



ConnectWise Setup Guide

Overview and User Guide



Overview & User Guide

Guide Description

The purpose of this guide is to lay out the steps for integrating Pax8 with Connectwise. After the integration is in place, you can do all of your billing, invoicing, and provisioning from the Connectwise interface.

Guide Description

The purpose of this guide is to lay out the steps for integrating Pax8 with Connectwise. After the integration is in place you can:

- Import and Bind Companies
- Bind Products
- Write Additions to Agreements for invoicing

Steps:

1. Login to Connectwise Manage with Admin credentials:

The screenshot shows the Connectwise Manage web interface. The top navigation bar includes options like '+ New', 'Recent', 'Calendar', 'Chat with Support', 'Tickets', 'Search', and 'Training'. The main content area is divided into several sections:

- In / Out Board:** A section with two radio buttons: 'I am in the office' (selected) and 'I am out of the office'.
- Notices:** A list of notices including 'There is 1 time sheet waiting for your approval', 'There is 1 expense report waiting for your approval', and 'There are 2 invoices waiting for your approval'.
- My Activities:** A table showing activity counts for different types of activities.

| Type of Activity | Past Due | This Week | All |
|------------------------|----------|-----------|-----|
| CRM / Sales Activities | 1 | 0 | 1 |
| Project Tickets | 0 | 0 | 0 |
| Project Issues | 0 | 0 | 0 |
| Service Tickets | 0 | 0 | 0 |
- Today's Activities:** A section for today's activities.
- ConnectWise Support:** A section for support resources, including 'Developer Alliance'.
- News:** A section for news items, including 'Inter@ctive Week, Internet News', 'Yahoo Computer & Internet News', 'CNet Technology News', and 'Today's Weather'.
- Support:** A section for support resources, including 'Microsoft Support Online', 'Microsoft Drivers and other Downloads', 'Microsoft Main Site', 'Yellow Pages / Yahoo', 'PC Webopedia, Computer Terms Encyclopedia', 'Dictionary', and 'Whois Domain Name Search'.



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2. Go to System>Members

The screenshot shows the ConnectWise interface. On the left is a dark sidebar with a menu including Finance, System, Setup Tables, My Company, Security Roles, Members, Mass Maintenance, Report Writer, and Outlook. A red arrow points to 'Members' in the menu. The main content area is divided into three sections:

- Notifications:** A list of alerts such as 'There is 1 time sheet waiting for your approval', 'There is 1 expense report waiting for your approval', and 'There are 2 invoices waiting for your approval'.
- My Activities:** A table showing activity counts for different types of activities.
- Support:** A list of support links including Microsoft Support Online, Microsoft Drivers and other Downloads, Microsoft Main Site, Yellow Pages / Yahoo, PC Webopedia, Computer Terms Encyclopedia, Dictionary, and Whois Domain Name Search.

| Type of Activity | Past Due | This Week | All |
|------------------------|----------|-----------|-----|
| CRM / Sales Activities | 1 | 0 | 1 |
| Project Tickets | 0 | 0 | 0 |
| Project Issues | 0 | 0 | 0 |
| Service Tickets | 0 | 0 | 0 |

3. Click API Members and Click +

The screenshot shows the 'Members - API Members' page in ConnectWise. The top navigation bar includes '+ New', 'Recent', 'Calendar', 'Chat with Support', 'Tickets', 'Search', and 'Training'. The main content area shows the following information:

- Members - API Members**
- Licensing: Regular (2 active/99 licensed), Mobile (0 active/99 licensed), StreamlineIT (0 active), Subcontractor(0 active)
- Filter tabs: Regular, StreamlineIT, Subcontractors, **API Members**
- Search bar: + SEARCH CLEAR
- Export View (No View)
- Page navigation: 1 - 15 of 15

| Member ID | First Name | Last Name | Inactive | Location | Type | Role ID | Work Role | Business Unit | Time Approver |
|--------------|------------|-----------|----------|--------------|-------|------------|-------------|---------------|---------------|
| CraigDemoAPI | Craig | Demo | All | Tampa Office | Admin | Office | Integration | Admin2 | A |
| Pax8-1 | Pax8 | Pax8 | | Tampa Office | Admin | Consultant | Admin | Admin1 | A |
| pax8123 | pax | 8 | | Tampa Office | Admin | Consultant | Admin | Admin2 | A |
| pax82 | pax8 | pax8 | | Tampa Office | Admin | Consultant | Admin | Admin1 | A |
| Dave8 | Dave | Dave | | Tampa Office | Admin | Sales | Admin | Admin2 | A |



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4. Type “Pax8” for Member ID and Member Name

Members - API Members > Detail
New Member

< + [Icons] HISTORY ▾ [Icon]

Profile

| | |
|----------------------|---|
| Member ID* Pax8 | Time Zone* GMT-5/Eastern Time: US & Canada ▾ |
| Member Name* Pax8 | Email |

System

| | |
|---------------------------------|------------------------------------|
| Role ID* Admin ▾ | Location* Location ▾ |
| Level* Corporate (Level 1) ▾ | Department* ▾ |
| Name* My Company ▾ | Default Territory* My Company ▾ |

5. *Note* Most of these fields are placeholders and have no functionality. We just need to fill out everything with an *. The main field we need to fill out is under **System>Role ID**. In this field, you can select “Admin” from the dropdown:

Wed, 8/22/2018 [Calendar Icon] [Browse](#)

Title

System

| | | | |
|---------------------|---------------------|---|---------------|
| Role ID* Admin ▾ | Location* ▾ | <input type="checkbox"/> Restrict to this Location | Employee ID |
| Engineer | Business Unit* ▾ | <input type="checkbox"/> Restrict to this Business Unit | Vendor Number |
| Executive | Reports To ▾ | <input type="checkbox"/> Manage Administrator | Type |
| Finance | | | |
| Manager | | | |
| Sales | | | |
| Subcontractor | | | |

Alternatively, if you would like to create a custom security role instead of giving Admin access, follow the instructions found here: [Creating a Custom Role in Connectwise](#)



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6. The rest of the * can be filled with personal preference selections:

| System | |
|---------------------|--------------------|
| Role ID* | Location* |
| Admin | Location |
| Level* | Department* |
| Corporate (Level 1) | |
| Name* | Default Territory* |
| My Company | My Company |



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7. Scroll down the page and fill out each *. Once completed, click save at the top. This will tell us if there are any fields we missed.

