CONNECTWISE™
Manage

Starter Implementation Statement of Work

Overview

This Statement of Work ("SOW") is between ConnectWise, LLC, a Delaware limited liability company, located at 4110 George Road, Suite 200, Tampa, FL 33634, or the ConnectWise affiliate identified on the Schedule ("ConnectWise" or "We"), and your organization, ("Client" or "You" or "Your") and specifies terms and conditions which apply to Services that ConnectWise will provide to Client.

This SOW incorporates by reference the terms of the then current Master Agreement and the Services and Education Addendum(s) located at www.connectwise.com/legal . Any capitalized terms used in this SOW shall have the meaning given in the Master Agreement and the Services and Education Addendum(s) unless otherwise provided herein.

Summary

The ConnectWise Manage Consulting Services are designed to offer you a comprehensive look at your business. We'll help you maximize the benefits of ConnectWise Manage to help you reach your business goals faster.

ConnectWise Manage outcome-based implementations are designed to deliver a functional, integrated system based on best practices.

Scope of Work

This Statement of Work is meant to be a guide for the implementation process and provides no guarantees of deliverables in a specified timeline.

The timelines within the SOW are estimates based on the information that was available at the time of the scoping effort.

This is a fixed fee engagement which includes the topics outlined in Appendix A. Additional consulting hours may be purchased for topics not included in this SOW.

Implementation sessions will be held remotely using online meeting technology. Dates and times for these sessions will be selected as schedules permit for the resources assigned.

Timeline

This is an outcome based implementation. The timeline of the project is dependent upon Client requirements and resource availability. Depending on complexity, and with full Client engagement, you can expect your implementation to take between 60 and 120 days.

Project Resources

ConnectWise will assign a ConnectWise Manage Consultant to lead the ConnectWise Manage implementation project. Additional ConnectWise Manage resources may be assigned as determined by ConnectWise to aid in the implementation.

ConnectWise Manage Resources

Service Coordinator

- Manages the Client onboarding process
- Manages the gathering of required documents for database configuration

ConnectWise Manage Consultant

- Manages, reviews and revises the ConnectWise Manage project work plan to include high-level of Client's goals and objectives. If a detailed project plan is required for Client tasks it is the responsibility of Client to build and maintain it.
- Provides status reports as agreed upon by the Project Team
- Brings issues to the Project Team
- Monitors compliance with statement of work and deliverables
- Documents and manages issues
- Responsible for bringing project to closure
- Reports to the Consulting Team Manager

Consulting Team Manager

- Directs and manages ConnectWise Manage Consultants
- Manages escalations from Clients and ConnectWise Manage Consultants
- Provides help as needed to ConnectWise Manage Consultant to aid in project delivery
- Reports to Sr. Director of Consulting

Sr. Director of Product Consulting

- Directs all implementation projects, consulting engagements and education resources
- Manages escalations from Consulting Team Manager
- Reports to VP of Services and Education

ConnectWise Client Support Consultants

- Provides support as needed during implementation
- Provides support post implementation
- Escalates support issues to support supervisors and development

ConnectWise Manage Technical Support Engineer

- Completes ConnectWise installation
- Configures Email Connector
- Configures Calendar Integrations
- Works server and cloud technical tasks and issues

Client Resources

Client agrees to fill the following roles and responsibilities prior to the start of the engagement:

Project Manager

- Manages the project from Client perspective
- Communicates as the primary point of contact with ConnectWise Manage Consultant
- Manages Client Project Team

- Manages Client project schedule
- Escalates questions and issues to ConnectWise Manage Consultant
- May be the same resource as the Client's ConnectWise Manage Administrator

Client's ConnectWise Manage Administrator

- Is expected to attend all sessions unless approved by the ConnectWise Manage Consultant
- Will become the ConnectWise Manage expert for Client
- Must complete ConnectWise Administrator major on the University

Key Stakeholders

- Must attend all sessions related to their functional area
- Responsible for communicating their business processes for their functional area
- Responsible for training team members of their functional area
- Responsible for testing for their business processes in their functional area

Project Resource

- Manages specific aspects and tasks of the project
- Works with ConnectWise Manage

End User

- Responsible to complete the ConnectWise University Major according to their role
- Responsible to attend training and provide input to project stakeholders

Project Management

Pre-Installation

The installation of ConnectWise Manage will be coordinated by the Service Coordinator. During this time, your primary contacts will be the Service Coordinator who will guide you through the completion of all necessary implementation paperwork. The Service Coordinator will also assist Client in coordinating University access so you can start reviewing ConnectWise Manage information available on ConnectWise University.

