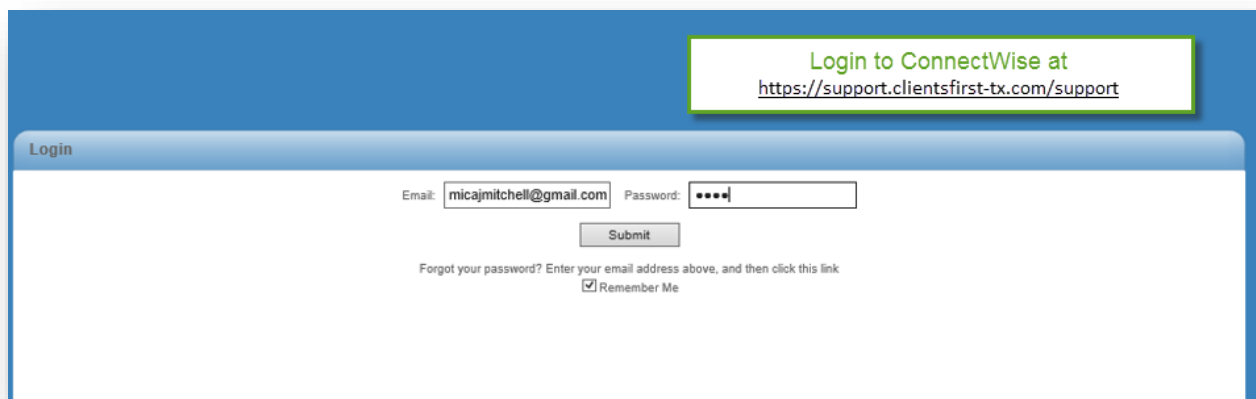


## CONNECTWISE OVERVIEW

Clients First uses ConnectWise to manage support requests and projects for our customer base. This is an industry standard tool for managing customer relationships, issue tracking, project management including planning, scheduling, budget tracking and billing. We want to give you easy tools to communicate with our team so we can solve any issues in a timely manner. In addition, we provide consultant and project manager email addresses and cell phone numbers.

Log into ConnectWise: <https://support.clientsfirst-tx.com/support>



The login form is titled "Login" and is set against a blue background. It features a "Submit" button and a "Remember Me" checkbox. A green box in the top right corner provides the login URL. Below the form, a link is provided for users who have forgotten their password.

Login to ConnectWise at  
<https://support.clientsfirst-tx.com/support>

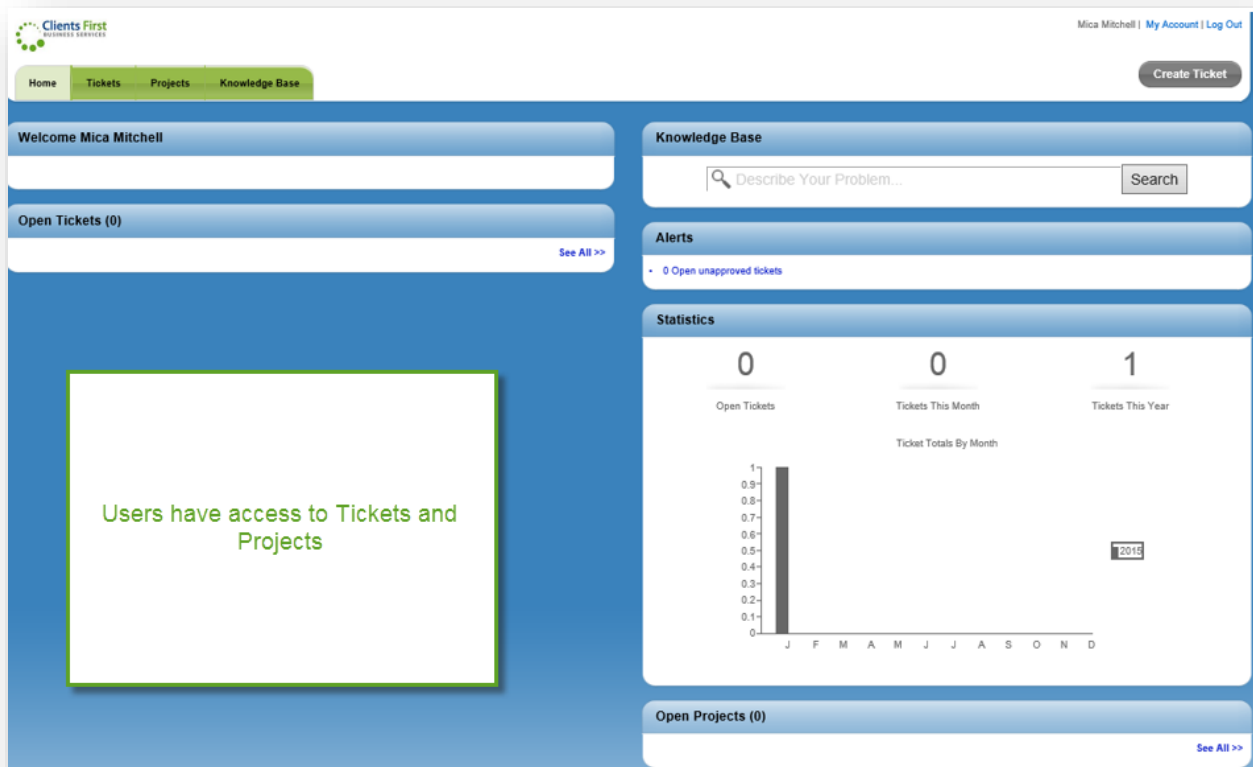
Login

Email:  Password:

Submit

Forgot your password? Enter your email address above, and then click this link  
☒ Remember Me

Example of home screen for users.



