

ConnectWise Fundamentals Boot Camp

What you will learn:

Start delivering business results! This Boot Camp will provide you with a comprehensive review and best practice guidelines to increase your knowledge and skills within ConnectWise. This will help you to analyze what you are already

doing and what you need to do to advance your competency in executing your business processes. These core processes and concepts will enable you to improve efficiency and service effectiveness across your organization.

Audience:

- New to ConnectWise Partners (post implementation)
- Service Managers new to ConnectWise
- Sales Managers new to ConnectWise
- ConnectWise Administrators new to ConnectWise

Everything You Wanted to Know About:

- Member Maintenance
- Portal Configurations
- Configurations
- Service Setup Tables
- Marketing Manager

Course Topics

Service Management

- Service Tickets
- Service Board Best Practices
- Service Workflow Best Practice
- Service Workflows
- Service Ticket Bundling
- Recurring Service Tickets
- One-Off Service Tickets

Resource Management

- Dispatch Portal
- Dispatch Portal Best Practices

Agreement Management

- Agreement Setup
- Agreement Best Practices
- Invoice Templates for Agreements
- Additions and Adjustments
- Exclusions/Limits

Deciphering Reports

- Financial Dashboard
- Business Report Cards
- Agreement Reports
- Resource Reports
- Finance Reports

Time and Expense Management

- Entering Time and Expenses
- Approvals Management

Invoicing

- Special Invoice – Downpayment
- Special Invoice – Miscellaneous
- Invoice Batch Emailing
- Deciphering Reports
- Financial Dashboard
- Business Report Cards
- Agreement Reports
- Resource Reports
- Finance Reports