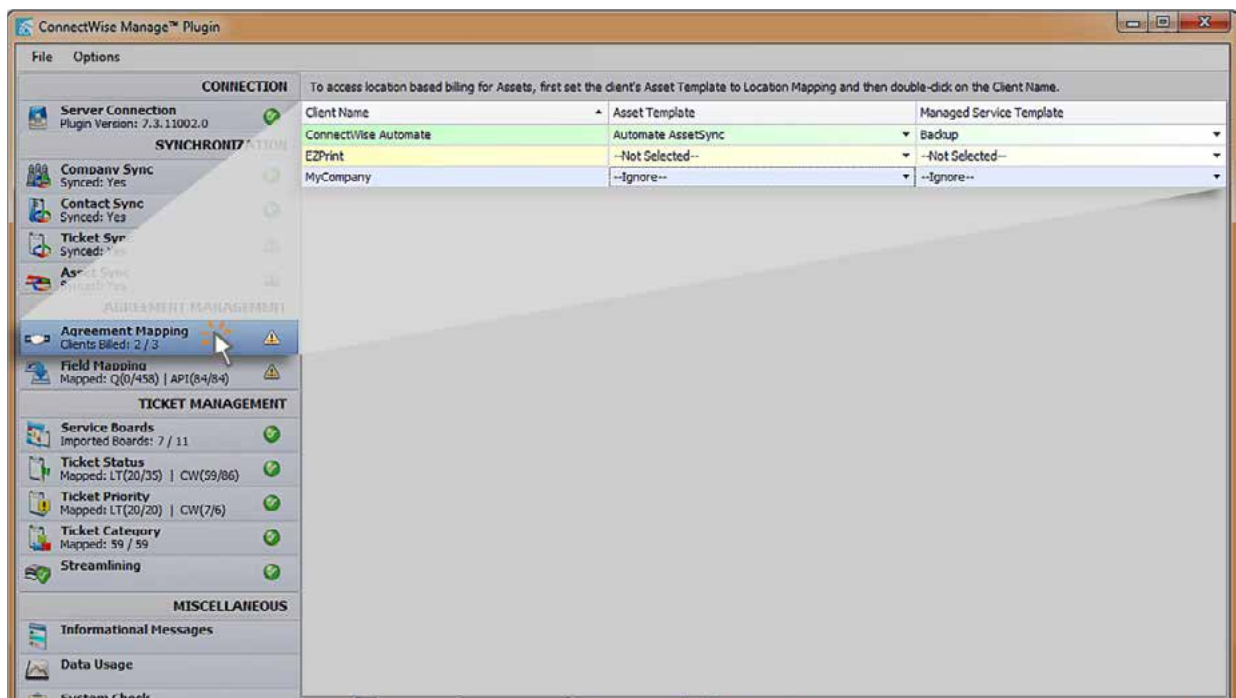
| Ticket Category | Description | Service Board | Priority | Service Type |
|---------------------|----------------------|----------------|-------------------|--------------|
| Antivirus | Antivirus | Managed Ser... | Priority 4 - Low | MUST CHANGE |
| Backup | Backup | Backup Alerts | Priority 4 - Low | Server |
| Database | Database | Managed Ser... | Priority 4 - Low | MUST CHANGE |
| Diagnostic-Check | Diagnostic-Check | Managed Ser... | Priority 4 - Low | MUST CHANGE |
| Disk Drive | Disk Drive | Managed Ser... | Priority 3 - M... | MUST CHANGE |
| E-Mail Problems | Conundrums and... | Help Desk | Priority 2 - High | MUST CHANGE |
| Event logs-Exch... | Event logs-Exch... | MS Exchange... | Priority 4 - Low | Server |
| General Questions | Help Desk | Help Desk | Priority 2 - High | MUST CHANGE |
| Hardware | Hardware | Managed Ser... | Priority 4 - Low | MUST CHANGE |
| How Do I ... | Jump in and get ... | Help Desk | Priority 2 - High | MUST CHANGE |
| Ignite | Default Ignite bc... | Managed Ser... | Priority 4 - Low | MUST CHANGE |
| Informational | Informational | Managed Ser... | Priority 4 - Low | MUST CHANGE |
| Informational-AD | Informational-Ac... | Managed Ser... | Priority 4 - Low | Server |
| Informational-ex... | Informational ex... | MS Exchange... | Priority 4 - Low | Server |
| Informational-Hi... | Informational MS... | SQL Alerts | Priority 4 - Low | Server |
| Informational-Ro... | Informational Rol... | Managed Ser... | Priority 4 - Low | Server |
| LabTech Server | LabTech Server | Managed Ser... | Priority 4 - Low | Server |
| Memory | Memory | Managed Ser... | Priority 4 - Low | MUST CHANGE |
| Monitor Alerts | Managed Ser... | Managed Ser... | Priority 4 - Low | MUST CHANGE |
| Network | Network | Managed Ser... | Priority 4 - Low | Network |
| Non-Contract | Non-Contract | Non-Contract | Priority 4 - Low | Workstation |
| Offline Servers | Offline Servers | Managed Ser... | Priority 2 - High | Server |