Members - API Members > Detail
New Member

< + [Print] [Refresh] [History] HISTORY v [Trash]

⚠ Please correct the issues on the following fields:

- Department is a required field.

Profile

| | | |
|----------------------|---|--------------|
| Member ID* Pax8 | Time Zone* GMT-5/Eastern Time: US & Canada | Notes [Info] |
| Member Name* Pax8 | Email | |

System

| | |
|-------------------------------|----------------------------------|
| Role ID* Admin | Location* Location |
| Level* Corporate (Level 1) | Department* |
| Name* My Company | Default Territory* My Company |

8. Once All Fields are filled out, it will give a success message

Members - API Members > Detail
Pax8Security (Pax8Security)

Details API Keys API Logs [Settings]

< + [Print] [Refresh] [History] HISTORY v [Trash]

✓ You have successfully updated this record.

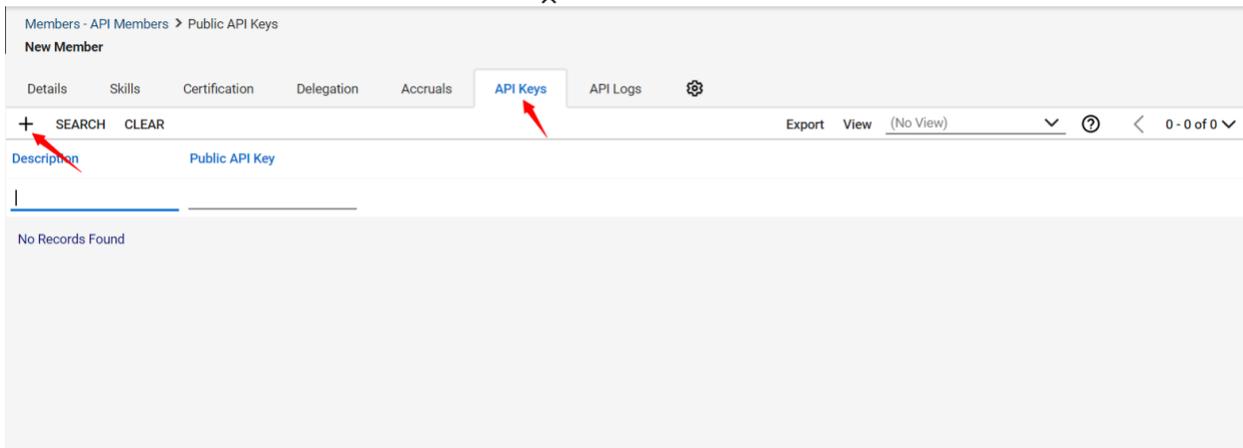
Profile

| | |
|-----------------------|---|
| Member ID* Pax 8 | Time Zone* GMT-5/Eastern Time: US & Canada |
| Member Name* Pax 8 | Email |

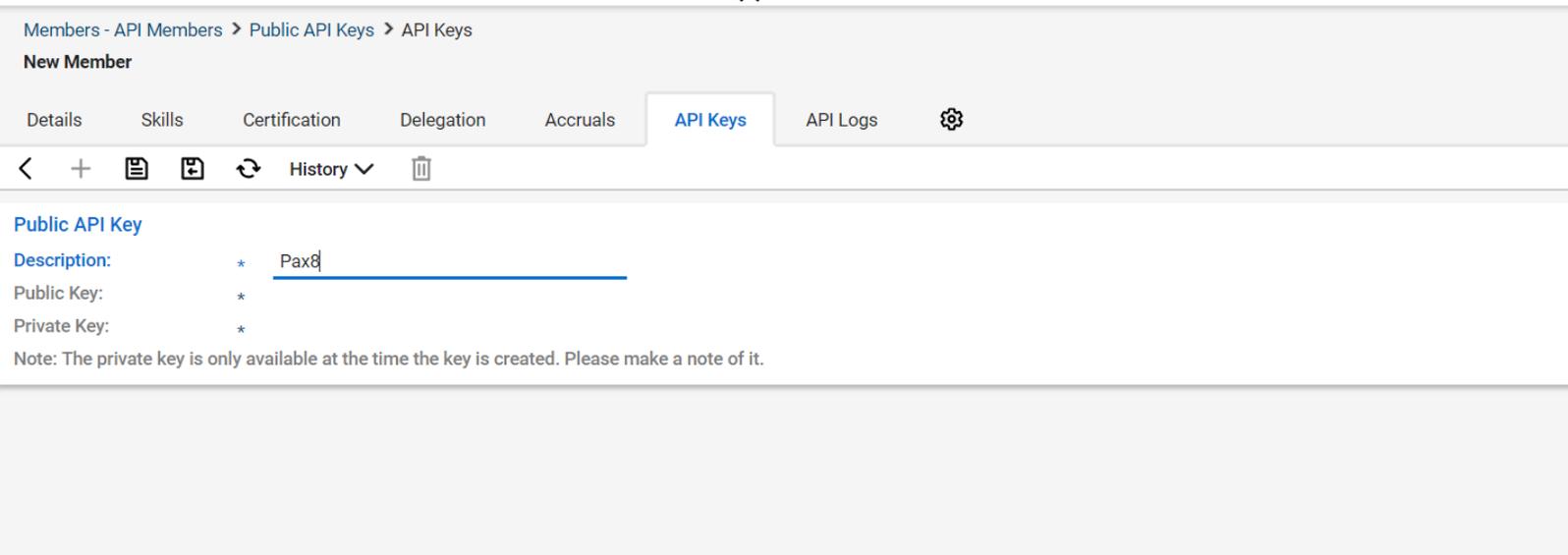


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9. Click **API Keys** on the tab list and then click +



10. Type "Pax8" for the description and click Save to generate the keys





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11. Copy these Keys

Members - API Members > Public API Keys > API Keys

New Member

Details Skills Certification Delegation Accruals **API Keys** API Logs

< + [] [] [] [] History [] [] [] [] []

✓ You have successfully updated this record. [X]

Public API Key [^]

Description: * Pax8

Public Key: * CIV5t8keF17BYGWg

Private Key: * s5sgfGtzYMZzxcC

Note: The private key is only available at the time the key is created. Please make a note of it.

12. Login to app.pax8.com

Search...