The home screen displays a navigation bar with "Home", "Tickets", "Projects", and "Knowledge Base". The "Tickets" tab is selected. The main content area includes a welcome message, a "Create Ticket" button, and sections for "Open Tickets (0)", "Knowledge Base", "Alerts", "Statistics", and "Open Projects (0)". A green box highlights the "Tickets" and "Projects" tabs.

Welcome Mica Mitchell

Open Tickets (0) [See All >>](#)

Knowledge Base

Describe Your Problem... [Search](#)

Alerts

- 0 Open unapproved tickets

Statistics

0 Open Tickets      0 Tickets This Month      1 Tickets This Year

Ticket Totals By Month

2015

Open Projects (0) [See All >>](#)

Users have access to Tickets and Projects

## SERVICE TICKETS

Service Tickets can be created by:

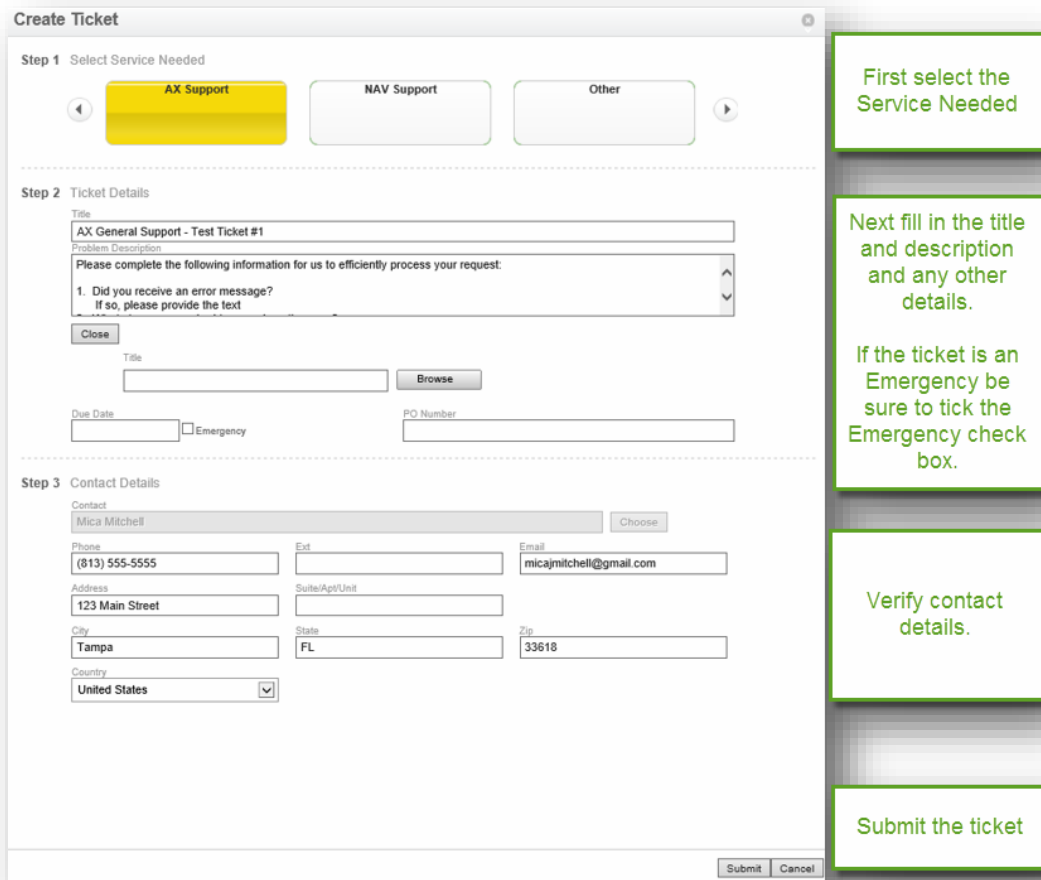
- Email: Send a mail to [cfbssupport@clientsfirst-tx.com](mailto:cfbssupport@clientsfirst-tx.com)
- Web: Log in to our portal and create a new ticket: <https://support.clientsfirst-tx.com/support>

When sending an email, ConnectWise creates a new ticket with your information already specified. The email Subject Line is used as the Ticket name and the system automatically includes the email as an attachment so any screen shots or attached documents are automatically saved to the newly created ticket.

When creating a new ticket through the portal, click the Create Ticket button on the home screen in the portal.



Then select whether the support request is AX, NAV or other. Enter a title for the ticket and a description of the issue. The default priority is medium. If the ticket is an emergency then check the emergency box and the ticket will be submitted with Priority 1-Critical status.



