

StreamOne® Ion

PSA Connectors



TD SYNnex

Integrate

PSA Connectors



Transform your business processes, enhancing efficiency with full StreamOne® data integration to your PSA of choice.



Intuitive design and seamless set up, with filters and notifications for error-handling

Autotask®


CONNECTWISE™



Advanced sync settings for flexible and configurable control.



Map any product in the StreamOne® Ion catalog with the PSA product catalog



Near real-time sync to PSA tools

- Get full visibility into any changes to subscriptions.
- Expedite your billing process for fast time to revenue.

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Capabilities include:

- Seamless, guided installation and set-up
- Configurable sync rules and templates
- Configurable proration rules
- On-demand and scheduled daily sync
- Product sync including cost and price
- Real-time sync for subscription seat count changes
- Notifications and audit reporting
- Enables upfront billing for license and usage-based products
- Automated billing reconciliation sync (IaaS)

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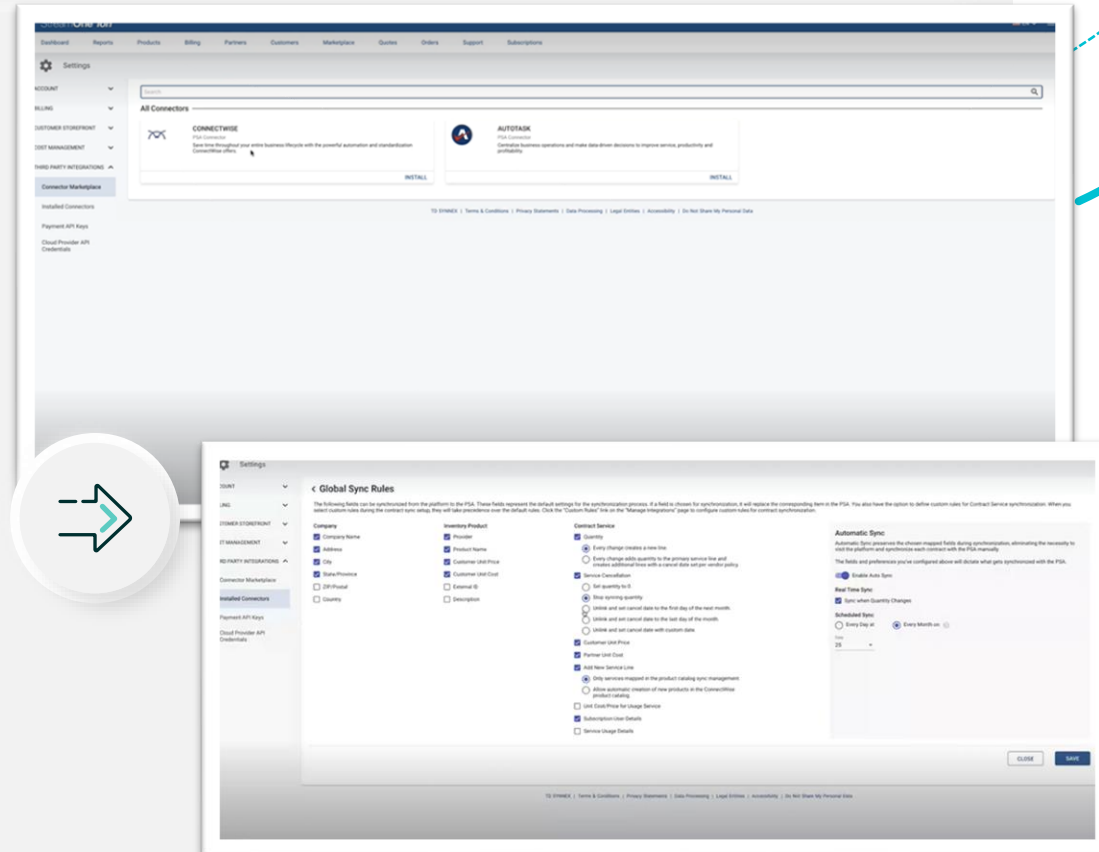
Managing PSA Connections | Setup

Installing and validating connectors

- PSA connector installation can be done by a simple click by any Partner.
- Once credentials are provided by the Partner, the platform automatically validates the new connection.

