

ConnectWise Automate™ On-Premise Server Upgrade

Upgrade with Confidence. Improve Performance. Stay Current and Supported.

Statement of Work

[Automate On-Premises Server Upgrade <4K Agents](#)
[Automate On-Premises Server Upgrade 4K-9K Agents](#)

Estimated Level of Effort:

6

Service Overview

The ConnectWise Automate On-Premises Server Upgrade service provides expert guidance and hands-on technical execution to upgrade your Automate server by **one major version release**. This ensures your environment stays current, secure, compatible, and optimized for performance.

This packaged upgrade includes the application of the **latest patch for the targeted major version**, ensuring your system receives the newest fixes and stability improvements.

Note:

Partners who are **two or more major versions behind** require a scoping call to determine prerequisites and plan the safest upgrade path.

What You Get: High Value Deliverables

Your upgrade is performed using a **pre-written, repeatable ConnectWise upgrade methodology**, ensuring consistency, stability, and minimized risk.

(Customization outside this process is not included.)

One Major Version Upgrade

Your Automate system is upgraded from your current major version to the **next major revision**, including:

- Automate server upgrade
- Upgrade of official ConnectWise-approved plugins
- Installation and upgrade as needed of ScreenConnect®, a ConnectWise company

Full System Validation

ConnectWise verifies core operational functions, including:

- PSA ticket sync
- Agent check-ins
- WCC and LCC communication
- Command execution
- Automated reports running over HTTP

This ensures your upgraded environment is fully functional and production-ready.

What ConnectWise Provides

- Upgrade executed by **experienced Automate Software Consultants**
- Remote completion using ScreenConnect
- Import and implementation of all work products
- Functionality testing to confirm upgrade success
- Communication updates via your dedicated project ticket

Your upgrade is handled with precision and care from start to finish.

Client Responsibilities

To ensure a successful upgrade, the Client must:

- Provide a **ConnectWise Automate administrator** as the project lead
- Supply any required third-party software not accessible to ConnectWise
- Validate that the upgraded environment meets expectations
- Perform additional production environment testing as needed
- Participate in a required scoping call if more than two major versions behind

The Client is responsible for final confirmation that the upgrade is ready for production

Why Choose ConnectWise for Your Automate Upgrade?

- **Safely stay on supported versions** with fewer operational risks
- **Improve security, performance, and system stability**
- **Minimize downtime** with a streamlined upgrade process
- **Ensure full feature compatibility** with the latest Automate ecosystem
- **Rely on Automate certified experts** who work with these environments daily
- **Gain peace of mind** with post-upgrade validation

This service is the most dependable and efficient way to modernize your on-premises Automate environment.

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