



# OBM/Legacy ShadowProtect ConnectWise Integration Guide

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## Integration Overview

ConnectWise PSA is business automation software that helps IT service providers efficiently manage all aspects of their business. ConnectWise is provided as a web application combined with a rich desktop or mobile client.

eFolder can be configured to push information about eFolder services into ConnectWise, using the ConnectWise integration APIs. **You must use the MSP ConnectWise add-on to do this.**

The following integration features are available:

- Automatic creation of service tickets when backups have failed and other notification events have occurred, such as no backup notifications or disk usage notifications. These tickets will be automatically resolved if the system detects the failure was later fixed.
- Populating of backup statistics for use by ConnectWise's executive management reports.
- Automated billing for online backup (total GB and number of servers and non-servers).
- Automated billing for local backup (number of servers and number of non-servers).
- Automated billing for email archiving (mailbox count).
- Automated billing for Email Security (DoubleCheck) email filtering (mailbox count).

After set up, eFolder will automatically push new information into ConnectWise. For example, eFolder will attempt to push information into ConnectWise within 60 seconds every time that a backup ends or a service status update is pushed into the eFolder Web Portal, although eFolder will not update ConnectWise for a given customer more frequently than every 12 hours.

## Process Overview

One time setup:

**If ticket integration is desired**, ConnectWise service status is updated and cross-referenced to the ticket status used by the integration API. Then an integrator login is created within ConnectWise, which allows eFolder to push information to ConnectWise.

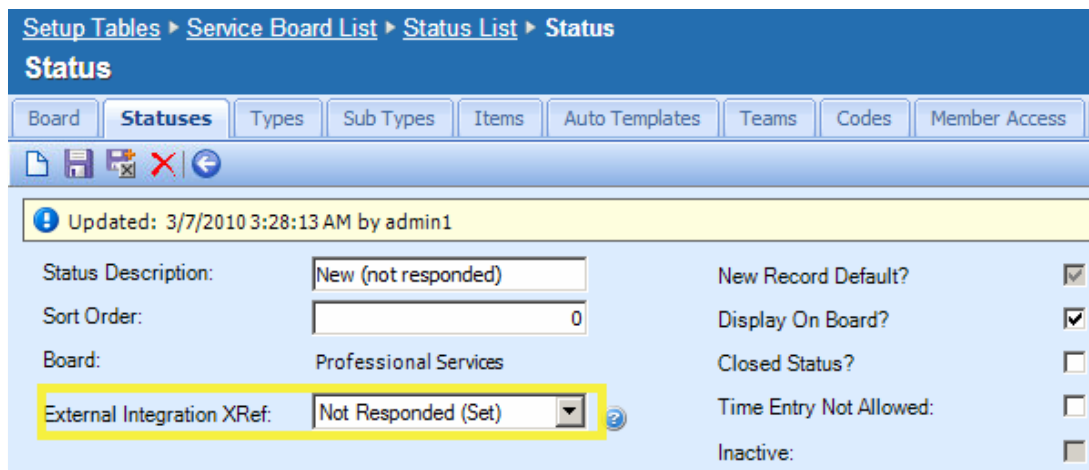
**If billing integration is desired**, ConnectWise products are cross-referenced to eFolder services. Next, the ConnectWise integration is configured within the eFolder web portal. Then, after every backup or service status update, eFolder automatically updates the quantity of additions on each agreement for each company in ConnectWise. You set the price for the corresponding ConnectWise products to be the unit prices specified in the agreement. In this way, invoices generated by the agreement are accurate.

Per-company setup: To setup ConnectWise ticket integration and backup statistics for an individual company, add the eFolder management solution to that company and assign a managed ID linking the ConnectWise company to an eFolder customer record. For billing integration, add a new agreement to the company, and then add one agreement addition per service to be billed (such as online backup or email filtering).