Configuring Sync Rules

- The options for data synchronization are multiple with the possibility for Partners to fully customize data flows for:
 - Customer datapoints
 - Products data points
 - Automatic Sync Settings
 - Contact Service Options



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Managing PSA Connections | Notifications

Notifications

Microsoft Partners can be notified via email about any changes that occur to their customer and/or product mapping/syncing.

- Global notifications emails configuration.

Microsoft Partners can also set custom notification preferences for specific customers or products.

- Customer Mapping notifications.
- Product Mapping notifications.

Synchronization status

- Visibility at subscription level in Subscription views

The image displays two screenshots of the StreamOne Ion web application. The top screenshot shows the 'Notification Preferences' settings page. It includes a sidebar with navigation options like ACCOUNT, BILLING, CUSTOMER STOREFRONT, COST MANAGEMENT, and THIRD PARTY INTEGRATIONS. The main content area is titled 'Notification Preferences' and contains sections for 'Notification Email' (with an 'Enable Notification' checkbox), 'Customer Mapping' (with an 'Immediate' checkbox), and 'Product Mapping' (with an 'Immediate' checkbox). The bottom screenshot shows the 'Subscriptions' view, which is a table listing various subscriptions with columns for PRODUCT NAME, SUBSCRIPTION ID, CUSTOMER NAME, PARTNER NAME, CLOUD PROVIDER, STATUS, LICENSES, AUTO RENEW, PURCHASED ON, RENEWAL DATE, and PSA. The table contains multiple rows of data, including subscriptions for 'Access LTSC - 2021 - Charity', 'Excess LTSC - 2021 - Education', 'Azure Active Directory', 'IBM Cloud Platform', 'Essentials device', 'Microsoft 365 E3', 'Microsoft 365 Business Premium', 'Microsoft 365 Apps for business', 'Office 365 E1', 'Access LTSC - 2021 - Charity', 'Excess LTSC - 2021 - Education', 'Azure Active Directory', 'IBM Cloud Platform', and 'Essentials device'.

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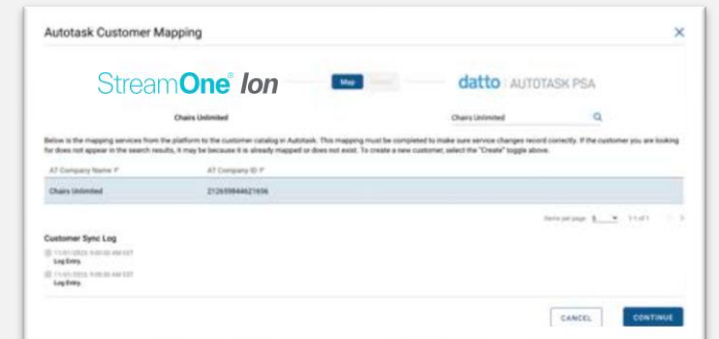
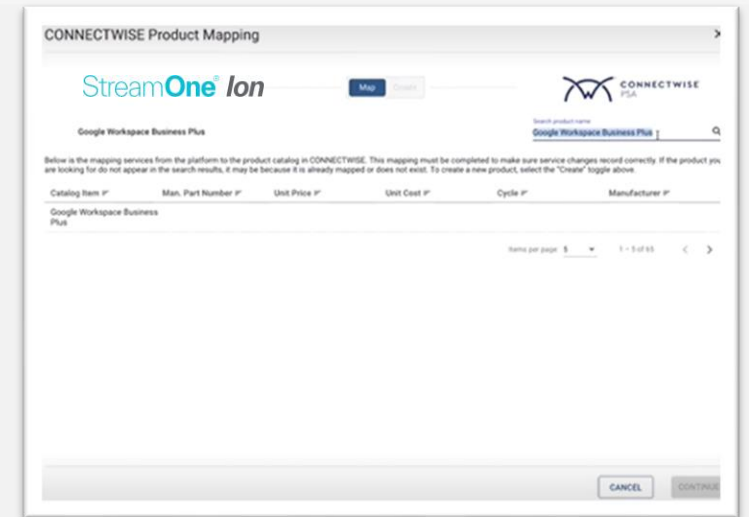
Managing PSA Connections | Mappings

Customers Mapping

- Full synchronization with PSA's CRM
- Partners can choose which Customer fields to override.
- Customer Sync log available
- Option to Map Only or Map & Sync.
- Partners can create PSA Customers on the fly from StreamOne® Ion .
- Sync Status view at Customer level
- Sync for each Customer can be easily un-mapped at any time.
- Bulk mapping also available

