

ConnectWise Automate Onboarding Partner Kit

Check List Items

DONE	TASK	MENU	SCREEN	TAB/SECTION	DOCS
	Initial Client Setup				
	Creating a New Client	Navigation Tree	n/a	n/a	Adding a New Client
	Creating a New Client Location	Navigation Tree	n/a	n/a	Adding a New Client Location
	Setting the Deployment and Default Settings	Location	n/a	Deployments & Defaults	Creating Location Maintenance Window and Agent Deployment Settings
	Enabling a Service Plan at a Location	Location	Ignite	Services	Configuring the Location
	Configuring the Client Locations Ticketing Policy	Location	Ignite	Ticket Policy	Configuring the Location
	Restricting Access to Client Agents	Computer Management	Ignite	Contract Status	Configuring the Agent
	Deploying Automate Agents				
	Automate Agent Deployment Overview	n/a	n/a	n/a	Agent Deployment Overview
	Manually Installing the Automate Agent on Windows	Web Control Center	Home	Quick Links/Install Packages	Deploying Agents Manually
	Manually Installing the Automate Agent on Mac	Web Control Center	Home	Quick Links/Install Packages	Installing the Mac Agent
	Manually Installing the Automate Agent on Linux	Web Control Center	Home	Quick Links/Install Packages	Installing the Linux Agent
	Configuring an Automate Agent to Be an Automate Probe	Computer Management	Welcome	Agent Flags	Enabling the Probe (Probe Wizard)
	Using an Automate Probe to Deploy Automate Agents	Location	Deployments & Defaults	Agent Deployment Settings	Deploying Agents via Probe Push
	Using an Automate Probe to Discover a Client Locations Assets	Control Center	Navigation Tree	Network	Network Device Mgmt. Overview
	Using Microsoft Group Policy to Deploy Agents	Web Control Center	Quick Links	Install Packages	Deploying Agents via GPO

	Initial Client Configuration				
	Synchronizing Clients Between Automate and ConnectWise	ConnectWise Plugin	Company Sync	n/a	Synchronizing Clients (Companies)
	Synchronizing Contacts Between Automate and ConnectWise	ConnectWise Plugin	Contact Sync	n/a	Synchronizing Contacts
	Synchronizing Automate Discovered Assets to ConnectWise	Connectwise Plugin	Asset Sync	n/a	Synchronizing Assets
	Managing Contacts in Automate	Control Center	Navigation Tree	Contacts	Adding Contacts