## StreamOne® Ion PSA Connectors

# **C** TD SYNNEX

**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 M

CONNECTWISE

Advanced sync settings for flexible and configurable control. Map any product in the StreamOne<sup>®</sup> 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.

**PSA** Connectors



#### **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 (laaS)

**PSA** Connectors



#### 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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**PSA** Connectors



#### 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

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**PSA** Connectors



#### 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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**PSA** Connectors



#### 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

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Contract Service				
Sync Bules				





Partner

Net Intellect, Managed Services Provider (MSP)

Founded

Location Australia

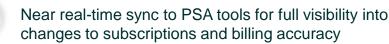
Website netintellect.com.au

### Stream**One**<sup>®</sup> Ion

#### **PSA Connectors**



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



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

Location Australia

Website netintellect.com.au think [StreamOne®

I think [StreamOne<sup>®</sup>] 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



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