



**CW KANBAN**

KANBAN FOR **CONNECTWISE**

**Welcome!**

# Application Improvements

- Board Design
- Time entry
  - Recent additions: Log entry only (no time), ticket status, work role, agreement, work type, billable, CC
- Style profile conditions
  - New conditions: Type, subtype, item, company name, project name, summary



# ConnectWise Embedded Mode

The screenshot displays the ConnectWise Helpdesk Board in Embedded Mode. The interface is organized into several sections:

- Top Navigation:** Includes a user profile for Peter, and navigation options for New, Recent, Calendar, and Chat with Support.
- Left Sidebar:** A vertical menu with icons for My Favorites, Companies, Sales, Marketing, Procurement, Project, Service Desk, Time & Expense, Finance, and System.
- Main Board:** A Kanban board titled "Helpdesk Board" with columns for New, Queued, Scheduled, Waiting, and In Progress. Each column contains tickets with details such as ID, title, assignee, status, and due dates.
- Right Panel:** Includes options for "Show only my tickets", "Filters", and "Help".

<https://portal.cwkanban.com/knowledgebase/44/Configuring-Managed-Hosted-API-to-embed-Kanban-in-ConnectWise.html>



# 2-Factor Authentication



Enter the token generated by your one-time password application:

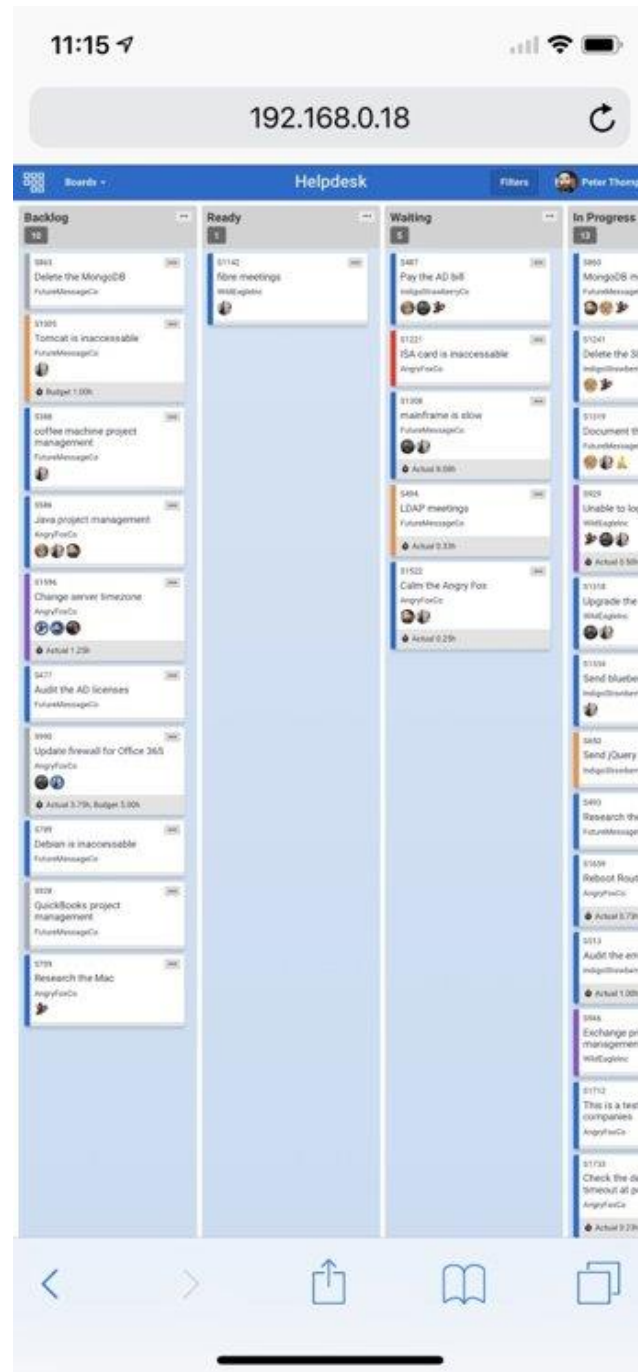
**Token**

[Cancel](#) [Log In](#)

<https://portal.cwkanban.com/knowledgebase/52/Two-Factor-Authentication-for-CWKanban.html>



# Mobile Usability



# New Products

- **Agile Manager Plan**  
For organizations where project manager/dispatcher/service manager uses Kanban, but technicians do not.  
\$119/mo, \$99/mo paid annually  
<https://www.cwkanban.com/pricing/>
- **Elite Agile Training**  
Customized training for adopting agile practices in your team  
\$2,499
- **CraftyBot**  
Interact with ConnectWise via Slack. (MS Teams support coming)  
<https://www.cwkanban.com/what-exactly-can-craftybot-do/>



# Account Improvements

- **Referral program**

Share CW Kanban- up to \$100 to you and your referral

<https://www.cwkanban.com/referral-program/>

- **Credit cards accepted now**

Feel free to cancel your recurring Paypal subscription



# What's Coming Up

- Features:
  - Column filter to show tickets in a status < some threshold  
Main use case: Completed columns where tickets disappear on their own after i.e. 1 week
  - Activity Boards  
Great for salespeople, executives, admins
- Autotask support





# Q&A

