

pax8Academy

MANGAGING PROJECTS IN CONNECTWISE

Syllabus

Last updated: October 2023

Course Overview

Managing Projects in ConnectWise is a 4-week, live-instruction, virtual course that will guide you through the project management process in the ConnectWise PSA. The course will cover how to set up, schedule, and manage a project in ConnectWise. The instructor will show you how to use scoping templates and project plans to create and manage the project schedule with ease.

The goal of this course is to enable Project Managers to use ConnectWise confidently to manage projects at their MSP from start to finish.

This course is designed for:

- Project Managers who use ConnectWise as their PSA
- MSPs who have recently started using ConnectWise
- MPS who are looking to improve their project management with ConnectWise
- Pax8 Partners who have a basic understanding of project management at MSPs or have taken the Academy Instructor Led Course - Project Management

It is recommended that you take the Pax8 Academy course Project Management first, as the concepts you learn in that course will support your learning in this one.

What You'll Get

- 4 hours of virtual, interactive, instructor-led content taught by a project management and ConnectWise expert.
- Downloadable videos* of the content you can rewatch at your convenience.
- Downloadable slide decks, guides, and documentation.

Learning Objectives

By attending this course, you will learn:

- Business Units in ConnectWise
- The differences between service boards and project boards
- How to manage the setup for projects including security roles, project roles, workflow rules, templates, and customer-type notifications
- Scheduling with Project Dispatch Portal
- Inspection and validation including quality assurance, budget analysis, and reporting

*Videos will either be recordings from your session, or they may be previously recorded material in which partner faces and voices have been removed. It is recommended to attend courses live to reap the full benefits of Q&A with the instructor and class.

Schedule of Topics

Session 1: PSA Configuration

- Business Units
- Member Costs
- Customer Type
- Security Roles
- Project Roles
- Project Boards
- Workflow Rules
- Templates
- Products

Session 2: Project Configuration Options

- Opportunity Setup
- Billing Methods
- Sales Orders / Procurement
- New Project Setup
- Project Tabs
- Work Plan Options

Session 3: Project Standup and Scheduling

- Opportunity Conversion
- Sales Orders Conversation
- WBS to Work Plan with Templates
- Scheduling with Project Dispatch Portal
- Setup My Calendar View

Session 4: Inspection and Validation

- Project Board View
- Dispatch Portal
- Needs Attention View (Project Ticket Search)
- Completed Ticket Review (Project Ticket Search)
- Project Reporting

Instructor



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Next Steps

Explore your next step with Pax8 Academy:

- On-Demand Content
 - [Strategic Time Management](#)
- Peer Groups
 - [Consider joining a Peer Group for Project Managers](#)
- Coaching
 - [Sign up for Business Coaching](#)

Testimonials

"This course is beneficial. There's a lot of valuable information that can help you wrangle your Projects or Professional Services teams. Josh is a fantastic instructor and has a knack for making people feel included in the course. 10/10 recommend!"

-S. Timmons, Interplay IT