

pax8Academy

CONTRACTS IN AUTOTASK

Syllabus

Last updated: June 2024

Course Overview

Contracts in Autotask is a 6-week, virtual, live-instruction course. This course is designed to build a framework for Autotask contracts that produces measurable reporting of profitability and efficiency. We will explore best practices and key foundational components such as Billing Codes, Roles, product and service components and how they are applied to contract types. We will further explore use cases for each contract type and how they are constructed to produce a measurable outcome.

This course is designed for:

- MSPs who have recently started using Autotask
- MSPs who are looking to improve contract profitability and efficiency within Autotask
- Autotask users with roles in Finance Administration, Account Management, Sales Administration, Service Executives, Owners

If you are new to contracts and agreements outside of how it's managed in the PSA (for example if you don't have an MSA), it is recommended that you take the Pax8 Academy course Contracts and Agreements, as it will provide an overview of all contract and agreement types.

What You'll Get

- 6 hours of virtual, interactive, instructor-led content taught by an expert in contract profitability and efficiency in Autotask.
- Downloadable videos* of the content you can rewatch at your convenience.
- Downloadable slide decks, handouts, and documentation.

Learning Objectives

By attending this course, Partners will learn:

- Applying Contract Types to Business Units
- Contract Foundations – Billing Codes, Roles, Products and Services
- Contract Components by Contract Type – Services, Billing Rules, Exclusions, Charges, Configuration Items and Projects
- Contract Management and Profitability 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

1. Financial Overview
 - a. Measuring Profitability
 - b. Lines of Business Defined
 - c. Contract Gross Margin and Efficiency
2. Contract Types
 - a. Mapping Contract Types to Lines of Business
 - b. Use case for each Contract Type
 - c. Use case for Subscriptions
3. Building Contract Components
 - a. Resource Burden Costs
 - b. Calculating and Applying Role Rates
 - c. Work Types
 - d. Lines of Business
 - e. Identifying and Calculating Labor Revenue
 - f. Identifying and Calculating Hard Costs
 - g. Identifying Recurring 3rd Party Cloud Products
4. Applying Contract Components
 - a. Services and Service Bundles
 - b. Products and Billing Codes
 - c. Exclusions by Role, Work Type, and or Issue Type
 - d. Exclusion Sets
 - e. Contract Exclusion Paths
 - f. Contract Categories
 - g. Contract Templates
5. Deploying and Managing Contracts
 - a. Contract Terms
 - b. Contract Billing Cycles
 - c. Bill To and Sub-Companies
 - d. Adjustments and Prorations
 - e. Contract True-Up Best Practices
6. Contract Reporting
 - a. Workflows
 - b. Dashboard Widget Reporting
 - c. Profitability Live Reporting

Instructor



Chuck Rich
Senior Executive Coach

LinkedIn: <https://www.linkedin.com/in/chuck-d-rich/>
Email: crich@pax8.com

Next Steps

Explore your next step with Pax8 Academy:

- On-Demand Content
 - [The Four Levers of Gross Margin](#)
 - [EBITDA Demystified: From Numbers to Strategy](#)
 - [MSPCFO 101](#)
- Instructor-Led Courses
 - [Contracts and Agreements](#)
 - [Operations for Efficiency and Profitability](#)
 - [Managing Projects in Autotask](#)
- Peer Groups
 - [Consider joining a Peer Group](#)
- Coaching
 - [Sign up for Business Coaching](#)