

ConnectWise Automate™ On-Premises to Cloud Conversion

Modernize Your Automate Deployment. Reduce Infrastructure. Improve Reliability.

Statement of Work

Automate On-Premise to Cloud Conversion

Service Overview

The ConnectWise Automate On-Premises to Cloud Conversion service helps existing partners seamlessly migrate from a locally hosted Automate server to the ConnectWise Cloud environment.

This expert-guided conversion ensures your system is replicated accurately and operates on the same Automate revision without requiring upgrades, rebuilds, or risky manual steps.

Whether you're moving to the cloud for performance, stability, cost savings, or scalability, this packaged conversion gives you a predictable, low risk path to a modern Automate deployment.

What You Get: High Value Deliverables

Your conversion is performed using a **prewritten, best practice ConnectWise process**, ensuring consistency and accuracy. (Customizations are out of scope.)

ConnectWise offers **two conversion options**, so you can choose the method that best fits your business needs.

✓ Option 1: Full Conversion

Ideal for partners wanting a complete migration with all data and configurations preserved.

- Install Automate on destination cloud server
- Migrate entire database (full data and configuration)
- Install ScreenConnect®, a ConnectWise company, on destination server
- Verify PSA ticket sync
- Verify agent check-ins
- Verify WCC and LCC connectivity
- Verify command execution
- Verify reports running over HTTP

This delivers a full, intact lift and shift of your Automate environment to the cloud.

✓ Option 2: Essential Table Conversion

Ideal for partners wanting a lighter-weight migration focused on core operational data.

- Install Automate on destination cloud server
- Migrate essential database tables only (per SOW)
- Install ScreenConnect on destination server
- Verify agent check-ins
- Verify WCC and LCC connectivity
- Verify command execution
- Verify reports running over HTTP

This option reduces legacy baggage while retaining essential Automate functionality.

What ConnectWise Provides

- Migration performed by experienced ConnectWise Automate software consultants
- Remote delivery via ScreenConnect
- All work products imported and tested in the Client's cloud environment
- Functionality validation performed by ConnectWise based on defined specifications
- Ongoing communication through your dedicated project ticket

Client Responsibilities

To ensure a successful conversion, Clients must:

- Provide a ConnectWise Automate administrator as the primary project contact
- Provide any required third-party software not directly accessible to ConnectWise
- Validate that the completed work product functions as expected
- Perform final testing within your production environment


Your confirmation is required before finalizing the migration.

Why Choose Automate Cloud Conversion?


- **Modernize your infrastructure** with a cloud-hosted Automate instance
- **Reduce server management burden** and local hardware dependencies
- **Improve reliability and uptime** with cloud-based resources
- **Retain your current setup** through full or essential migration options
- **Minimize risk** with a structured, repeatable conversion process
- **Ensure full functionality** with expert-led verification and testing


This service is the safest and most efficient path to transforming your Automate environment into a cloud-ready, future-proof platform.

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Service scope may vary. Refer to the Statement of Work for complete details.