Linked Systems 2017 for ConnectWise

Connectwise / Great Plains Integration

EXPORT SERVICE INVOICES TO GREAT PLAINS

Linked Systems users can export service invoices from ConnectWise to Great Plains as a SOP invoice instead of just a dollar-amount general ledger entry. Customize invoices can be generated in GP with the line items you want and GL distributions generated automatically, eliminating the need to manually re-type ConnectWise service invoices into GP, or settle for non-detailed services invoices in GP.

HANDLE MULTIPLE TYPES OF SERVICE INVOICES

Most ConnectWise users have complicated service invoices that categorize service invoices as block time used and sold, flat fee, time and materials, and managed services. Linked Systems can import and automatically categorize different types of service invoices, enabling automatic creation of customized invoices in Great Plains for each scenario.

FIX YOUR SERVICE INVOICES BEFORE YOU INVOICE

Linked Systems software's built-in editor allows users to fix errors in customer invoices before they go to Great Plains, where they are much more time-consuming to fix. A 3-step Wizard allows users to read service invoices from ConnectWise, review and edit the service invoices, preview service invoices before they are transferred to GP, and transfer them to GP, automatically adding new items, customers and addresses to GP.

PREVIEW AND TRANSFER PERFECT INVOICES

Linked Systems software users can review invoices exactly as they would appear in Great Plains before they go into GP, catching errors before they become a problem in GP. The transfer process takes 5 to 10 seconds per invoice and will automatically create the invoice in GP, automatically generating custom line items and distributions, and can add new customers and items to GP, further saving accounting staff time.

SALES STAFF CAN VIEW, EDIT, PRINT

With Linked Systems software, after the order/purchase order has been exported from ConnectWise to Microsoft Dynamics GP, Sales staff can still view, edit and print the order/purchase order safely in their Linked Systems sales dashboard. You can decide whether to give them access to make changes to orders/purchase orders.

ACCOUNTING STAFF CAN VIEW, EDIT, PRINT

With Linked Systems software, after the order/purchase order has been exported from ConnectWise to Microsoft Dynamics GP, Accounting staff can view, edit and print the orders, purchase orders and invoices in their Accounting dashboard. Accounting users can save time by making changes to orders/purchase orders in the dashboard in one step, instead of multiple steps in Great Plains

6 STEP IMPLEMENTATION PROCESS

Linked Systems is able to set up and implement this entire process with a proven 6-step process (Review, Install, Test, Analyze, Train, Finalize) taking approximately 30 days. We can customize the ConnectWise/Great Plains integration in any manner to meet your needs, without reinventing the wheel.