CASE STUDY

One Status Change, One Documented Process:

Fixing the ConnectWise Quote Handoff



Pivotal Crew

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A mid-sized managed service provider replaces a patchwork quote-request process with one automated, documented workflow in ConnectWise PSA.

The Challenge: When “Needs Quote” Meant Anyone’s Guess

Every time a technician hit a job that needed parts, the handoff to quoting and dispatch depended on who remembered to flag it.



Tickets sat in limbo with no status to show the delay.



Service tickets and their quotes had no link between them.



Quote requests came in by email, chat, or word of mouth, and some never landed at all.



Technicians didn’t know whether to close a ticket or hold it once a quote went out.

The Solution: One Status, One Path, No Exceptions

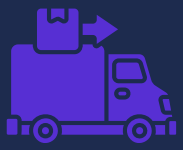
We built the whole process inside native ConnectWise PSA, with no add-ons and no extra cost.

- Setting a ticket to “Needs Quote” triggers the entire process automatically.
- The service ticket, quoting ticket, and opportunity stay linked from start to finish.
- The workflow splits cleanly for a replacement machine versus a repair already underway.
- Dispatch gets an automatic alert the moment products arrive.
- We documented every step so the client’s team can train on it and repeat it.

The Results: What Changed on the Ground



Quote requests stop slipping through the cracks because the status change creates the ticket and assigns an owner automatically.



Dispatch knows the instant products land, without chasing anyone down.



Technicians and dispatch follow the same written rules for closing or holding a ticket.



Every ticket, quote, and delivery record traces back to the others.



Leadership can see exactly where revenue is stuck.

Overview: Why This Client Chose Pivotal Crew

We build inside the tools an MSP already owns, so there's nothing new to license or maintain. Our team has spent close to 12 years running MSP operations and ConnectWise, so we understand this workflow from firsthand experience.

We hand over full documentation with every build, so the process outlives any one employee. The same framework adapts to any MSP running ConnectWise PSA with a similar gap.

The Impact: What Success Looks Like

Success for this client shows up in the details of day-to-day work. New hires learn the workflow straight from the documented SOP, with no shadowing required. Technicians know exactly what to do the second a job needs parts. Dispatch works from one clear queue instead of chasing updates, and leadership finally has a system they can trust for reporting.

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Facing a similar handoff problem in your own ConnectWise setup?

Book a free ConnectWise PSA assessment with Pivotal Crew and find out what's really behind it.