Companies 1

Subscriptions 1

Catalog 377

Quotes 0

One Time Charges 4

Trials 0

Users 1

ADVANCED

Admin

Tools

Orders

Billing

The banner features the Pax8 logo at the top, followed by the text "PRESENTS WINGMAN 2020" in a large, stylized font. Below this, it says "AN EXTRAORDINARY PARTNER EXPERIENCE IS TAKING OFF" over a background of snow-capped mountains.

Introducing Wingman2020, the first national Pax8 event!

We're building on the foundation of our popular Mission Briefings and Azure and Microsoft 365 Bootcamps to bring you three days of immersive learning and networking in the Rocky Mountains. Wingman2020 is loaded with sessions for product certifications, technical trainings, and business advice from cloud vendors and industry leaders.

Date: June 3-5, 2020

Location: Denver, CO at the Gaylord Rockies Resort & Conference Center

If you're interested in attending the largest event of the year for Microsoft-focused partners, [sign up to be notified](#) when registration for Wingman2020 opens.



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13. Go to **Tools** on the left-hand side

| | |
|------------------|-----|
| Companies | 1 |
| Subscriptions | 1 |
| Catalog | 377 |
| Quotes | 0 |
| One Time Charges | 4 |
| Trials | 0 |
| Users | 1 |
| ADVANCED | |
| Admin | |
| Tools | |
| Orders | |
| Billing | |



14. Click on the **Business Automation** tab in the top right corner

Tools

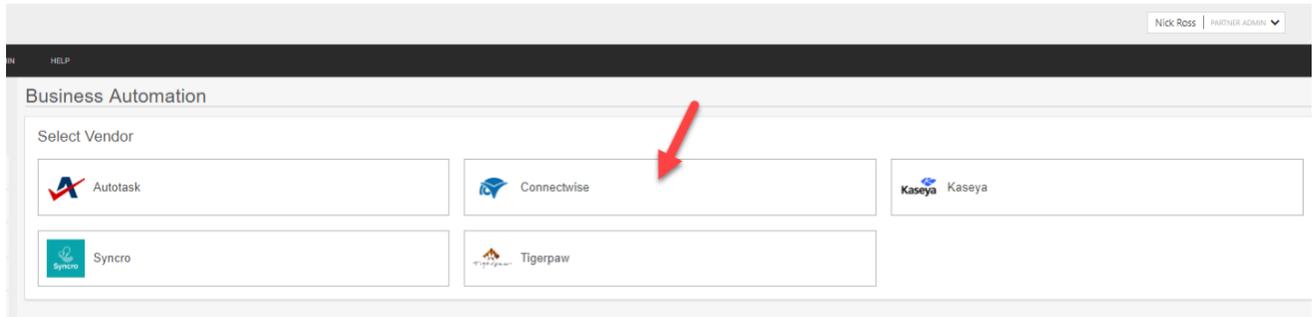
| | | |
|---|---|--|
| AutoPilot View Market Promotions | Microsoft Import Tool Import Subscriptions from CSP | Business Automation Manage Business Automation Tools |
| Manage Roles Assign User Roles | Message History View System Emails | Partner Shells Manage Partner Shells |
| Pax8 Stax View Market Penetration | Pending Tasks View Incomplete Tasks | |



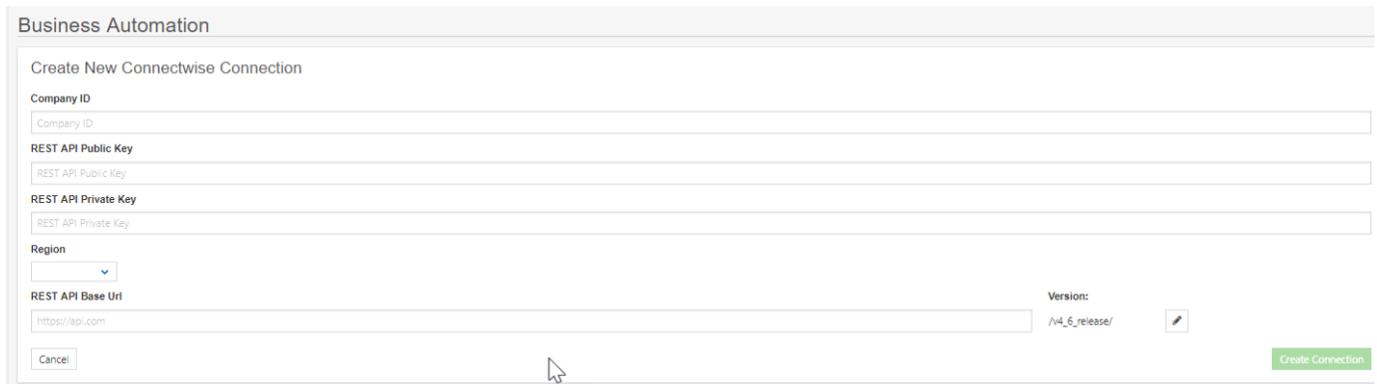


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15. Select Connectwise



16. Fill out your Company ID, Copy/Paste the Public and Private key from Connectwise. For region, **Select North America if Connectwise host**. If you are self-hosted, select that from the dropdown and enter your CW Url, including the “https://”



NOTE

If your Connectwise environment is self-hosted and protected by a firewall, you may need to whitelist our IP addresses for full functionality. Pax8 IP addresses to be whitelisted are as follows:

54.166.50.195
34.230.146.81
23.22.220.211
34.196.222.167

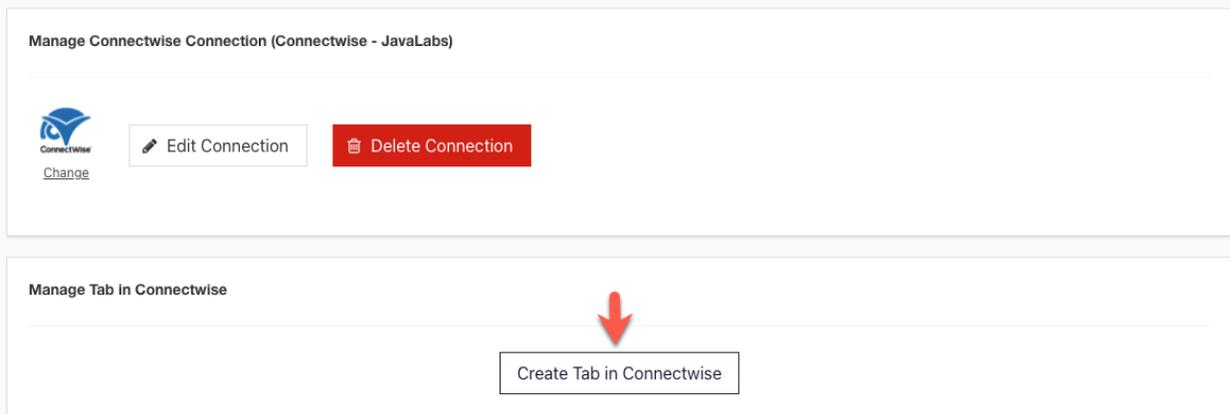
You will need to whitelist each of our (4) dedicated IPs which belong to our load balanced application cluster, as we do not force user connections to specific nodes.