## Step 1. Service Status Setup (Only If Using Ticket Integration)

ConnectWise must be told which ticket status to use when eFolder tries to create a ticket with a "Not Responded" (new) status. Since eFolder only creates new tickets, this is the only status which must be cross-referenced. To set this up, refer to Figure 1 as you complete the following steps:

1. In ConnectWise, go to the Setup tab, and choose Setup Tables.
2. Search for the *Service* table, Select *Service Board*, Select your Board Name, and select the *Statuses* tab to open it.
3. Edit (or create) the status in the service board that you want to use for new eFolder- related tickets. Make sure the External Integration XRef field is set to *Not Responded (Set)*.



The screenshot shows the 'Status' configuration window in ConnectWise. The breadcrumb path is 'Setup Tables > Service Board List > Status List > Status'. The window title is 'Status'. The 'Statuses' tab is selected. A notification bar indicates the record was updated on 3/7/2010 at 3:28:13 AM by admin1. The configuration fields are as follows:

Status Description:	New (not responded)	New Record Default?	<input checked="" type="checkbox"/>
Sort Order:	0	Display On Board?	<input checked="" type="checkbox"/>
Board:	Professional Services	Closed Status?	<input type="checkbox"/>
External Integration XRef:	Not Responded (Set)	Time Entry Not Allowed:	<input type="checkbox"/>
		Inactive:	<input type="checkbox"/>

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

## Step 2. Create an Integrator Login

eFolder requires an integrator login in ConnectWise in order to communicate the proper information. To configure an integrator login:

1. In ConnectWise, go to the Setup tab and choose Setup Tables.
2. Search for the *Integrator Login* table and open it.
3. Click the New icon and enter a username and password. Note: Remember this information for the eFolder Web Portal. The Integrator Login in ConnectWise and the 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.

6. If you are not using ticket integration, then uncheck the Service Ticket API checkbox as well.
7. If you are using ticket integration, then check the Service Ticket API checkbox and select a Service Board in the Service Board field (if none show up, make sure you completed step 1. Service Status Setup). Select none in the *Ticket Callback URL* field.

### Step 3. Create ConnectWise Products for eFolder Services

**Skip this step if you are not setting up billing integration.** ConnectWise uses products to track different line items that can appear on agreements and thereby on invoices. You should setup one ConnectWise product for each eFolder service that you want to automatically bill for. These products will represent the unit price for each billable unit for the service (such as the number of GBs, the number of servers, and the number of mailboxes). Depending on what you need to bill for, create new ConnectWise products for one or more of the following, as appropriate for your company:

