

ConnectWise PSA™ Group Merge

Streamline Your PSA Structure. Reduce Complexity. Improve Operational Clarity.

Statement of Work

[ConnectWise PSA Group Merge](#)

Estimate Level of Effort: 7 hours

Service Overview

The ConnectWise PSA Group Merge service provides a fast, structured, and repeatable way to consolidate PSA Groups and reassign all associated records. Whether you're reorganizing teams, restructuring service delivery, or cleaning up legacy data, this packaged migration ensures your PSA environment remains accurate, consistent, and easy to manage.

Using a proven, pre-defined process, ConnectWise reassigns all records from a source Group to a destination Group, then safely deletes the source Group, helping you maintain a clean, optimized PSA system without manual effort or risk.

What You Get: High Value Deliverables

This engagement uses a **standardized, pre-written Group merge process** to ensure reliability and accuracy. (Customization is out of scope but consulting can be added separately.)

✓ Mapping Template for Record Reassignment

You receive a structured mapping template to document which Groups should be merged and where all associated records should move.

✓ Complete Group Reassignment

ConnectWise performs:

- Reassignment of all records tied to the source Group
- Association of those records with the designated target Group
- Safe deletion of the source Group from the PSA environment

✓ Two UAT Cycles Included

- UAT cycle 1: Client reviews the test migration output
- UAT cycle 2: Final validation before production execution
- Additional UAT cycles available as paid add-ons

This ensures a clean, validated result before changes are applied to your live environment.

Partnering with ConnectWise

What ConnectWise Provides

You will have access to:

- **Scheduling coordinators** to manage project logistics
- **Experienced PSA Technical Engineers** executing the merge
- Clear communication via your dedicated PSA project ticket
- Guidance and direction throughout the UAT review process

Important:

This service does **not** include business process consulting. If you need help designing your PSA Group structure, that can be purchased as a separate consulting engagement.

Client Responsibilities

To ensure a smooth and successful Group merge, the Client must:

Assign a PSA Administrator

Acts as the main point of contact and ensures timely approvals.

Provide a Completed Mapping Template

- Required before work can begin
- Must clearly define all source and destination Groups

Conduct Thorough UAT

The Client is responsible for:

- Validating the test migration results
- Ensuring the output meets business requirements
- Confirming accuracy before approving production execution

Additional UAT cycles beyond the included two will be billed as per the SOW.

✓ Final Approval for Production Execution

The Client must confirm that the test migration is complete, correct, and defect-free before ConnectWise proceeds.

Why the Group Merge Service?

- **Eliminates manual reassignment work**
- **Ensures consistent and accurate PSA data**
- **Reduces clutter caused by legacy or unused Groups**
- **Supports reorganizations, mergers, and restructuring efforts**
- **Minimizes risk** with a proven, repeatable process
- **Includes multiple validation cycles** for accuracy and peace of mind

This service is the most efficient and reliable way to consolidate PSA Groups and maintain a clean, organized system.

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