

Client Portal Dashboard for ConnectWise and Autotask

The Client Portal Dashboard gives users a real-time view of a client's ticket status, response, and resolution. The drill-down and slicers feature gives more information on each widget and allows the results to be filtered per client.

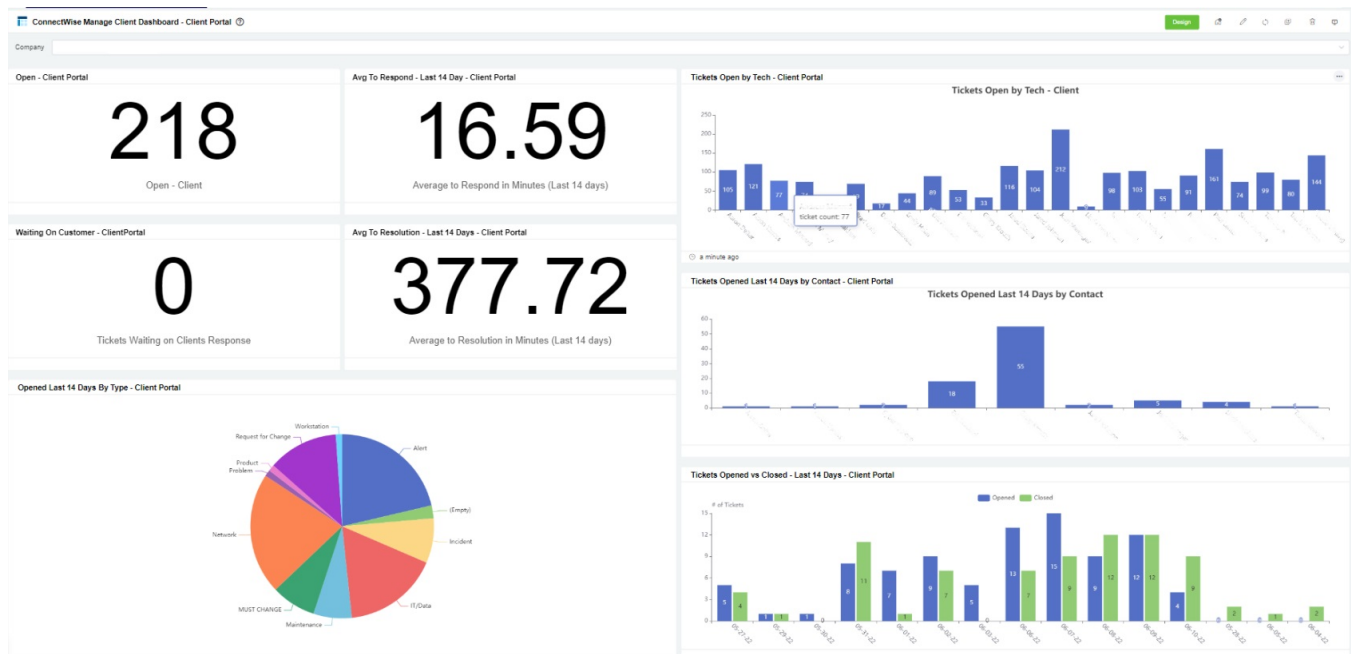
This article gives an overview of the following topics about the Client Portal Dashboard:

- [What does the Client Portal Dashboard look like?](#)
 - [Client Portal Dashboards for ConnectWise](#)
 - [Client Portal Dashboards for Autotask](#)
- [Descriptions of Widgets and Features](#)
- [How to Access the Client Portal Dashboard Template](#)
 - [New Template: ConnectWise Manage Client Dashboard - Client Portal](#)
 - [New Template: ConnectWise Manage Audit Report - Client Portal](#)
- [How to Show Results per Company](#)
- [What else can I do in the Client Portal Dashboard?](#)
- [How to use the Client Portal for your clients](#)
 - [Related Topics](#)

What does the Client Portal Dashboard look like?

