

PSA Cloud to Platform

Validate Readiness. Unify PSA Data. Move to the ConnectWise Platform.

Statement of Work

[ConnectWise PSA Cloud to Platform Service Description](#)

Service Description

This service supports existing ConnectWise PSA partners moving from PSA Classic to Platform-Powered ConnectWise PSA. ConnectWise provides remote modernization and onboarding guidance focused on prerequisite validation, Platform provisioning readiness, Migration Wizard delivery, user and role unification, and completion and handoff.

The partner journey is typically structured across four weeks.

What You Get: High Value Deliverables

The engagement guides existing PSA partners from PSA Classic to Platform-Powered ConnectWise PSA through readiness, migration, unification, and handoff.

Prerequisite and Platform Readiness

- Confirm PSA is hosted in ConnectWise Cloud and eligible for modernization
- Validate SSO, CW Home access, Platform provisioning, and user permissions
- Confirm required webinars, demo, readiness assessment, and partner path

Migration Readiness and Companies Unification

The consultant reviews readiness and guides company, site, contact, and corporate structure migration.

- Activities include:
- Run and review the Migration Wizard data assessment
- Review inconsistencies and select the appropriate source of truth
- Review company mapping and planned change window expectations
- Prepare companies, sites, contacts, and corporate structure for migration

Users, Roles, Recap, and Handoff

The consultant guides user and role unification and completes the modernization handoff.

- Review users, roles, migration logs, and CW Home permissions
- Review open errors, known risks, limitations, and next steps
- Confirm user management readiness and document outstanding actions

Custom development, custom reporting, unsupported integrations, and partner-owned data cleanup are not included unless separately scoped.

Partnering With ConnectWise

ConnectWise Resource Obligations & Communication

- **Assign** modernization, provisioning, Platform, and escalation resources as needed
- **Provide** remote sessions through Microsoft Teams, WebEx, or similar meeting software
- **Validate** prerequisite, Platform, SSO, CW Home, and Migration Wizard readiness
- **Guide** migration assessment, company structure unification, and user and role unification
- **Communicate** project status, risks, scope changes, session recaps, and handoff actions

Client Responsibilities

To help keep the conversion on track, you are responsible for the following:

- **Readiness** requires you to complete assigned University coursework, required webinars, and the Sales Engineer demo before the engagement begins.
- **Access** requires you to provide technical and operational stakeholders who can support access, decisions, cleanup, validation, and approvals.
- **Cleanup** requires you to complete required data cleanup and resolve readiness issues before migration activities begin.
- **Decisions** require you to select the source of truth and complete migration steps during the agreed change window.
- **Validation** requires you to review migration outcomes, complete assigned follow up tasks, and perform user acceptance testing.
- **Ownership** requires you to manage custom reports, data imports, integrations, APIs, and partner owned cleanup items.
- **Scope changes** require you to submit new initiatives or scope changes in writing through a ticket.

Your readiness, stakeholder access, data volume, blockers, and scheduling affect the project timeline.

Why Choose PSA Cloud to Platform Conversion?

- **Modernization** helps you move your PSA environment onto the ConnectWise Platform so your team can work from a more unified foundation.
- **Alignment** helps you streamline company structure, user access, roles, SSO, CW Home, and Platform readiness before conversion.
- **Continuity** gives you a structured conversion process that protects core PSA operations and reduces avoidable disruption.
- **Guidance** connects you with ConnectWise resources who validate prerequisites, review readiness, guide modernization sessions, and communicate next steps.
- **Confidence** gives you a clearer path to Platform adoption with defined responsibilities, readiness checkpoints, and validation activities.

Refer to the Statement of Work for complete scope, prerequisites, assumptions, and terms.

CONTACT US



accountmanager@connectwise.com



home.connectwise.com



813.463.4700 Press 1 for Sales
and 1 for Account Management



UK Phone: +44 (0)203 817 6900
Ask for your Account Manager

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