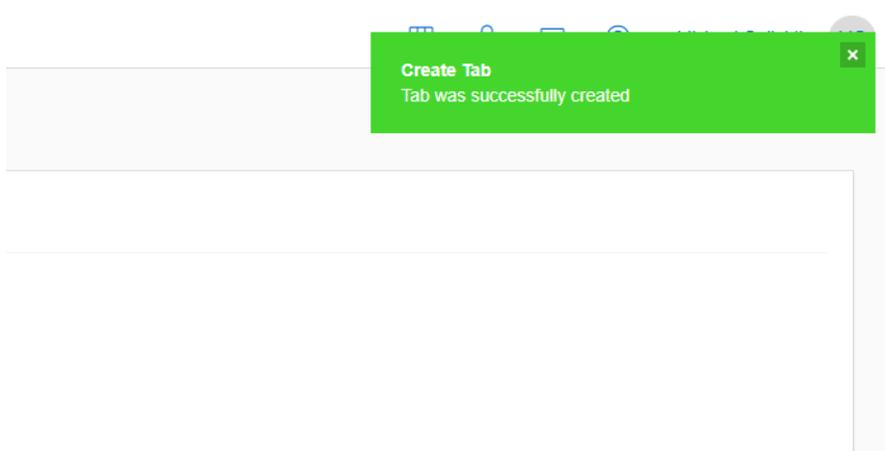
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17. From here you will get a green success message at the top of the page. If you get an error message, verify there are no spaces at the end of the keys and verify your URL is correct if self-hosted.

Once integration is established, you will be able to click the “Create Tab in Connectwise” button. This will create a link for Pax8 in your Connectwise app that allows easy access into the Pax8 Platform.



18. You will get another success message:





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19. From here, you can go back to Connectwise and logout/login or refresh the page for these changes to take effect. After you sign back in, you will see Pax8 listed under the Companies module:

The screenshot shows the ConnectWise Manage interface. The left sidebar contains a list of modules, with 'Pax8' highlighted by a red arrow. The main content area displays the 'Hello Training' dashboard, which includes an 'In / Out Board' with radio buttons for 'I am in the office' (selected) and 'I am out of the office'. Below this is a 'Notices' section with a 'Loading...' message. The 'My Activities' section contains a table with the following data:

| Type of Activity | Past Due | This We |
|------------------------|----------|---------|
| CRM / Sales Activities | 1 | 0 |
| Project Tickets | 0 | 0 |
| Project Issues | 0 | 0 |
| Service Tickets | 0 | 0 |

At the bottom of the dashboard, there is a section for 'Today's Activities'.

20. The Pax8 button under companies will open a new webpage in your default browser for the Pax8 Platform.

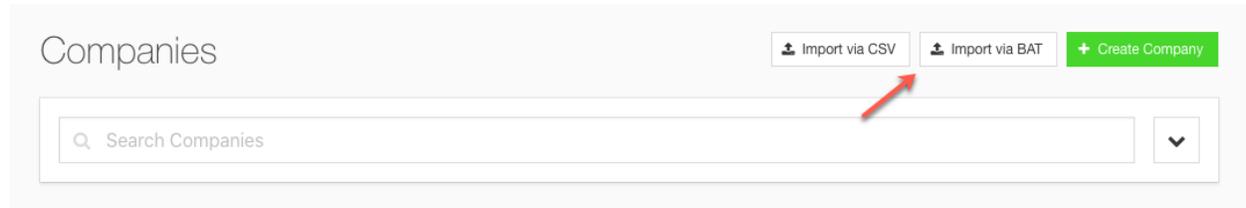
21. Now you can import companies, export products, and write additions to your active agreements in Connectwise.

Import Company:

Expand Companies > Click **Import via BAT**



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Select Connectwise and Start Typing a Customer Name

Select vendor you would like to import your company from



Import Companies

Import Connectwise Company

Companies

Ba

- azkaban
- Batman's Orphanage
- Batman's Tech
- prisoner of azkaban
- the prisoner of azkaban

Select your Customer and Click **Import Company**. Their company info will already be filled out as it is listed in ConnectWise. Fill in missing required fields, if any.



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Create New Pax8 Company

Name *
Denver Broncos

Address 1 *
123 Broncos st

Address 2

City *
Denver

State *
Colorado

Zip Code *
80000

Country *
United States

Phone *
667-456-4556

Fax

Domain *
www.denverbroncos.com

Below, add a contact for this company (internal to your business) that receives confirmation emails once orders are placed. You can use an existing contact if you have already added someone to Pax8

Primary Contact for Pax8 Related Communications

Create New Contact Use Existing Contact

Existing Contacts *

select

select

Nicholas Ross

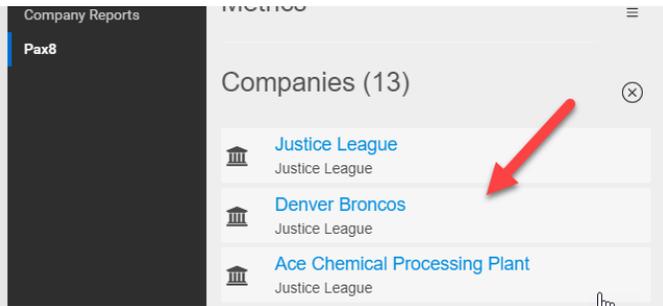


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Click Create and Bind to get a success message:



If you refresh the page, you will now see that company listed





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Syncing Subscriptions

If you search for any subscription you can click on it to bring up its history and sync over to ConnectWise:

✕

Display **1** Results on Search

Companies
0

Subscriptions
15

Microsoft Office 365 Business Essentials - Includes Exchange Email
Arcadia Tech

SYNCED

Catalog
1

Microsoft Office 365 Business Essentials - Includes Exchange Email

Quotes
0

Microsoft Office 365 Business Essentials - Includes Exchange Email

ID: 234357
SKU: MST-OFB-BES-C100
Term: Monthly
Renews: 3/1/2019

Sync

| | | | | |
|----------|--------------|--------------|------------|--|
| Quantity | Retail Price | Partner Cost | Start Date | |
| 7 | \$5.00 | \$4.20 | 11/27/2018 | Modify Cancel Subscription |

[History](#)
 Support Tickets

Subscription History

| ID | History Action | Quantity | Effective Date | Renews | Ordered By | Subscription Status | Sync Status |
|--------|-----------------|----------|----------------|----------|------------|---------------------|-------------|
| 157571 | Initial Order | 8 | 7/1/2018 | 3/1/2019 | A. Markov | Active | SYNCED |
| 234357 | Quantity Change | 7 (-1) | 11/27/2018 | 3/1/2019 | K. Park | Active | |



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When you click on Sync, you will go through a binding process to match everything with Connectwise. It is required to bind You will skip over panels that recognize existing connections:

First is asking for our company name in Connectwise:

The screenshot shows a progress bar at the top with five steps: CONNECTION (Connectwise), COMPANY (Ace Chemical Processing Plant), PRODUCT, AGREEMENT, and REVIEW (0 Item(s)). The 'COMPANY' step is currently active. Below the progress bar, the 'Manage Companies' section is displayed. It includes a 'Bind Pax8 Company' heading, a 'Pax8 Company' section with 'Ace Chemical Processing Plant', and a 'Connectwise Company' section with a search input field containing 'Search Connectwise Company' and a 'Bind' button.

Secondly, we can either bind a Pax8 product to an existing product in your Product Catalog or Export the Pax8 product as a new product in your catalog

The screenshot shows a progress bar at the top with five steps: CONNECTION (Connectwise), COMPANY (Ace Chemical Processing Plant), PRODUCT, AGREEMENT, and REVIEW (0 Item(s)). The 'PRODUCT' step is currently active. Below the progress bar, the 'Manage Products' section is displayed. It features two options: 'Bind Product' (with a 'Bind Product' button) and 'Export Product' (with an 'Export Product' button). The 'Export Product' option includes a note: 'Export and bind an existing Pax8 product to Connectwise. (You will only have to do this once per product.)'



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If you choose to export you can white label the product description to anything you choose. Price and Cost will autofill with your cost and suggested retail price when you select the term. Customize the Customer Description if you choose, and all the dropdown fields will be determined by how your Connectwise catalog is set up.

Export Products

Export Pax8 Product

Microsoft Office 365 Enterprise E3 - Includes Exchange Email and Desktop Office Suite

| | | | |
|---|--|-----------------------------------|---------------------------------------|
| Description | Term | | |
| <input type="text" value="Pax8 - Microsoft Office 365 Enterprise E3 - Includes Exchange Email and Desktop Office Sui"/> | <input type="text"/> | | |
| Unit Price | Unit Cost | | |
| <input type="text" value="0"/> | <input type="text" value="0"/> | | |
| Customer Description | | | |
| <input type="text" value="Microsoft Office 365 Enterprise E3 includes fully installed Office applications across multiple devices, email hosting, HD video conferencing, and features to support compliance."/> | | | |
| Category | Subcategory | | |
| <input type="text" value="business productivity"/> | <input type="text" value="business productivity"/> | | |
| Type | Class | Unit Of Measure | Vendor SKU |
| <input type="text" value="Standalone"/> | <input type="text" value="Service"/> | <input type="text" value="User"/> | <input type="text"/> |
| <input type="button" value="Cancel"/> | | | <input type="button" value="Export"/> |



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Step 4 looks for all your active agreements in Connectwise and you can select the one you want to write to:

Configure Addition

Agreement* Date: 11/16/2018

Ace Monthly

Invoice Description

Short Long Microsoft

Pax8 - Microsoft Office 365 Enterprise E3 - Includ

50/6000

Effective Date*

10/1/2020

Quantity

2.00

Price Cost

\$ 25.00

\$ 20.00

Bill Options Taxable

Billable

Yes

Add Prorates

Edit All Unselect All Threshold Prorate

| Synced | Addition ID | Agreement ID | Effective Date | Effective During | Quantity Increase | Quantity | Prorate Cost | Unit Cost | Prorate Price | Unit Price | Total To CW | Actions |
|--------|-------------|--------------|----------------|----------------------|-------------------|----------|--------------|-----------|---------------|------------|-------------|---------|
| \$ | | | 10/01/2020 | 9/9/2020 - 9/30/2020 | 1.00 * | 2.00 | 14.00 | 20.00 | 17.50 | 25.00 | \$17.50 | |

* For additional information, please click on this [user guide](#) on how threshold prorates are calculated.

Prorates for partial months will automatically be calculated and added as a separate one-time addition. If you would like to edit the details of the prorated addition, click the yellow pencil icon under Actions.

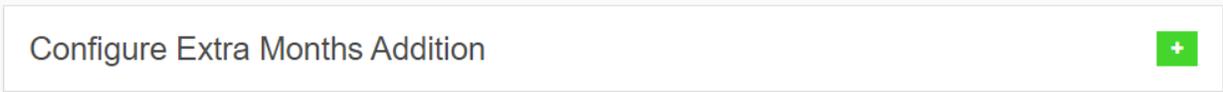
If you would like to **exclude** the prorate, click the red X button to remove it.



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You can choose the Configure Extra Months Addition at the bottom of the page if you bill out at least one month or more in advance. Ex. Its January and I have already billed out for February. My next invoice data is March 1st.

You may also use this field if you need to back-bill for previous months if you have already invoiced but had not yet created an addition for the subscription. (Most common for net new customers that have had services turned on, but you may not have set up their agreement yet)



The Configure Extra Months Addition will be explained further on page 26 of this guide.



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After clicking Continue, the final page is just a summary of the two additions we are writing over. One for the ongoing subscription and one for the prorated line item. Click Confirm Sync when complete.

