ShadowProtect Cloud ConnectWise Integration Guide

for ShadowProtect

Revised October 2016

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Requirements for ConnectWise-eFolder BDR for ShadowProtect Integration

- ConnectWise PSA is professional service automation software that helps you efficiently manage all aspects of your business.

- eFolder's BDR for ShadowProtect can be configured to push information about eFolder services to your ConnectWise PSA, using the ConnectWise integration APIs. The tight integration between eFolder and ConnectWise allows you to streamline your support processes and report to customers on backup health.

But before integrating your eFolder and ShadowProtect customers with ConnectWise, you must first complete the following six requirements:

Six "Must Have" Requirements BEFORE You Begin:

	ConnectWise requirements:
❐	Purchase the MSP ConnectWise add-on from ConnectWise*
❐	Have ConnectWise System Administrator access, with All Administrator Rights*
❐	Complete the ConnectWise University Training prior to setting up ConnectWise*
	eFolder requirements:
❐	Use eFolder's Online Backup Manager (version 3.17.35 or higher)
❐	Be an eFolder Senior Manager Account Holder with All Administrator Rights
❐	Complete the eFolder ShadowProtect BDR and Web Portal Training prior to setting up integration at: https://secure.efoldering.com/portal/livetraining/signup.htm

*Need help with these ConnectWise requirements?

If you need help with ConnectWise setup information, agreement, reports, billing, or business strategy questions, submit questions to ConnectWise Support at:
http://www.connectwise.com/support/contact-us.php

Need help with eFolder requirements?

- Contact eFolder Support at: http://www.efolder.net/help
- Browse our Knowledgebase

When you have completed all of these "Must Have" requirements, you're ready to begin integrating ConnectWise with eFolder's BDR for ShadowProtect.

Step 1. Create ShadowProtect BDR accounts in eFolder's web portal

For each source ShadowProtect BDR cloud, create a new account with a **ShadowProtect Cloud** service plan in the eFolder BDR Portal.

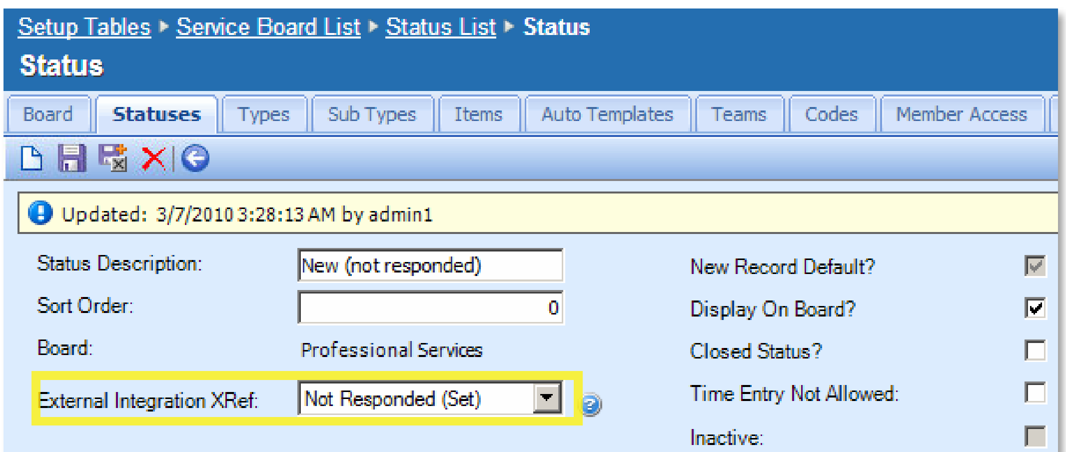
> For detailed instructions on creating new accounts in the eFolder BDR Portal, please review the following resources:
>
> - Overview of the eFolder BDR Portal video
> - Create an account using the New Account Wizard video
> - How do I create new customers and accounts? KB article

Step 2. Setup new ticket service status

This step is only needed if you plan to use ticket integration.
Skip this step if you are not setting up ticketing integration.

ConnectWise must be told which ticket service status to use when eFolder tries to create a ticket with a "Not Responded" (new) status. Complete the following steps:

a) In ConnectWise, go to the *System* tab, and choose **Setup Tables**.
b) Locate the *Service* table, and then select **Service Board**, your **Board Name**, and, finally, the **Statuses** tab.
c) Edit (or create) the status for new eFolder-related tickets in this service board.
d) Ensure the *External Integration XRef* field is set to **Not Responded (Set).**



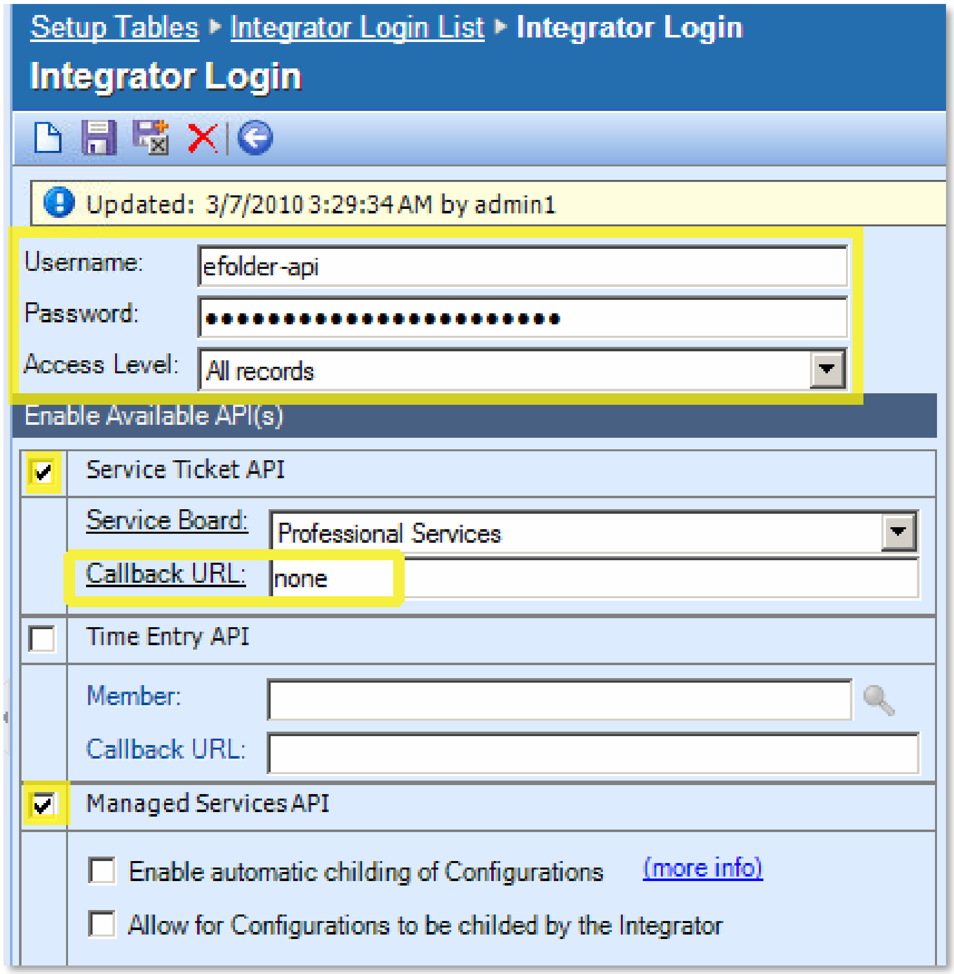
Service boards cross-referenced in this way will now be available for integration.

Step 3. Create an integrator login in ConnectWise

To communicate the proper information, eFolder requires an **integrator login in ConnectWise**.
To configure an integrator login in ConnectWise:

1. In ConnectWise PSA, go to the *System* tab and choose **Setup Tables**.
2. Search for the *Integrator Login List* table and open it.
3. Click the **New** icon and enter a **username** and **password**.
   Note: Remember this information *exactly* for the eFolder Portal login. Your Integrator Login in ConnectWise and the eFolder Web Portal *must* match exactly for data to flow correctly.
4. Change the *Access Level* to **All records**.
5. Check the **Service Ticket API** and **Managed Services API** checkboxes and uncheck all other APIs.
   - If you are **not** using ticket integration, uncheck the **Service Ticket API** checkbox.
   - **If you are using ticket integration,** select a **Service Board** in the *Service Board* field.