While some of these ideas may seem like miniscule time-savers, implementing effective routing automations can relieve a considerable burden from your service desk and, at the end of the day, lead to more satisfied clients.

Maximize Efficiency & Profit with Automated Billing

Is billing your biggest headache? You aren't alone there. But with the integration of ConnectWise Manage and ConnectWise Automate, this task can take part in some serious automation too!

ConnectWise Automate dynamically counts how many endpoints are being serviced at any given moment and synchronizes that count directly to the ConnectWise Manage agreement, significantly reducing administrative overhead when it comes to billing. No more spending a week counting assets at the end of the month or checking in with finance every time you add a device. Instead, you'll see a seamless transition of every piece of information that matters, making it faster and easier to deliver a single, hyper-accurate invoice to every customer.



Maximize Efficiency & Profit with Automated Billing [Continued](#)

You'll be able to see how much you're logging toward each agreement, where you are most efficient, and how you can be more profitable. **Employing this automation will also make it harder for your clients to question the value of your services when you're able to provide them a detailed look at everything that's been accomplished in a given month.** They will also begin to trust you more when they are receiving accurate invoices instead of ones with errors due to manual process mis-steps.

As employees put time against agreements, those costs are automatically updated too, allowing you to see how profitable that client is. If you're spending a lot of valuable tech time on a company that doesn't make you any money, it's time to shift priorities and focus instead on those that will add to your bottom line (instead of taking away from it).



Conclusion

So, what's the bottom line? You could be delivering faster service, making your customers happier (and stickier), and ensuring you're billing for all the devices you manage. With the power of ConnectWise Manage working side-by-side with ConnectWise Automate, you'll be able to **streamline the relationship between client assets and the services provided to support them**. With the time they save, your technicians can focus on delivering top-notch customer support to set your business apart from competitors and maximize your profits.





ConnectWise®

About ConnectWise

ConnectWise is a software company that connects technology teams to the solutions, services, and people that allow them to thrive. Our business automation platform stands at the center of a comprehensive Ecosystem of integrated solutions, best practices, and a community dedicated to everyone's success. We are driven by our passion to make it simple for technology solution providers (TSPs) and CIOs to build resilient businesses, delivering the platform, Ecosystem, community, and resources that drive consistently amazing experiences.

We streamline the delivery of solutions and services to enable higher levels of scalability, profitability, and simplicity. We help technology teams keep pace with a fast-changing technology landscape, allowing them to navigate a changing landscape. Our mission is to fuel TSPs' systematic, scalable journey into the future of the technology industry, connecting more than 200,000+ technology workers to hundreds of relevant, integrated applications.

For more information, visit ConnectWise.com or call 800.671.6898.

Manage&AutomateBetterTogether-US-05/02/18



Boost the effectiveness of your IT teams and simplify every aspect of your business with flexible remote monitoring and management from **ConnectWise Automate**. Gain better visibility, remove delivery roadblocks, and increase service without increasing costs through a solution that helps you master discovery, management, patching, monitoring, and automation. Eliminate blind spots in your supported environments, automate any IT support task, and support more endpoints without adding headaches or head count



ConnectWise Manage is a business management platform designed to run your technology solution business, connecting everything with one application to allow superior service delivery, know your business better, discover full-visibility billing, and handle handoffs without hiccups. With ConnectWise Manage, you can put your people first, rely on detailed reporting functionality, speed up billing without sacrificing accuracy, and keep everyone on your team on the same page. From projects to services, marketing, sales, and finance, ConnectWise Manage brings it all together.