

# ConnectWise Automate™ Server Merge

Consolidate Automate Environments. Retain Key Assets. Simplify Management.

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## Statement of Work

[Automate Server Merge](#)

Estimate Level of Effort: 6 hours

### Service Overview

The ConnectWise Automate Server Merge service provides expert technical execution to merge a source Automate server into a destination Automate server, combining critical operational elements into a single environment.

This service is designed for existing Automate partners seeking to simplify infrastructure, reduce administrative overhead, or transition away from aging servers while retaining Clients, Locations, and Agents from the source instance.

### What You Get: High Value Deliverables

Your merge is completed using a **pre-written, standardized ConnectWise methodology** that ensures consistency, accuracy, and predictable outcomes.

(Customizations are out of scope.)

#### ✓ Source → Destination Server Merge

ConnectWise migrates the following database tables:

- Clients
- Locations
- Passwords
- Computers (Agents)

This ensures you retain core operational elements without manually recreating them.

#### ✓ Agent Migration Verification

ConnectWise verifies:

- Agents are checking in from your designated test group
- Connectivity between components (WCC, LCC, commands, etc.) is functioning within expected parameters

#### ✓ Hands-On Training and Support

Includes:

- **Client training on the agent migration process**
- **1 hour of troubleshooting and assistance** for agent migration

This ensures your team understands how to complete the remaining agent transitions from source to destination.

## What ConnectWise Provides

- Expert execution by **ConnectWise Automate Software Consultants**
- Remote services performed through ScreenConnect®, a ConnectWise company
- All merge work imported into your environment and tested to specification
- Ongoing communication via your project ticket, including updates and status notifications
- Transparent guidance and validation steps
- Your environment remains in the hands of knowledgeable engineers who specialize in Automate architecture.

## Client Responsibilities

To ensure a successful merge, the Client must:

- Provide a **ConnectWise Automate administrator** as the primary point of contact
- Supply any required third-party software not directly accessible to ConnectWise
- Provide a test group for agent check-in verification
- Complete remaining agent migration steps after training
- Validate system functionality in production
- Confirm that the results meet business expectations

Final verification and approval are required before closing the project.

## Why Choose the Automate Server Merge?

- **Consolidate multiple Automate environments** for simpler management
- **Preserve your Clients, Locations, Passwords, and Agents** with minimal manual effort
- **Reduce infrastructure and maintenance overhead**
- **Ensure proper agent functionality** with expert-led validation
- **Minimize risk** with a structured, repeatable ConnectWise process
- **Accelerate transition efforts** with guided training and troubleshooting

This service is the most efficient and reliable way to merge two Automate environments while retaining operational continuity.

## CONTACT US



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