

# ConnectWise PSA™ Company ID Change

Seamlessly Update Your PSA Identity. Ensure System Accuracy.  
Maintain Operational Continuity.

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## Statement of Work

[ConnectWise PSA Company ID Change](#)

Estimate Level of Effort: 3 hours

## Service Overview

ConnectWise PSA Company ID Change is a specialized technical consulting service designed for existing ConnectWise PSA partners who need to update their Company ID in the cloud or on-premises. Whether you're rebranding, restructuring, or simply aligning naming standards, ConnectWise provides expert-led support to handle this sensitive update efficiently and safely.

This engagement uses a structured, standardized process to ensure your new Company ID is applied correctly across your PSA ecosystem without compromising stability, data integrity, or system availability.

## What You Get: High Value Deliverables

Your Company ID change is executed using a **prewritten, best practice solution** created by the ConnectWise PSA engineering team. (Customizations fall outside the scope.)

### ✓ Pre-Check Requirements

As part of the process, ConnectWise performs a Company ID Change precheck to ensure:

- The new Company ID meets syntax requirements
- It is unique and not already in use
- The environment is eligible for the change

*ConnectWise reserves the right to postpone the change if precheck requirements are not met.*

### ✓ PSA Company ID Change Execution

Your ConnectWise PSA Technical Engineer will perform the following:

- Install new ConnectWise PSA cloud application instance
- Create a new licensing record
- Move uploaded documents
- Move PSA report subscriptions
- Update owner, system, and documents tables
- Add the database to the availability group
- Create new Customer Portal service ticket for updates
- Update business suite integrations
- Update partner configuration
- Archive the legacy PSA installation
- Test system functionality to validate the change

This ensures every connected component seamlessly recognizes the new Company ID.

## What ConnectWise Provides

- A full project team including:
  - Scheduling coordinators
  - Experienced PSA Technical Engineers
- Conversion work delivered remotely via ScreenConnect®, a ConnectWise company, or other secure access methods
- Attended access available upon request
- Status updates and communication managed through your project ticket
- Recommendations for validating functionality

We manage the technical heavy lifting and your team stays informed every step of the way.

To ensure a smooth and successful Company ID change, the Client must:

### Provide a PSA Administrator

- Acts as the main point of contact and coordinates internal access and approvals.

### Support Technical Requirements

- Provide any required third-party software not accessible to ConnectWise
- Provide the **new Company ID in writing**, ensuring it follows guidelines:
  - Unique
  - No more than **12** alphanumeric characters
  - No spaces
  - Short derivative of company name

### Update Dependent Systems and Workflows

The Client is responsible for:

- Updating any third-party integrations to use the new Company ID
- Updating custom report writer invoice URLs
- Communicating new legacy Customer Portal URL changes
- Testing functionality post change

The Client must also ensure that the final work product is complete, accurate, and ready for production. Any additional adjustments are billed hourly.

## Why Choose ConnectWise for Your Company ID Change?

- **Minimized risk** with a proven, controlled process
- **Expert PSA engineers** performing all technical tasks
- **Complete data handling**, including documents, reports, and integrations
- **Seamless transition** with minimal operational disruption
- **Full visibility** through structured communication and project tracking
- **Future-ready alignment**, ensuring all components recognize and use the new ID

A Company ID is a core identifier—trust the experts to ensure it is updated safely and correctly.

## CONTACT US



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