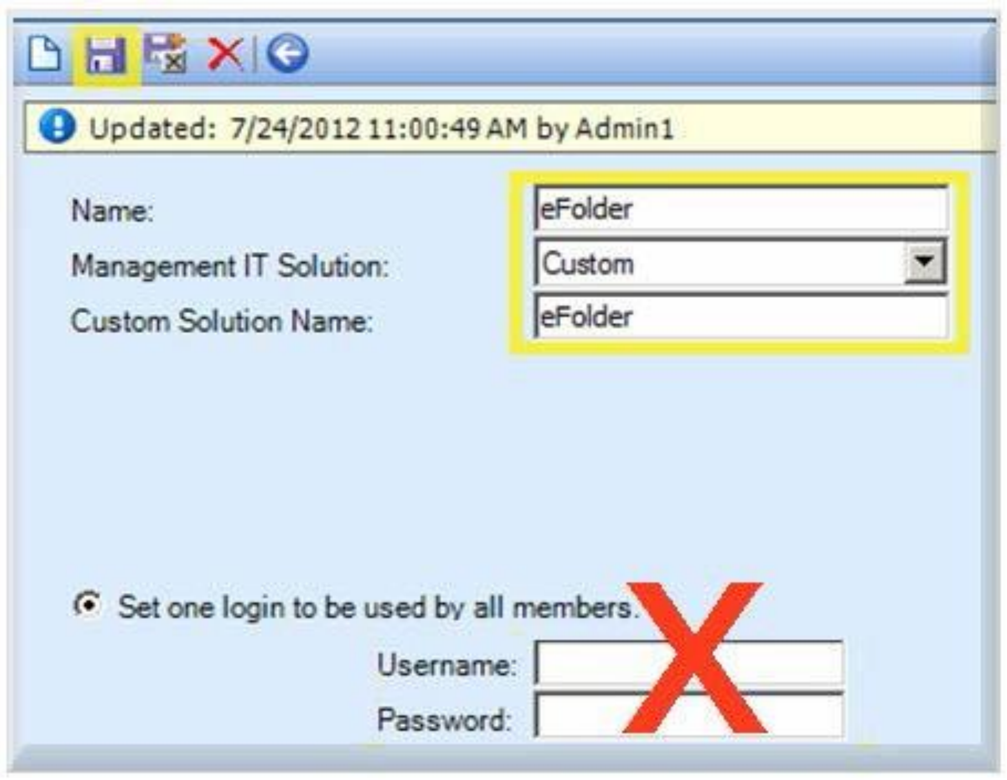
   Note: If no Service Boards are visible, ensure you have completed the previous step [“Step 2. Setup new ticket service status”]
6. Type the word **None** in the *Ticket Callback URL fiel*



Step 4. Configure the eFolder Management Solution in ConnectWise

A **management solution** must be set up in ConnectWise to represent your eFolder services.

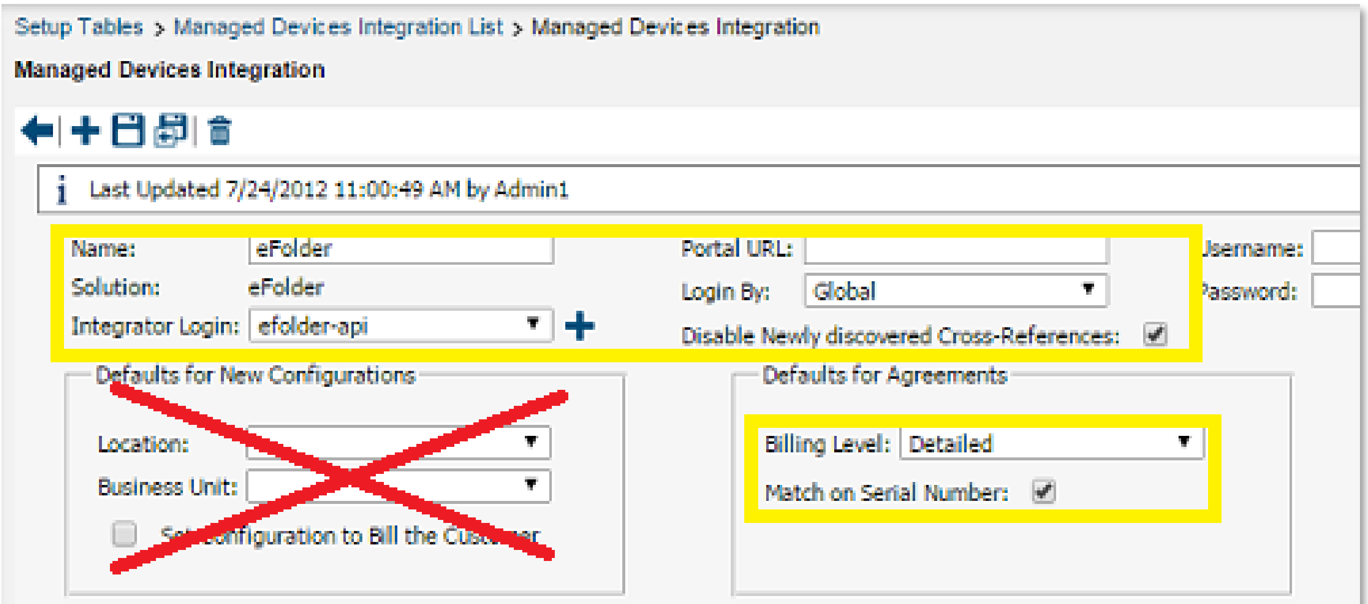
1. In ConnectWise, navigate to the *System* tab and choose the **Setup Tables** tab.
2. Search for and open the *Management IT Solution List* table.
3. Click the **New** icon and choose a management solution name (such as *eFolder*).
4. In the *Management IT Solution* field, select **Custom**.
5. In the *Custom Solution Name* field, enter the same **management solution** name you chose above in step 3 (such as *eFolder*).
6. Do not fill in a username or password or change anything else. Instead, just click **Save**.



Step 5. Cross-reference ConnectWise products with eFolder Services

To set up integration cross-reference:

1. In ConnectWise, navigate to the *System* tab and click **Setup Tables**.
2. Search for and open the *Managed Devices Integration List* table.
3. Select the management solution you created in the previous step and configure the eFolder Management Solution in ConnectWise.
4. Select the appropriate **Integrator Login.**
5. Select **Global** in the *Login By* field.
6. Check the **Disable Newly discovered Cross-References** checkbox.
7. Select **Detailed** in the *Billing Level* field.
8. Check the **Match on Serial Number** checkbox.
9. Leave all other options blank.
10. Click **Save** to save the changes to the record.

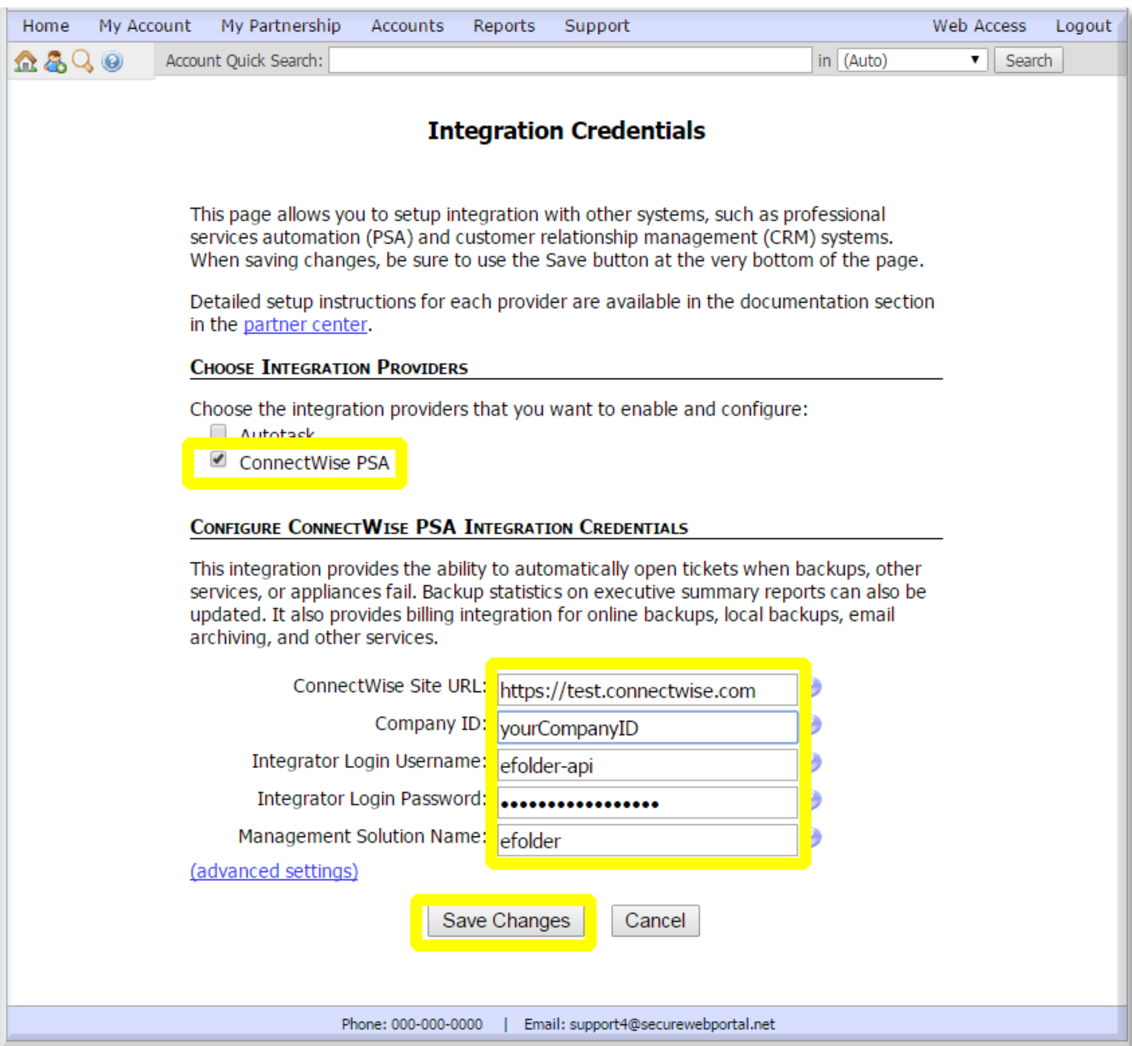


Step 6a. Configure ConnectWise credentials in the eFolder Web Portal

ConnectWise integration must be activated in the eFolder Web Portal.
To perform this activation, complete the following steps.