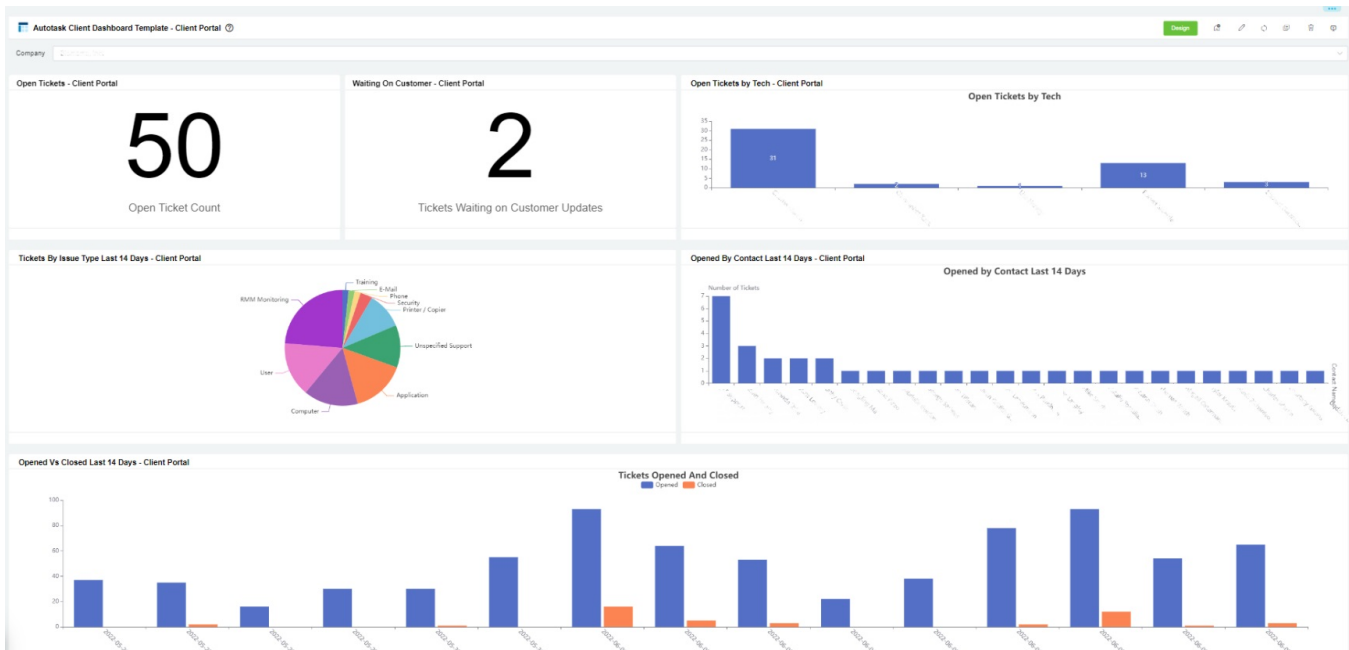
Below are screen captures of sample Client Portal Dashboard templates for ConnectWise and Autotask.

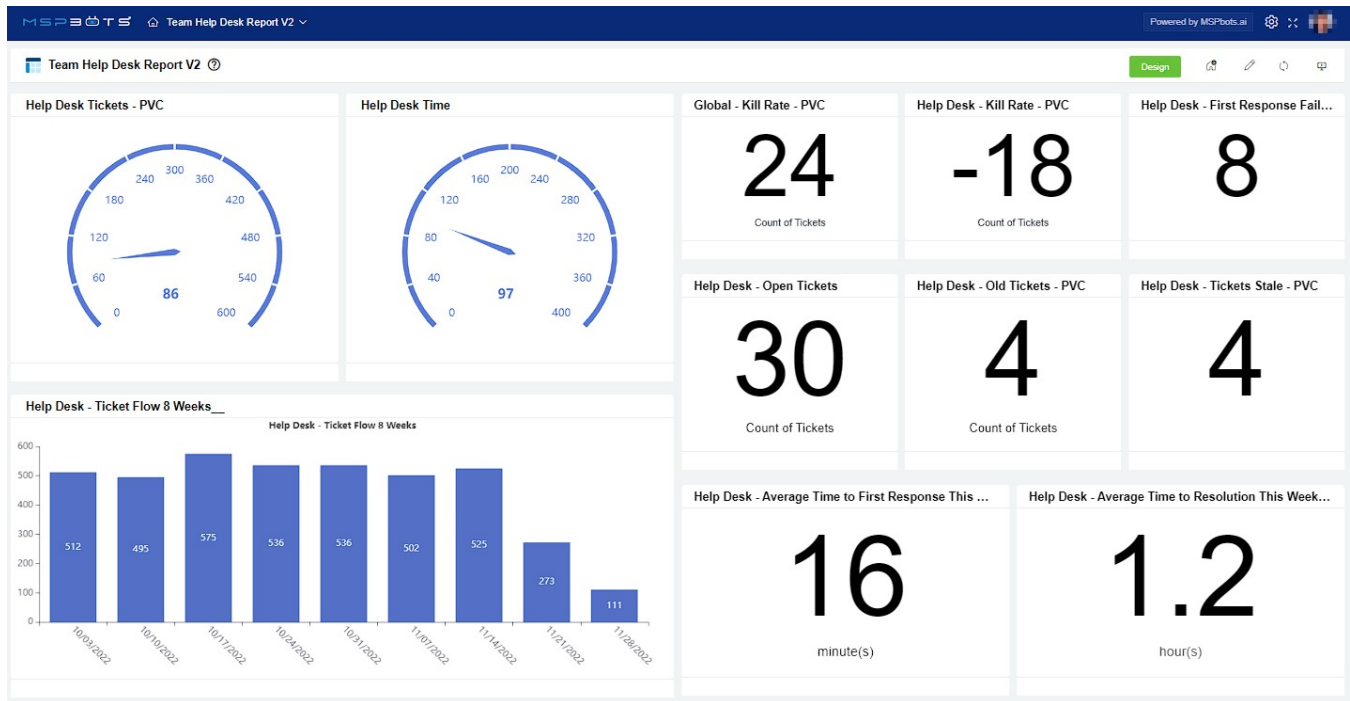
Client Portal Dashboards for ConnectWise





