

Financial Suite for ConnectWise Manage Integration

The Financial Suite for ConnectWise Manage provides insights on key metrics such as Profit Margin, Effective Rate, and Contribution Rate to enable business owners and service managers to ensure all agreements are profitable. The metrics are broken down per agreement type, company, and trend graphs to determine correct agreement prices and effective management of agreement labor costs.

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List of Dashboards

Dashboard Name	Description
Agreement Profitability - Summary	This dashboard shows the total billed, margin, effective rate, contribution rate, and profit per agreement type. It also contains graphs showing the monthly trend for the KPIs.
Agreement Profitability - Agreement Details	This dashboard shows a breakdown of the same key metrics from the Summary Dashboard but on a per agreement-company level. It also contains graphs that show the trend of labor hours vs. the target, and the profit margin %.
Agreement Profitability - Margin Review	This dashboard contains a table that displays all companies under each agreement type and their monthly margins. This allows users to see the trend and to determine which companies should be looked into.
Agreement Profitability - Effective Rate	This dashboard shows effectiveness rates per customer and agreement type with a breakdown of billed, addition costs, and labor hours.
(SETTINGS) Financial Suite App Settings Form	This contains settings for dashboards under the Financial App for ConnectWise Manage Integration. For the Financial suite, users can set the Target Profit Margin for computation of the Target Hours.