Products Mapping

- Full synchronization with PSA's Catalogue
- Partners can choose which Product fields to override.
- Product Sync log available
- Option to Map Only or Map & Sync.
- Partners can create PSA Products on the fly from StreamOne® Ion .
- Sync Status view at Product level
- Sync for each Product can be easily un-mapped.
- Bulk mapping also available



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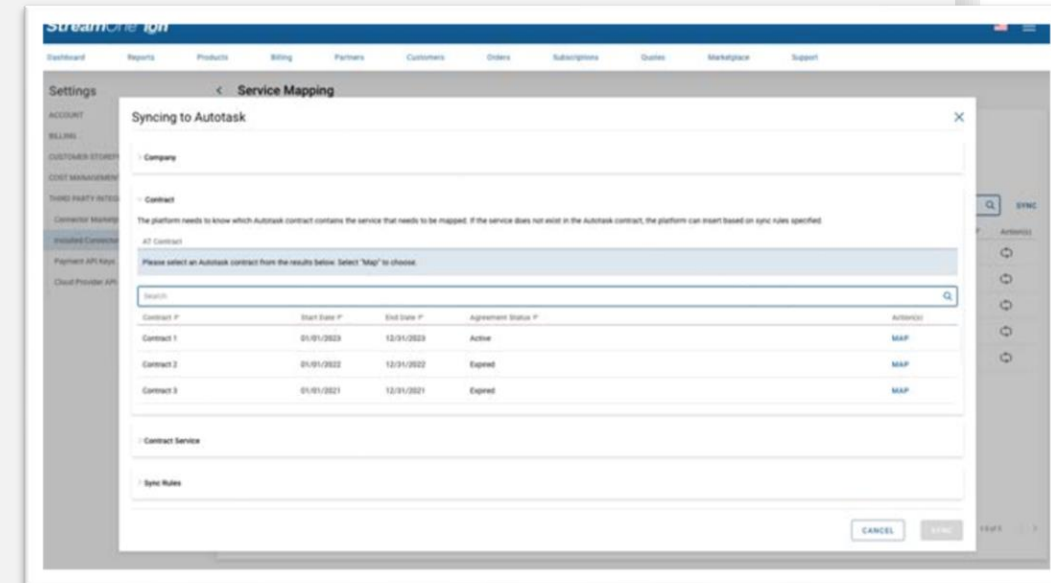
Managing PSA Connections | Mappings, continued

Mapped Services Contract

- The platform will automatically be linked to at least one contract by default. Partners can then select additional contracts from the list that need to be mapped with the platform.
- Partners can also disconnect the contract that is initially selected by default and map another contract to the platform

Contract Service

- The platform will automatically be linked to at least one contract service by default. Partners can then select additional contract services from the list that need to be mapped with the platform.
- Partners can also disconnect the contract service that is initially selected by default and map another contract to the platform





Partner

Net Intellect,
Managed Services Provider (MSP)

Founded

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Location

Australia

Website

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StreamOne[®] Ion

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Intuitive design and seamless set up, with filters and notifications for error-handling



Near real-time sync to PSA tools for full visibility into changes to subscriptions and billing accuracy



Advanced sync settings for flexible and configurable control



“[Billing] is live, so as something changes in Azure, the **billing changes are reflected** through to ConnectWise. So, you can pretty much bill whenever you want, and you’ll be **accurate**.”

-Net Intellect



“The [PSA] integration we’ve been helping test, it’s going to be a big change for our operations. We’ve had three different suppliers, and it leaves all the rest of them for dead. It’s a **really nice, sleek integration** that is very easy to use, and works, which is important.”



André Dowding
Managing Partner
Net Intellect



Partner

Net Intellect,
Managed Services Provider (MSP)

Founded

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Location

Australia

Website

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“

I think [StreamOne®] **ticks every box** I can think of as far as being easy to use. I always used to need to be quite heavily involved in ordering, and it's been **easy to train** a few of our support staff. I don't really have to touch it at all now, so it's provided a lot of **efficiency** that we haven't had before.

”

André Dowding
Managing Partner
Net Intellect

New opportunity awaits



Solve cloud business needs



**Reduce
complexity**



**Recognize
higher profitability**



**Deliver higher
customer value**

Learn more at tdsynnex.com/StreamOnelon.com