Client Portal Dashboards for Autotask





Descriptions of Widgets and Features

| Widget Type | Widget Name | Description | PSA Availability |
|-------------|------------------------------|---|--|
| Slicer | Company filter | This slicer uses email addresses to detect the client MSPs who are currently logged in. It displays only the data of the company set in the client portal management. MSP admin users can view all the companies on the list. | <ul style="list-style-type: none"> Connect Wise Autotask Kaseya BMS |
| Card Number | Open Client | This card number shows the count of client open tickets. | <ul style="list-style-type: none"> Connect Wise Autotask |
| | Waiting on Customer - Client | This card number shows the count of tickets waiting on a client's response. | <ul style="list-style-type: none"> Connect Wise Autotask |
| | Average to Respond | This card number shows the average time taken to respond to tickets updated in the last 14 days and is measured in minutes. The ticket status should be Open. | <ul style="list-style-type: none"> Connect Wise Autotask (Not available) |
| | Average to Resolution | This card number shows the average time to resolution for tickets updated in the last 14 days. This is measured per client, and ticket status should be Open. | <ul style="list-style-type: none"> Connect Wise Autotask (Not available) |
| Pie Chart | Opened Last 14 Days By Type | This chart shows the type and count of tickets opened in the last 14 days. | <ul style="list-style-type: none"> Connect Wise Autotask |

| | | | |
|--------------|---|---|--|
| Column Chart | Tickets Open by Tech - Client | This chart shows open tickets (non-resolved tickets) by the technician per client. | <ul style="list-style-type: none"> • Connect Wise • Autotask |
| | Tickets Opened by Contact Last 14 days - Client | This chart shows the count of tickets opened by contacts in the last 14 days. | <ul style="list-style-type: none"> • Connect Wise • Autotask |
| | Tickets Opened vs Closed Last 14 Days - Client | This chart shows the count of tickets opened per day and the count of tickets completed at the end of the day for the last 14 days. | <ul style="list-style-type: none"> • Connect Wise • Autotask |