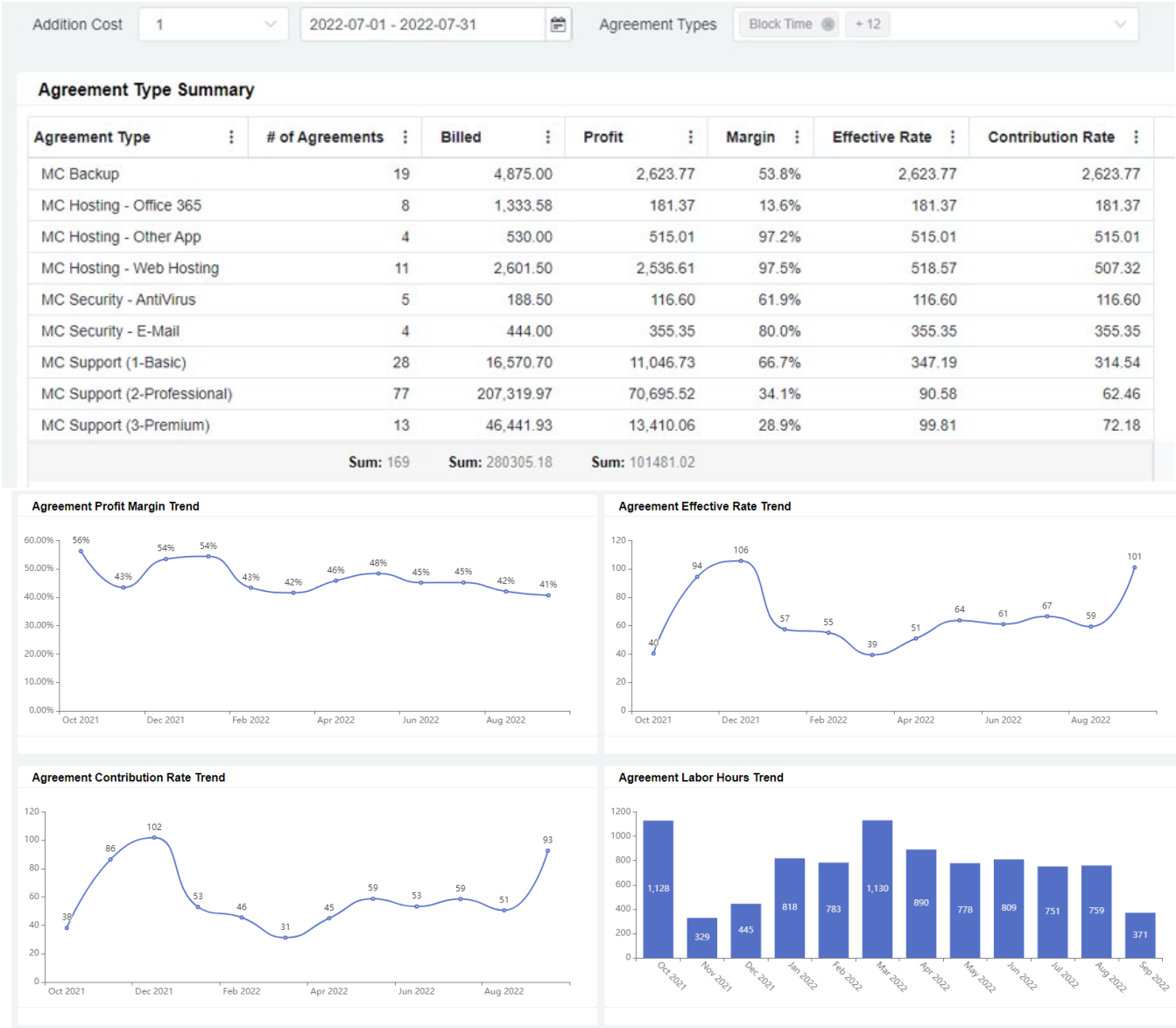
Terms and Calculations

Term	Definition/Calculation
Value	$\text{Value} = \text{Addition Price} = \text{Quantity} \times \text{Unit Price}$ For agreements with an annual billing cycle, Total Value is divided by 12 to show the monthly value.
Billed	$\text{Sum of } [(\text{Actual Quantity} \times \text{Unit Price}) + \text{Service Total}]$ for all invoices within the selected date range
Addition Costs	$\text{Sum of } (\text{Actual Quantity} \times \text{Unit Cost})$ for all invoices within the selected date range Can be included or excluded using the slicer
Profit	$\text{Billed} - (\text{Addition Costs} + \text{Labor Costs})$
Margin	$\text{Profit} \div \text{Billed}$
Actual Labor Hours	Total recorded hours for an agreement
Effective Rate	$(\text{Billed} - \text{Addition Costs}) \div \text{Labor Hours}$ (if labor hours is < 1, then it is rounded off to 1)
Contribution Rate	$\text{Profit} \div \text{Labor Hours}$ (if labor hours is < 1, then it is rounded off to 1)
Ave. Hourly Labor Rate	Average of all hourly labor rate of all active technicians with a work type tagging
Target Hours	Budgeted hours to achieve the Target Total Cost Margin %, which can be set in the ConnectWise Settings for App Packages dashboard. Calculation: $\{ [\text{Target Total Cost Margin \%} - (\text{Addition Costs} \div \text{Billed})] \times \text{Billed} \} \div \text{Average Hourly Labor Rate}$

Agreement Profitability - Summary Dashboard

The Summary Dashboard shows the total billed, margin, effective rate, contribution rate, and profit per agreement type. It also contains graphs showing the monthly trend for the KPIs.