Post Installation

Once ConnectWise Manage has been installed, your project will be assigned to a ConnectWise Manage Consultant. Your ConnectWise Manage Consultant will contact the Client's primary contact and will work with the Client Project Manager to manage all project related tasks throughout the implementation.

Status Reports & Communications

The ConnectWise Manage Consultant will communicate the status of the project and a recap of the session in the project communication ticket. Specific status meetings may be scheduled based on project needs.

It is the responsibility of the Client to keep detailed notes regarding topics covered during consulting sessions for future review.

Rescheduling

When rescheduling is required, the ConnectWise Manage Consultant will communicate any change in status that could cause a risk to the project timeline and will work with the Client project team to reschedule based on availability.

Issue Management

Issues should be communicated to the ConnectWise Manage Consultant. The ConnectWise Manage Consultant will document the issue or risk and work with the appropriate ConnectWise colleagues to address the issue. Any change to status or scoping of the project will be communicated to the Client Project Team.

Out of Scope, Assumptions and Client Responsibilities

Any initiative that is uncovered that is not defined in the Statement of Work and will be considered out of scope.

The following Out of Scope, Assumptions, and Client Responsibilities pertain to this SOW. In the event of any conflicts or inconsistencies between the Out of Scope, Assumptions or Client Responsibilities below shall prevail.

i. OUT OF SCOPE
   a. Installation, implementation or configuration of any software not expressly set forth herein or third-party software.

ii. ASSUMPTIONS
   a. The scope of services is limited to ConnectWise Manage.
   b. The assumptions made by the ConnectWise Manage Consultant during the initial business review are to serve only for informational purposes of the implementation. It is the responsibility of the Client to review the information for any processes not yet observed or reviewed. It is the responsibility of Client to request, track, and conform to all additional assumptions made by the ConnectWise Manage Consultant.
   c. Each engagement will be scheduled during a mutually agreed upon period, during regular business hours, excluding ConnectWise holidays.
   d. The management, performance and completion of the Services including project management, task identification, project results and completion are driven by the ConnectWise Consultant. ConnectWise makes no representation or warranty that the Services provided will provide any specific deliverable or result outside of the outcome-based package the Client purchased as outlined in Appendix A.

iii. CLIENT RESPONSIBILITIES
   Client agrees to fulfill the following responsibilities prior to the start of the engagement:
   a. Designate a Client Project Manager as the single point of contact to manage the ConnectWise resource.
   b. Provide access to the proper environments and to relevant business and technical documentation as required.

Project Closure

Upon completion of the Services under this SOW, ConnectWise will be responsible for communicating the following to Client:

- Future Release Process
- Role of the ConnectWise Partner Success department and how to contact them
- Role of the ConnectWise Support department and how to contact them
- Account Manager and how to contact them
- Availability of Ongoing Education & Consulting Services

The Client will be required to review and sign the provided project closure document in agreement that implementation has been completed. The project will be deemed accepted by Client unless, within ten (10) days of being presented with the project closure document, Client rejects the project closure document in a written notice to ConnectWise that specifies in reasonable detail the reason for the rejection.

If Client rejects the project closure document, ConnectWise will use commercially reasonable efforts to: (1) promptly correct the Services, or (2) if it is impracticable to promptly correct the Services, work with Client to correct the Services. If ConnectWise disagrees with Client's rejection of the project closure document, ConnectWise will promptly notify Client's Project Manager and schedule a meeting to discuss and resolve the issue. If ConnectWise and Client are unable to resolve the issue, then it will be referred to the parties' executives for resolution in accordance with the Master Agreement.

Implementation Deliverables

Application Environment

Cloud

ConnectWise Manage Deliverables

- ConnectWise will provide a production environment.
- Training and testing Sandboxes are available for an additional fee.