How to Access the Client Portal Dashboard Template

1. Log in to the MSPBots app and navigate to [Dashboards](#).



Apps

Bots

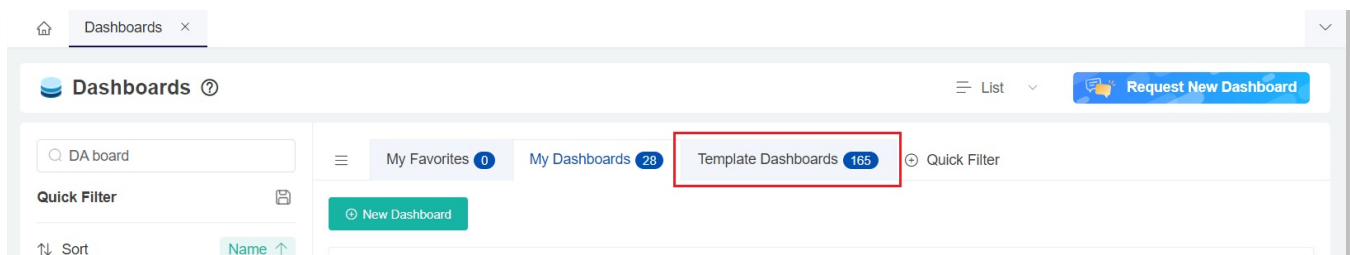
Dashboards

Scorecards

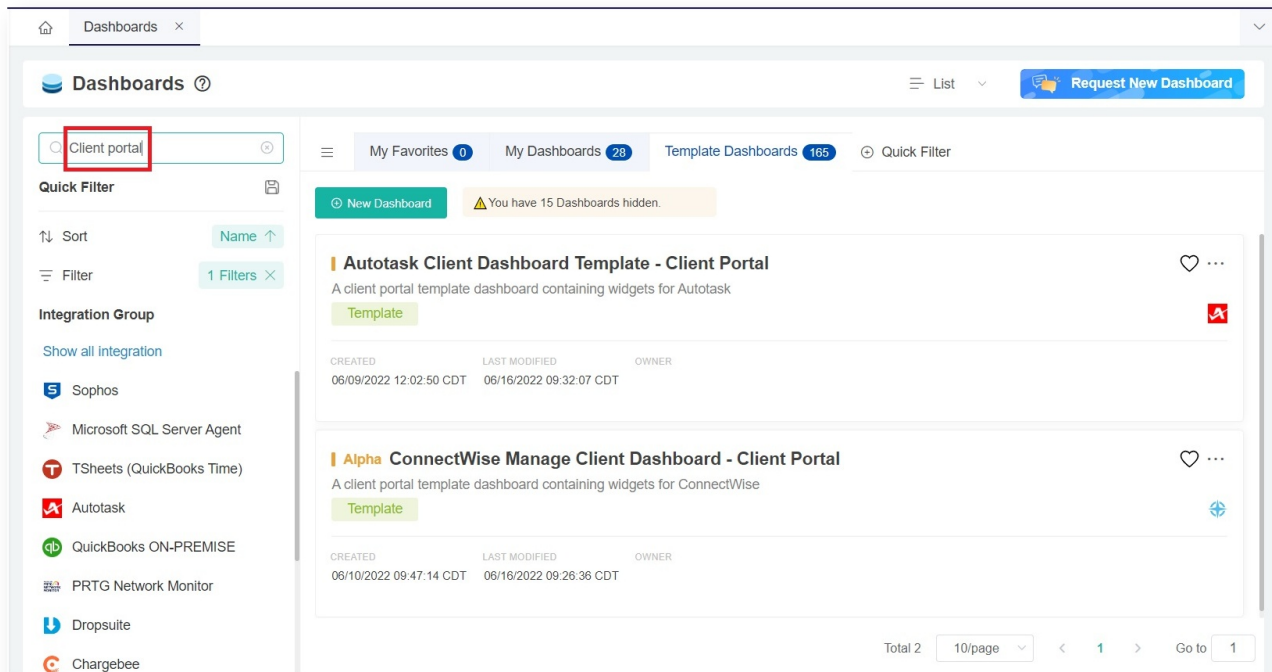
Widgets

Datasets

2. On the Dashboards tab, click **Template Dashboards**.

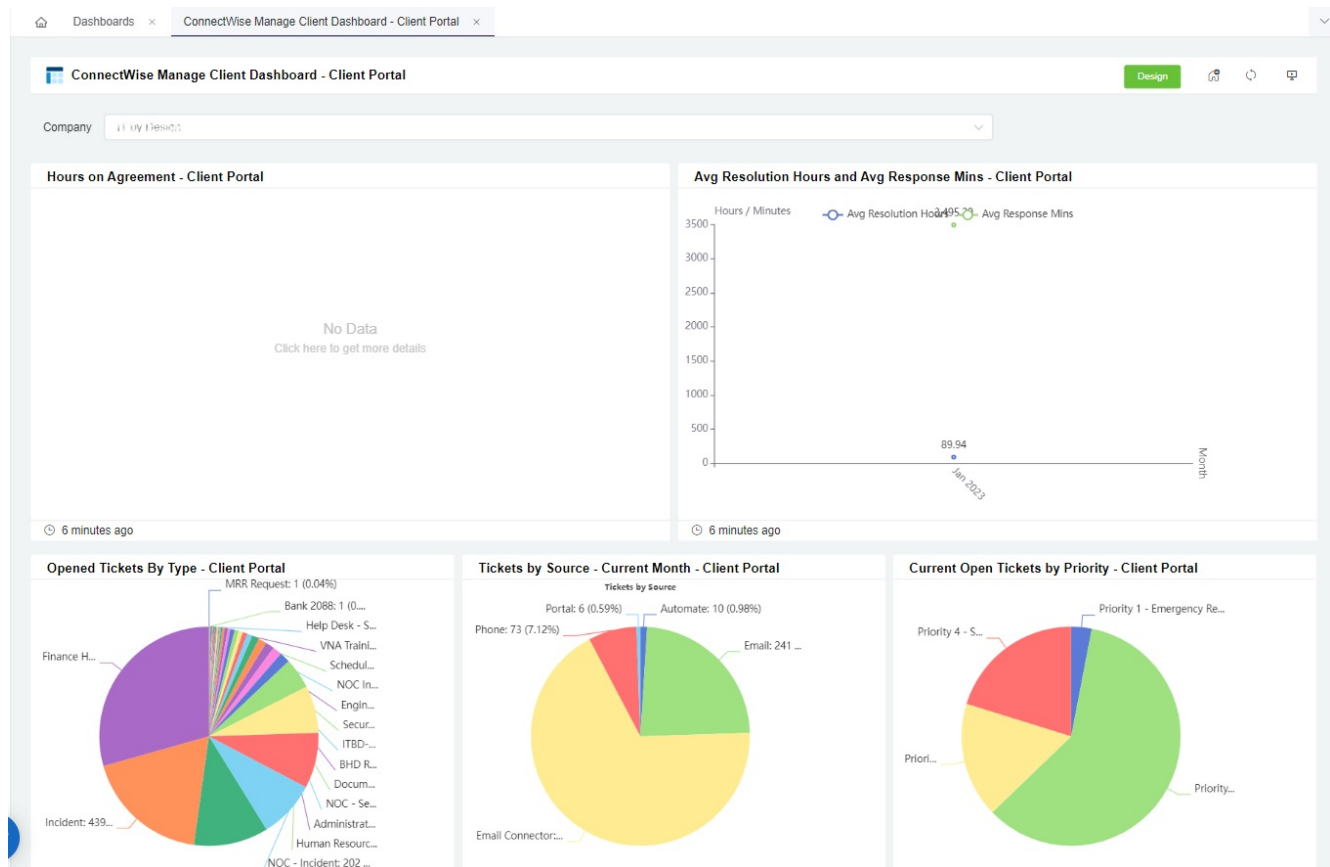