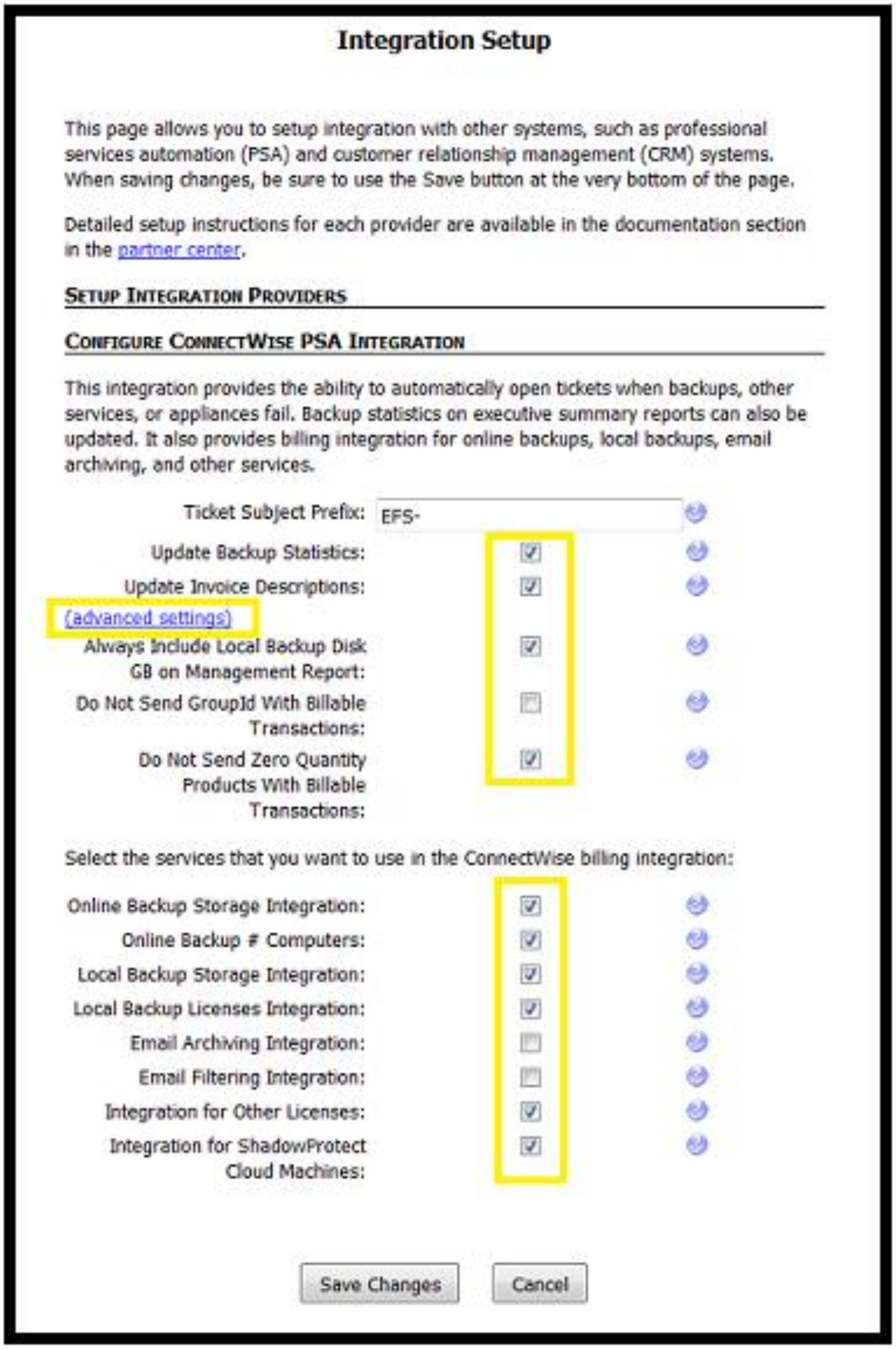
1. Login to the eFolder Web Portal with your company's Partner Senior Manager user account.
2. Select **My Partnership -> PSA Credentials** on the Main Menu.
3. On the *Integration Credentials* page, check the **ConnectWise PSA** checkbox.
4. In the *ConnectWise Site URL* field, enter the URL where the ConnectWise PSA is hosted.
   Note: ConnectWise **requires https://** for integration to be active. This entry should start with https:// in the URL.
5. Enter your ConnectWise **Company ID, Integrator Login Username,** and **Password**.
   (You created these previously in "Step 3. Create an Integrator Login in ConnectWise")
6. Click **Save Changes**.

Note: ConnectWise has divided cloud hosting into two or more different areas/clouds. Please contact ConnectWise Support to obtain the correct URL for your company.



Step 6b. Configure ConnectWise integration in the eFolder Web Portal

1. Login to the [eFolder Web Portal](#) with your company's **Partner Senior Manager** user account.
2. Select **My Partnership** -> **Integration Setup** on the main menu.



3. Check the **Update Backup Statistics** checkbox to update the executive management report.

4. Check the **Update Invoice Descriptions** checkbox to update the billing invoice line item descriptions with detailed, per-account disk-usage amounts.

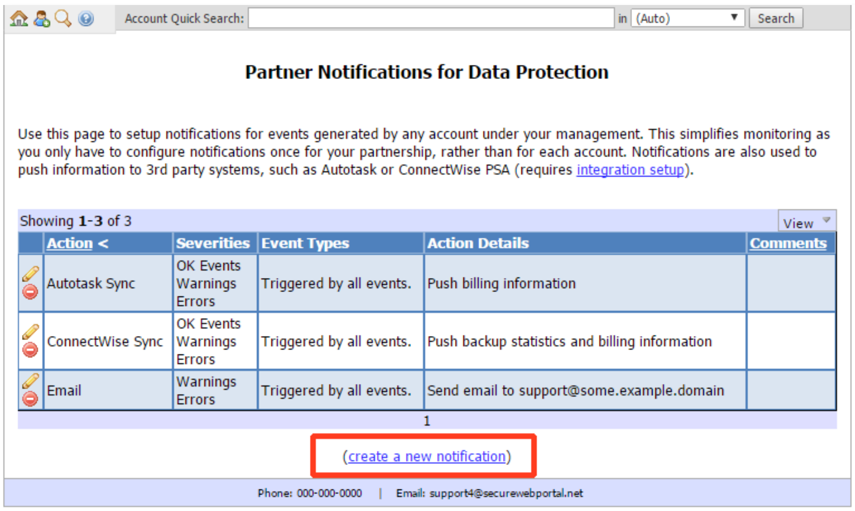
5. Check the desired checkboxes to enable the services that you configured for integration in "[Step 5. Cross-reference ConnectWise Products with eFolder Services](#)."

6. Remember to click **Save Changes** to save your changes.

Step 7. Configure partner-wide ticket notification on the Web Portal

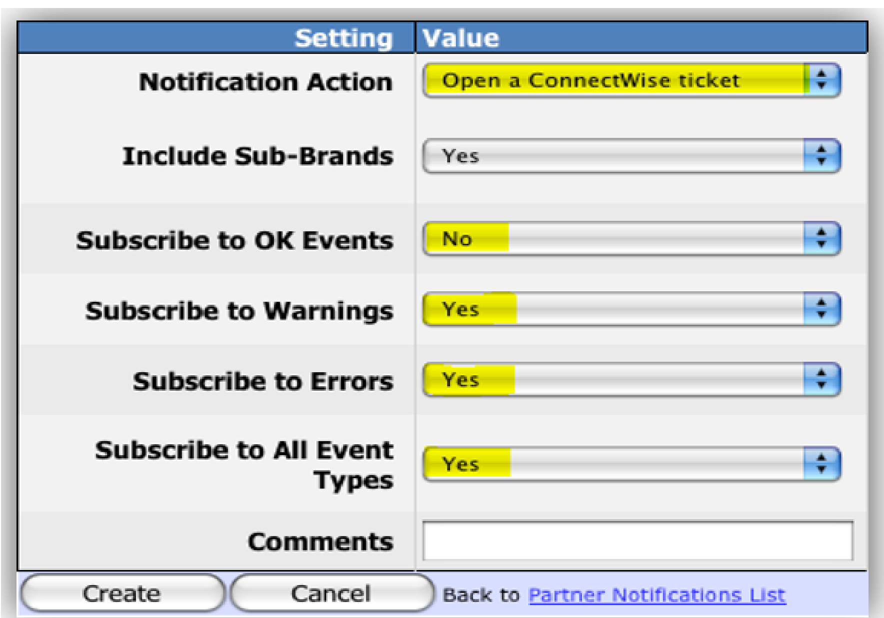
To configure notifications in the eFolder Web Portal, follow these steps:

1. Choose the **My Partnership** > **Partner Notifications** menu item.
2. Click the **Create a New Notification** link at the bottom of the page.



