

ConnectWise PSA™ Premises Role Switch

Re-Align Your PSA Environments. Support New Business Needs. Ensure Clean, Stable Operation.

Statement of Work

ConnectWise PSA Premises Server Role

Switch

Estimate Level of Effort: 3 hours

Service Overview

The ConnectWise PSA Premises Server Role Switch service provides expert technical consulting to help existing PSA premises partners swap the roles of their production and sandbox environments.

Partners typically request this service when undergoing structural business changes, workflow redesigns, test-to-production transitions, or new operational requirements that make their current production/sandbox alignment no longer suitable.

This engagement ensures the switch is executed safely, accurately, and without cross contamination, preserving the integrity of both environments.

What You Get: High Value Deliverables

Your server role switch is performed using a **prewritten, best-practice ConnectWise method**, ensuring consistency and reliability.

(Custom scopes outside of this standardized method are not included.)

✓ PSA Production ↔ Sandbox Role Switch Execution

ConnectWise performs:

- Full **server precheck**
- Updating **PSA database names** in both environments
- Updating respective **login database tables**
- Updating **SQL maintenance plans**
- Updating **owner, system, and documents** tables
- Updating **SQL reporting services**
- Reconfiguring **IIS web server**
- Executing **cross-contamination prevention scripts** for new Sandbox
- Updating **licensing records** for both environments
- Testing **application functionality**
- Updating **Business Suite Support Portal** (if applicable)

This ensures both environments adopt their new roles cleanly and reliably.

What ConnectWise Provides

- A full project team:
 - **Scheduling coordinators**
 - **Experienced PSA technical engineers**
- Remote execution via ScreenConnect®, a ConnectWise company, or supported access methods
- Attended access available if needed
- Clear communication and progress updates via your project ticket
- Post execution validation and best practice guidance

You get a clean, controlled, and professional environment role switch without guesswork.

Client Responsibilities

To ensure a smooth and timely server role switch, the Client must:

Provide a PSA Administrator

Serves as the primary point of contact throughout the project.

Prepare Environments

- Purchase and configure the sandbox environment as required
- Provide any third-party software needed for integrations
- Ensure the server environments meet resource requirements

Perform Required Tasks

Clients are responsible for:

- Scheduling a downtime maintenance window
- Applying necessary DNS changes (internal and external)
- Testing PSA functionality after the switch
- Validating Sandbox functionality and cross-contamination safeguards

The Client must verify that final work products are correct, complete, and ready for production use. Additional change requests are billed hourly.

Why Choose ConnectWise for Your Server Role Switch?

- **Expert-led transition with PSA-certified engineers**
- **Clean cutover with built-in cross-contamination prevention**
- **Minimal risk thanks to prechecks and proven methodology**
- **Improved alignment between your PSA environments and business needs**
- **Reduced downtime with efficient, remotely delivered execution**
- **Full transparency via ticket-based communication and status updates**

This service ensures your production and sandbox environments are aligned exactly how your business needs them—safely, accurately, and efficiently.

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