Client Deliverables

Client is responsible for complying with the following:

- Completing workstation installation checklist on each workstation
- Completing setup for email and calendar integration

On-Premises

ConnectWise Manage Deliverables

- Production and Training - ConnectWise Manage will provide a production and training environment and a method to copy the settings from Production to Training. Production and Training will always be the same version and are updated at the same time. The training environment will not have workflow rules, calendar integration or email connectors activated.
- Testing - A testing environment is available for an additional fee. This environment will enable updates to be applied separately from the Production and Training environment thus enabling testing of releases, integrations and reports. A separate server and installation is required. Default user count is 20.

Client Deliverables
Client is responsible for complying with the following:

- Reviewing and conforming to ConnectWise provided System Requirements and Supported Versions
- Completing server setup and installation checklist (Documentation will be provided)
- Completing workstation installation checklist on each workstation
- Completing setup email and calendar integration.

Project Execution and Methodology

Our implementation methodologies follow the principals of Hybrid Project Management. Hybrid methodologies accept the fluidity of projects and allow for a more nimble and nuanced approach to the work. They can be applied to the full job or specific aspects of the project, allowing for more than one way to approach and address any possible issues.

Lead Times & Scheduling

The ConnectWise Manage Consultant will not begin the scheduling of remote consulting sessions until ConnectWise Manage has been installed.

The ConnectWise Manage Consultant may have a lead time of 1 - 4 weeks and scheduling is dependent upon current resource availability.

Topics

Appendix A outlines the topics that will be discussed during the sessions based on the implementation offering. The content of each session topic and the number of sessions needed for each specific topic is dependent on your specific business processes and the extent of the setup required to support your specific business process. Sessions must be attended by the Client Project Manager and Stakeholders familiar with current processes that are empowered to make decisions on the particular topic.

Upon the completion of each session, the ConnectWise Manage Consultant will provide a brief summary of what was covered during the session. This summary will also communicate any related homework and tasks that need to be completed. All assigned homework should be completed prior to the next scheduled session date. Any homework not completed on time can potentially jeopardize your Go-Live date.

Please see Appendix A for a definition of each deliverable based on your chosen Implementation Offering.

Data Entry

It is the responsibility of Client to complete data entry into ConnectWise Manage outside of what is outlined in Appendix A.

Data Imports

ConnectWise Manage provides Excel spreadsheet templates to import the following data

- Companies, Contacts, Sites (Addresses)
- Service Tickets

- Activities
- Configurations
- Tax Codes

Custom import services are scoped separately and available at an additional fee.

Companies, Contacts, Sites (addresses)

It is the responsibility of Client to populate the import spreadsheets with the data to be converted. If importing Companies, Contacts & Addresses, Client can use the Company and Contact import. Your ConnectWise Manage Consultant will cover the process necessary to submit the data imports for processing.

Service Tickets, Activities, Configurations and Tax Codes (if applicable)

It is the responsibility of Client to populate the import spreadsheets with the data to be converted. The
imports for Service Tickets, Activities, Configurations, Tax Codes must be completed by the ConnectWise Technical Support team.

Client Deliverables

It is the responsibility of Client to review the data fields that are available in the import templates and ensure that the required fields are included. The specific fields that are imported can be found on the ConnectWise University by clicking on Implementation and then Import Templates section.

User Acceptance Testing

Client is responsible for scheduling and executing all user acceptance training. If outlined in the scope of work section, the ConnectWise Manage Consultant can assist Client with user acceptance testing.

It is the responsibility of Client to create test scripts for business processes. If outlined in the scope of work section, the ConnectWise Manage Consultant can assist Client with developing test scripts.

Please reference section titled Application Environment for database options.

Integrations

Integrations to other non-ConnectWise systems are the sole responsibility of Client and it is the responsibility of Client to review the API documentation to ensure the required data fields and actions are available.

Method of Delivery

All scheduled remote meetings with the ConnectWise Manage Consultant will be performed by hosting a remote session that is set up by your ConnectWise Manage Consultant.

Written correspondence will be done through e-mail via the ConnectWise Manage project ticket.

Perceived Risks

Client Resources - Project timelines will be constructed based upon the availability of Client resources and key decision makers. Lack of access to the project stakeholders will impact project timelines if decisions cannot be made and relayed in a timely fashion and will result in additional hourly fees. In addition, it is requested that we have multiple points of contact in the event that a single source is not available for an extended period of time.

