

# ConnectWise PSA™ to PSA Data Merge (Packaged Service)

Unify data. Reduce complexity. Accelerate your PSA consolidation.

#### Ideal for:

Partners consolidating multiple PSA instances into one standardized, production-ready environment. Provides migration services, including companies, contacts, configurations, and tickets. Scoping is required.

#### Statement of Work

[ConnectWise PSA to ConnectWise PSA Data Migration](#)

Estimate Level of Effort: 23 hours

## Service Overview

The **PSA to PSA Data Merge** is a packaged consulting engagement that migrates key operational and historical records from a **source** ConnectWise PSA environment into a **destination** ConnectWise PSA environment, using a proven, fixed-scope method designed for accuracy, predictability, and speed. Any customizations that are required need to be scoped and will extend the engagement.

### What You Get: High Value Deliverables

- **End-to-end data merge** for core business objects (e.g., companies, contacts, opportunities, projects, service tickets, time, expenses, agreements, invoices) with structured mapping and translation per the SOW.
- **System alignment** for setup items (selected setup tables) driven by a **pre-migration checklist** to ensure behaviors in the destination system match your business intent.
- **Test environment and UAT cycles:** A full **test merge** plus **two included UAT cycles**, so your team can validate, request corrections, and sign off before production. (Cloud UAT includes a two-week temporary environment.)
- **Production merge and cutover** performed during an agreed window, with clear communications and expectations for performance and timing.

### How The Process Works

#### 1. Phase 1: Pre-migration checklist

You complete a guided checklist that maps source settings to destination behaviors (this is critical to predictable outcomes and may require your internal business decisions).

#### 2. Phase 2: Test merge and UAT

We execute a Test Merge into a training/test environment. You review results, log questions, and provide UAT approval (required seven calendar days before the Production Merge date). Two UAT cycles are included.

#### 3. Phase 3: Production merge

We perform the Production Merge at the scheduled date/time. While migration runs, the destination system may be slow or temporarily inaccessible; timing depends on data size and network/server performance.

**After-hours option:** Work outside standard hours can be scoped and scheduled in advance and is billed at the applicable after-hours rate/minimums.

## Readiness and Requirements

- **Version alignment:** Source and destination must be on **the latest general release version** (on-premise), and SQL server version on source must be  $\leq$  destination's SQL version. Cloud release cycles may impact scheduling.
- **Capacity planning (on-premise):** Plan for  $\sim 2.5\times$  source DB size available on the destination DB drive; ensure sufficient storage for document transfers if included

## What's Included vs. Not Included

**Included (examples):** Companies, Contacts, activities, opportunities, sales and purchase orders, projects, project and service tickets (with related time/expense), agreements, invoices, selected system/setup items per the checklist. Details in the SOW data translation section.

### Key exclusions/considerations:

- **Custom fields** (System » Setup Tables » Custom Fields) do **not** migrate; company profile user fields (1–10) are preserved via a **company configuration** for reference.
- Email Connectors, security roles, home portals, integrations, workflows/notification rules are not migrated and must be (re)configured in the destination.
- **Record identifiers** (e.g., ticket #) cannot be retained; original ticket numbers are **pre-pended to ticket summaries** in the destination
- **Duplicate companies** may occur if entities exist in both systems; post-merge **company merge** cleanup can be performed after cutover.
- **Attachments** available as an **add-on** service.

## Client Responsibilities

- Complete the **pre-migration checklist** and provide timely test feedback.
- Conduct thorough **UAT** and provide **approval  $\geq 7$  days** before production.
- Validate the **production** results meet your requirements; post-production changes are billed hourly.

## Why Partners Choose This Service?

- **Proven, repeatable method** reduces risk and accelerates time-to-value.
- **Structured UAT** ensures confidence before cutover.
- **Clear scope and expectations** with a fixed fee core offering and optional add-ons.

## CONTACT US



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