The image shows a 'Create Ticket' form with three steps. Step 1, 'Select Service Needed', has three buttons: 'AX Support' (highlighted in yellow), 'NAV Support', and 'Other'. Step 2, 'Ticket Details', includes a 'Title' field with the text 'AX General Support - Test Ticket #1', a 'Problem Description' text area with a prompt to provide information for efficient processing, a 'Close' button, a 'Title' field with a 'Browse' button, a 'Due Date' field, an 'Emergency' checkbox, and a 'PO Number' field. Step 3, 'Contact Details', includes a 'Contact' dropdown with 'Mica Mitchell' selected, a 'Choose' button, and fields for 'Phone' ((813) 555-5555), 'Ext', 'Email' (micajmitchell@gmail.com), 'Address' (123 Main Street), 'Suite/Apt/Unit', 'City' (Tampa), 'State' (FL), 'Zip' (33618), and 'Country' (United States). Annotations on the right side of the form provide instructions: 'First select the Service Needed' points to the service buttons; 'Next fill in the title and description and any other details.' points to the title and description fields; 'If the ticket is an Emergency be sure to tick the Emergency check box.' points to the Emergency checkbox; 'Verify contact details.' points to the contact information fields; and 'Submit the ticket' points to the Submit button at the bottom right.

**Step 1 Select Service Needed**

AX Support NAV Support Other

**Step 2 Ticket Details**

Title  
AX General Support - Test Ticket #1

Problem Description  
Please complete the following information for us to efficiently process your request:  
1. Did you receive an error message?  
If so, please provide the text

Close

Title  
Browse

Due Date ☐ Emergency PO Number

**Step 3 Contact Details**

Contact  
Mica Mitchell Choose

Phone  
(813) 555-5555

Ext

Email  
micajmitchell@gmail.com

Address  
123 Main Street

Suite/Apt/Unit

City  
Tampa

State  
FL

Zip  
33618

Country  
United States

Submit Cancel

First select the Service Needed

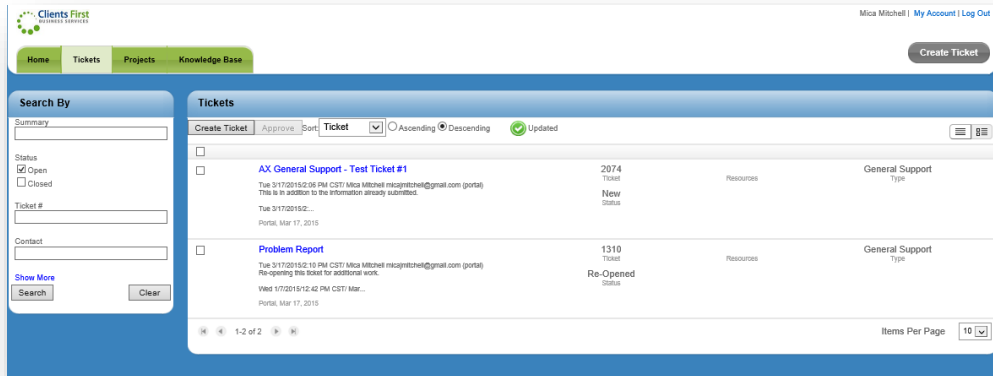
Next fill in the title and description and any other details.

If the ticket is an Emergency be sure to tick the Emergency check box.

Verify contact details.

Submit the ticket

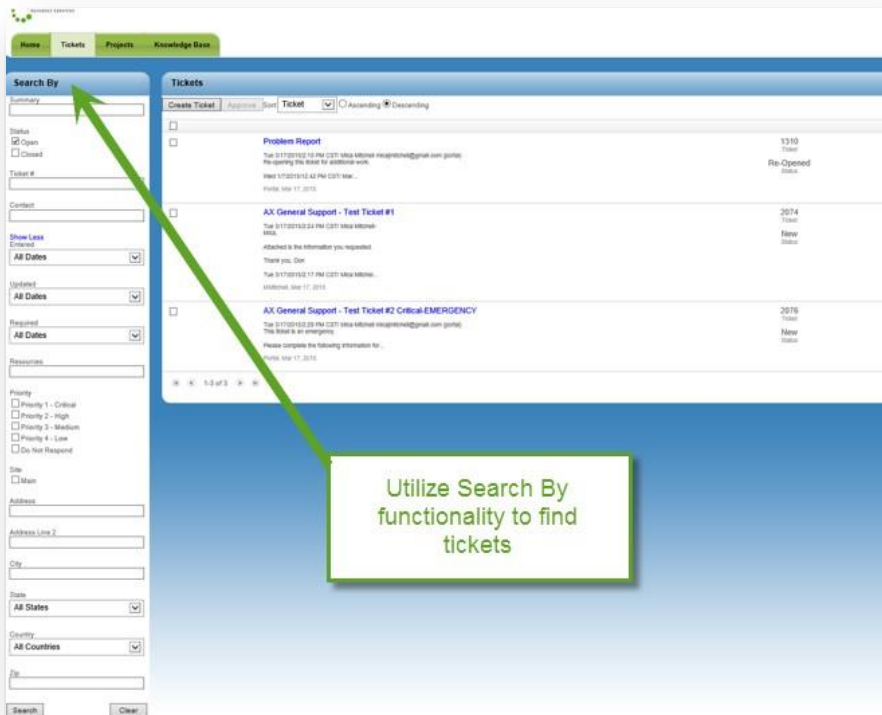
Once the ticket has been submitted to ConnectWise, whether through email or the portal, it will be assigned to the appropriate Clients First resource. The ticket will also be available for review on the Tickets tab when in the Portal.



