

ConnectWise PSA™ Premises Historical Third Instance

Secure Your PSA History. Preserve Critical Data. Expand Safely.

Statement of Work

[ConnectWise PSA Premise Historical Third](#)

[Instance](#)

Estimate Level of Effort: 3 hours

Service Overview

The ConnectWise PSA Premise Historical Third Instance service provides expert-led technical consulting to install a dedicated, one user historical PSA instance for ConnectWise PSA Premises partners. This service is ideal for organizations that need to maintain access to legacy or historical data (such as records, archived workflows, or past configurations) without impacting their primary production environment. This is a common service for M&A activity where historical instances need to stay on-premises.

This fully managed, best practice installation ensures your historical instance is deployed securely, isolated properly, and configured to prevent cross contamination, giving you long-term access to historical system data with minimal operational risk.

What You Get: High Value Deliverables

Your historical instance installation is performed using a **standardized, pre-written solution** built to ensure accuracy, stability, and repeatability.

(Customizations fall outside the project scope.)

✓ Historical Third Instance Installation

ConnectWise performs the following:

- Server pre-check
- Database and uploaded document backup acquisition
- Restore of legacy database and documents
- Login database updates
- SQL maintenance plan updates
- Owner, system, and documents table updates
- SQL Server Reporting Services update
- IIS Web Server configuration
- Execution of scripts to prevent cross contamination
- Licensing record update
- Full functionality testing

This end-to-end process ensures the historical instance is stable, secure, and fully isolated.

What ConnectWise Provides

- A dedicated project team including:
 - **Scheduling coordinators**
 - **Certified PSA Technical Engineers**
- Remote implementation via ScreenConnect®, a ConnectWise company, or approved access methods
- Attended access available upon request
- Clear communication through your project ticket
- Post-session recaps and validation guidance

Your ConnectWise PSA experts manage the entire technical workflow to ensure accuracy and reliability.

Client Responsibilities

To ensure a smooth and successful installation, the Client must:

Provide a PSA Administrator

Serves as the primary contact for coordination and decisions.

Ensure Infrastructure and Software Readiness

- Confirm the Premises PSA server has adequate resources for the new instance
- Provide software not already accessible to ConnectWise (if required)
- Provide additional server resources (disk space, etc.) as needed

Complete Required Tasks

Clients are responsible for:

- Completing any required **legal release documentation**
- Scheduling an appropriate **maintenance downtime window**
- Backing up and acquiring the database and uploaded documents (if required)
- Conducting full functionality testing of the historical instance

Clients must ensure the work product is correct, complete, and ready for production use. Any additional adjustments will be billed hourly.

Why Choose ConnectWise for Your Historical Instance?

- **Preserve legacy PSA data** without impacting production
- **Protect data integrity** with cross-contamination safeguards
- **Gain controlled access** to historical information as needed
- **Ensure compliance and audit readiness** with secure data retention
- **Avoid risks** by relying on certified PSA experts
- **Receive a fully validated, ready-to-use historical PSA instance**

This service enables safe, structured preservation of PSA history without disruption.

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