Change Control

If any new initiative is uncovered during the implementation process, it is the responsibility of the Client to submit the request for change in writing via a ticket to the ConnectWise Manage Consultant. The ConnectWise Manage Consultant will work with the appropriate business resources to develop a Scope of Work and possible quote for the new initiatives.

Expiration

Client shall have twelve (12) months from the effective date of the Statement of Work (Contract Date) to utilize the prepaid fees towards their ConnectWise Manage outcome based implementation. Project shall expire after twelve (12) months and Client shall not be entitled to any refund. Prepaid project fees cannot be applied to other consulting work.

SOW Acceptance

This Statement of Work, as referenced in your quote, shall be considered fully executed and binding when an authorized representative of Client's organization has signed the quote provided by your sales associate.

Appendix A

Foundations of ConnectWise Manage

My Company Setup:
The setup and organization of the My Company setup tables is the foundation of the entire system. Depending on the settings configured, there will be heavy impact on visibility and overall reporting in the system.

ConnectWise Manage Consultant will review with Client:
- My Company screen and it's settings
- Member Maintenance screen and it's settings
- Company and contact screen and their settings
- The company and contact import spreadsheet

ConnectWise Manage Consultant will assist Client in configuring:
- Settings on the Owner tab
- Your company Structure
- Your company Groups (business units)
- All Members
- Assist Client in importing All Companies through the Companies & Contacts import template

Work Role, Work Type and Charge Codes:
As a result of the work role, work type and charge codes being setup you will be able to bill correctly and report properly. These three settings are the main contributors to how your rates are calculated, profitability and how time is reported for utilization and billing percentages around resources.

ConnectWise Manage Consultant will assist Client in configuring:
- Work Roles
- Work Types
- Charge Codes

Time Periods:
Allows for resources to enter time and expense in the system but will also dictate how often approvals will need to be done.

ConnectWise Manage Consultant will assist Client in configuring:
- All Time and Expense periods for the current year

Calendars:
Having the appropriate calendar setup in the system will allow dispatchers to see availability of resources. This will not only help with scheduling client appointments but also internal meetings.

ConnectWise Manage Consultant will assist Client in configuring:
- Company calendars
- Holidays for the current year

Calendar Integration:

With integrating of a calendar with ConnectWise Manage, it will give a single calendar that the company can work from. It will help improve the efficiency of scheduling, help avoid scheduling conflicts and help drive the adoption of ConnectWise Manage. As resources begin to not have to jump between multiple systems and items begin to sync back and forth, it allows them to have great visibility to themselves and their teams along with providing Client with reporting metrics in which business decisions can be derived.

ConnectWise Manage Consultant will assist Client in configuring:

- The necessary settings inside of ConnectWise Manage, but the client will be responsible for setup inside of your Email service provider and inputting in the password inside of ConnectWise Manage

Security Roles:

When security roles are set up properly you should have the confidence that everyone with access to the system can only see what is needed. Your organization should establish a proper change approval process when someone needs to increase or decrease their security rights. While this may seem like a minor detail, partners who don't take the time to set this up appropriately, tend to have minimal security set up in the system which seems to cause concern because everyone is afraid of what others can see.

ConnectWise Manage Consultant will assist Client in configuring:

- One (1) new security roles by cloning one of the existing roles and making the necessary adjustments

UserCentric:

ConnectWise UserCentric™ is a tool built from the ground up by ConnectWise to bring user centric billing to your business. UserCentric works by seamlessly synchronizing a user's Active Directory contacts with ConnectWise Manage® contacts. All information is transferred through the ConnectWise Manage APIs using an installed agent on a user's Active Directory and an Integrator Login to retrieve the requested information.

ConnectWise Manage Consultant will assist Client in configuring:

- One (1) Company to sync contacts over to ConnectWise Manage

Agreements

Agreement Type Setup:

Agreement types are templates that you can use to apply an agreement to your customer. If you sell standard service offerings, you can set up specific agreement types for each one. If you do not have standard service offerings, you can still set up some templates that can be edited when they are applied to the customer.

ConnectWise Manage Consultant will assist Client in configuring:

- All Agreement types
- All Active agreements to one of the existing companies

Service

Service Board Setup:

Central to Ticket Management is configuring your Service Boards, which are essentially queues to organize your Tickets. These will be configured in your Service Board Setup Table and appropriate Statuses, Types, Subtypes, and Items will need to be built out that represent the different escalation points in your ticketing processes and the meaningful categories to report on the common issues you are dealing with.

