pax8 | Academy

ConnectWise Procurement 101

Syllabus

Training Overview

Thie training provides an overview of best practices for using the Procurement Module in the ConnectWise PSA.

The instructor will review the details of the Procurement Module in ConnectWise and how it interfaces with Opportunities, Tickets, Projects and Sales Orders (Invoicing).

Attendees will receive Visio and Word templates to outline their procurement process, as well as inside tips on creating accurate data in ConnectWise.

This training is designed for:

- **Procurement Supervisors**
- **Accounting staff who interface with Procurement**
- **Service staff who interface with Procurement**
- **Finance staff**

Training Inclusions

- **4-hours of virtual, interactive content taught by an expert instructor with ConnectWise Procurement expertise**
- **Downloadable videos* of the content you can watch on-demand at your convenience**
- **Downloadable slide decks, handouts and resources**

Learning Objectives

Partners attending this training will learn how to:

- **Determine what "good" looks like for ConnectWise Procurement**
- **Create Purchasing demands in a repeatable manner**
- **Receive POs with accurate financial data**
- **Interface with QuickBooks**

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

Training Topics

Session 1: The Basics

- **Quoting tool overview**
- **Opportunities**
- **Product attributes**

Session 2: Conversion from Opportunity

- **Why Sales Orders?**
- **Invoicing best practices**
- **Down payments**
- **Conversion to Tickets or Projects**
- **Best practices for Sales Orders**

Session 3: Purchase Orders

- **Purchasing demands**
- **Vendor setup tips**
- **PO statuses**
- **Purchasing variances**
- **Best practices for POs**

Session 4: Receiving

- **Detailed steps**
- **Multiple receivings**
- **Posting to QuickBooks**
- **Review and questions**

Meet the Instructor

Chris Brown

Senior Executive Coach

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Explore your next steps with Pax8 Academy

- **On-Demand Learning**
  - Pax8 ConnectWise Setup and Configuration
- **Instructor-Led Training**
  - Agreements in ConnectWise
  - Managing Projects in ConnectWise
- **Peer Groups**
  - Connect, collaborate and grow with a Peer Group
- **Coaching**
  - Transform your business with coaching for Value Creation, Operations, Sales and Security

Register for this training through the Instructor-Led Training Subscription

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- **1-5 employees**
- **6-25 employees**
- **26-50 employees**
- **51+ employees**

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ConnectWise Setup

Pax8 ConnectWise Setup Guide

ConnectWise Sales Orders

How Sales Orders Can Help Optimize Your Conversion Process | ConnectWise Product Tips