

ConnectWise PSA™ Overlay

Duplicate PSA Environments Safely. Reset Your System. Enable Clean Transitions.

Statement of Work

[ConnectWise PSA Overlay](#)

Estimated Level of Effort:

2 hours

Service Overview

The ConnectWise PSA Overlay service provides a structured, expert-led solution for partners needing to **overwrite one PSA environment with a full copy of another**. This includes transferring the PSA database and uploading documents to create a clean, accurate duplication of the source environment.

This service is ideal for partners who need to realign environments, refresh system data, rebuild a corrupted environment, or deploy a consistent PSA configuration across instances while avoiding manual work and minimizing risk.

Note: This SKU is not used for Cloud Production → Cloud Sandbox overlays.

Those are handled by Partner Support at no charge. If there is a premise environment involved for either the product or sandbox, then this SKU is needed.

What You Get: High Value Deliverables

Your overlay is performed using a **pre-written, standardized ConnectWise process**, ensuring accuracy and consistency. (Customizations are out of scope.)

Pre-Overlay Validation

A PSA Overlay precheck confirms:

- The target environment is eligible
- No conflicts or data use issues exist
- All requirements are met before work begins

ConnectWise may delay the overlay if eligibility requirements are not met.

Complete PSA Environment Overlay

Your Technical Engineer will:

- Install the new PSA application on the target environment
- Update the licensing record
- Move all uploaded documents
- Update owner, system, and documents tables
- Update partner configuration
- Test full system functionality

This delivers a complete, clean copy of your PSA source environment.

Partnering With ConnectWise

What ConnectWise Provides

- A dedicated project team with:
 - **Scheduling coordinators**
 - **Experienced PSA Technical Engineers**
- Remote execution through ScreenConnect®, a ConnectWise company, or similar tools
- Attended access when needed
- Clear communication via the project ticket
- Recommended methods for verifying functionality post-overlay

Your PSA overlay is executed safely, accurately, and with full transparency.

Client Responsibilities

Assign a PSA Administrator

This individual will act as the internal project lead and contact point.

Provide Required Access/Software

If third-party software is involved, the client must provide access where needed.

Complete Required Overlay Tasks

The client is responsible for:

- Updating all **third-party integrations** to use the new PSA environment
- Updating any **Custom Report Writer invoice URLs**
- Upgrading the target PSA SQL Server environment (if required)
- Communicating any changes to the **Legacy Customer Portal URL**
- Signing any required **data release documentation**
- Performing thorough **functionality testing** to validate the overlay

Clients must confirm that the final results are complete, correct, and production-ready.

Any additional adjustments are billed hourly.

Why Choose the PSA Overlay Service?

- **Fast, reliable way to duplicate or overwrite environments**
- **Reduced system inconsistencies and technical debt**
- **Ideal for environment resets, reconfigurations, or cleanup**
- **Ensured data integrity and complete copying of PSA components**
- **Performed by PSA certified engineers using proven processes**
- **Clear, structured communication throughout the project**

This service is the safest, most efficient way to replicate or refresh a PSA environment without manual complexity.

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