3. In the *Notification Action* field, select **Open a ConnectWise ticket.**

4. Decide which event severities you are interested in. Typically, you will only want to be notified for a ticket when there is a warning or error.



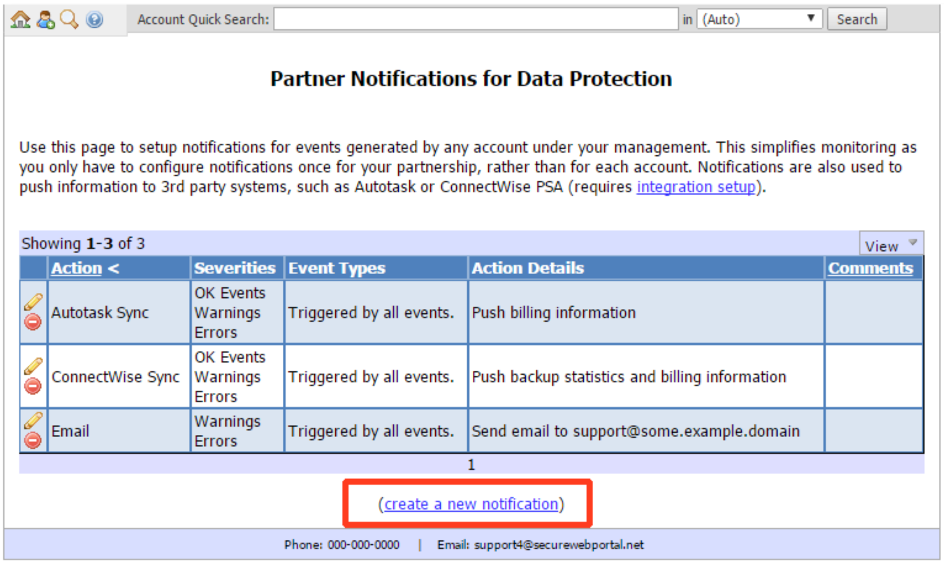
5. Select which types of events should trigger a ConnectWise ticket (if the event severity matches your chosen settings).

In most cases, you can leave the *Subscribe to All Event Types* field with its default value of **Yes**. You will then be notified for a warning or error of **any** type (backup failure, archiving failure, BDR hardware failure, and so forth).

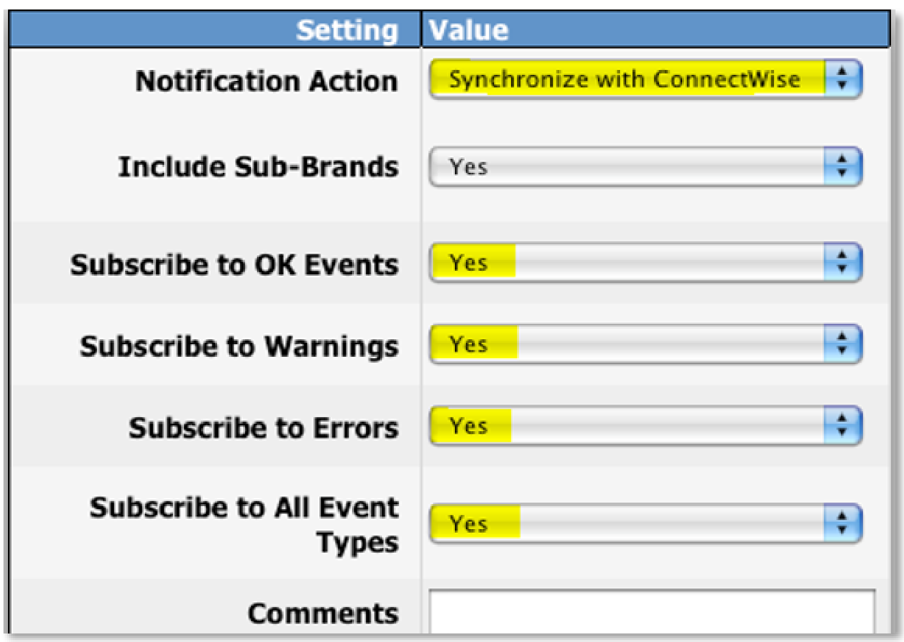
6. Finally, click **Create**.

Step 8. Configure Partner-Wide ConnectWise Data Synchronization

1. Login and choose the **My Partnership->Partner Notifications** on the main menu.
2. Click the **Create a new notification** link at the bottom of the page.



a) Select **Synchronize with ConnectWise** in the *Notification Action* field.
b) Select **Yes** in the *Subscribe to All Event Types* field to subscribe to all event severities.
c) Select **Yes** in all the other fields to subscribe to all event types.
d) Click **Create** to create a new integration.



Set Up a ConnectWise Company to Integrate with eFolder Services

Now that ConnectWise integration with eFolder has been configured globally, you must perform some additional steps for *each* ConnectWise company that needs to integrate with eFolder services. These steps will cross-reference eFolder accounts and customers with ConnectWise company records.

Note: The following sections describe the steps you *must* perform for *each* ConnectWise company.

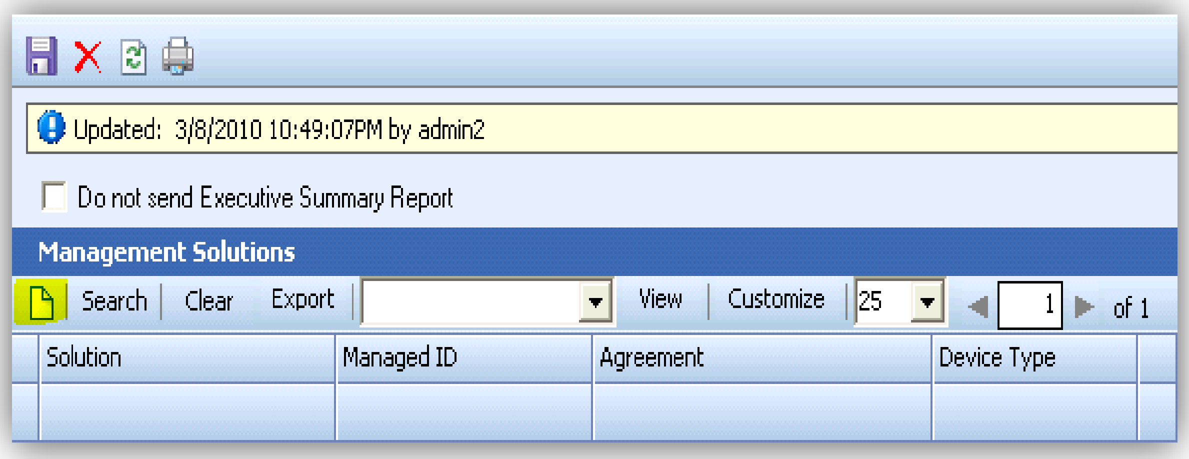
Configure the Managed ID for a ConnectWise Company

It is necessary to configure *two* distinct settings for **each** Managed ID in ConnectWise:
The first setting is for **Workstations and Servers** and the second setting is for **Backup Stats**.

The following steps *must* be performed *in this order* for *each* ConnectWise company to be integrated with eFolder.

In ConnectWise, open the Company tab and find the company record to configure.

1. Click the **Company Name** button to start editing that company record.
2. Click the **Management** tab.
3. If the **New** button is grayed out, click the **Save** button.
4. Click the **New** icon (highlighted below) in the *Management Solutions* list:



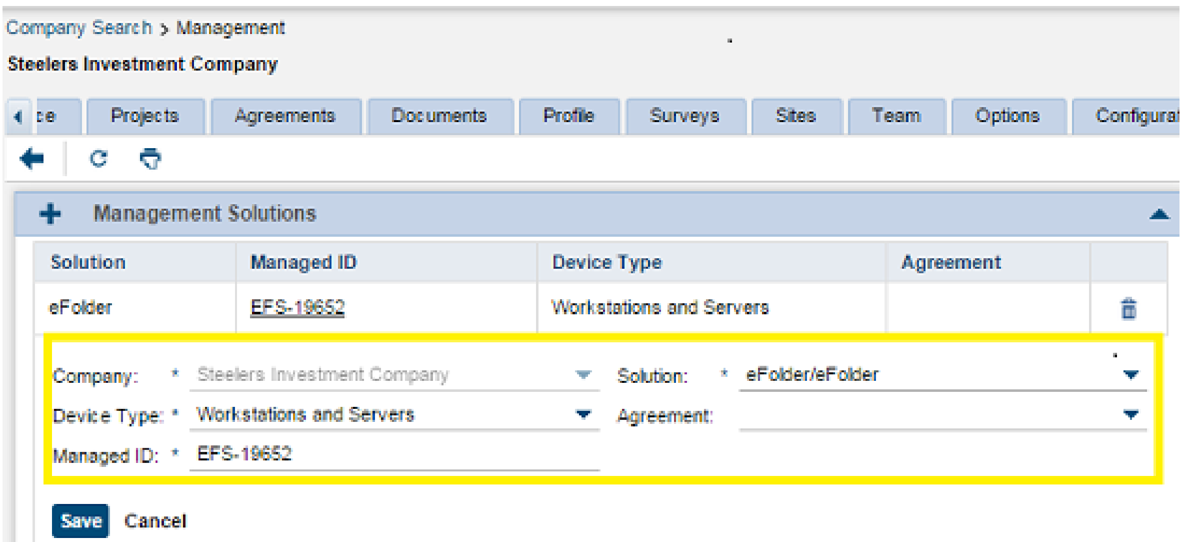
In the eFolder BDR Portal, log in using the **Account Center (Visual View)**.

