



FocusPlanit  
strategy · structure · support

# Who We Are

FocusPlanit is the industry's premier team of highly qualified ConnectWise, QuickBooks, Wise-Sync, GoZynta, CharTec, ConnectBooster experts who have dedicated years of their professional life implementing and optimizing these software solutions. Our hands-on experience working with hundreds of Managed Service Providers (MSPs) as well as our vast knowledge of the industry, allows our team to provide the unique ability to advise and teach your organization far beyond just the basics.

## **STRATEGY**

As your partner, we will help you develop the right strategy to meet your business goals.

## **STRUCTURE**

We will help you identify the right structure and necessary tools needed to keep your office running smoothly.

## **SUPPORT**

We offer support in your sales processes, your operational systems, and your finance tools.

# Services

Click on each Section to learn more

## Sales Processes

- Quoting
- Sales Management
- Sales Reporting
- Product Catalog
- Opportunity Management
- Leads Management
- Procurement
- Sales Orders

## Operations

- Automation
- Service Desk
- Dispatching
- Project Management
- Time Management
- Scheduling
- RMM Integration
- KPI Reporting
- SLA Management
- Relationship Management
- Onboarding

## Finance

- Invoicing
- Quickbooks, Xero, Sage and Others
- Agreements
- Reporting
- Payment Collection Integrations
- Purchase Orders
- Expense Management
- Product Catalog Management
- Vendor Management

# ConnectWise Support

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## TeamFocus Monthly Partnership

The FocusPlanit team partners with your team to manage your ConnectWise

### FEATURES:

- Customized Offering Tailored to Your Business Needs
- Assistance with 3rd Party Integrations
- Unlimited Maintenance and Administration Hours
- Full Access to the Entire FocusPlanit Team
- Fixed Monthly Budget

### WHAT'S INCLUDED:

- Development of Business Processes
- ConnectWise PSA Consulting and Administration
- ConnectWise CPQ Consulting and Administration
- Hands-on Training and Guidance for Quote to Cash Workflow
- Custom CPQ Quote forms
- Personalized ConnectWise Configuration Settings
- Common Business Practices
- Hands-on ConnectWise Training for Your Team

### AVAILABLE ADD-ONS:

- Onsite Training
- Centralized Office Services Including:
  - » Opportunity Conversion
  - » Creating Agreements
  - » Agreement Invoicing
  - » Product Catalog Administration
  - » Standard Invoicing
  - » Credit Memos



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