

ConnectWise Automate™ Server Migration

Move Automate to a New Server. Retain What You Need. Modernize with Confidence.

Statement of Work

Automate Server Migration

Estimate Level of Effort: 6

Service Overview

The ConnectWise Automate Server Migration service provides expert technical consulting and execution for partners who need to move their existing Automate environment to a new server.

This service is ideal for hardware refreshes, infrastructure changes, datacenter moves, or cloud/on-prem realignments where you want to preserve key Automate components or start fresh intentionally.

This migration uses the **same version** of Automate currently in place. It does **not** include Automate upgrades, configuration rebuilds, script recreation, or troubleshooting of issues unrelated to the migration.

What You Get: High Value Deliverables

Your migration is performed using a **prewritten, repeatable, best-practice process**, ensuring accuracy, stability, and minimized risk.

ConnectWise offers **two migration options**, depending on how much data and configuration you want to carry forward.

✓ Option 1: Full Migration

Retains all existing data and configuration.

Migration includes:

- Install Automate on destination server
- Full database migration to destination SQL server
- Install ScreenConnect® on new server
- Verify PSA ticket sync
- Verify agents are checking in
- Verify WCC and LCC connectivity
- Verify commands execute successfully
- Verify reports run over HTTP
- Verify scripts execute
- Verify email function
- Verify ScreenConnect integration

This option gives you a complete lift and shift of your current Automate environment.

✓ Option 2: Essential Table Migration

Retain only what you need to start fresh with core records intact.

Migration includes:

- Install Automate on destination server
- Install ScreenConnect
- Migrate only specific database tables (per SOW)
- Verify agent check-ins
- Verify WCC and LCC connectivity
- Verify commands run
- Verify reports run over HTTP
- Verify scripts run
- Verify email function
- Verify ScreenConnect integration

This option is ideal for clients who want a cleaner, more modern Automate instance, without legacy data or configuration clutter.

What ConnectWise Provides

- Migration performed by **experienced Automate software consultants**
- Remote execution through ScreenConnect
- Importing and testing of all work products
- Final validation to ensure migration meets specification
- Clear communication throughout the engagement

Your migration is executed with precision, transparency, and expert oversight.

Client Responsibilities

To ensure a smooth and successful migration, the Client must:

- Provide a **ConnectWise Automate administrator** as the primary point of contact
- Provide any third-party software not directly accessible to ConnectWise
- Test and validate the migrated environment
- Confirm readiness for production use
- Understand that this service does not include:
 - Troubleshooting unrelated issues
 - Rebuilding monitors, scripts, or configuration items

Final acceptance from the Client is required before the migration is considered complete.

Why Choose Automate Server Migration?

- **Move Automate to new hardware or infrastructure** with zero guesswork
- **Choose your migration style:** full data retention or clean start model
- **Preserve agent functionality** through expert-led validation
- **Reduce risk** using proven, standardized migration processes
- **Ensure operational continuity** with minimal downtime
- **Benefit from hands-on testing and verification** by Automate-certified experts

This service is your safest, fastest, and most reliable path to modernizing your Automate server environment.

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