The screenshot displays the Clients First ConnectWise portal interface. At the top, the navigation bar includes 'Home', 'Tickets', 'Projects', and 'Knowledge Base'. A 'Create Ticket' button is located in the top right corner. The main content area is titled 'Tickets' and features a search sidebar on the left with fields for 'Summary', 'Status' (Open/Closed), 'Ticket #', and 'Contact'. The central table lists tickets with columns for checkboxes, ticket titles, dates, ticket numbers, statuses, and types. Two tickets are visible: 'AX General Support - Test Ticket #1' (Ticket #2074, New Status, General Support Type) and 'Problem Report' (Ticket #1310, Re-Opened Status, General Support Type). The bottom of the page shows pagination controls indicating '1-2 of 2' items and a 'Items Per Page' dropdown set to 10.

	AX General Support - Test Ticket #1	Problem Report
	Tue 3/17/2015 2:08 PM CST: Mica Mitchell mica.mitchell@gmail.com (portal) This is in addition to the information already submitted. Tue 3/17/2015 2:08 PM CST Portal, Mar 17, 2015	Tue 3/17/2015 2:10 PM CST: Mica Mitchell mica.mitchell@gmail.com (portal) Re-opening this ticket for additional work. Wed 3/18/2015 12:42 PM CST: Mar... Portal, Mar 17, 2015
	2074 Ticket New Status	1310 Ticket Re-Opened Status
	Resources	Resources
	General Support Type	General Support Type

There are multiple ways to search for tickets by using the Search By functionality found on the Tickets tab. Search by Open, Closed, Dates, Priority, etc.



**Search By**

Summary

Status

☒ Open

☐ Closed

Ticket #

Contact

Show Less

Contact

All Dates

Updated

All Dates

Required

All Dates

Reassigned

Priority

☐ Priority 1 - Critical

☐ Priority 2 - High

☐ Priority 3 - Medium

☐ Priority 4 - Low

☐ Do Not Respond

Site

☐ Main

Address

Address Line 2

City

State

All States

Country

All Countries

Zip

Search

Clear

**Tickets**

Create Ticket Approve Sort Ticket Ascending Descending

Problem Report

Tue 3/17/2015 10:10 PM CST Mica Mitchell micajmitchell@gmail.com (portal)

Re-opening this ticket for additional work.

Wed 3/18/2015 12:42 PM CST Mar...

Portal, Mar 17, 2015

1310 Ticket

Re-Opened Status

AX General Support - Test Ticket #1

Tue 3/17/2015 2:24 PM CST Mica Mitchell Mica,

Attached is the information you requested.

Thank you, Don

Tue 3/17/2015 17:17 PM CST Mica Mitchell...

Mitchell, Mar 17, 2015

2074 Ticket

New Status

AX General Support - Test Ticket #1 Critical-EMERGENCY

Tue 3/17/2015 2:24 PM CST Mica Mitchell micajmitchell@gmail.com (portal)

This ticket is an emergency.

Please complete the following information for...

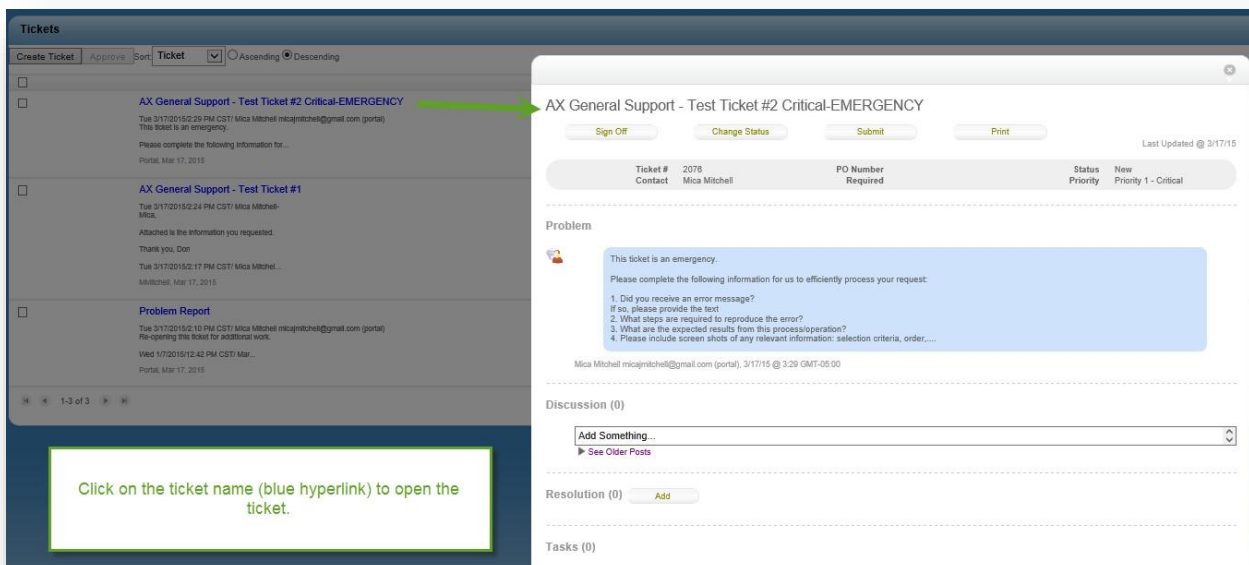
Portal, Mar 17, 2015

2076 Ticket

New Status

Utilize Search By functionality to find tickets

Open the ticket by clicking on the ticket name (blue hyperlink).