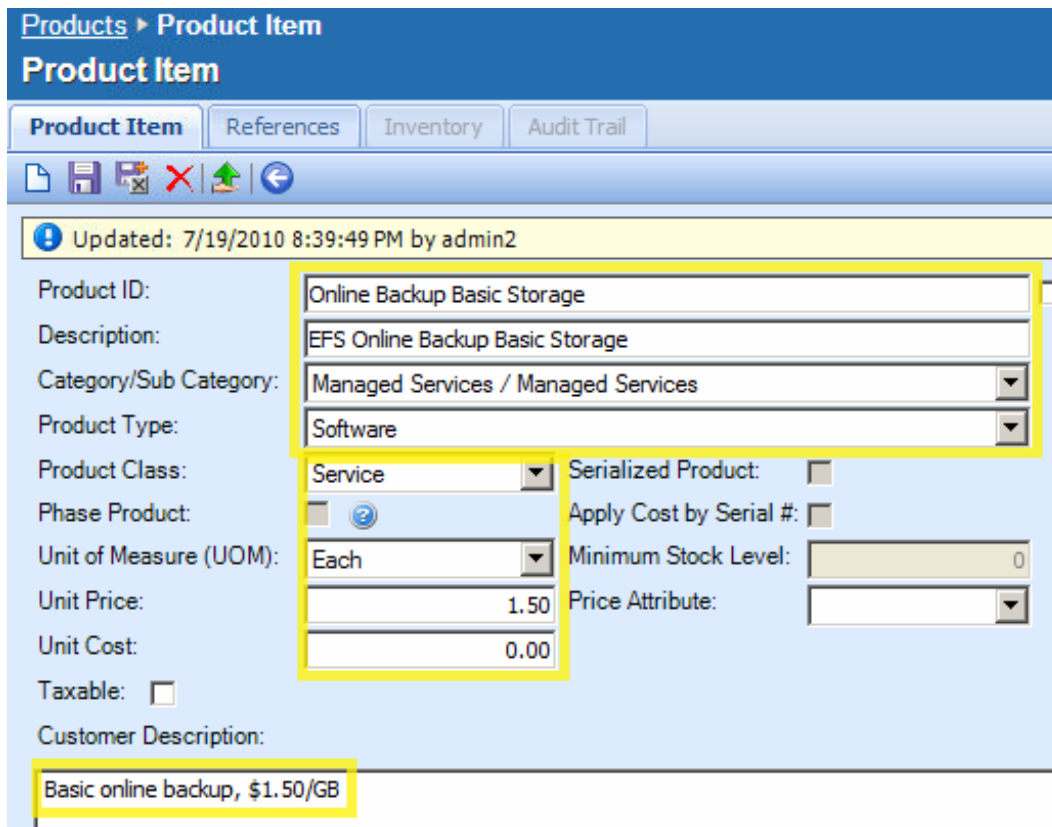
<ul style="list-style-type: none"> <li>• Select Online Backup Storage</li> <li>• Basic Online Backup Storage</li> <li>• Online Backup # Servers</li> <li>• Online Backup # Desktops</li> <li>• ShadowProtect BDR Storage</li> <li>• ShadowProtect BDR Servers</li> </ul>	<ul style="list-style-type: none"> <li>• ShadowProtect BDR Desktops</li> <li>• Local Backup # Servers</li> <li>• Local Backup # Desktops</li> <li>• Local Backup Storage</li> <li>• Email Archiving # Mailboxes</li> <li>• Email Filtering # Mailboxes</li> </ul>
--	---

### Special Notes:

- Because there are different eFolder backup service plans, one ConnectWise product is created for each online backup service plan.
- You can customize the 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 bill for local backups based on the number of servers and desktops rather than the amount of storage that is protected with local backups.

Follow these steps for each ConnectWise product you need to create (refer to Figure 3):

1. In ConnectWise, navigate to the Setup tab, and then click the Products tab.
2. Click the New icon and fill in the *Product ID* and *Description* fields (see the recommended description above).
3. Select a *Category/Sub Category*, *Product Type*, and *Product Class* in their respective fields. We recommend choosing *Managed Services*, *Software*, and *Service*, respectively.
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 product that you need to create.



Note: These products should only cover usage charges (for example, setting up a charge for a flat monthly price that includes 25 GB of online backup storage) and do not cover any fixed price service fees for eFolder services.

To add additional fixed-price eFolder services:

1. Create a separate product for the flat monthly price of the fixed-price eFolder service.
2. Add both products (for example, "Basic Online Backup w/ 25 GB" and "Basic Online Backup Storage") to your customer's agreement.
3. Modify the agreement addition for the product being used to charge for extra usage (for example, "Basic Online Backup Storage") to include a certain amount (such as 25 GBs) for free.

After you have configured your products, your product list might look like the one shown

Product Search ▶ [Product](#)

