



How to successfully onboard to StreamOne®

A step-by-step
partner guide for your
first **30 days**



This onboarding guide helps new partners get started with StreamOne® Ion quickly and effectively. Designed for resellers, MSPs, CSPs, and operational teams, it provides a structured path through key setup and management tasks, including identity configuration, customer onboarding, pricing setup, ordering, subscription management, governance, reporting, and training.

Your onboarding guide is organized into **six clear phases**, each with focused actions and supporting resources. Access to the supporting documentation requires you to log in to StreamOne® Ion. Whether you are a new reseller, an administrator, or part of an operational team, this checklist is designed to help you build a strong foundation and use StreamOne® Ion confidently and efficiently.

30-Day Onboarding Timeline

Click on each resource to explore supporting material.

Phase 1 Days 1 – 5

Access & identity setup

-  **Understand MFA & password resets**
-  **Set up your **partner account** and create users**
-  **Review company profile** (including MPN ID for Microsoft-migrated partners)
-  **Settings & customization**
-  **Learn how to **navigate** on StreamOne® Ion**

01

Phase 2 Days 6 – 10

Customer & pricing configuration

-  **Create **customer profiles****
-  **Find **customer info** if migrating business**
-  **Create **custom pricebooks****
-  **Assign pricebooks**

02

Phase 3 Days 11 – 15

Ordering & subscription management

-  **Buy flow**
-  **Subscription management**
-  **Email templates & **how** to customise**
-  **Quotes**

03

Phase 4 Days 16 – 20

Governance & security

-  **Delegated admin** (e.g., Microsoft GDAP)
-  **SOC & SOC 2 compliance**
-  **Cybersecurity threats**
-  **How to **create budgets****

04

Phase 5 Days 21 – 25

Reporting, billing & optimization

-  **Reports**
-  **TD SYNnex **billing statement****

05

Phase 6 Days 26-30

New cloud vendors, platform resources & training

-  **Activate program access to new cloud providers**
-  **StreamOne® Ion resources section as a **platform Knowledge Hub****
-  **StreamOne® Ion **Essentials Training*****
-  **All training resources**

06

*To access the StreamOne® Ion Essentials training through **TD SYNnex Channel Academy**, in the Catalog Search, select TD SYNnex StreamOne® from the dropdown, then search for StreamOne® Ion Essentials to begin your learning journey. **Grow your expertise.**