Creating new Connectwise Addition.

| | Pax8 | Connectwise |
|-----------------------------|---|--|
| Product Name: | Microsoft Office 365 Enterprise E3 - Includes Exchange Email and Desktop Office Suite | Pax8 - Microsoft Office 365 Enterprise E3 - Includ |
| Invoice Description: | N/A | Pax8 - Microsoft Office 365 Enterprise E3 - Includ |
| Term: | Monthly | Monthly |
| Quantity: | 2 units | 2 units |
| Unit Cost: | \$20.00 | \$20.00 |
| Unit Price: | \$25.00 | \$25.00 |
| Recurring Cost: | \$40.00 | \$40.00 (\$20.00 × 2 units) |
| Recurring Price: | \$50.00 | \$50.00 (\$25.00 × 2 units) |
| Effective Date: | | 10/01/2020 |
| Bill Customer: | N/A | Billable |
| Taxable: | N/A | true |

Creating new Connectwise Addition.

Prorated Addition for Pax8 - Microsoft Office 365 Enterprise E3 - Includ - Prorated for 09/9/2020-9/30/2020

Ignore

| | Pax8 | Connectwise |
|-----------------------------|---|---|
| Product Name: | Microsoft Office 365 Enterprise E3 - Includes Exchange Email and Desktop Office Suite | Pax8 - Microsoft Office 365 Enterprise E3 - Includ |
| Invoice Description: | N/A | Pax8 - Microsoft Office 365 Enterprise E3 - Includ - Prorated for 09/9/2020-9/30/2020 |
| Term: | Monthly | One-Time |
| Quantity: | 2 units | 2 units |
| Unit Cost: | \$20.00 | \$17.14 |
| Unit Price: | \$25.00 | \$21.43 |
| Non-Recurring Cost: | \$0.00 | \$34.28 (\$17.14 × 2 units) |
| Non-Recurring Price: | \$0.00 | \$42.86 (\$21.43 × 2 units) |
| Effective Date: | | 10/01/2020 |
| End Date: | | 10/31/2020 |

In Connectwise you will see the two additions written over to the agreement, note the prorated addition has an end date, the recurring addition does not:

| | | | | |
|--------|---------|----------|----------------------------------|---|
| 682.00 | 10/1/20 | 10/31/20 | MST-QFC-EE3-C100 | Pax8 - Microsoft Office 365 Enterprise E3 - Includ - Prorated for 09/9/2020-9/30/2020 |
| 683.00 | 10/1/20 | | MST-QFC-EE3-C100 | Pax8 - Microsoft Office 365 Enterprise E3 - Includ |



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Incrementing Seats

You can go to any subscription and modify seat counts in a one-step checkout:

renews: 3/1/2019

| | | | | |
|---------------|-----------------------|-------------------------|--------------------------|--|
| Quantity 4 | Retail Price 20.00 | Partner Cost \$20.00 | Start Date 02/11/2019 | Proration <input type="checkbox"/> I want to waive prorate. |
|---------------|-----------------------|-------------------------|--------------------------|--|

I accept the [terms and conditions](#)

[History](#)
[Support Tickets](#)

Subscription History

| ID | History Action | Quantity | Effective Date | Renews | Ordered By | Subscription Status | Sync Status |
|--------|----------------|----------|----------------|----------|------------|---------------------|--|
| 102047 | Initial Order | 1 | 2/8/2019 | 3/1/2019 | N. Ross | Provisioning | SYNCED |

Now you are immediately prompted to update your Agreement.

Next Steps

Subscription Updated!
Your subscription for Microsoft Office 365 Enterprise E3 - Includes Exchange Email and Desktop Office Suite has been successfully modified.

If this is the initial order of a Microsoft product through Pax8 for a U.S. customer, [CLICK HERE](#) to assign Arrow as a Delegated Admin on the Customer Account.

If this is the initial order of a Microsoft product through Pax8 for a Canadian customer, [CLICK HERE](#) to assign Arrow as a Delegated Admin on the Customer Account.

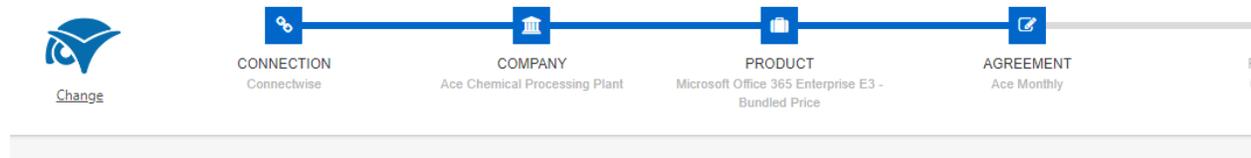
If the customer has previously ordered a Microsoft product through Pax8, disregard this step.

or



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Now we recognize the existing addition and simply ask to update with the new quantity and add any prorated additions.



Configure Addition

Agreement

Ace Monthly

Agreement Date(s): 11/16/2018

Previous Addition found in Connectwise:

Would you like to update the most recent existing one or create a new one?

Update Addition

Create New Addition

**This will update the most recent existing Addition that has no cancellation date or the cancellation date is after the end of the current month.*

Previous prorates that have already synced show a blue “synced” chain link to indicate this has been synced. The unsynced prorate is added by default.

| Add Prorates | | | | | | | | | | | | |
|--------------|-------------|--------------|----------------|-----------------------|-------------------|----------|--------------|-----------|---------------|------------|-------------|---------|
| Synced | Addition ID | Agreement ID | Effective Date | Effective During | Quantity Increase | Quantity | Prorate Cost | Unit Cost | Prorate Price | Unit Price | Total To CW | Actions |
| | 8638 | 290 | 10/01/2020 | 8/5/2020 - 8/31/2020 | 12.00 * | 282.00 | 4.19 | 5.00 | 5.03 | 6.00 | \$60.36 | |
| | | | 10/01/2020 | 8/17/2020 - 8/31/2020 | 1.00 * | 283.00 | 2.26 | 5.00 | 2.71 | 6.00 | \$2.71 | |