**Tickets**

Create Ticket Approve Sort Ticket Ascending Descending

AX General Support - Test Ticket #2 Critical-EMERGENCY

Tue 3/17/2015 2:29 PM CST Mica Mitchell micajmitchell@gmail.com (portal)

This ticket is an emergency.

Please complete the following information for...

Portal, Mar 17, 2015

AX General Support - Test Ticket #1

Tue 3/17/2015 2:24 PM CST Mica Mitchell Mica,

Attached is the information you requested.

Thank you, Don

Tue 3/17/2015 17:17 PM CST Mica Mitchell...

Mitchell, Mar 17, 2015

Problem Report

Tue 3/17/2015 10:10 PM CST Mica Mitchell micajmitchell@gmail.com (portal)

Re-opening this ticket for additional work.

Wed 3/18/2015 12:42 PM CST Mar...

Portal, Mar 17, 2015

Click on the ticket name (blue hyperlink) to open the ticket.

**AX General Support - Test Ticket #2 Critical-EMERGENCY**

Sign Off Change Status Submit Print

Last Updated @ 3/17/15

Ticket # 2076 PO Number Required Status New Priority 1 - Critical

Contact Mica Mitchell

**Problem**

This ticket is an emergency.

Please complete the following information for us to efficiently process your request:

1. Did you receive an error message? If so, please provide the text.
2. What steps are required to reproduce the error?
3. What are the expected results from this process/operation?
4. Please include screen shots of any relevant information: selection criteria, order,....

Mica Mitchell micajmitchell@gmail.com (portal), 3/17/15 @ 3:29 GMT-05:00

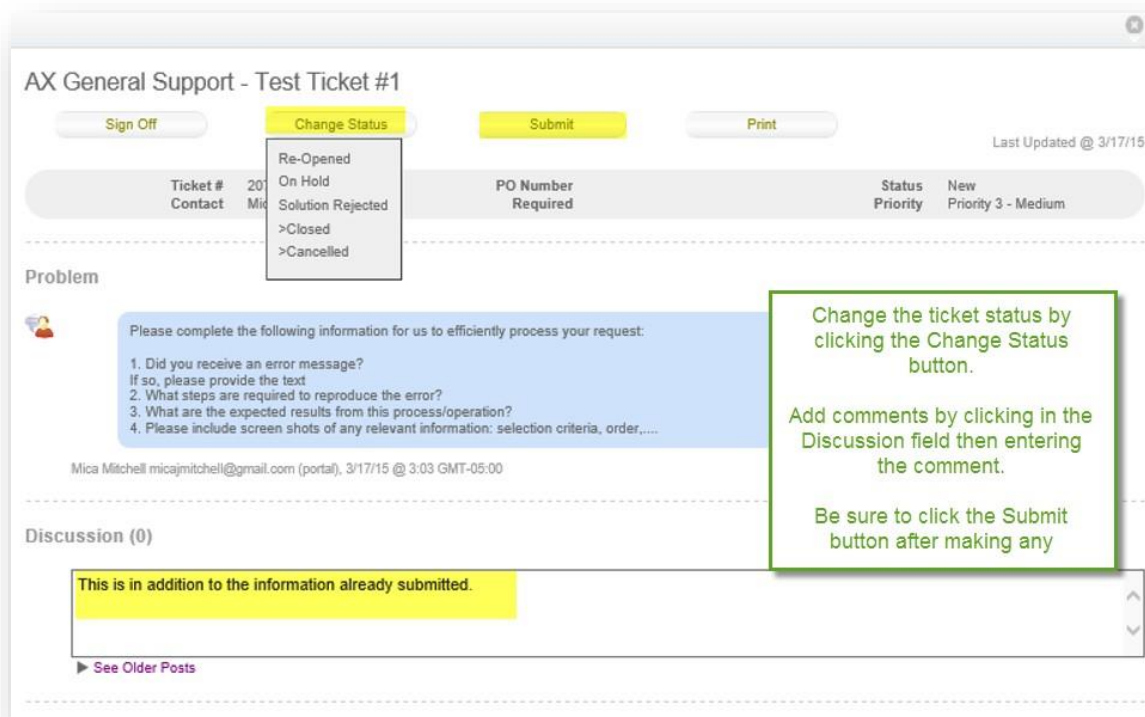
**Discussion (0)**

Add Something... See Older Posts

**Resolution (0)** Add

**Tasks (0)**

Once the ticket is open options include changing status, printing, adding comments and reviewing attachments.



AX General Support - Test Ticket #1

Sign Off Change Status Submit Print

Last Updated @ 3/17/15

Ticket #	Contact	PO Number	Status	Priority
201	Mik	Required	New	Priority 3 - Medium

**Problem**

Please complete the following information for us to efficiently process your request:

1. Did you receive an error message?  
If so, please provide the text
2. What steps are required to reproduce the error?
3. What are the expected results from this process/operation?
4. Please include screen shots of any relevant information: selection criteria, order,....

Mica Mitchell micajmitchell@gmail.com (portal), 3/17/15 @ 3:03 GMT-05:00

**Discussion (0)**

This is in addition to the information already submitted.

[See Older Posts](#)

Change the ticket status by clicking the Change Status button.

Add comments by clicking in the Discussion field then entering the comment.

