

SMARTSHIFT – SHIFT HAPPENS...MAKE IT SMART

DATASHEET

Who We Are

Co-developed by Decision Digital and CrushBank, SMARTshift is the only AI-powered tool designed specifically to extract, curate, and safely merge entire ConnectWise environments—something no other tool or vendor can do.

Whether you're migrating PSAs or integrating environments during M&A, SMARTshift handles the complexity with speed, precision, and unmatched depth. Our blend of automation and expert oversight ensures your data moves with full integrity—quickly, cleanly, and without disruption.

Others migrate data. SMARTshift moves the business.

Why Choose Us



Industry Leadership & Innovation

We bring deep expertise in IT and ConnectWise consulting, helping to shape industry trends with tailored solutions for your business.



Strategic Consulting for Scalable Growth

Our consultative approach ensures that we align technology with your business goals, driving efficiency and supporting long-term success.



Experts in Migration & Integration

We migrate, archive and provide AI-drive access to data that doesn't make the transition, ensuring nothing is left behind.

Click to watch the video and explore SMARTshift details.

LEARN MORE:

www.decisiondigital.com/smartshift | 404-303-0330

Merge *For M&A Integrations*

1 Ingest

We pull all relevant data from both ConnectWise systems into a secure, query-ready data lake.

2 Map

We align source fields to destination fields, resolving structural mismatches and standardizing entities

3 Transform

We apply filters, field selectors, and business logic to prepare clean, curated datasets for the new environment.

4 Load

We load the curated data into the destination ConnectWise system with full validation and minimal disruption.

Migrate *For Competitor PSA Migrations*

1 Extract

We securely pull legacy PSA data into our encrypted data lake for full access and control.

2 Blueprint

Data is reviewed and mapped using our DOC spreadsheet, aligning it with your ConnectWise setup for clean, accurate configuration.

3 Import

Curated data is imported into ConnectWise using optimized tools to ensure accuracy and readiness.

4 Activate

Legacy data is made searchable in ConnectWise via SMARThive—maintaining access without cluttering your new system.

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High-Level Migration Summary

A clear roadmap that standardizes data, preserves integrity, and ensures a seamless ConnectWise transition.

110	4	25
setup tables	data remapping areas	data prefix areas
15	750	30
master datasets	selectable data fields	data filters

Remapped Datasets

Where old naming meets new conventions. Match arriving data to their new homes, in four areas:



Member IDs: One-to one or many-to one mapping to new identifiers to ensure data associations remain intact.



Department: Remap existing inbound departments to match go-forward standards for naming and business units.



Location: Remap current location mappings to comply with future standards for geography, operating companies, and territorial requirements.



SLA/Priorities: two companies with two different sets of service delivery SLAs and priority levels that must be carefully remapped into one.

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Master Datasets

The BIG 15 core datasets and their extended datasets for quick reference.

Companies	Contacts	Opportunities	Agreements
Company, Vendors, Sites, Notes, Teams, Types, Statuses, Time Zone, Market	Contact, Profiles, Department, Notes	Opportunities, Stages, Statuses, Type, Notes, Conversions, Forecasts, Products	Active Agreements, Sites, Types, Billing Parameters

Agreements – Additions	Boards – Service	Boards – Streamline IT	Boards – Projects
Additions, Dates, Amounts	Boards, Statuses, Types, Subtypes, Items, Programming	Boards, Statuses, Types, Subtypes, Items, Programming	Boards, Statuses, Types, Subtypes, Items, Programming

Tickets – Service	Tickets – Project	Projects	Activities
Active Tickets, Notes, Resources, Work Types, Work Roles, Time Logs, Activities, Tasks, Expenses, Scheduled Resource	Active Tickets, Notes, Resources, Work Types, Work Roles, Time Logs, Activities, Tasks, Expenses, Scheduled Resource	Active Projects, Phases, Sub-Phases, Finance, Products, Time Logs, Expenses, Gantt, Security Roles	Previous and Future Activities, Statuses, Types, Notes, Expenses

Product Catalog	Configurations	Workflows
Products, Categories, Subcategories, Warehouse, Bin Location	Configurations, Statuses, Types, Location	Workflows, Programming, Tracks

Custom Fields
Custom fields in each master dataset area

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Prefix Datasets

To maintain consistency and avoid data conflicts during a merger or PSA migration, SMARTshift applies strategic prefixes to specific records. These pre-pended areas preserve legacy data context while enabling a clean transition into the new operating environment. Below is a categorized list of where prefixing is applied:

Project & Task Management

- Activity
- Activity Status
- Phase Status
- Project Status
- Schedule Status

Agreements & Billing

- Agreement
- Agreement Type
- Billing Status
- Invoice

Company & Contact

- Company
- Company Status
- Contact
- Member
- Source

Configurations

- Configuration Status
- Configuration Type

Purchasing

- Purchase Order Status
- RMA Status

Boards & Time Entry

- Board
- Work Role
- Work Type

Opportunities

- Opportunity Status

Priorities & SLAs

- SLA
- Priorities