

Reports and Dashboards Implementation

Build Foundational Reporting Skills. Configure Dashboards. Support Adoption.

Statement of Work

[Reports and Dashboards Implementation Services Description](#)

Service Description

The Reports and Dashboards Implementation service provides remote software implementation to help the Client establish foundational usage of the Reports and Dashboards solution. ConnectWise resources support configuration, setup, administrator training, and adoption using ConnectWise recommendations and best practices.

The implementation includes software provisioning, initial coordination and scheduling, one BI and Reporting session, and one Q&A wrap up session. Depending on complexity and full Client engagement, the implementation is expected to take between 30 and 60 days.

Deliverables

The implementation provides foundational setup and guided training for the Reports and Dashboards software package.

BI and Reporting: One 1:1 Session, 1 Hour

- Complete user setup
- Review datasources, datasets, gauges, and dashboards
- Review out of the box gauges and dashboards for PSA and CPQ

Gauge and Dashboard Fundamentals

The consultant reviews the components used to understand and build gauges.

- Session activities include:
- Review gauges, measures, dimensions, and filters
- Review how to edit existing gauges
- Review how to create a new gauge
- Discuss foundational usage based on ConnectWise recommendations

Q&A Wrap Up: One 1:1 Session, 1 Hour

The consultant reviews setup progress and provides additional guided assistance.

- Review progress from setup
- Assist with further build outs in Dashboards, Reports, Gauge Builder, and Goals
- Share support details and address questions

Custom reporting, dashboards, KPIs, imports, migrations, ETL services, and integrations are not included unless separately scoped.

Partnering With ConnectWise

ConnectWise Resource Obligations & Communication

- Coordinate paperwork, software provisioning, University access, login details, resource assignment, and scheduling
- Provision the Reports and Dashboards software and provide login information
- Provide remote configuration, setup, administrator training, and adoption guidance
- Communicate project status and provide post session or post work recaps by email
- Document issues or risks and communicate project status or scope changes to the Client project team

Client Responsibilities

To support the implementation, the Client must:

- Complete assigned ConnectWise University coursework before implementation begins
- Provide project stakeholders, key decision makers, multiple points of contact, and required team members
- Define, create, schedule, and execute user acceptance testing plans and scripts
- Complete required data entry and populate ConnectWise import templates
- Review import template fields and confirm required data fields are included
- Manage custom reports, dashboards, KPIs, integrations, APIs, and non-ConnectWise products
- Review information observed during remote sessions and track additional assumptions
- Submit new initiatives or scope changes in writing through a ticket

Client availability and timely decisions are required to support the planned timeline.

Why Choose Reports and Dashboards Implementation?

- **Turn reporting data into clearer business insight**, helping teams understand performance without relying on manual reporting work
- **Improve visibility into KPIs, trends, and operational health through** guided setup and focused administrator training
- **Support faster adoption by helping teams configure**, use, and maintain Reports and Dashboards with confidence
- **Reduce guesswork by giving stakeholders** a more consistent view of the data they need to make informed decisions

Reports and Dashboards Implementation helps clients move from data collection to practical visibility across the business. The engagement provides setup, guidance, and training so teams can use reporting tools more effectively after implementation.

CONTACT US



accountmanager@connectwise.com



home.connectwise.com



813.463.4700 Press 1 for Sales
and 1 for Account Management



UK Phone: +44 (0)203 817 6900
Ask for your Account Manager

Service scope may vary. Refer to the Statement of Work for complete details.