Be sure to click the Submit button after making any

AX General Support - Test Ticket #1

Sign Off Change Status Submit **Print**

Ticket # 2074 PO Number Status New  
Contact Mica Mitchell Required Priority Priority

Problem

Please complete the following information for us to efficiently process your request:

1. Did you receive...
2. If so, please provide...
3. What steps are...
4. What are the es...
4. Please include...

Mica Mitchell micajmitchell@g...

Discussion (0)

This is in addition to th...

See Older Posts

Resolution (0) Add

Tasks (0)

Click the Print button to print information about the specific Service Ticket.

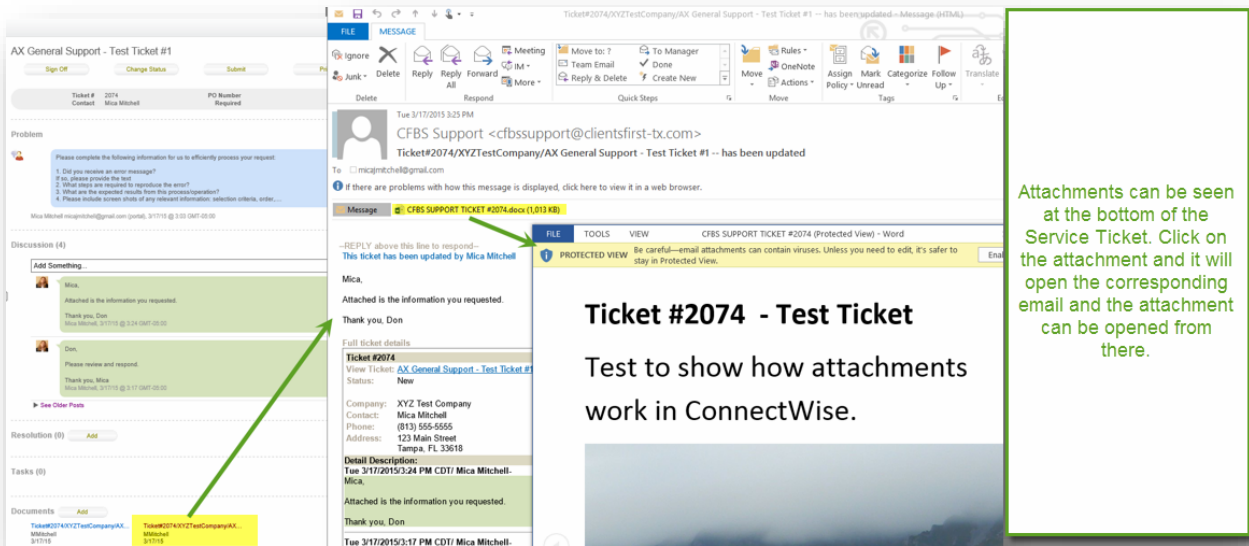
https://support.clientsfirst-tx.com/v4\_6\_release/services/system\_io/Reports/report...

**Clients First Business Solutions**  
Service Ticket

Service Ticket #2074: AX General Support -  
Test Ticket #1

Details	
Company: XYZ Test Company	Service Board:
Contact: Mica Mitchell	Status: New
Phone: (813) 555-5555	Service Type: General Support
Email: micajmitchell@gmail.com	Source: Portal
Site Name: Main	Service Location: Remote
Address: 123 Main Street Tampa, FL 33618 United States	Team: AX Support Team

Attachments are listed at the bottom of the ticket. Click on the attachment to view the documents.

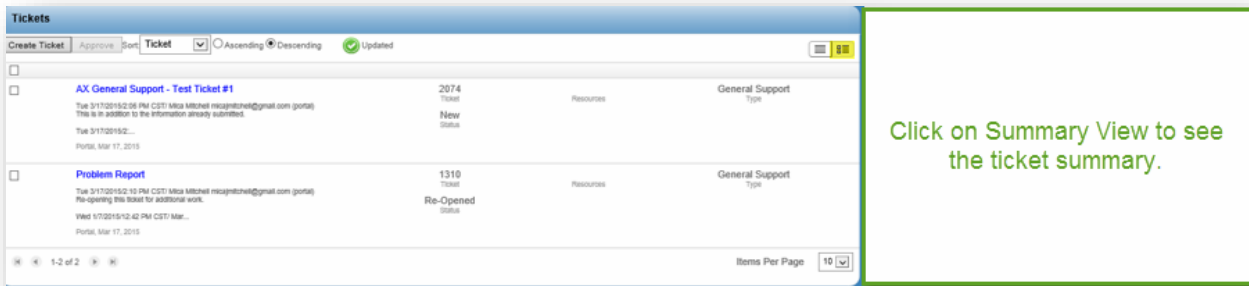


**Ticket #2074 - Test Ticket**

Test to show how attachments work in ConnectWise.

