

# ConnectWise PSA™

## Cloud-to-Premises Conversion

Seamlessly Transition Your PSA Environment. Gain Control. Maximize Performance.

### Statement of Work

[ConnectWise PSA Cloud to Premises Conversion](#)

### Estimated Level of Effort:

6 hours

### Service Overview

The ConnectWise PSA Cloud-to-Premises Conversion service provides expert technical consulting and execution to transition your organization from cloud-based ConnectWise PSA to an on-premises PSA server environment. This engagement is ideal for existing PSA partners who require full ownership and control of their PSA infrastructure for performance, customization, compliance, or security needs.

Our experienced engineers use a structured, proven, and repeatable conversion process to ensure your system is migrated accurately, efficiently, and with minimal disruption.

### What You Get: High Value Deliverables

ConnectWise performs your conversion using a **standardized, prewritten, best practice solution** to ensure a reliable outcome. (Customizations fall outside the scope.)

#### Pre-Conversion Checks

- Complete server pre-check
- Validation of system specifications
- Performance testing

*ConnectWise may delay or halt the conversion if your server does not meet requirements.*

#### Cloud-to-Prem Migration Execution

Your ConnectWise PSA Technical Engineer performs:

- Installation of ConnectWise PSA application
- Database backup and restoration
- Migration of uploaded documents
- Migration of PSA report descriptions
- Functional testing
- Installation of maintenance plans and extended events
- Stopping of cloud services
- Implementation of new PSA URL

Everything you need to move you from the cloud to on-premises, performed by experts.

### What ConnectWise Provides

- Experienced PSA Technical Engineers who perform the conversion
- Project coordination and scheduling support
- Remote conversion services via ScreenConnect®, a ConnectWise company, or other secure methods
- Clear communication throughout the project via your project ticket
- Post-session recaps and status updates

Most technical work is performed **remotely**, with attended access available upon request.

## Client Responsibilities

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

### Provide a PSA Administrator

- Acts as the primary project contact
- Coordinates internal resources

### Prepare the Server and Environment

- Complete Windows/SQL updates
- Complete the full Server Checklist
- Purchase a **third-party single domain SSL certificate** (required)
- Perform ongoing backups post conversion

### Manage Integrations and Dependencies

- Facilitate support for third-party integrations
- Manage future integration updates directly with vendors
- Migrate any custom reports maintained outside the PSA installation

### Testing and Validation

- Perform functional testing once ConnectWise completes the technical tasks

Your participation is essential to maintain timeline and ensure optimal performance.

## Why Choose ConnectWise for Your Conversion?

- **Expert-run transition** from the cloud to on-premises using a proven methodology
- **Reduced risk** through thorough pre-checks and validation
- **Fast and efficient migration** performed by PSA-certified engineers
- **Complete data handling**, including database, documents, and reports
- **Clear communication** throughout every step of the project
- **Smooth cutover** with minimal operational disruption

This service delivers the control and customization of an on-premises PSA environment backed by ConnectWise expertise.

## CONTACT US



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