ConnectWise Manage Consultant will assist Client in configuring:

- One (1) Service Board
  - Default board setting
  - One (1) Status
  - One (1) Type
  - One (1) Subtype
  - One (1) Item
  - One (1) Team
  - One (1) Standard Note
  - Member Access
  - Auto Assign

Email Connector:

By utilizing the e-mail connector, it will give you a central location to submit your inquiries and allow you to put monitors in place so that items don't fall through the cracks.

ConnectWise Manage Consultant will assist Client in configuring:
The necessary settings inside of ConnectWise Manage, but the client will be responsible for setup inside of your Email service provider and inputting in the password inside of ConnectWise Manage

Ticket Management:

Understanding how a ticket flows through the system and the checks and balances you put in place to create a streamlining process.

ConnectWise Manage Consultant will review with Client:

- The different methods of entry for a service ticket and how to manage those ticket through to completion.

Time Entry:

Since Time is central to ConnectWise Manage, there will be some setup involved. To start tracking, you will need to configure the Time Period Setup Table. Work Roles and Work Types will need to be configured so you can determine what job role and type of work that employee is doing. Work Roles will then be defaulted on a per Member basis that aligns with what their main job title relates to.

ConnectWise Manage Consultant will review with Client:

- Time entry process and entering in a time entry from a service ticket
- Time Sheet Approvals

- Time Sheet Rejections
- Time Sheet Reversals

Calendar Usage:
This will give you the ability to keep track of everyone's schedule – which days and hours employees work; when employees are on vacation, holiday, or sick leave; and when employees are in trainings and internal meetings. If your staff is growing and you're having more employees working from home or in different time zones, Calendar Usage could be central to allowing a Dispatcher and Service Manager to accurately schedule jobs and gauge whether employees have the capacity to take on more work for the day, week, and/or month.

ConnectWise Manage Consultant will review with Client:

- Calendar views
- Scheduling a ticket on a resources calendar
- Schedule capacity

RMM Integration:
Setting this integration up is going to be very important for any client that is using an RMM tool. The integration between RMM tools and ConnectWise Manage allows for service tickets and assets to sync over from the RMM tool. This saves you countless hours and allows a better workflow for your technicians as they can work primarily in one system. Several of the RMM integrations also sync over device counts which can automate billing using ConnectWise Manage agreements.

ConnectWise Manage Consultant will review with Client:

- Third party documentation with Invent approved integrations

ConnectWise Manage Consultant will assist Client in configuring:

- The necessary settings inside of all ConnectWise products

Asset Management:
Asset management is a valuable tool for our clients. You'll use a combination of ConnectWise Manage and 3rd party integrations to help you to both track and manage assets for your customers. We are going to want to discuss configurations as that is how ConnectWise Manage currently tracks and manages assets. We also want to confirm if you are using any integrations to track assets.

ConnectWise Manage Consultant will review with Client:

- SLA Hierarchy
- Interaction with Agreements

ConnectWise Manage Consultant will assist Client in configuring:

- One (1) custom Configuration type
  - Required fields
  - One (1) Question associated with each Configuration type

Out-of-the-box Workflow Rules:

ConnectWise Manage offers users the ability to automate their business. Workflow rules are one of the chief ways that we help you to automate your business. We install a fresh database with several workflow rules that are there to both serve as an example of what can be accomplished with workflow rules and because they are some of our most requested.

ConnectWise Manage Consultant will review with Client:

- The out-of-the box workflow rules and help activate any rules that the partner sees fit.
    - Condition and action editing will not be covered

Finance Management

Invoicing:

Invoicing is the method to communicate with customers the value of goods and services rendered. Accurate invoicing is dependent on having reliable data input from members.

ConnectWise Manage Consultant will review with Client:

- The creation of all standard, all agreement, all Down-payment and all Miscellaneous invoices

ConnectWise Manage Consultant will assist Client in configuring:

- Billing Setup

Accounting Package Integration:

The Accounting Package Sync is utilized to move invoices, expenses and received product to a supported accounting package. These transactions will ultimately be used on the profit and loss statement and the balance sheet.

