



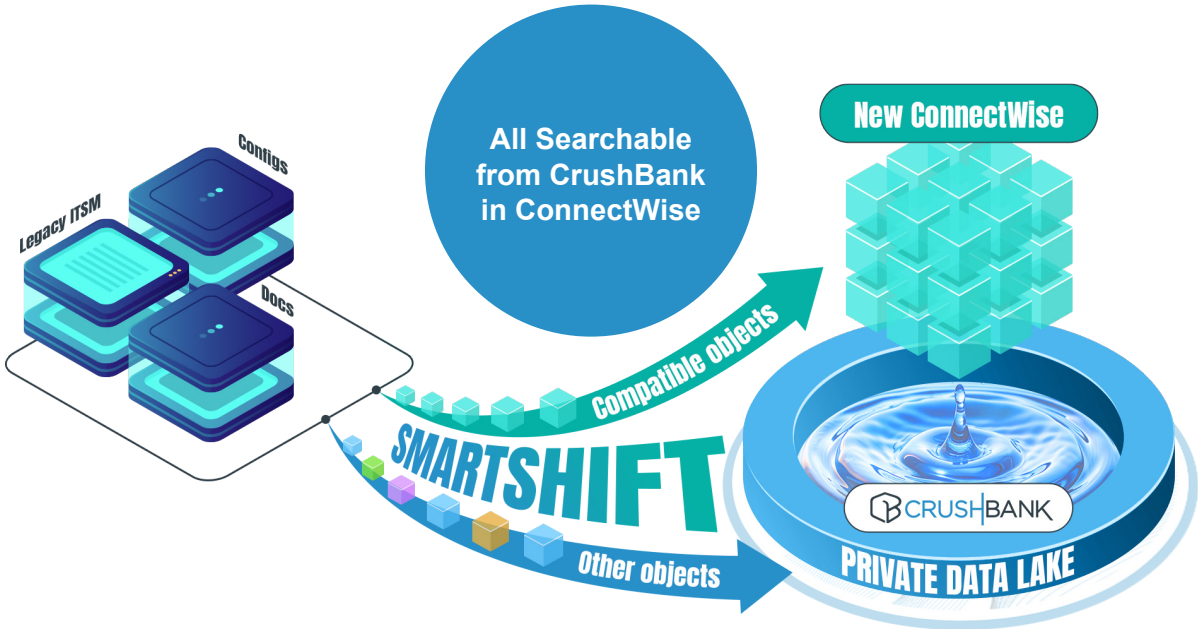
# SmartShift for ConnectWise

## It's All About The Data

### Overview

Transitioning between IT Service Management (ITSM) platforms can be challenging, especially when ensuring historical data is preserved and accessible while aligning with new workflows. SmartShift from CrushBank simplifies this process by migrating all legacy system data into CrushBank's secure and searchable data lake, with select standard objects seamlessly integrated into your ConnectWise environment.

This dual approach ensures comprehensive data access while optimizing your ConnectWise instance for peak performance.



### Key Benefits

- ✓ **Unified Data Lake**  
All legacy data, including tickets, configurations, attachments, and more is moved to the CrushBank data lake and is available for secure, AI-powered search and retrieval.
- ✓ **Universal API**  
Data is extracted from the legacy system, independent of the vendor through a universal API connection. Whatever the system's API can expose can be imported.
- ✓ **Select Standard Object Integration**  
Specific standard objects, such as core ticket data, active configurations, and essential client details, are directly migrated into ConnectWise, ensuring immediate usability.
- ✓ **Smart Ticket Reclassification**  
Reclassify legacy tickets and objects according to your company's current workflows, categories, and priorities, aligning seamlessly with ConnectWise.
- ✓ **Decommission Legacy Systems**  
Once data has been migrated, legacy ITSM systems can be safely shut down, saving licensing costs and reducing complexity.
- ✓ **Improved Productivity and Data Access**  
Technicians gain access to historical and current data through CrushBank's intelligent search tools, reducing time spent looking for critical information.

### How It Works

- 1 Data Extraction**  
SmartShift extracts data from your legacy ITSM system via API, capturing all objects, including tickets, configurations, and attachments.
- 2 Data Transformation**  
Objects are categorized, reclassified, and prepared for integration into a specific CrushBank data lake just for your business. Standard objects are refined to match your ConnectWise workflows.
- 3 Data Migration**
  - ✓ **To the CrushBank Data Lake:** All objects are stored securely in the CrushBank data lake, where they remain searchable and accessible.
  - ✓ **To ConnectWise:** Select standard objects are migrated directly into ConnectWise for immediate use, and are also made part of the data lake for unified searching
- 4 Legacy System Decommissioning**  
After validation, the legacy system can be decommissioned, reducing licensing and operational costs.
- 5 Search and Retrieval**  
CrushBank's intelligent data lake enables technicians to search across both current and historical data in ConnectWise, ensuring compliance and business continuity.

## Use Case: Migrating to ConnectWise

A Managed Services Provider migrating from an outdated ITSM platform wanted to ensure all historical data was preserved while reducing clutter in their new ConnectWise instance. With SmartShift, they:

- Migrated all objects into the CrushBank data lake.
- Moved open tickets, active assets, and critical client data into ConnectWise.
- Reclassified tickets to match new workflows.
- Decommissioned the legacy platform, saving \$25,000 annually in licensing fees.
- Enabled technicians to search across legacy and current data seamlessly.

## Why Choose SmartShift for ConnectWise?



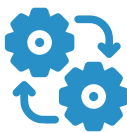
### Comprehensive Data Access

CrushBank's data lake ensures every piece of information is preserved and searchable, even if not directly integrated into ConnectWise.



### Optimized ITSM Environment

Only essential objects are moved into ConnectWise, keeping the platform uncluttered and efficient.



### Tailored for MSPs

SmartShift aligns with the specific needs of MSPs, ensuring a smooth and efficient transition to ConnectWise.



### Cost Savings

Decommission outdated ITSM systems and reduce operational overhead.

## Technical Features

- ✓ **Dual Migration Paths:**  
Objects are moved either into the CrushBank data lake or directly into ConnectWise, depending on type and business needs.
- ✓ **Search-Optimized Data Lake:**  
Search across all historical and current data.
- ✓ **Data Integrity Checks:**  
Built-in validation ensures consistency and completeness.
- ✓ **Customizable Reclassification:**  
Flexible tools to align data with ConnectWise workflows.
- ✓ **Secure Process:**  
End-to-end encryption and compliance with industry standards.

## Consulting Services

SmartShift for ConnectWise is powered by a partnership with Decision Digital, a trusted leader in ITSM system migrations. Decision Digital brings extensive expertise in data extraction, transformation, and migration, ensuring that every project is executed with precision and efficiency. By combining Decision Digital's technical capabilities with CrushBank's innovative AI-powered data lake, businesses can confidently transition from legacy systems to ConnectWise. This collaboration ensures seamless data integrity, minimal disruption, and optimal results for Managed Services Providers looking to modernize their ITSM platforms.

## Take the Next Step

Streamline your ITSM transition while maintaining full access to your historical data.  
Contact CrushBank today to learn how SmartShift can transform your migration to ConnectWise.

