



Overview - ConnectWise

QXchange is a powerful data integration tool to access, integrate and manage large volumes of data from various systems. Extraction, transformation and loading of data are powered by QXchange with source and target database support.

QXchange helps organizations to bond together all enterprise data and ensures accuracy of data in a timely manner. QXchange is a simple stand-alone application that can be used by novice users at ease.

QXchange is flexible, easy to use, data integration software. It can quickly and easily transfer data between many standard data formats and applications, including MS Access, Excel, Comma delimited flat file, MS SQL Server, QuickBooks, Salesforce.com, ODBC, MySQL, and others. It allows simple and clear setup of extraction, transformation and loading instructions to exchange data between different formats. The instructions are stored and managed as profiles.

ConnectWise is a business process automation platform that allows your business to sell, service and support technology more efficiently and in a more streamlined way. The business management tool allows your business to centralize all information, automate business process, real-time visibility in operations, and provide better customer support.

Technology ConnectWise SDK

The ConnectWise SDK is a RESTful web service and basic authentication along with Public key, Private key, company ID to communicate with 3rd party applications. The SDK contains various objects support and each object has its own API point. From the SDK, QXchange authenticates with ConnectWise and get the required objects data or post the data based on the need. The SDK ensures that,

- the business sets up the permissions for third-party software access to the data.
- provides strong error recovery and data logging to make sure data is protected.
- Provides standardization across various upgrades of ConnectWise.

QXchange has tight integration with many accounting/CRM systems to bring in sales details and can also work as a stand-alone product in providing solutions. It can also share the data with spreadsheets, delimited and fixed length files. Ability to import/export data between ConnectWise Manage and other data sources, CRM, and Accounting software. Able to extract customers, opportunities from other data sources and create Service Tickets, Invoices through integration. Supporting various objects in ConnectWise Manage such as Accounting, Purchase module and other modules Ability to see the logs, errors occurred during integration and other details in the application. The integration is easily configurable through QXchange profiles, and it can be scheduled to run daily. QXchange is supporting 40+ kind of data sources.

Authentication and Authorization

QXchange uses a digital certificate to identify itself while communicating through the ConnectWise SDK. The connection with ConnectWise requires the following.

- ConnectWise Site URL
- Company ID
- API Member ID
- Public Key
- Private Key

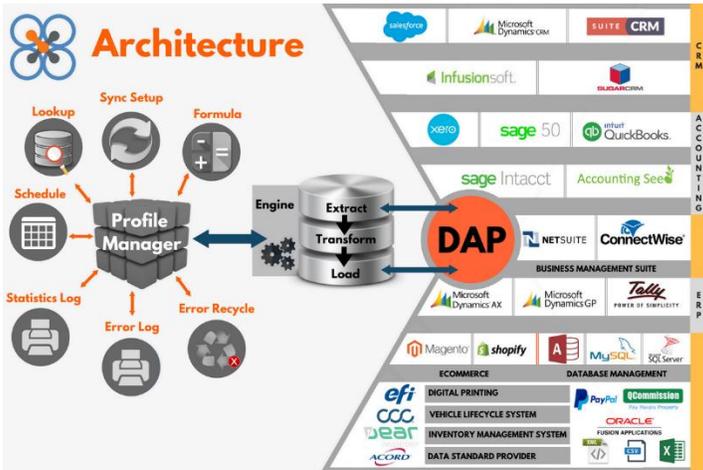
Using the above the QXchange communicates with ConnectWise and pull/push the data using SDK.

Data Access Plug-in

QXchange integration engine uses Data Access Plug-ins (DAPs) for individual application and data format integration. All the DAPs are called using a standard Application Program Interface (API). The ConnectWise SDK is wrapped inside one of these DAPs. This allows for a smooth and standard operation across all the various DAPs.

Architecture

Communication between QXchange and ConnectWise is based on a client/server model. All communication messages are in a special form JSON as required by the SDK. QXchange sends a message request to ConnectWise and ConnectWise sends back a response message; the communication managed synchronously.



ConnectWise Data

The ConnectWise SDK exposes most (but not all) of the data objects available in the ConnectWise data store. The various objects available are listed here.

Lists

The following lists are available for access:

Lists	Objects
Entity Lists	Member, Contact Company
Item Lists	Product Item, Catalog Item

Transactional Data

Transaction objects correspond to the basic accounting entities in a business. Adding a transaction object (except a non-posting transaction object) affects the account balance of the business. The following types of transactions are supported:



Transactions	Objects
Accounts Receivable Transactions	Invoice, Invoice Line Opportunity, Opportunity forecast
Other Transactions:	Tickets, Agreements

To learn more about QXchange, please visit our website and fill out information at the Inquiry link.

www.qxchange.com/inquiry-about-qxchange.html

Using QXchange

The QXchange engine works the same for all different DAPs. Every data transfer is set up as a profile, with a source and target data file, which can be of different data formats. Data transfer between specific objects and the mapping of source to target fields are also set up in the profile.

The profile can be executed directly or can be scheduled to be executed later. The process can be run on a local desktop or on a server.

Source Data

ConnectWise can be defined as source data and the various objects can be accessed. Field level data from the objects can be extracted and mapped to destination objects and fields in different data formats. Data from multiple objects can be extracted. Multiple profiles can be set up to extract data from various objects.

Source data can also be filtered using various expressions. Prior to executing extract, the source data can be viewed to make sure the right records are getting selected.

Scenarios

The QXchange ability to integrate ConnectWise allows many uses. Certain limitations in ConnectWise reporting can be exceeded with this tool. Fields such as "Paid Date" on invoice are normally not available to reporting tools. Fields such as internal keys and last modified date/time are also not available directly. Using QXchange, you can access to those fields. This allows many different scenarios:

- Extract paid invoices in the last month into Excel
- Extract customer information with company names starting with "A"
- Insert spreadsheet invoice data sent from branch offices into ConnectWise.
- Extract Opportunities from Salesforce.com and create Invoices in ConnectWise.
- Extract Invoices from ConnectWise and update opportunities in Salesforce.com
- Get tickets entered in ConnectWise and load it to other systems.
- Get customer data entered online and create Customers in ConnectWise.

Roadmap

- Ability to push the data to ConnectWise using SDK.

Conclusion

QXchange does a tremendous job, understanding the intricacies of the ConnectWise data structure as well as the complications inherent in the data integration process. With this ability and its ease of use, it allows users to make more effective use of their ConnectWise Data.

Contact Us

"The QXchange product was able to take care of my integration needs right out of the box. And the QXchange team solved all the other usual data issues that come up in such a project, very quickly. They worked very closely with me and solved every issue. I am very happy I found QXchange."

- Rich Bartels. Goose Island Corporation