

Automate to RMM Platform

Plan the Migration. Configure RMM. Prepare Your Team for Adoption.

Statement of Work

[Automate to RMM Platform](#)

Service Overview

Automate to RMM Platform helps existing Automate partners prepare for and adopt ConnectWise RMM through structured migration planning, platform setup, deployment guidance, administrator training, and standard configuration aligned to documented best practices.

The engagement includes remote onboarding sessions, project management, weekly status reporting, and a two week user acceptance testing period after onboarding deliverables are completed.

What You Get: High Value Deliverables

The service provides guided migration planning, platform configuration, administrator training, and adoption support for Automate partners transitioning to ConnectWise RMM. The engagement is designed to be completed within two calendar months of kickoff.

- **Kickoff and Platform Readiness:** One 1:1 Session, 1 Hour
Reviews platform differences, migration tool capabilities, prerequisites, and customization considerations.
- **Setup & Deployment:** One 1:1 Session, 1 Hour
Guides user and permission configuration, company and site setup, agent deployment, ScreenConnect, remote support, and notification settings.
- **Devices, Groups, Monitoring & Alerting:** One 1:1 Session, 1 Hour
Covers device groups, custom fields, intelligent alerts, custom monitors, and alert management.
- **Policies, Packages, and Communicator:** One 1:1 Session, 1 Hour
Reviews packages, policy groups, endpoint overrides, communicator configuration, and endpoint messaging.
- **Patching Policies and Patch Management:** One 1:1 Session, 1 Hour
Introduces patching policies, approvals, exclusions, status reporting, and third party patch management.
- **Tickets, PSA & Reporting:** One 1:1 Session, 1 Hour
Reviews ticket management, PSA integration, PSA policies, reporting, BrightGauge, and dashboards.
- **Automation & Scripting:** One 1:1 Session, 1 Hour
Covers script creation, automation logic, AI assisted scripting, scheduled tasks, and reporting.
- **Review, QA & Project Wrap Up:** One 1:1 Session, 1 Hour
Addresses questions, customization topics, project completion activities, and post adoption resources.

Custom development, data migrations outside the defined service scope, third party application services, and coding for client operations are excluded from this engagement.

Partnering With ConnectWise

What ConnectWise Provides

- **Dedicated implementation** resources to coordinate kickoff, delivery, scheduling, and completion
- **Remote administrator training** with session agendas, minutes, and recordings
- **Standard RMM configuration** guidance based on documented best practices
- **Weekly written reporting covering progress**, completed tasks, outstanding items, **and dependencies**
- **Issue and risk** management with escalation to appropriate ConnectWise resources

Client Responsibilities

To support the onboarding, the Client must:

- **Designate a ConnectWise** administrator as the primary contact
- **Complete assigned ConnectWise University** coursework before activities are scheduled
- **Provide requested** documentation within five business days
- **Make required systems**, personnel, and access available for remote activities
- **Complete required data entry**, validation, testing, and assigned project tasks
- **Define, create**, schedule, and execute user acceptance testing
- **Report issues or risks** promptly and provide actionable feedback
- **Manage custom reporting**, third party integrations, and API requirements unless separately scoped

Why Choose Automate to RMM Platform?

- **Accelerate the transition** from Automate to ConnectWise RMM
- **Build administrator confidence** through structured platform training
- **Establish standard configuration** aligned to ConnectWise best practices
- **Improve visibility across devices**, monitoring, patching, ticketing, and reporting
- **Prepare your team to use** automation and scripting capabilities

Move forward with a guided onboarding designed to support long term RMM adoption.

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Service scope may vary. Refer to the Statement of Work for complete details.