ConnectWise Manage Consultant will review with Client:

- The sync between the two products for one expense and one procurement item on all invoices
- Third party documentation with Invent approved integrations

ConnectWise Manage Consultant will assist Client in configuring:

- The necessary settings inside of all ConnectWise products

Payment Sync:

The Accounting Package Sync is utilized to mark invoices in ConnectWise Manage as Paid. This facilitates the ability to have Members review a customer's outstanding items without having access to an accounting package. Additionally, workflow rules can be utilized as reminders and tickets created for follow up.

ConnectWise Manage Consultant will review with Client:

- The sync between the two products for (1) invoice
- Third party documentation with Invent approved integrations

ConnectWise Manage Consultant will assist Client in configuring:

- The necessary settings inside of all ConnectWise products

GL Setup (Single Segment):
The general ledger holds account information that is needed to prepare the company's financial statements, and transaction data is segregated by type into accounts for assets, liabilities, owners' equity, revenues, and expenses.

ConnectWise Manage Consultant will assist Client in configuring:
- The GL account mapping in the setup tables for a chart of accounts consisting of a single (1) segment.

Procurement

Item List Setup:
To maintain an accurate list of current offerings.

ConnectWise Manage Consultant will review with Client:
- Product import and required fields needed in order to mass import your products
- Different fields on a product and their impact on accounting and tax

ConnectWise Manage Consultant will assist Client in configuring:
- Products in the system with all the necessary settings

Sales Management

Opportunity Management:
Opportunities are the records in ConnectWise Manage by which an organization tracks sales deals from their inception through to their closure. Often times organizations will start out utilizing spreadsheets and other files to track their sales, but as the organization grows and matures, sales management gets harder and the need for proper tools for sales tracking becomes evident to address communication and collaboration needs that come with the additional hand off to service delivery teams. Utilizing opportunities to track sales will help centralize sales data and allow an organization to develop and refine processes to help drive sales growth. Accurate sales forecasting is dependent on having reliable data on opportunities to forecast revenue projections and provide insight into resource planning.

ConnectWise Manage Consultant will assist Client in configuring:
- Opportunity Settings
  - Type
  - Status
  - Sales Stage
  - Probability
- The creation of one (1) opportunity and review the following
  - Opportunity Tab
  - Products Tab
  - Activities Tab
  - Attachments Tab
  - Contacts Tab
  - Team Tab

Activity Management:

Successfully managing Sales opportunities requires tracking the interactions with the client to ensure all necessary steps to complete the sale are fulfilled. Successful salespersons should have their thumb on the pulse of their pending deals and have a good understanding of their completed and pending tasks. Sales Activities function for task management and tracking of every touchpoint from the initial phone call or email through to the signing of the contract or statement of work for the goods/services.

ConnectWise Manage Consultant will assist Client in configuring:

- Activity Settings
    - Type
    - Status

Communications Management:

Mass communication of important information to customers is a common need for most organizations. Rather than maintaining distribution lists that live outside of ConnectWise Manage, it is possible to leverage the contact data inside of ConnectWise Manage to build ad hoc lists of contacts to mass e-mail or maintain lists (Groups) that can be updated and used as needed. Additionally, customized HTML email templates can be loaded into the system and saved to the system.

ConnectWise Manage Consultant will review with Client:

- The process to create Email communications and send them

Project Management

Project Board Setup:

To efficiently manage larger service delivery engagements, particularly those involving multiple resources, extended duration, and multiple billing events, deployment of the Project Module is a must. If there is a desire to manage groups of related tasks to achieve a timely and cost-effective deliverable, an organization will find value in the use of projects. Using a project will allow the organization to perform analysis of profitability and performance against budget and expected duration easily. This will allow for necessary modifications of sales and service delivery approaches pertaining to resource planning and sales engineering algorithms to be identified and executed.

ConnectWise Manage Consultant will assist Client in configuring:

- One (1) Project Board
    - Default board settings
    - One (1) Status
    - One (1) Type
    - One (1) Subtype
    - One (1) Item
    - One (1) Team
    - One (1) Standard Note
    - Member Access
    - Auto Assign

Standard Reports

Review of the Out-of-the-box Reports that are available:

ConnectWise Manage includes over 130 reports. These reports can be executed on demand or scheduled. Reports are outputted into multiple formats.

ConnectWise Manage Consultant will review with Client:

- The Out-of-the-box reports and how to run and schedule these reports to be viewed