5. Note the eFolder Customer ID number (found in the **Cust. ID column**).
   In the example highlighted below, the eFolder Customer ID number is 19652.

REQUIRED Managed ID Entry #1: Workstations and Servers

6. Return to ConnectWise and enter **EFS-[efolderCustID]** in the *Managed ID* field. For example, enter EFS-19652.

7. In the *Device Type* field, select **Workstations and Servers**. (Must be first entry only)



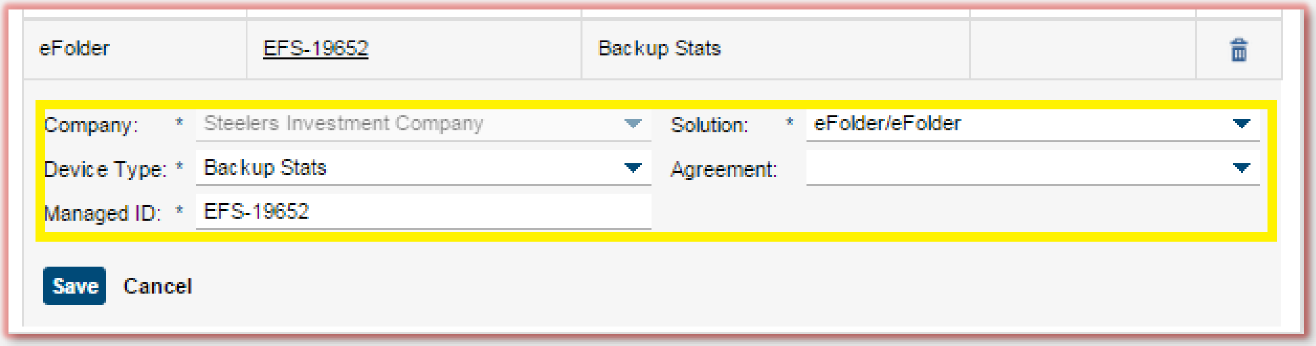
8. Leave the *Agreement* field blank. This field must be blank.

9. Click **Save** and then **Close**.

REQUIRED Managed ID Entry #2: Backup Stats

10. *In the Managed ID* field, enter **EFS-[efolderCustID].**
For example, enter EFS-19652

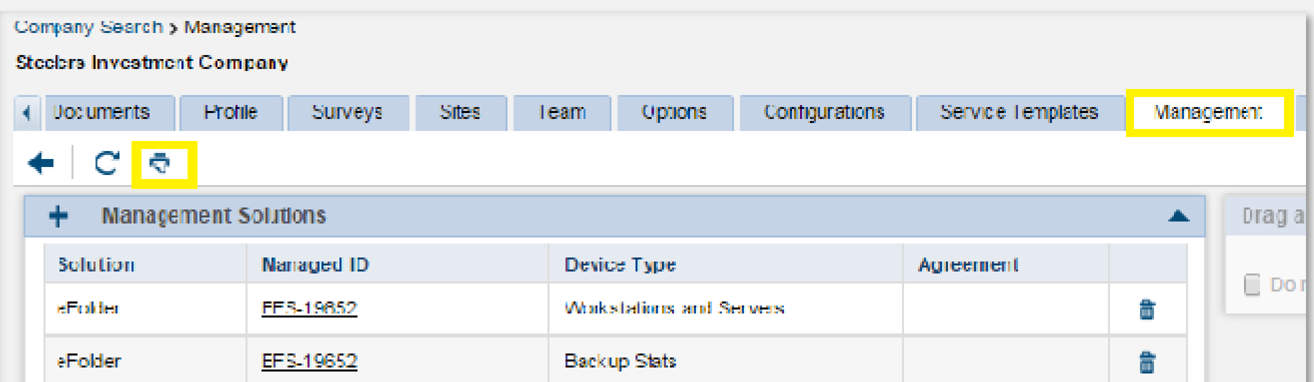
11. In the *Device Types* field, select **Backup Stats.** (Must be second entry only.



12. Leave the *Default Agreement* field blank. This field must be blank.
13. Click **Save** and then **Close.**

Note: Ensure the entry order has Workstations and Servers *first* and Backup Stats *second*, as shown.
A ConnectWise data flow issue will occur if these two entries are switched.

14. Select the **Company** > **Management** tab and then click the **Printer** icon.

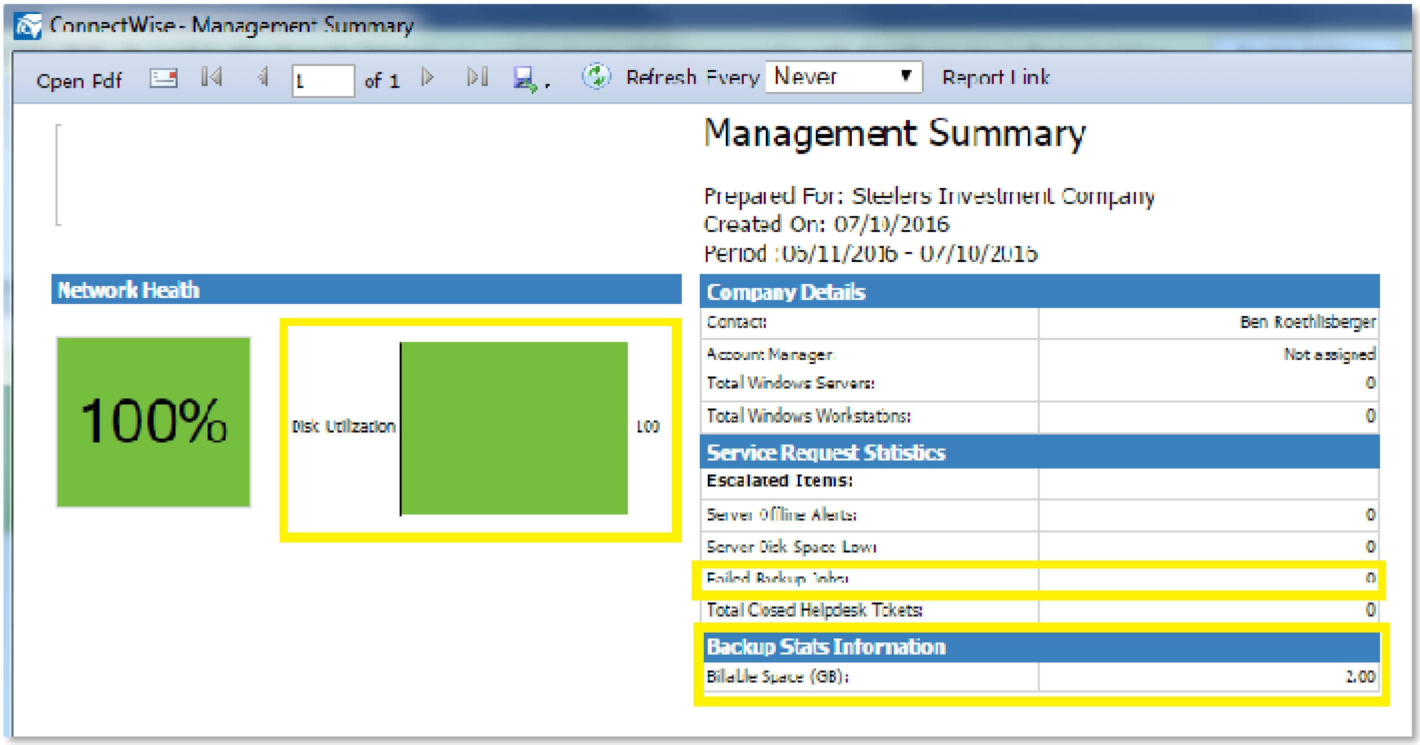


This will generate the *ConnectWise Management Report*, which tells you if backup sync is working properly.

Executive Management Reports

After the two distinct settings for each Managed ID in ConnectWise have been fully configured (the first for **Workstations and Servers** and the second setting for **Backup Statistics**), the backup statistics on the Executive Management report will be updated after each completed backup.

