

# ConnectWise PSA™ Premises to Cloud Conversion

Modernize Your PSA. Improve Performance. Reduce Infrastructure Burden.

## Statement of Work

[ConnectWise PSA Premise to Cloud](#)

[Conversion](#)

Estimate Level of Effort: 4 hours

## Service Overview

The ConnectWise PSA Premises to Cloud Conversion service helps existing PSA partners modernize their environment by migrating from an on-premises installation to the ConnectWise PSA cloud.

This expert-led engagement provides a stable, secure, and future ready PSA environment without the maintenance, hardware dependencies, or upgrade overhead associated with on-premises systems.

Partners leveraging this service gain immediate benefits such as improved performance, reduced infrastructure costs, simplified updates, availability to new features and a reliable cloud-hosted environment maintained by ConnectWise.

## What You Get: High Value Deliverables

Your conversion is executed using a **proven, standardized conversion process**, ensuring reliability, accuracy, and minimized business disruption.

(Customizations are not included in this service scope.)

## ✓ Complete Premise-to-Cloud Migration Workflow

ConnectWise performs:

- Full **Server Pre-Check**
- **Database backup and restoration** to the cloud environment
- Migration of **uploaded documents**
- Migration of **report subscriptions**
- Functional testing to validate integrity
- Installation of **maintenance plans** and **extended events**
- Stopping legacy on-prem services
- Deployment of **new PSA cloud URL**
- Applying PSA updates as needed
- Ensuring ongoing backup stability

This end-to-end approach ensures a seamless, low-risk transition to the ConnectWise PSA cloud.

## What ConnectWise Provides

- A dedicated project team including:
  - **Scheduling coordinators**
  - **Experienced PSA Technical Engineers**
- Remote technical work performed through ScreenConnect®, a ConnectWise company, or supported access
- Attended access available on request
- All communication managed through your dedicated project ticket
- Precheck validation: if your system is not version-compliant or fails performance testing, ConnectWise may pause the conversion until resolved

If the partner is more than **two versions behind** the current PSA general release, updates must be applied before conversion.

## Client Responsibilities

To ensure a smooth and timely migration, the Client must:

### Provide a PSA Administrator

The main point of contact for coordination and approvals.

### Prepare the PSA Environment

- Match PSA Cloud version requirements
- Apply all available PSA updates before the precheck
- Arrange support with third-party vendors for integrations
- Provide required software for any integration work
- Confirm the PSA cloud **CompanyID**
- Resolve any database corruption issues prior to migration (billable if engineering assistance is required)

### Post Migration Tasks

Clients are responsible for:

- Performing final functionality testing
- Updating SPF records
- Migrating any custom reports maintained outside PSA

The Client must ensure the migrated environment is correct, complete, and ready for production. Additional work is billed hourly.

## Why Choose ConnectWise for Your Cloud Conversion?

- **Modernize your PSA** with a robust, secure cloud environment
- **Reduce server maintenance and infrastructure costs**
- **Improve performance and reliability** with cloud resources
- **Stay current automatically** with PSA cloud updates
- **Ensure a smooth, low risk migration** with PSA-certified engineers
- **Gain scalability** for future business expansion

This service provides the fastest and safest path to unlocking the full value of ConnectWise PSA cloud

## CONTACT US



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*Service scope may vary. Refer to the Statement of Work for complete details.*