

Cloud Backup Onboarding Service

Deploy Cloud Backup. Configure Your Portal. Prepare Your Team.

Statement of Work

[Cloud Backup Onboarding Service Description](#)

Service Description

ConnectWise provides remote consulting for ConnectWise Cloud Backup. The service guides the Client through initial deployment, portal setup, reporting, and restore capabilities.

The engagement also establishes utilization goals and introduces available support resources. The Client remains responsible for project management, scheduling, task ownership, and engagement results.

What You Get: High Value Deliverables

Remote onboarding includes two guided sessions that cover initial deployment, portal configuration, reporting, and restore capabilities.

Cloud Backup Deployment Walkthrough

- Review user management, SSO, and UBI capabilities
- Walk through the Cloud Backup portal, permissions, documentation, and partner resources
- Review support options, agreement details, and first 90 day utilization goals

Initial Configuration: One 1:1 Session, 30 to 45 Minutes

The consultant guides the Client through the initial Cloud Backup setup.

- Session activities include:
- Add the first company and configure the desired setup
- Configure notifications
- Review the Cloud Backup portal and available resources
- Schedule reports and restore training

Reports and Restore Training: One 1:1 Session, 30 Minutes

The consultant provides guided training on reporting and data restore options.

- Walk through ConnectWise Reports and Dashboards
- Demonstrate restores, exports, and restore monitoring
- Review questions related to reporting and restore tasks

Additional training or consulting requires available purchased hours or a separate scope.

Partnering With ConnectWise

What You Can Expect From ConnectWise

- **Assign a Cloud Backup Consultant** to support your onboarding based on resource availability.
- **Schedule remote sessions** with your team during mutually agreed regular business hours.
- **Share project updates** through post session recap emails so your team has a clear record of what was covered.
- **Document issues or risks** and work with the appropriate ConnectWise teams to help address them.
- **Communicate scope or status changes** to your project team when updates are needed.

Client Responsibilities

To help keep your onboarding on track, your team will need to:

- **Provide written objectives** that explain the issues or goals your team wants to address before the engagement begins.
- **Prepare the engagement agenda** with ConnectWise so both teams understand the planned activities.
- **Designate a project manager** to serve as the main point of contact for your team.
- **Provide access and documentation** for the environments, business materials, and technical details needed for the engagement.
- **Manage your internal work** by coordinating scheduling, task ownership, project decisions, and completion activities on your side.
- **Keep detailed notes** from consulting sessions so your team can reference decisions, guidance, and next steps later.
- **Communicate issues and changes** as soon as they come up and submit scope change requests in writing.
- **Use prepaid consulting fees** within twelve months of the Statement of Work effective date.

Your participation, timely access, and clear objectives help ConnectWise guide the onboarding sessions efficiently.

Why Choose Cloud Backup Onboarding?

Guided setup

Get a **structured start** and work with a Cloud Backup Consultant through remote sessions covering portal walkthrough, permissions, resources, first company setup, notifications, and utilization goals.

Enablement that sticks

Build **practical product** knowledge, learn reporting, restore options, exports, restore monitoring, support paths, and partner resources.

Clear execution

Keep **delivery clear**, use agreed scheduling, project ticket communication, post session recaps, issue tracking, and documented scope changes.

Choose Cloud Backup Onboarding when you want a structured start, practical product guidance, and a documented path for communication, risks, scheduling, and change control. Refer to the Statement of Work for complete scope, assumptions, responsibilities, and terms.

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