

ConnectWise

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Overview

Emersion has developed an extensive integration with ConnectWise Manage. For users of both ConnectWise and Emersion, the benefits include a single invoice for all the products and services you sell including bundles.:

- Subscription-based services (Telecommunications, data, utilities, etc)
- Time entries from ConnectWise service tickets
- Product sales
- Expenses

See: <https://www.emersion.com/connectwise> for a quick overview video.



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Licensing

This feature is available to subscribers of the following:

- ☐ Emersion Core
- ☒ Optional Modules
- ☒ Upon Request (please contact your Account Manager)

Features and How To's

This section contains articles on the various features and how to use them.

Core Features and Fundamentals

- [Setting up Your ConnectWise Integration](#)
- [Create a Custom Security Role](#)
- [Accounts and Contact Sync Fundamentals](#)
- [Invoice Sync Fundamentals](#)
- [ConnectWise API Endpoints](#)

Configuration

Settings

- [Company/account and contacts](#)
- [Product defaults](#)
- [Invoices](#)
- [Product item templates](#)
- [Connection](#)

How To's

- [Override product defaults for a package plan](#)
- [Find and resolve errors](#)

Mappings

- [Map company types](#)
- [Company status](#)
- [Communication type](#)
- [Tax codes](#)
- [Unit of measure](#)
- [Product Categories and subcategories](#)

Prerequisites

Before attempting to use this module, users should:

- have a fully working instance of both ConnectWise and Emersion.

Dependencies

There are no dependencies for this module. It is a standalone module.

This module can be setup to work in conjunction with Accounting System Integration Modules.

Module Events

No events are included with the module, but the [Account Created event type \(event id: 2\)](#) can be optionally triggered for accounts created in Emersion during the sync process.

Module Reports

No reports are included with the module.

Access Control

Module permissions and powers are used to control access to modules, Powers are used to control access to features of a module, functions, and page sections.

If you are unable to access a given feature and you have checked the permissions and powers, please contact **Emersion**.

Module Permissions

No module permissions are used.

Module Powers

Power	Description
ConnectWise Integration	Parent power for the ConnectWise Integration module.
Allow Contact Editing	Users can edit contacts that would ordinarily be locked by ConnectWise Integration.
ConnectWise Mappings Management	Grants access to the ConnectWise mappings pages.
ConnectWise Quarantine Management	Grants access to the ConnectWise Quarantine page.
ConnectWise Settings Management	Grants access to the ConnectWise settings pages.

Related Articles

- [ConnectWise Invoice Settings](#)
- [ConnectWise Accounts and Contact Sync Fundamentals](#)
- [ConnectWise Accounts Data Mapping](#)
- [Pull Invoices from ConnectWise to Emersion](#)
- [ConnectWise Invoice Sync Fundamentals](#)
- [Push Invoices to Emersion from ConnectWise](#)
- [ConnectWise Company and Contact Settings](#)
- [ConnectWise](#)
- [ConnectWise Administration Settings and Mappings](#)
- [Override ConnectWise Product Defaults For a Package Plan](#)
- [Map Company Status](#)
- [ConnectWise Connection Settings](#)
- [Map Communication Types](#)
- [Map Tax Codes](#)
- [ConnectWise Product Default Settings](#)