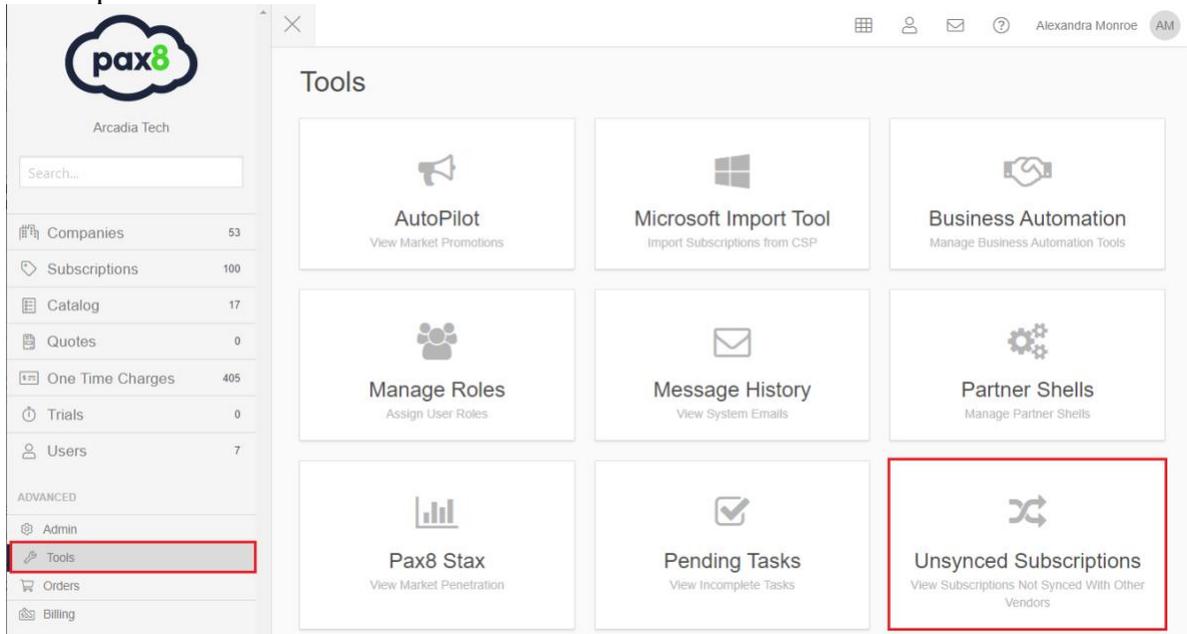
* For additional information, please click on this [user guide](#) on how threshold prorates are calculated.



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Metrics Tab

Lastly, we have created an “Unsynced Subscriptions” Tab so you can additionally audit any subscriptions that are not synced with your Agreements. You can choose to sync or ignore the subscriptions.



Unsynced Subscriptions

This page allows you to view all unsynced subscriptions, broken down by vendor.

Autotask Connectwise Syncro

Connectwise

Non Arrears Subscriptions

| Id | Company | Subscription | Action(s) |
|--------|----------------------------|--|-----------|
| 103602 | Dynamo Corporation | Microsoft Office 365 Business Essentials - Includes Exchange Email | |
| 103606 | Franks Flower Shop | Dropsuite Business Backup + Email Archiving | |
| 103627 | Gibson, Pott, and York LLC | Microsoft Office 365 Business Premium - Includes Exchange Email and Desktop Office Suite | |

1 - 3 of 3 10 Previous Next

We recommend checking this list before invoicing each month to ensure any changes to subscriptions have been addressed. Ignoring a subscription filters it out of this list permanently until you “restore” it from the Ignored Subscriptions at the bottom of this page.



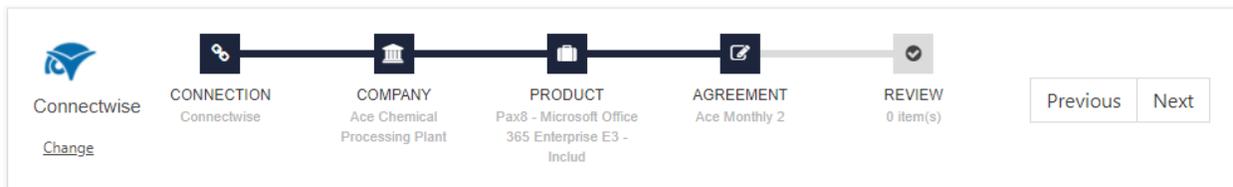
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Partners who Invoice at least one Month in Advance or on the 15th of the month

If you bill on or near the first of the month for the upcoming month, this section may not be applicable.

Use the same workflow as shown in the Syncing Subscriptions section of this guide to begin the sync process.

When you reach Step 4 (agreement selection) you will need to make a few changes if you have already invoiced for the next month. In this example, let's assume today is January 18th, and I already sent out February's invoice on January 15th.



Configure Addition

Agreement* Date: 06/04/2019

Effective Date* 2/1/2021

Invoice Description: Pax8 - Microsoft Office 365 Enterprise E3 - Includ

Quantity: 2.00

Price: \$ 25.00 Cost: \$ 20.00

Note: A red arrow points to the Effective Date field in the original image.

IF this is a new subscription you are adding to your agreement, change the Effective Date field to the first of the next month in which you have not yet invoiced. In this case it is January, we have ALREADY billed for February, so we need to change the effective date field to 3/1. Also check/uncheck taxable box if applicable:



Overview & User Guide

Configure Addition

Agreement* Date: 06/04/2019

Effective Date* 

Ace Monthly

3/1/2021

Invoice Description

Short Long Microsoft

Pax8 - Microsoft Office 365 Enterprise E3 - Includ

50/6000

Quantity

2.00

Price

\$ 25.00

Cost

\$ 20.00

Bill Options

Billable

Billable

Billable Taxable

Yes

IF this is an existing subscription that is already written on your CW agreement, you can simply leave the defaulted “update Addition” and you DO NOT have to change the effective date:

Configure Addition

Agreement* Date: 11/16/2018

Effective Date*  **Cannot be changed when updating existing addition**

Ace Monthly

10/1/2020

 **Previous Addition found in Connectwise:** Would you like to update the most recent existing one or create a new one?

Invoice Description

Existing Short Long Microsoft

Pax8 - Microsoft Office 365 Enterprise E3 - Includ

50/6000

Quantity

2.00

Price

\$ 25.00

Cost

\$ 20.00

Bill Options

Billable

Billable Taxable

Yes



Overview & User Guide

In the prorate section, you will want to click on the yellow pencil icon for any available prorates that have not yet been synced.