Here is an example report with the backup statistics updated by the eFolder integration process:



Billing Setup Instructions

1. Create ConnectWise Products for eFolder Services

This step is only needed if you plan to use billing integration.
Skip this step if you are not setting up billing integration.

- Each ConnectWise product tracks a different line item on your customer's agreements and invoices.
- **You must configure one ConnectWise product for each eFolder service to be automatically billed.**

Depending on the needs of your customers, you might create new ConnectWise products for one or more of the following eFolder services, as appropriate. eFolder services are generally categorized as listed below:

Examples of billable Efolder services which may require ConnectWise products:

✓	Select Online Backup Storage
✓	Basic Online Backup Storage
✓	Online Backup # Servers
✓	Online Backup # Desktops
✓	ShadowProtect BDR Storage
✓	ShadowProtect BDR Servers
✓	ShadowProtect BDR Desktops
✓	ShadowProtect Cloud Machines
✓	Local Backup # Servers
✓	Local Backup # Desktops
✓	*Local Backup Storage**

Typical ConnectWise products you might create to cross-reference specific eFolder services:

Examples of ConnectWise products to be cross-referenced with eFolder services:

ConnectWise Product Level	ConnectWise Product Type	ConnectWise Product Configuration Type
Select	Online Storage	Backup Stats
Basic	Online Storage	Backup Stats
ShadowProtect BDR	Online Storage	Backup Stats
# Servers	Online Storage	Backup Stats
# Desktops	Online Storage	Backup Stats
ShadowProtect BDR	Local Storage	Backup Stats
# Servers	Local Backups	Backup Stats
# Desktops	Local Backups	Backup Stats
ShadowProtect Cloud Servers	Cloud Count	Backup Stats
ShadowProtect Cloud Desktops	Cloud Count	Backup Stats
ShadowProtect Servers	Other Licenses	Licenses

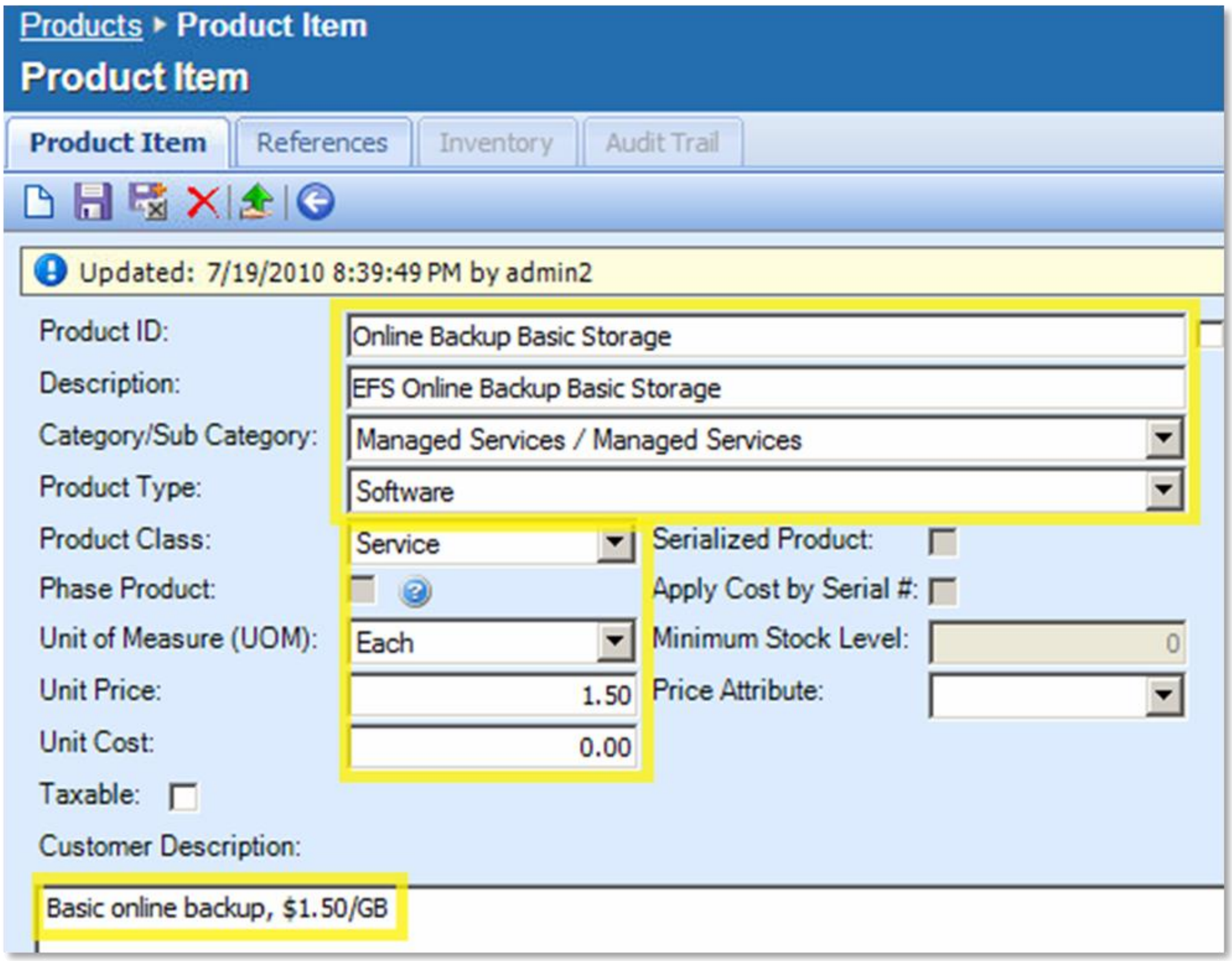
The following pages contain step-by-step instructions on creating and cross-referencing various ConnectWise products to a selection of eFolder services. Examples will show how to create ConnectWise products for flat monthly pricing, as well as for situations where your customers may have eFolder usage charges.

Notes on Creating ConnectWise Products for eFolder Services:

- Because eFolder online backup service plans vary, one ConnectWise product is needed for each variety of eFolder online backup service plan.
- You can customize the ConnectWise product names. Correlations between eFolder services and ConnectWise products are setup explicitly later on, so the actual names of the ConnectWise products can be customized according to your preference.
- **Normally, you do not need to create a Local Backup Storage product.** Typically, you will bill for local backups based on the number of servers and desktops rather than the amount of storage that is protected with local backups.
- ConnectWise products are only for usage charges. For example, set up a ConnectWise product for the usage charges related to a flat monthly service including 25 GB of online backup storage.

2a. Create ConnectWise Products For eFolder Service Usage Charges:

1. In ConnectWise, navigate to the **Procurement** tab, and then click the **Products** tab.
2. Click the **New** icon and fill in the *Product ID* and *Description* fields.
3. Select a **Category/Sub Category, Product Type,** and **Product Class** .
   Note: We recommend choosing **Managed Services, Software**, and **Service**, as shown below. You may need to create the options within ConnectWise Setup Tables.
4. Select **Each** in the *Unit of Measure* field.
5. Set a list price for the default price in the *Unit Price* field.
6. Enter a simple one-line description in the *Customer Description* field, such as "Basic Online Backup, $1.50/GB."
7. Repeat these steps for each ConnectWise product to be created.



These ConnectWise products are only for **usage charges**. For example, set up a ConnectWise product for usage charges related to a flat monthly service which includes 25 GB of online backup storage. **Do not** use ConnectWise *products* for eFolder **fixed price** service fees.

2b. Create ConnectWise Products for eFolder Fixed-Price Service Fees

In some cases, you may charge your customer a fixed-price flat fee which includes an initial amount of storage. For example, you might charge a customer $8.00 and include 25GB of storage spread between unlimited accounts. In this case, you would set up **two** ConnectWise products but only cross reference one:

a. First, create one separate ConnectWise product with the flat monthly price of the fixed-price eFolder service.
For example:

New ConnectWise product#1:	Fixed Price:
Online Backup Basic Storage **Flat Fee**	$ 8.00

b. Next, create an additional separate ConnectWise product, detailing charges for extra usage related to that first product. Describe what is included for free in the product name:

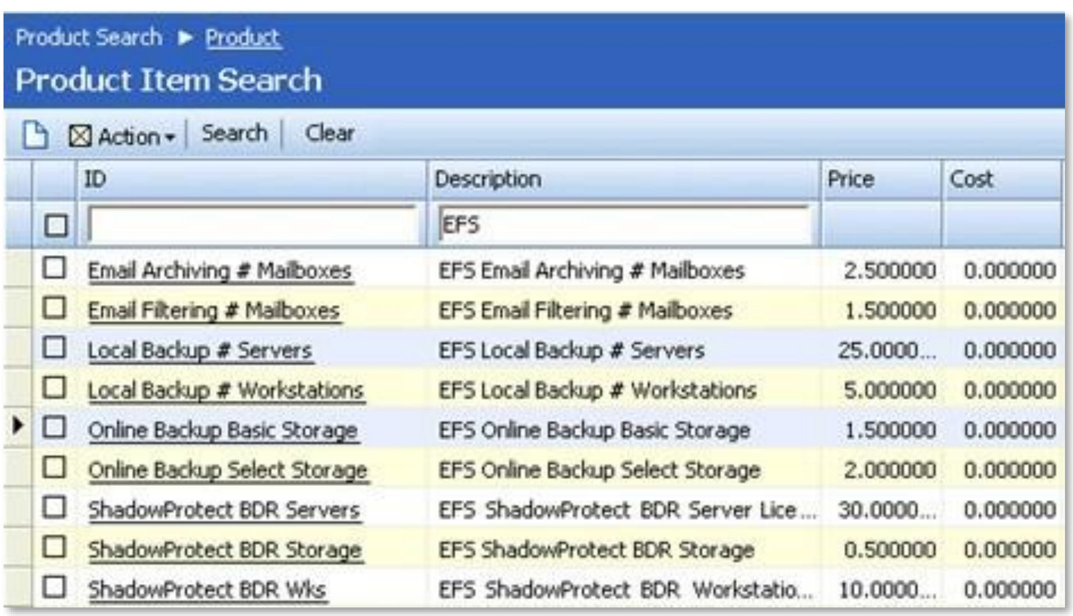
New ConnectWise product#2:	Per Unit:
Online Backup Basic Storage **w/25 GB**	$1.50/GB (up to 25 GB free)

c. Add both products (in this example," Online Backup Basic Storage Flat Fee" and "Online Backup Basic Storage w/25 GB") to your customer's agreement.

d. When adding these products to your **Agreement Additions**, modify the Per-Unit product with an appropriate "Less Included" value. (In this example "25".) See section 3 "Set up Agreements to Bill for eFolder Services" for more information.

e. When adding products to Product Cross References, **only cross-reference the second per-unit product.** Do not cross-reference the fixed or flat fee product.

After you have configured your ConnectWise products to your eFolder Service Plans, your product list might look like the one shown below:


Product Search ▶ Product
Product Item Search
Action ▾ | Search | Clear

ID	Description	Price	Cost
	EFS		
Email Archiving # Mailboxes	EFS Email Archiving # Mailboxes	2.500000	0.000000
Email Filtering # Mailboxes	EFS Email Filtering # Mailboxes	1.500000	0.000000
Local Backup # Servers	EFS Local Backup # Servers	25.0000...	0.000000
Local Backup # Workstations	EFS Local Backup # Workstations	5.000000	0.000000
Online Backup Basic Storage	EFS Online Backup Basic Storage	1.500000	0.000000
Online Backup Select Storage	EFS Online Backup Select Storage	2.000000	0.000000
ShadowProtect BDR Servers	EFS ShadowProtect BDR Server Lice...	30.0000...	0.000000
ShadowProtect BDR Storage	EFS ShadowProtect BDR Storage	0.500000	0.000000
ShadowProtect BDR Wks	EFS ShadowProtect BDR Workstatio...	10.0000...	0.000000

3. Cross-reference ConnectWise Products with eFolder Services

1. In ConnectWise, navigate to the *System* tab and click the **Setup Tables** tab.

2. Search for and open the *Managed Devices Integration* table.

3. Select the management solution created in [Global Setup Step 4. Configure the eFolder Management Solution in ConnectWise.]()

4. Select the appropriate **Integrator Login.**

5. Select **Global** in the *Login By* field.

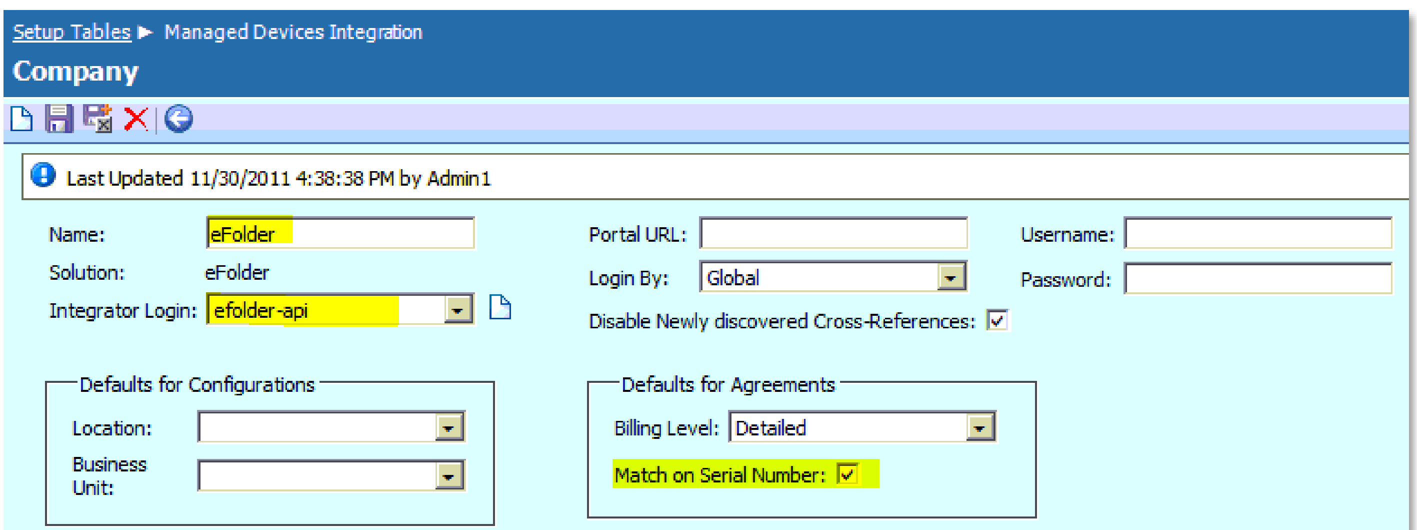
6. Check the **Disable Newly discovered Cross-References** checkbox.

7. Select **Detailed** in the *Billing Level* field.

8. Check the **Match on Serial Number** checkbox.

9. Leave all other options blank.

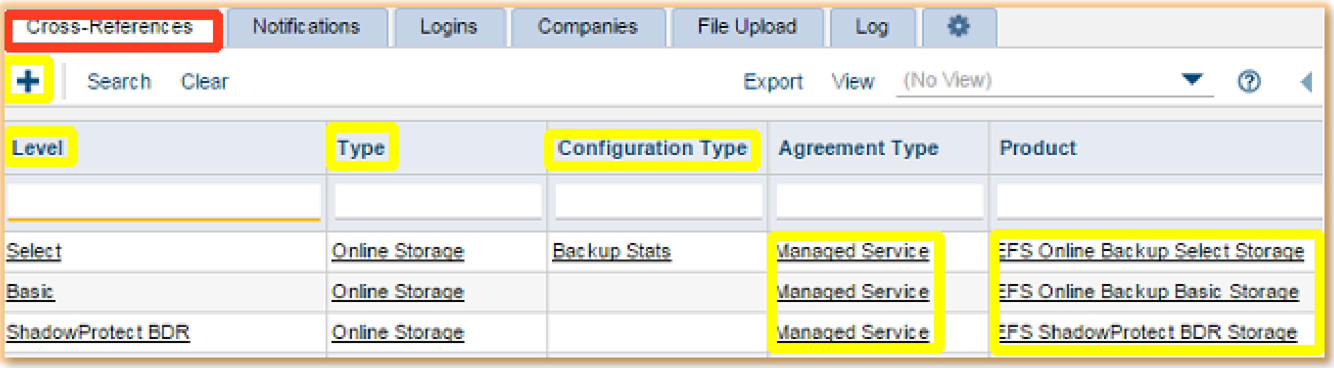
10. Click **Save** to save the changes to the record.



11. The Cross-References tab appears on the bottom half of the screen:

For each ConnectWise product to be cross-referenced with an eFolder service, perform the following:

a. Click the **New** icon [+] in the top-left corner of the cross-reference table.



b. Complete the **Level**.
c. Complete the **Type**.
d. Complete the **Configuration Type** based on the **Level** and **Type** from the table below:

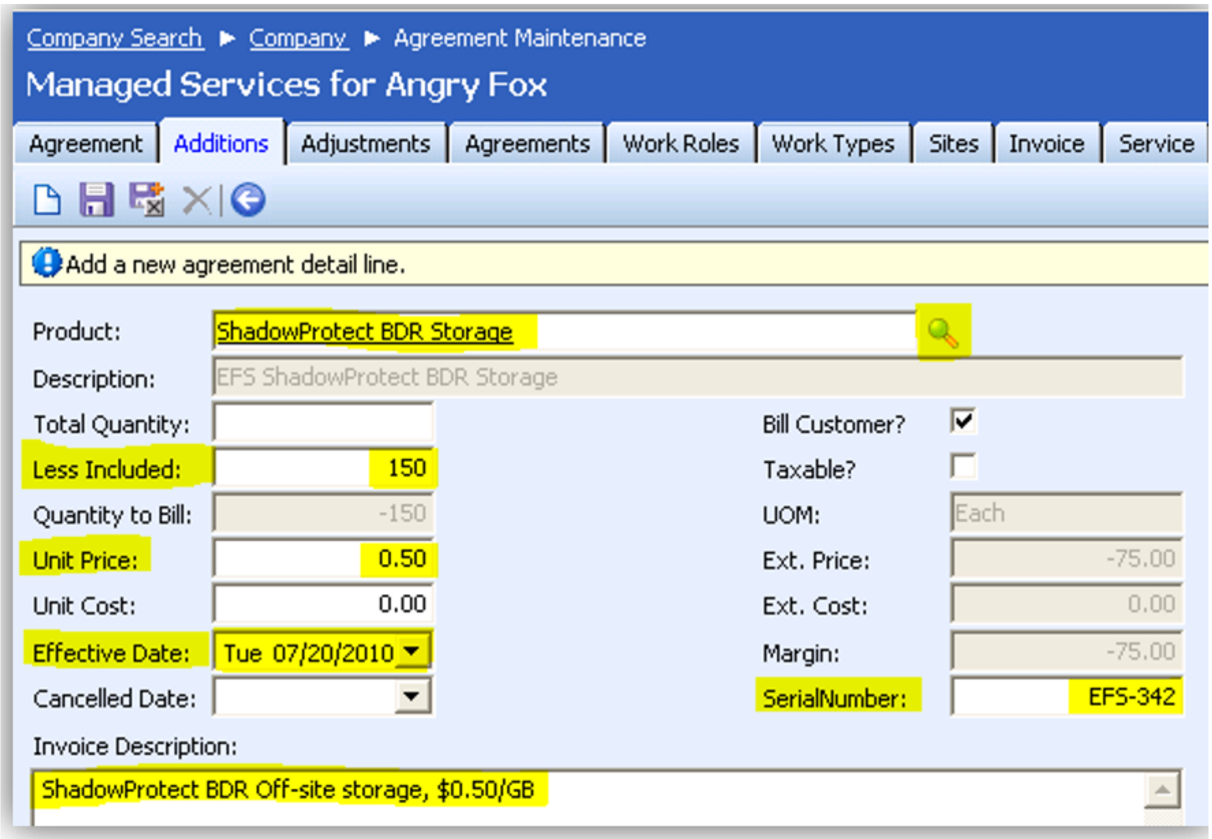
Level	Type	Configuration Type
Select	Online Storage	Backup Stats
Basic	Online Storage	Backup Stats
ShadowProtect BDR	Online Storage	Backup Stats
# Servers	Online Storage	Backup Stats
# Desktops	Online Storage	Backup Stats
ShadowProtect BDR	Local Storage	Backup Stats
# Servers	Local Backups	Backup Stats
# Desktops	Local Backups	Backup Stats
ShadowProtect Cloud Servers	Cloud Count	Backup Stats
ShadowProtect Cloud Desktops	Cloud Count	Backup Stats
ShadowProtect Servers	Other Licenses	License

e. In the *Agreement Type* field, select **Managed Service**.
f. In the *Product* field, select the appropriate ConnectWise product for the specified eFolder service.

5. Set up Agreements to Bill for eFolder Services in ConnectWise

In this step, enter addition(s) to one or more agreements to bill for one or more eFolder services.

1. In ConnectWise, open the *Company* screen and locate the desired company record.
2. Click **Company Name** to start editing.
3. Click the **Agreements** tab.
4. Locate the desired agreement (or create a new agreement, if needed.)
5. Click the **Additions** tab.
6. For *each* eFolder service to be billed, click the **New** button and edit the new agreement addition.
7. Click the magnifying glass icon to find and select the appropriate ConnectWise product associated with desired the eFolder service.
   Review Step 5. Cross-reference ConnectWise Products with eFolder Services, if needed.



   If line items on the agreement already specify an amount for the billable resource, enter that existing amount in the *Less Included* field. For example, if this agreement addition is for BDR offsite storage, you might use 150 in this field.

a) Customize **Unit Price**, if necessary.
b) If you wish to track your cost, enter a **Unit Cost.**
c) Set **Effective Date** to the first day of the billing cycle.
d) In the *SerialNumber* field, enter **EFS-[efoldercustomerid]** (In this example, EFS-342).
e) If eFolder is not configured to update invoice line item descriptions, enter the description which should appear on the invoice in the *Invoice Description* field.

6. Add New ConnectWise Client Companies under Management ID

After your initial ConnectWise integration has been fully configured, you can add new ConnectWise client companies and create new eFolder Web Portal user accounts.

For each new ConnectWise Client company to be integrated with eFolder services, remember to [add the two previously configured ConnectWise Management ID entries.]

Viewing eFolder BDR Portal Notifications and Testing Sync

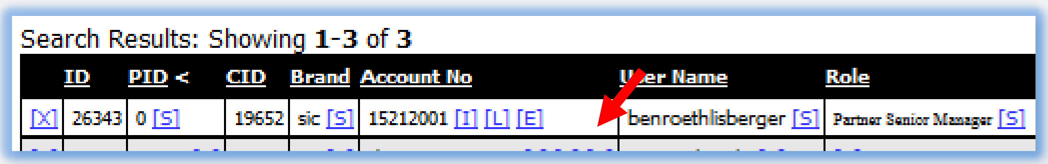
Whenever a backup ends (or a service status update is pushed into the eFolder BDR Portal), eFolder will attempt to push information into ConnectWise within 60 seconds.

eFolder will not automatically update ConnectWise for a given customer more frequently than every 12 hours. However, a manual sync can be initiated for a specific customer via the "Reprocess Notifications" link contained inside the Event details described below.

Inside the event log for each customer account, eFolder records the success or failure of pushing information into ConnectWise. Each customer account is synced and the status of that sync is reported in the account level Event Log. One sync occurs per twelve hour billing. If an account is processed *after* the billing sync occurs but *before* the twelve hours is up, the Event Log entry will note "Skipping ConnectWise synchronization (only updating every 12 hours)."
A ticket sync will still occur, if needed, when that particular Event is processed by the Integration.

Viewing the Event Log In the eFolder Web Portal:

1. Select **Accounts> Account List (Detailed View)** on the Main Menu bar.
2. Enter the user account in the *Quick Search* box and click **Search**.
3. In the *Account No.* column, click the [E] beside the Account Number.

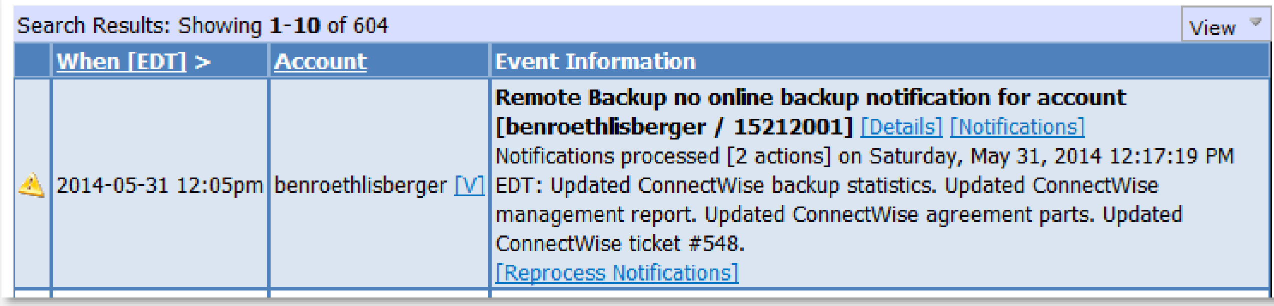

Search Results: Showing **1-3** of **3**

	ID	PID <	CID	Brand	Account No	User Name	Role
[X]	26343	0 [S]	19652	sic [S]	15212001 [I] [L] [E]	benroethlisberger [S]	Partner Senior Manager [S]

4. For example: "EFS123456789 [I] [L] [E] [License Keys]") to view the Event Log.

5. In the *Event Information* column, each row represents a different event.
   Click the **Notifications** link in the *Event Information* row.

6. Click the **Reprocess Notification** link to reprocess the old entry and force the process to re-sync.



Search Results: Showing **1-10** of 604 View

	When [EDT] >	Account	Event Information
	2014-05-31 12:05pm	benroethlisberger [V]	**Remote Backup no online backup notification for account [benroethlisberger / 15212001]** [Details] [Notifications] Notifications processed [2 actions] on Saturday, May 31, 2014 12:17:19 PM EDT: Updated ConnectWise backup statistics. Updated ConnectWise management report. Updated ConnectWise agreement parts. Updated ConnectWise ticket #548. [Reprocess Notifications]

Important! ConnectWise tickets must remain on the board selected when going through Step 2. - Setup new ticket service status Tickets cannot be moved to a different service board or changed to a child ticket, as doing so will break the integration sync and cause errors with duplicate tickets.

Conclusion

Congratulations on completing your ConnectWise and eFolder configuration!

The tight integration between eFolder and ConnectWise allows you to streamline your support processes and report to customers on backup health.

If you find you have additional questions related to integrating your ConnectWise with eFolder, please review the following resources:

Additional Assistance

- For ConnectWise setup information, agreements, reports, billing, or business strategy questions, submit questions to ConnectWise support at: http://www.connectwise.com/support/contact-us.php
- Submit all eFolder questions to www.efolder.net/help
- Browse our Knowledgebase.

The People Behind Your Cloud

