

Introduction

The Own Web Now Agreement Sync for ConnectWise provides a lightweight application to sync accounts and agreements with your client database in ConnectWise. This application eliminates the need to manually click through companies and agreements on monthly basis and updates all the seat counts automatically, keeping your billing accurate every month.

Requirements

ConnectWise 2010


Internet Explorer

Own Web Now Username and Password, ExchangeDefender for Service Providers

Usage

Launch Own Web Now Agreement Sync for ConnectWise.

Provide your Own Web Now administrative username and password. To validate your credentials and access role please go to <https://support.ownwebnow.com>. Enter your ConnectWise CompanyID as it appears in ConnectWise.

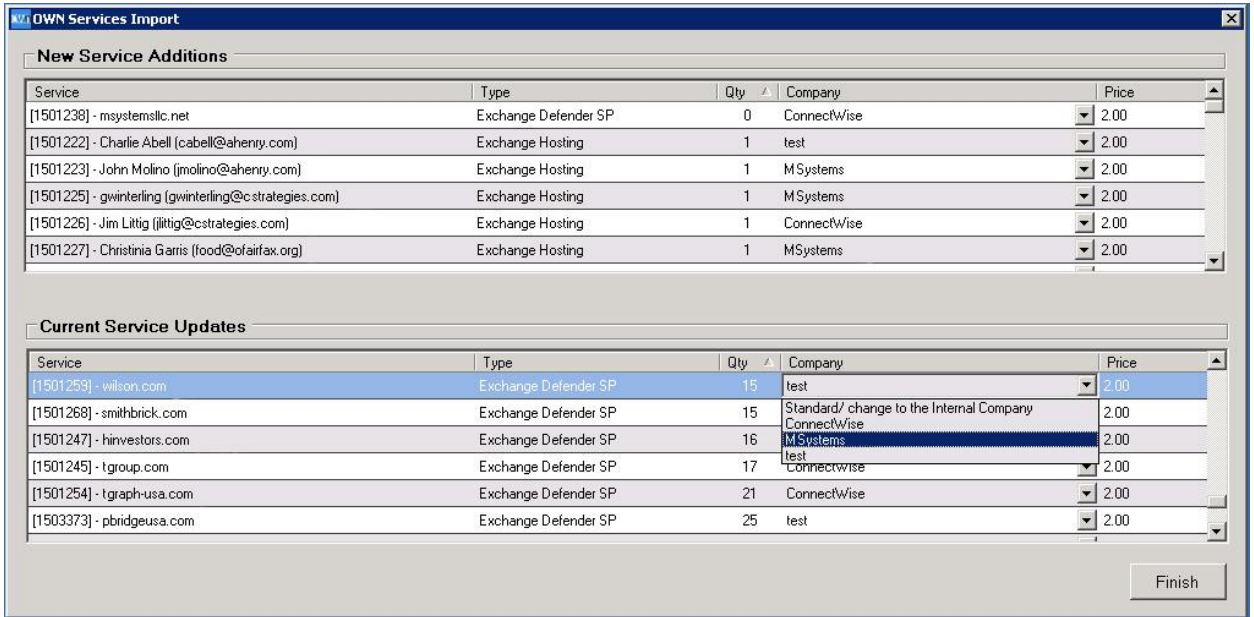


The image shows a software configuration window titled "Step 1 - Configuration". It has a standard Windows-style title bar with a close button (X) in the top right corner. The window is divided into two main sections. The first section is titled "OWN Credentials" and contains two text input fields: "Username:" and "Password:". The second section is titled "ConnectWise Credentials" and contains one text input field: "Company ID:". At the bottom right of the window, there is a "Next" button.

The first time you launch the application you will be prompted for default pricing information. This pricing will be automatically applied for the new agreements about to be created in ConnectWise. The amounts can be adjusted at any time directly through ConnectWise and are never reset.



Your Own Web Now services will be downloaded securely and matched up with ConnectWise companies. Here you can manually map services to companies if they were never provided a ConnectWise Company Name in our Own Web Now portal. This assures all the services are associated with the companies that are paying for them. The prices on the right are adjustable, giving you the power to bill different companies at different rates depending on your value add.



If this is your first time running the application, sync will attempt to create new services and agreements in ConnectWise for you automatically. After the initial sync you will only be prompted to update the services.

Click Finish and you're done.

Support

Technical support for Own Web Now Agreement Sync for ConnectWise is provided by Own Web Now Corp at <https://support.ownwebnow.com>. If you have any ideas or suggestions please post them under Development > Features.

Own Web Now Agreement Sync for ConnectWise is provided free of charge and is available AS-IS with NO warranty.

ConnectWise PSA is a registered trademark of ConnectWise. For more information see www.connectwise.com