

ConnectWise PSA™ Location Merge

Simplify Your PSA Structure. Consolidate Locations. Eliminate Data Fragmentation.

Statement of Work

[ConnectWise PSA Location Merge](#)

Estimate Level of Effort

7 hours

Service Overview

The ConnectWise PSA Location Merge service provides a fast, structured approach to consolidating PSA Locations by reassigning every associated record from one location to another. Once all records are reassigned, the source location is safely deleted, helping partners clean up outdated or redundant locations and maintain a consistent, accurate PSA environment.

This packaged service uses a proven, pre-defined methodology to ensure a smooth and error-free merge, reducing the risk of data inconsistencies and supporting a cleaner organizational structure.

What You Get: High Value Deliverables

This service uses a **standardized, pre-written merge process** designed to ensure accuracy and repeatability. (Custom business consulting or workflow redesign is not included.)

✓ **Location Mapping Template**

ConnectWise provides a mapping template to define:

- Source location(s)
- Destination location(s)
- Record mapping logic

This template must be completed before work can begin.

✓ **Complete Location Reassignment**

Your ConnectWise PSA Technical Engineer will:

- Reassign **all records** tied to the source location
- Associate those records with the designated destination location
- Safely delete the source location from the PSA system

✓ **Two UAT Cycles Included**

You receive two validation cycles:

- **Test migration review (UAT Cycle 1)**
- **Final validation before production (UAT Cycle 2)**

Additional UAT cycles are available as add-ons.

This structured approach ensures the merge is accurate before applying changes to your live environment.

What ConnectWise Provides

You will receive a dedicated services team, including:

- **Scheduling coordinators** to manage project logistics
- **Experienced PSA technical engineers** to execute the Location merge
- Communication and updates through your project ticket
- Guidance on reviewing UAT results

Note:

This service does *not* include business process consulting or redesign of PSA organizational structures. If you require business consulting, this can be purchased separately.

Client Responsibilities

✓ Assign a PSA Administrator

This person acts as your internal project lead and primary point of contact.

✓ Complete the Mapping Template

- Clearly define source and destination locations
- Submit the template before work can begin

✓ Perform Thorough UAT

You are responsible for:

- Validating the test migration/work product
- Ensuring results meet your expectations
- Confirming accuracy before approving production execution

If additional UAT cycles are needed beyond the included two, they will be billed according to the add-ons section of the SOW.

✓ Final Approval

Only after you approve the UAT results will ConnectWise execute the location merge in your production environment.

Why Choose the Location Merge Service?

- **Eliminate redundant or legacy locations**
- **Improve data accuracy and reduce confusion for your team**
- **Ensure clean reassignment of all location based records**
- **Reduce PSA clutter for a simpler operational model**
- **Prevent manual errors through a standardized, vetted process**
- **Validate results thoroughly before changes go live**

This service provides a safe, efficient, and reliable way to clean up your PSA Location structure.

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