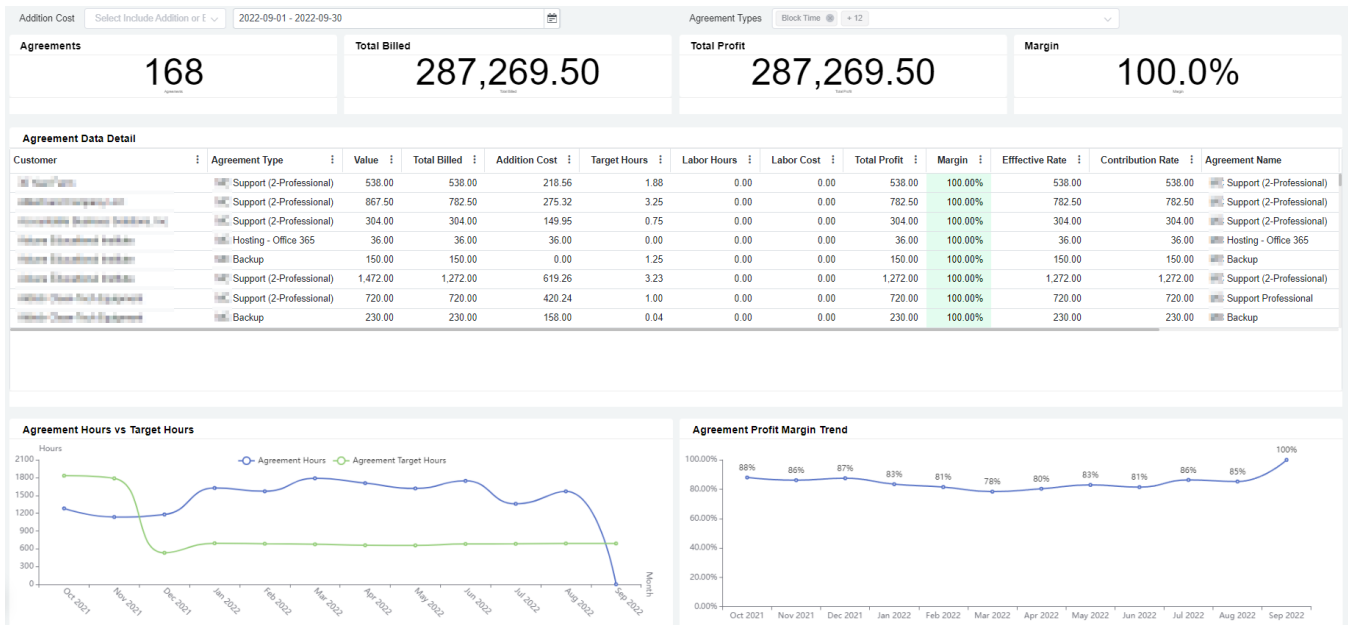
The available slicers are **Addition Cost** (Exclude, Include), **Date Range** (Invoice Date), and **Agreement Types**



Agreement Profitability - Agreement Details Dashboard

The Agreement Details Dashboard shows a breakdown of the same key metrics from the Summary Dashboard but on a per agreement-company level. It also contains graphs that show the trend of the labor hours vs. the target, and profit margin.

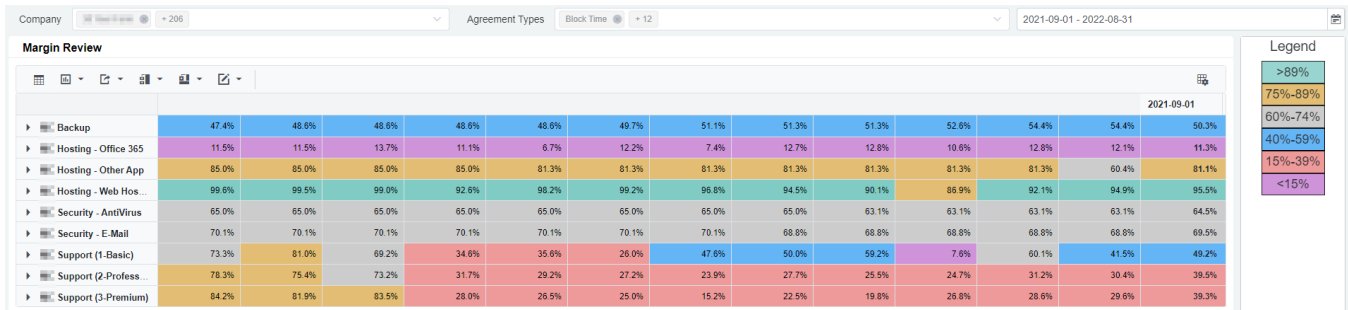
The available slicers are **Addition Cost** (Exclude, Include), **Date Range**, and **Agreement Types**.



Agreement Profitability - Margin Review Dashboard

The Margin Review Dashboard contains a table that displays all companies under each agreement type with their monthly margins. This allows users to see the trend and determine which companies should be looked into.

The available slicers are **Company**, **Date Range**, and **Agreement Types**.



Agreement Profitability - Effective Rate Dashboard

The Effective Rate Dashboard shows effective rates per customer and agreement type with a breakdown of billed, addition costs, and labor hours.

The available slicers are **Addition Cost** (Exclude, Include), **Date Range**, and **Agreement Types**.