3. Search for "Client Portal" to show the templates for Autotask and ConnectWise Client Portal.

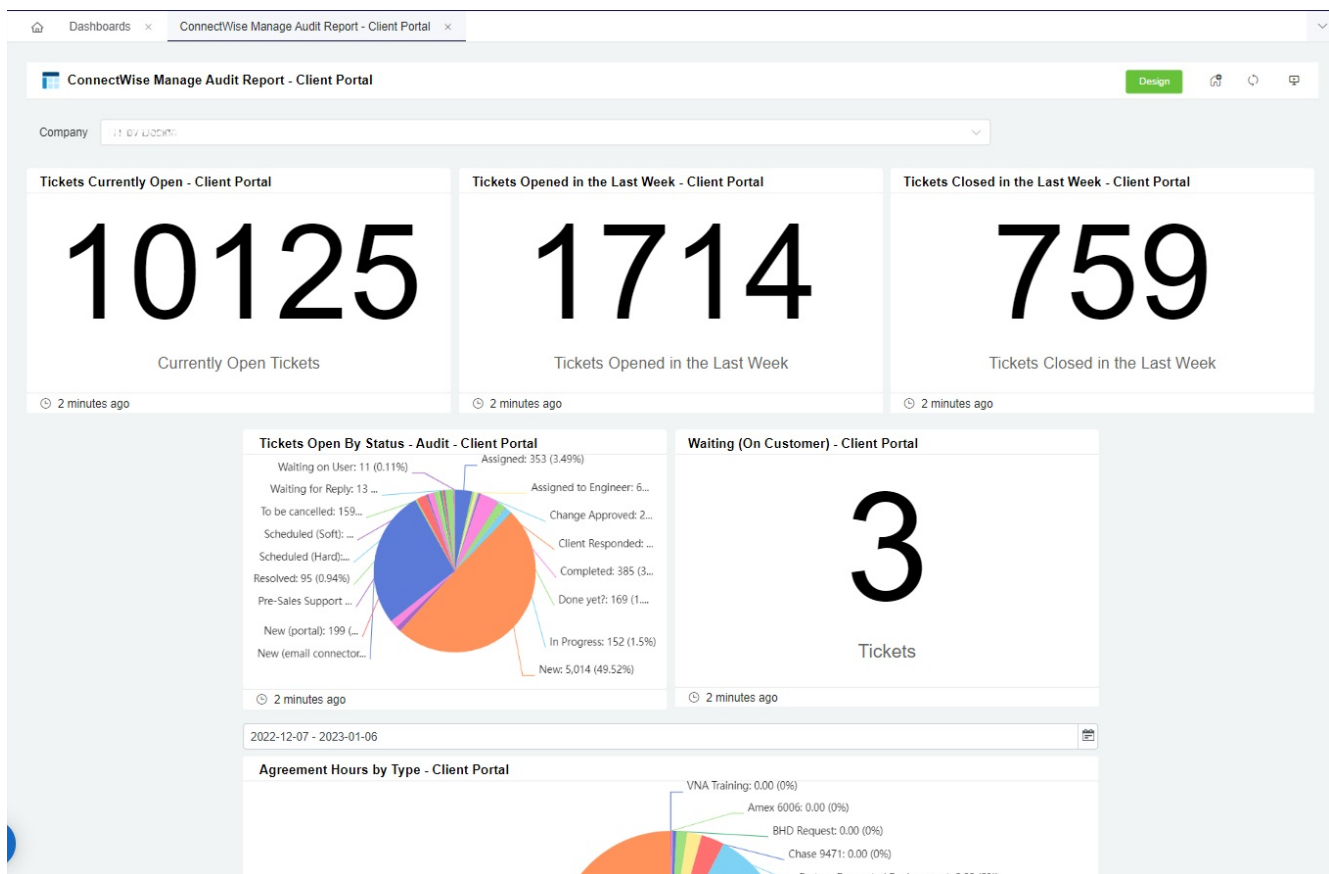


4. Click the dashboard that you want to view.

New Template: ConnectWise Manage Client Dashboard - Client Portal

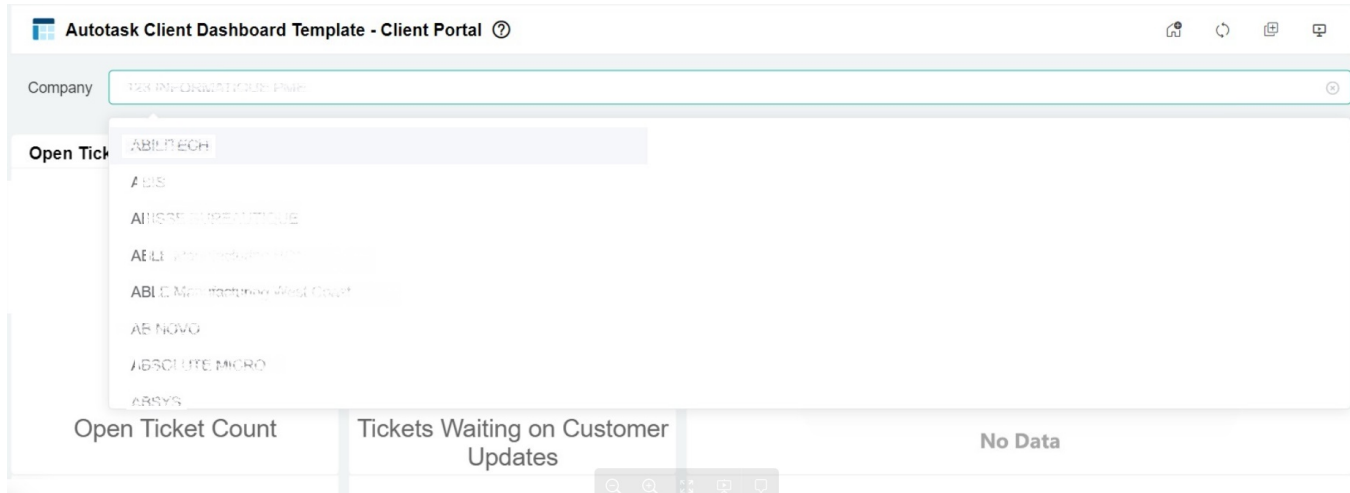


New Template: ConnectWise Manage Audit Report - Client Portal



How to Show Results per Company

On the Client Portal Dashboard view, click on the **Company** dropdown text field.



What else can I do in the Client Portal Dashboard?

- [Clone the Client Portal Dashboard](#)
- [Share the Client Dashboard with a Client](#)

How to use the Client Portal for your clients

- [Client Portal Management](#)

Related Topics

Content by label

There is no content with the specified labels