Add Prorates Edit All + Select All Threshold Prorate

| Synced | Addition ID | Agreement ID | Effective Date | Effective During | Quantity Increase | Quantity | Prorate Cost | Unit Cost | Prorate Price | Unit Price | Total To CW | Actions |
|--------|-------------|--------------|----------------|-------------------------|-------------------|----------|--------------|-----------|---------------|------------|-------------|---------|
| | 10528 | 225 | 02/01/2021 | 01/04/2021 - 01/31/2021 | 2.00 * | 2.00 | 17.14 | 20.00 | 21.43 | 25.00 | \$42.86 | |
| | | | 02/01/2021 | 01/17/2021 - 01/31/2021 | 1.00 * | 3.00 | 7.86 | 20.00 | 9.82 | 25.00 | \$9.82 | |

* For additional information, please click on this [user guide](#) on how threshold prorates are calculated.

From here you will change the Effective Date to the first of the next month in which you have not yet invoiced. For this example, it is January, we have billed for February, so we need to put 3/1/2021.

| Synced | Addition ID | Agreement ID | Effective Date | Effective During | Quantity Increase | Quantity | Prorate Cost | Unit Cost | Prorate Price | Unit Price | Total To CW | Actions |
|--------|-------------|--------------|----------------|-------------------------|-------------------|----------|--------------|-----------|---------------|------------|-------------|---------|
| | 10528 | 225 | 02/01/2021 | 01/04/2021 - 01/31/2021 | 2.00 * | 2.00 | 17.14 | 20.00 | 21.43 | 25.00 | \$42.86 | |
| | | | 03/01/2021 | 01/17/2021 - 01/31/2021 | 1.00 * | 3.00 | 7.86 | 20.00 | 9.82 | 25.00 | \$9.82 | |

Invoice Description

Suggested Short Long

Pax8 - Microsoft Office 365 Enterprise E3 - Prorated for 01/17/2021-01/31/2021

78/6000

| | | | |
|-----------------------|---------------------------------------|-----------------|---|
| Effective Date | <input type="text" value="3/1/2021"/> | Quantity | <input type="text" value="3.00"/> |
| Price | <input type="text" value="\$ 9.82"/> | Cost | <input type="text" value="\$ 7.86"/> |
| Bill Options | <input type="text" value="Billable"/> | Taxable | <input checked="" type="checkbox"/> Yes |

Now we need to click the Green Plus icon in the “Configure Extra Months Addition” field

Configure Extra Months Addition

Add Extra Months Addition



Overview & User Guide

Select the month in which we need to bill out for. In this example it is January, we have billed out for February but need to collect for the additional February license/s.

Configure Extra Months Addition ✕

| | |
|---|---|
| Effective Date 1 | Quantity 2 |
| <input type="text" value="3/1/2021"/> | <input type="text" value="1"/> |
| Starting From 3 | Number Of Months 4 |
| <input type="text" value="February"/> | <input type="text" value="1"/> |
| Price | Cost |
| <input type="text" value="\$ 25.00"/> | <input type="text" value="\$ 20.00"/> |
| Bill Options | Taxable 5 |
| <input type="text" value="Billable"/> | <input type="checkbox"/> Yes |

1. The effective date is the 1st of the next month for which you have not yet invoiced. In our example here it is January, we have billed for February, and now our next invoicing date is 3/1/2021.
2. The quantity is the delta of the seat count for which we have increased that was not included on the invoice we already sent out.
 - a. For increases in subscriptions, this will be the delta of the seat counts. Ex. I have 2 Microsoft E3 licenses and I increased that to 3. The number that I put here is 1.
 - b. For net-new subscriptions it is just the same seat count as the subscription. Ex. I order 5 seats so this number should be 5.
3. This is the month we need to collect proration for. (I already billed for February, but I need to collect for this additional February license)
4. The number of months we are back-billing for.
5. Be sure to check the taxable box if the addition needs to be taxable.



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From here I get my summary page of which I can scroll down and click confirm sync:

Oxford Senior Living
 Microsoft Office 365 Enterprise E3 - Includes Exchange Email and Desktop Office Suite
 ID: 314438
 Term: Monthly

SKU: MST-OFC-EE3-C100
 Renewals: 4/1/2019

Cancel Sync

Change

CONNECTION
Connectwise

COMPANY
Oxford Senior Living

PRODUCT
Microsoft Office 365 E3
Monthly with Backup

AGREEMENT
SSC Sentinel Services
Comprehensive

REVIEW
3 Item(s)

Previous

Next

Review

Please review each Addition below and click confirm to complete the sync process for this order.

Creating new Connectwise Addition.

| | Pax8 | Connectwise |
|--------------|---|---|
| Description: | Microsoft Office 365 Enterprise E3 - Includes Exchange Email and Desktop Office Suite | Microsoft Office 365 E3 Monthly with Backup |

| | | |
|----------------------|------------|--------------------------|
| Non-Recurring Cost: | \$0.00 | \$7.86 (\$7.86 × 1 unit) |
| Non-Recurring Price: | \$0.00 | \$9.82 (\$9.82 × 1 unit) |
| Effective Date: | 02/04/2021 | 03/01/2021 |
| End Date: | | 03/31/2021 |
| Prorated Period: | N/A | 02/17/2021 - 02/28/2021 |
| Bill Customer: | N/A | Billable |
| Taxable: | N/A | true |

Confirm Sync

Overview & User Guide



Frequently Asked Questions

1. Does this integration automatically create Agreements in Connectwise?

No. You will need an active agreement in place so that we can write over additions to your agreements

2. What happens when I have not created a product in my product catalog to bind to?

You will have the option during the sync to export the Pax8 product to your catalog. You can white label this to whatever you would like.

3. What happens once I increment seat counts?

Incrementing is a 1 step checkout process and you are immediately prompted to sync with your Connectwise agreement. It will recognize we already have an addition in place and simply as you to update the addition (as in rewrite) with the updated quantity OR create a new addition and throw a cancellation date on the old addition

4. Does this integration support proration?

Yes. Any new subscriptions or incrementing of seats during the month will write over 2 additions. One will be for the ongoing subscription with no cancellation date and the other will be for the prorated amount and will have a cancellation date so that it only bills out for that month.

5. Does this integration support infrastructure billing?

Yes, this integration supports either a fixed based billing model or usage based billing model. This includes products like Azure, Profitbricks, AWS, etc where billing is in arrears. Reach out with your CAM to learn more with one of our Sales Engineers.

For a detailed walkthrough of syncing Azure usage, reference [This Guide](#)