

ConnectWise Automate™ Cloud to On-Premises Conversion

Gain Full Control. Improve Customization.

Statement of Work

[Automate Cloud to On-Premises Conversion](#)

Estimated Level of Effort:

6

Service Overview

The ConnectWise Automate Cloud to On-Premises Conversion service helps existing partners migrate their Automate cloud installation to a fully self-managed on-premises server environment.

This expert-guided conversion is ideal for partners who require more control, enhanced customization capabilities, local data governance, or internal infrastructure alignment. The migration uses your current Automate revision—no upgrades or version changes required—ensuring a smooth, predictable transition.

With options for **full migration** or **essential-table-only migration**, you can choose the level of data transfer that best supports your operational goals.

What You Get: High Value Deliverables

Your conversion is performed using a **predefined, best practice ConnectWise methodology**, ensuring reliability and consistency. (Custom scope is not included.)

ConnectWise offers **two conversion paths**:

Option 1: Full Conversion

Retains all data and configuration for a complete, end-to-end migration.

ConnectWise performs:

- Install Automate on destination on-prem server
- Fully migrate the cloud database to the new SQL Server
- Install ScreenConnect®, a ConnectWise company, on destination server
- Verify PSA ticket sync
- Verify agents are checking in
- Verify WCC and LCC connectivity
- Verify command execution
- Verify automated reports run over HTTP

This option delivers a comprehensive lift and shift of your existing Automate cloud environment.

Option 2: Essential Table Conversion

Migrates only the critical data needed for ongoing operations.

ConnectWise performs:

- Install Automate on destination on-prem server
- Migrate essential database tables only (per SOW)
- Install ScreenConnect
- Verify agent check-ins
- Verify WCC and LCC connectivity
- Verify command execution
- Verify HTTP-based reporting

This option is ideal for partners seeking a clean start while retaining necessary operational data.

What ConnectWise Provides

- Migration handled by **experienced Automate software consultants**
- Remote execution through ScreenConnect
- Importing and testing all work products in your environment
- Functionality testing against defined specifications
- Ticket-based communication for transparency and real-time updates

Your migration is guided end-to-end by experts who deeply understand Automate architecture.

Client Responsibilities

To ensure a successful Cloud to On-Prem conversion, the Client must:

- Provide a **ConnectWise Automate administrator** as the primary contact
- Provide any required third-party software not directly accessible to ConnectWise
- Confirm functionality and performance after cutover
- Perform production environment testing
- Ensure the on-prem server meets the required specifications
- Final acceptance and validation of the environment are required before closing the project.

Why Choose Cloud to On-Premises Conversion?

- **Full control** over infrastructure, database, and configuration
- **Enhanced customization capabilities** not limited by cloud policies
- **Local data ownership** to support compliance and internal governance
- **Scalable architecture** optimized to your internal standards
- **Reliable migration** using tried and tested ConnectWise processes
- **Smooth functionality validation** with expert-led testing

This service gives your organization the control and flexibility of a fully on-prem Automate deployment with zero guesswork.

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