

ConnectWise PSA™ Report Development and Training

Custom Reporting. Expert Guidance. Actionable Insights for Your PSA.

Ideal for:

Partners who need custom reporting, enhanced visualizations, document/form design, or training

Statement of Work

[Reporting & Forms Development](#)
[Hourly](#)
Estimate Level of Effort: 7 hours

Includes

Report Report Writer, SSRS, Reports and Dashboards, Custom Invoices, CPQ, Forms Design

Service Overview

ConnectWise PSA Report Development and Training gives you direct access to PSA Technical Consultants who can **design, build, optimize, or train your team on PSA reporting tools**.

This includes structured support for:

- **Report writer reports**
- **Reports and Dashboards**
- **SSRS / SQL-based reporting** (on-premises)
- **Custom invoice templates**
- **Custom CPQ (configure price quote) form design**

Work is performed remotely and billed on actual hours, allowing you to prioritize the reporting outcomes most important to your business.

Note: Scoping is required to define objectives, confirm feasibility, and estimate effort.

ConnectWise cannot guarantee the final work product until development begins.

What You Get: High Value Deliverables

✓ Remote Ad Hoc Report Development Hours

Flexible use of purchased hours for:

- Report writer development or optimization
- Reports and Dashboards custom reporting
- SQL queries, functions, and created objects
- SSRS development (on-prem)
- Custom invoice templates
- Custom CPQ form design

All work is delivered through a **pre-defined, Agile development process**.

✓ Training Sessions (Optional)

Hands-on training for your team, covering:

- Report Writer fundamentals
- Reports and Dashboards reporting and KPI setup
- SQL/SSRS concepts
- Report lifecycle best practices

✓ User Acceptance Testing (UAT)

- Work product delivered for review
- Ticket enters waiting on partner UAT status
- Client tests and approves output
- If no reply is received within two weeks, approval is assumed

Partnering with ConnectWise

What ConnectWise Provides

- Certified PSA technical consultants
- Scheduling coordination
- Remote delivery through RDP / ScreenConnect®, a ConnectWise company
- Iterative development with samples and progress updates
- Ticket-based communication and notifications

Client Responsibilities

To ensure a successful engagement, the Client must:

- Assign a **PSA project manager** as primary contact
- Provide required PSA and SQL access
- Provide report specifications (ConnectWise does not provide design consulting)
- Validate the work product thoroughly during UAT
- Approve or request changes through the project ticket
- Understand that **all time is billable**, including emails, scoping, revisions, and training

Why Choose PSA Report Development and Training?

- **Make data actionable** with custom reports and dashboards
- **Enhance internal processes** with optimized invoices and CPQ forms
- **Expand team capabilities** through training on PSA reporting tools
- **Speed up your reporting roadmap** using expert developers
- **Ensure accurate outcomes** with structured UAT
- **Flexible, pay for what you need model** using ad hoc hours

This service is your fastest, safest path to scalable, reliable PSA reporting and visualization.

Billing & Engagement Details

- Minimum purchase: **2 hours**
- Billed on **actual time used** (scoping, development, communication, testing)
- Additional hours available at the same rate
- Prepaid time expires after **12 months**

CONTACT US



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