

# ConnectWise PSA™ Data and ETL Services

Clean Your Data. Automate Transformations. Power Your PSA With Accurate Information.

## Statement of Work

[PSA Data ETL Data Consulting Hourly](#)

## Includes

Custom data updates, ETL workflows, third-party imports, agreement and opportunity imports, custom field loads, and non-standard migration work.

## Service Overview

ConnectWise PSA Data and ETL Services provide expert remote technical consulting for partners who need **custom data manipulation, cleanup, imports, or transformation** within ConnectWise PSA.

This flexible, hour-based service is ideal for organizations that need to perform **advanced data work**, align disparate systems, clean up legacy PSA data, or load new data that falls outside the scope of standard migrations.

All engagements require **scoping** to ensure feasibility, proper planning, and accurate estimation.

## What You Get: High Value Deliverables

This service includes **remote data ETL hours** that can be used for a wide variety of custom data tasks, such as:

- ✓ **Data Cleanup and Maintenance**
  - Updating, removing, or cleaning up data inside PSA
  - Bulk adjustments to records across modules (tickets, companies, contacts, agreements, projects, etc.)
- ✓ **Third-party and Spreadsheet Imports**
  - Importing data into PSA from external systems
  - Importing CSV/Excel files into PSA tables
  - Mapping, transforming, and validating imported datasets
- ✓ **Agreement and Opportunity Imports**
  - Importing agreements with additions and financial details
  - Migrating opportunity data from legacy or external systems
- ✓ **Custom Field Imports**
  - Bulk loading into PSA custom fields
  - ETL logic to handle variance between systems
- ✓ **Other Nonstandard Migrations**

For any data migration need **outside standard PSA/third-party conversions**, the ETL service can support custom-designed workflows tailored to your data.

## How the Engagement Works

### 1. Scoping Required

ConnectWise and the Client collaborate to define:

- Data sources and targets
- Mapping and transformation requirements
- Expected outcomes
- Required access and environments

### 2. Developing and ETL Execution

A ConnectWise data consultant builds the required data processes using an Agile approach:

- Start with minimal requirements
- Deliver initial version quickly
- Iterate through collaboration

### 3. User Acceptance Testing (UAT)

- Work is delivered into a test environment (Cloud includes 2-week test environment)
- Client validates accuracy, completeness, and business requirements
- Ticket enters **waiting on partner—UAT**
- Approval triggers production execution

---

## What ConnectWise Provides?

- Remote data/ETL consulting hours
- Experienced PSA data engineers
- Secure remote execution using ScreenConnect®, a ConnectWise company
- Transparent communication through ticket system
- Progress updates, samples, and iterative versions

---

## Client Responsibilities

To ensure a successful data engagement, the client must:

- Provide clear design requirements (ConnectWise does *not* provide business-level design consulting)
- Provide required PSA and SQL access
- Validate all work product using standard QA procedures
- Provide timely UAT approval (required **7 days before** scheduled production work)

## Why Choose PSA Data and ETL Services?

- **Fix data quality issues** that affect workflows, reporting, billing, and automation
  - **Eliminate manual data manipulation** and reduce error risk
  - **Import data from any system** via flexible ETL options
  - **Accelerate onboarding or business transitions** with expert-led migrations
  - **Customize PSA for your processes** through targeted ETL enhancements
- 

## Billing and Engagement Details

- Minimum purchase: **2 hours**
- Billed on actuals (emails, scoping, development, testing, UAT)
- After-hours work available at 2× rate (minimums apply)
- Cloud UAT: temporary 2-week test environment included
- On-prem: Client training environment used for UAT

### CONTACT US



[accountmanager@connectwise.com](mailto:accountmanager@connectwise.com)



[home.connectwise.com](https://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