

# Endpoint Security Onboarding for ConnectWise Managed EDR™

Launch Endpoint Security with Confidence. Accelerate Protection. Empower Your Team.

Statement of Work  
[Endpoint Onboarding](#)

Eligible Products  
SentinelOne, Bitdefender, Microsoft Defender,  
AVTakeout

## Service Overview

Security Endpoint Onboarding for ConnectWise Managed EDR gives your team everything they need to confidently deploy and operationalize your new security solution. Our software experts guide you through foundational setup, best practice configuration, and key workflows to ensure your environment is ready, optimized, and aligned with security standards.

By the end of the engagement, your administrators will have a strong understanding of the platform, and you'll be positioned to begin your security transformation journey with a solid foundation.

## What You Get: High Value Deliverables

The onboarding journey includes core deliverables for Partner Program, Endpoint, and SIEM to ensure your entire ecosystem is configured for success.

### ✓ Guided Implementation (7-30 Days)

The project timeline depends on your environment, complexity, and availability. With full engagement, most partners complete onboarding in **7–30 days**.

### ✓ Expert Provisioning

ConnectWise provisions the software on your behalf and delivers login credentials through your Project Coordinator or by email.

### ✓ HandsOn Remote Training Sessions

Delivered by ConnectWise implementation specialists, training covers:

- Educational overview of your endpoint security tool
- New site/company creation (if applicable)
- General setup best practices

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## What ConnectWise Provides

Your onboarding experience is fully supported by a dedicated ConnectWise team, including:

### ✓ Project Coordinator

Responsible for:

- Provisioning
- ConnectWise University access
- Login distribution
- Scheduling
- Initial onboarding logistics

### ✓ **Implementation Specialist**

Responsible for:

- Leading configuration sessions
- Delivering training and platform walkthroughs
- Providing post session summaries and next steps
- Documenting issues/risks and coordinating resolution
- Ensuring smooth progress from kickoff to completion

All services are delivered **remotely** via tools like Microsoft Teams or WebEx.

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## Client Responsibilities

To ensure an efficient and successful onboarding, the client must:

- **Provide required system access and documentation**
- **Designate a Project Manager/Administrator** to act as the single point of contact
- **Create and execute UAT test plans and scripts**
- **Complete data entry** (Companies, Contacts, Agreements, Configurations, Projects, Tickets, Tax Codes, etc.)
- **Populate ConnectWise-provided import spreadsheets** for any data imports
- **Manage custom reporting** (available as an additional paid service)
- **Manage integrations** with non-ConnectWise systems  
(Client must review API documentation for compatibility)

Your full engagement keeps the timeline on track and ensures maximum value from your investment.

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## Why Choose Endpoint Onboarding?

- **Accelerated readiness for your new endpoint security platform**
- **Reduced guesswork with expert guided sessions**
- **Training built for your workflows and operating model**
- **Best practice implementation ensures a strong security foundation**
- **Faster time-to-value and improved adoption for your team**

This service gives you the confidence and clarity needed to operationalize endpoint protection the right way.

## CONTACT US



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