

# ConnectWise PSA™ SQL Server Migration

Modernize Your PSA Database. Improve Performance. Ensure Long-term Stability.

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## Statement of Work

[ConnectWise PSA SQL Server Migration](#)

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## Estimated Level of Effort:

3 hours

### Service Overview

The ConnectWise PSA SQL Server Migration service provides expert technical consulting to transition your PSA database to a new SQL Server environment safely, accurately, and without changing your application version.

This service is ideal for PSA partners who need to modernize database hardware, improve performance, ensure compliance, enhance stability, or prepare for future scalability. For migrations of application servers, please refer to the **PSA Premise Reinstall service**.

Our engineers follow a structured, proven migration process to ensure your database, reports, subscriptions, and PSA functionality migrate smoothly, with minimal business disruption.

### What You Get: High Value Deliverables

Your SQL Server migration is executed using a **prewritten, best practice methodology** created by the ConnectWise Professional Services team.

(Customization beyond this standard method is out of scope.)

#### End-to-end SQL Migration Execution

ConnectWise performs:

- **Server pre-check** to validate readiness
- **Backup and restore** of the PSA database
- Installation of **standard ConnectWise reports**
- Installation of **maintenance plans** on the new SQL Server
- Installation of **custom reports** provided by the client
- Migration of **report subscriptions**
- Installation of **extended events**
- Full **PSA functionality testing**
- Stopping old SQL services and taking legacy databases offline

This ensures your PSA database is transferred safely, cleanly, and fully operational on its new SQL Server home.

### What ConnectWise Provides

- A full migration team, including:
  - **Scheduling coordinators**
  - **Experienced PSA Technical Engineers**
- Remote implementation through ScreenConnect, a ConnectWise company, or supported access
- Attended access available upon request
- Ticket-based communication for full visibility and real-time updates
- Incremental deliverables following an **Agile methodology**, allowing for controlled adjustments and collaboration

You get expert guidance, transparent communication, and a structured migration from start to finish.

## Client Responsibilities

To ensure a successful SQL migration, the Client must:

### Provide a PSA Administrator

Acts as the primary internal contact for scheduling, approvals, and coordination.

### Prepare Your New SQL Environment

- Confirm the SQL migration fee
- Complete all required **Windows/SQL updates**
- Complete the **SQL Server Checklist**
- Provide any required third-party software that ConnectWise cannot access directly
- Arrange vendor support for any **third-party integrations**

### Post Migration Responsibilities

Clients must:

- Test PSA functionality after migration
- Configure optional **High Availability** features if desired
- Verify all work products and confirm the environment is ready for production

Any follow-up adjustments or additional work beyond scope will be billed hourly.

## Why Choose ConnectWise for Your SQL Migration?

- **Reduce risk** with a structured, repeatable migration process
- **Improve performance** by moving to modern SQL Server infrastructure
- **Preserve all data, reports, and subscriptions** through expert handling
- **Minimize downtime** with efficient, remote execution
- **Stay compliant** with best practice database standards
- **Leverage PSA certified Technical Engineers** for accuracy and reliability

This service delivers the safest, most efficient path to modernizing your PSA database environment.

## CONTACT US



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