

SMARTSHIFT

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 SMARTchive—maintaining access without cluttering your new system.

SMARTSHIFT

DATASHEET

High-Level Migration Summary

100

setup tables

4

data remapping areas

13

migration datasets

30

data filters

750

selectable data fields

25

data prefix areas

Remapped Datasets

Where old naming meets new conventions. Match arriving data to their new ones, in three areas



Member IDs: Mapped to new identifiers to ensure data associations remain intact.



Department: Reclassified based on a predefined mapping for consistency.



Location: Adjusted to align with the new system's geographical requirements.



Priorities: Mapped from legacy labels (e.g., High/Med/Low) to standardized tiers (e.g., P1-P4) for consistency.

Standard Datasets

The BIG 13 datasets that make the move from old to new:

- Company
- Contact
- Opportunity
- Agreement
- Agreement Additions
- Boards (Service + Project)
- Tickets – Service
- Projects
- Project Templates
- Tickets – Projects
- Activities
- Catalog Items
- Configuration

LEARN MORE:

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

SMARTSHIFT – MAKE YOUR SHIFT SMART

DATASHEET

Dependency Datasets

All the backend tables linked to the Standard Datasets? Yep—plenty of dependencies, and we’ve got them covered.

ActivityStatus	ActivityType	AddressFormat	AdjustmentType	AgreementType	AutoSyncTime
BillingCycle	BillingSetup	BillingStatus	BillingTerm	Calendar	Campaign.SubType.CampaignSubType
CampaignStatus	CampaignType	Category	ChargeCode	CommunicationType	CompanyNoteType
CompanyStatus	CompanyType	ConfigurationStatus	ConfigurationType	ConfigurationTypeQuestion	ConnectWiseHostedSetup
ContactDepartment	ContactRelationship	ContactType	Country	DeliveryMethod	DepartmentLocation
EmailExclusion	ExpenseType	Finance.Currency	HolidayList	Imap	InOutType
InvoiceEmailTemplate	InvoiceTemplate	LdapConfiguration	Link	ManagementBackup	MarketDescription
MemberType	MenuEntry	Office365EmailSetup	OpportunityRating	OpportunityStage	OpportunityStatus
OpportunityType	OrderStatus	OwnershipType	PaymentType	PricingSchedule	Priority
ProductType	ProjectSecurityRole	ProjectStatus	ProjectType	PurchaseOrderStatus	QuoteLink
ReportCard	RmaAction	RmaDisposition	RmaStatus	Role	SalesProbability
SalesTeam	ScheduleStatus	ScheduleType	SecurityRole	ServiceSignoff	ServiceTicketLink
ShipmentMethod	Skill	SkillCategory	SLA	Source	StandardNote
State	SubCategory	Survey	SystemDepartment	SystemLocation	TaxCode
TeamRole	TicketSync	TimeAccrual	TimePeriodSetup	TimeZoneSetup	TodayPageCategory
Track	UnitOfMeasure	WorkRole	WorkType		

LEARN MORE:

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

SMARTSHIFT – MAKE YOUR SHIFT SMART

DATASHEET

Pre-Fix 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

Company & Contact Info

- Company
- Company Status
- Contact
- Member
- Source

Orders & Sales

- Opportunity Status
- Order Status
- Purchase Order Status
- RMA Status

Agreements & Billing

- Agreement
- Agreement Type
- Billing Status
- Invoice
- SLA

Configurations & Boards

- Configuration Status
- Configuration Type
- Board
- Campaign Status
- Work Role
- Work Type