

Autotask to ConnectWise PSA Migration

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

Statement of Work

ConnectWise PSA Data Conversion – Autotask to ConnectWise PSA

Estimated Level of Effort:

7

Service Overview

This packaged migration service provides a proven, standardized process for transitioning your operational and historical data from Autotask to ConnectWise PSA.

Designed for partners moving to ConnectWise PSA who want a fast, predictable, and cost-effective migration, this engagement uses a predefined methodology and tested conversion scripts that eliminate guesswork and reduce disruption.

Customization can be added as an optional enhancement, giving partners the flexibility to meet unique data needs while keeping the core engagement streamlined and efficient. However, if customizations are required, the work shifts into a custom scope, which will delay the time-to-value.

What You Get: High Value Deliverables

This migration uses a **two-phase approach**, each requiring an Autotask database backup.

You may also choose a **one-phase migration**, which combines both phases and requires only one backup.

Phase 1: Pre-Implementation Migration

ConnectWise performs:

- Pre-implementation migration into a **UAT/test environment**
- Pre-implementation migration into **production**

This phase migrates all data needed to begin using ConnectWise PSA in a live environment.

Phase 2: Post-Implementation Migration

ConnectWise performs:

- Post-Implementation migration into **production**

This phase typically includes historical tickets and remaining data once Autotask usage has tapered off.

Temporary Cloud Test Environment

- A two-week UAT environment is provided
- Additional two-week test periods are available as add-ons per SOW

This environment allows your team to validate your migrated data before it goes live.

What ConnectWise Provides

You receive a dedicated migration team, including:

- **Project coordinators** to manage scheduling and timelines
- **Experienced PSA technical engineers** who assist with migration tasks
- Remote delivery via ScreenConnect®, a ConnectWise company, or supported access
- Clear communication through your project ticket
- Structured migration phases with defined checkpoints

This ensures a predictable, transparent migration experience from start to finish.

Client Responsibilities

A successful migration requires your active participation in the quality and validation process.

PSA Administrator Assignment

You must appoint a PSA administrator who will act as your internal project owner.

Data Quality Assurance and UAT

You are responsible for ensuring the migrated data meets your business needs, including:

- Reviewing and approving migrated data at each phase
- Performing thorough quality assurance
- Responding to UAT steps when the ticket is placed in “Waiting on Partner – UAT”

Tasks Required in Each Phase

Phase 1: Pre-Implementation Migration

- Complete phase one checklist
- Obtain Autotask database backup
- **Review and UAT approve migration results**

Phase 2 – Post-Implementation Migration

- Process remaining tickets in Autotask until archive ready
- Obtain the second Autotask database backup

These steps ensure your production environment receives accurate, complete data.

Why Choose This Migration Package?

- **Proven, repeatable conversion process** reduces risk
- **Faster time-to-value** with ConnectWise PSA
- **Predictable and cost-effective**—no custom scope unless you choose it
- **Clear migration phases** with structured checkpoints
- **Dedicated experts** manage the heavy lifting
- **Optional customization** available if needed

This is the simplest, most efficient way to move your Autotask data into ConnectWise PSA.

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