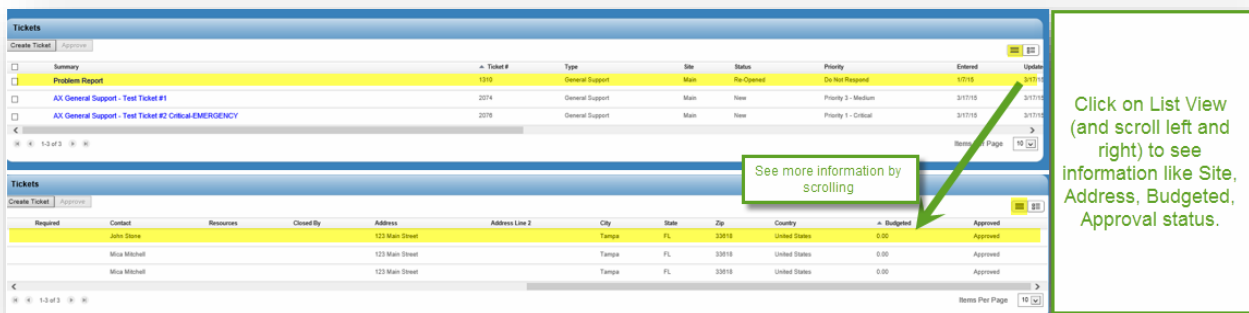
Attachments can be seen at the bottom of the Service Ticket. Click on the attachment and it will open the corresponding email and the attachment can be opened from there.

Change the view on the Tickets screen to view budgeted hours and more. Summary View:



Click on Summary View to see the ticket summary.

List View



Click on List View (and scroll left and right) to see information like Site, Address, Budgeted, Approval status.

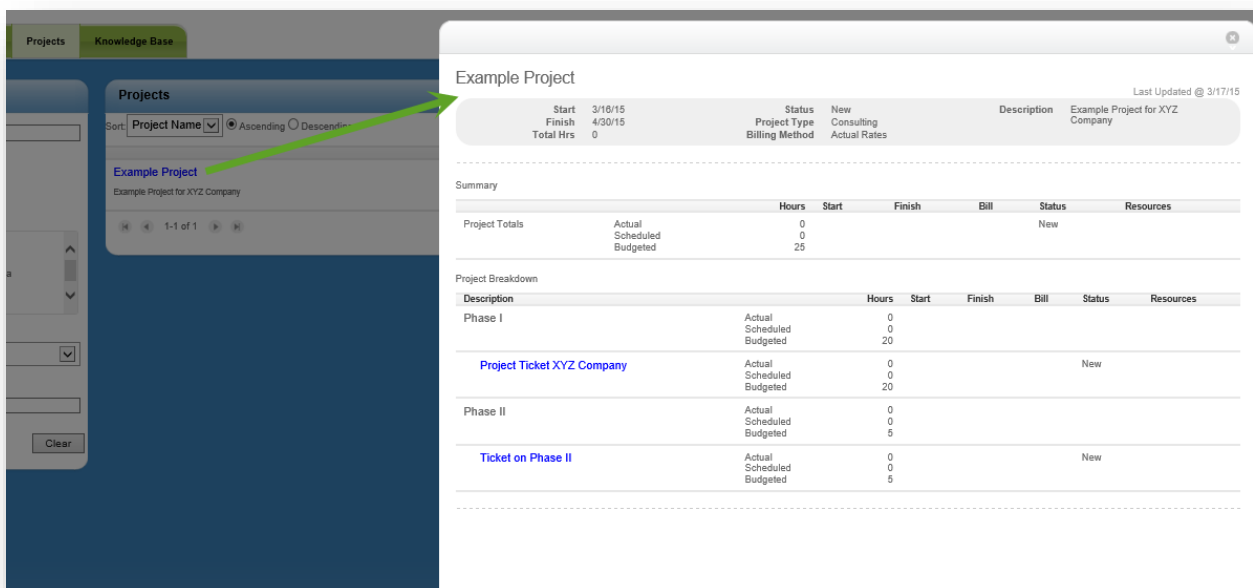
See more information by scrolling



## PROJECTS

The Project tab works much the same way as the Service Ticket Tab, however, projects can only be created by Clients First. Once the Project, Phases and Tickets have been created they can be accessed by approved employees.

As with Service Tickets, the view on the Project tab can be changed from Summary to List and there is Search capability. To open a project click on the Project Name (blue hyperlink). This opens the Project overview screen which lists the different phases and tickets on the project. It also lists the Project hour totals and the breakdown of hours by phase and ticket. Start and Finish dates and resources are also listed here.



**Example Project** Last Updated @ 3/17/15

Start	Finish	Status	Project Type	Billing Method	Description
3/16/15	4/30/15	New	Consulting	Actual Rates	Example Project for XYZ Company
Total Hrs	0				

---

**Summary**

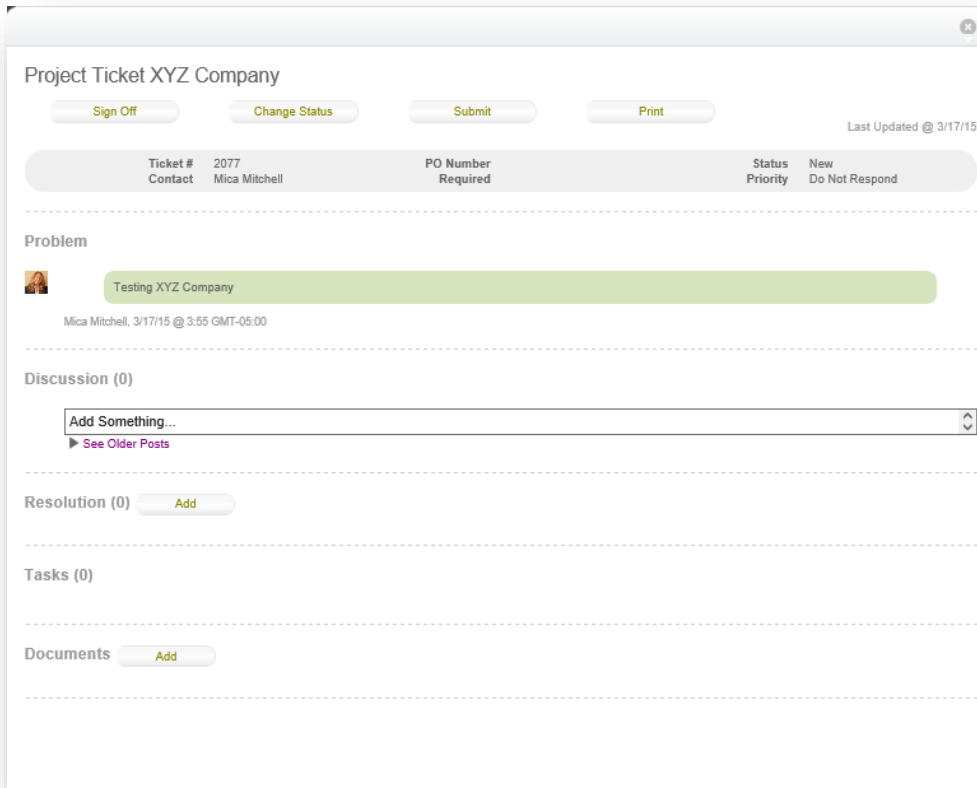
	Hours	Start	Finish	Bill	Status	Resources
Project Totals	Actual Scheduled Budgeted	0 0 25			New	

---

**Project Breakdown**

Description	Hours	Start	Finish	Bill	Status	Resources
Phase I	Actual Scheduled Budgeted	0 0 20				
<a href="#">Project Ticket XYZ Company</a>	Actual Scheduled Budgeted	0 0 20			New	
Phase II	Actual Scheduled Budgeted	0 0 5				
<a href="#">Ticket on Phase II</a>	Actual Scheduled Budgeted	0 0 5			New	

Once on the Project overview select the appropriate ticket and click on the description (blue hyperlink). This will open the Project Ticket. Once in the Project Ticket it behaves similarly to the Service Ticket including changing the status, adding comments, printing, and attachments.



The screenshot displays a web interface for a 'Project Ticket XYZ Company'. At the top, there are four buttons: 'Sign Off', 'Change Status', 'Submit', and 'Print'. To the right of these buttons, it says 'Last Updated @ 3/17/15'. Below this is a table with ticket details:

Ticket #	Contact	PO Number	Status	New
2077	Mica Mitchell	Required	Priority	Do Not Respond

Below the table, the 'Problem' section shows a user profile icon and a green bar with the text 'Testing XYZ Company'. Below this, it says 'Mica Mitchell, 3/17/15 @ 3:55 GMT-05:00'. The 'Discussion (0)' section has a text input field with the placeholder 'Add Something...' and a 'See Older Posts' link. The 'Resolution (0)' section has an 'Add' button. The 'Tasks (0)' section is empty. The 'Documents' section has an 'Add' button.

## EXAMPLE PROJECT TEMPLATE

Typically our Project Manager will start our clients' projects with this standard template. They then update/edit based on the quote and Project Details provided by the sales team.

Project Templates > Template > Work Plan

Work Plan

Template Work Plan

← ↻ + New Phase + New Ticket

Description	Hrs
<b>Preparation</b>	<b>120.00</b>
<a href="#">Kick Off Meeting</a>	16.00
<a href="#">Server/Env. Review</a>	8.00
<a href="#">Software Installation</a>	8.00
<b>Data Imports</b>	<b>40.00</b>
<a href="#">Data Prep/Cleansing</a>	16.00
<a href="#">Base Table Imports</a>	24.00
<a href="#">Structure COA</a>	8.00
<a href="#">Project Management</a>	80.00
<b>Foundation</b>	<b>64.00</b>
<a href="#">Basic System Setups</a>	4.00
<a href="#">Basic Security</a>	8.00
<a href="#">GL - Incl. Fixed Assets &amp; Bank</a>	8.00
<a href="#">A/R Setup</a>	4.00
<a href="#">A/P Setups</a>	4.00
<a href="#">CRM Setups</a>	4.00
<a href="#">Inv/BOM Setups</a>	16.00
<a href="#">Master Planning</a>	8.00
<a href="#">Project Setups</a>	8.00
<b>Implementation</b>	<b>238.00</b>
<a href="#">GL/AR/AP Training</a>	40.00
<a href="#">GL/AR/AP Follow-up/Review</a>	8.00
<a href="#">Inv/BOM/Master Planning Training</a>	40.00
<a href="#">Inv/BOM/Master Planning Follow-up/Review</a>	8.00
<a href="#">Project Training</a>	128.00
<a href="#">Project Follow-up/Review</a>	8.00
<a href="#">CRM Training</a>	4.00
<a href="#">CRM Follow-up/Review</a>	2.00
<b>Advance Issues/Development</b>	<b>0.00</b>
<b>System Testing</b>	<b>48.00</b>
<a href="#">Module Transaction Testing</a>	32.00
<a href="#">"Day in the Life"</a>	16.00
<b>Miscellaneous</b>	<b>24.00</b>