### Product Item Search

📄  Action ▼ | Search | Clear

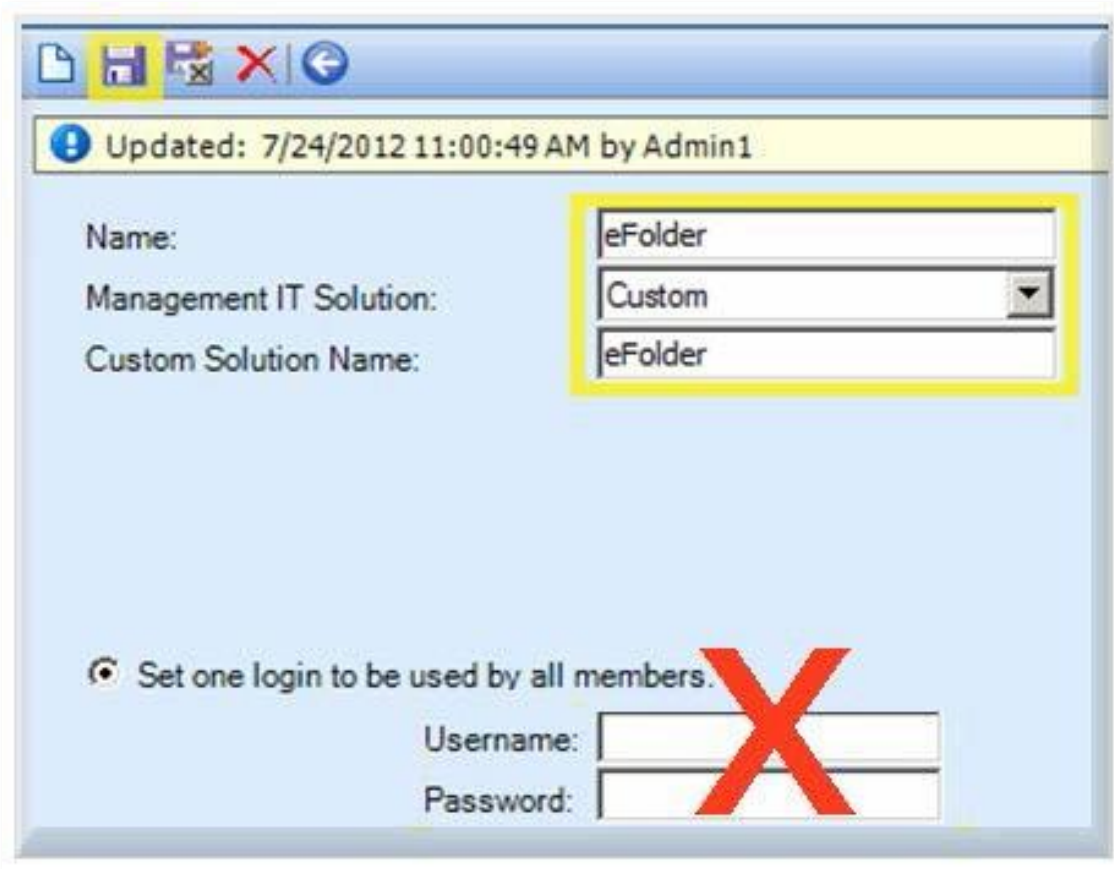
	ID	Description	Price	Cost
<input type="checkbox"/>		EFS		
<input type="checkbox"/>	<a href="#">Email Archiving # Mailboxes</a>	EFS Email Archiving # Mailboxes	2.500000	0.000000
<input type="checkbox"/>	<a href="#">Email Filtering # Mailboxes</a>	EFS Email Filtering # Mailboxes	1.500000	0.000000
<input type="checkbox"/>	<a href="#">Local Backup # Servers</a>	EFS Local Backup # Servers	25.0000...	0.000000
<input type="checkbox"/>	<a href="#">Local Backup # Workstations</a>	EFS Local Backup # Workstations	5.000000	0.000000
▶ <input type="checkbox"/>	<a href="#">Online Backup Basic Storage</a>	EFS Online Backup Basic Storage	1.500000	0.000000
<input type="checkbox"/>	<a href="#">Online Backup Select Storage</a>	EFS Online Backup Select Storage	2.000000	0.000000
<input type="checkbox"/>	<a href="#">ShadowProtect BDR Servers</a>	EFS ShadowProtect BDR Server Lice...	30.0000...	0.000000
<input type="checkbox"/>	<a href="#">ShadowProtect BDR Storage</a>	EFS ShadowProtect BDR Storage	0.500000	0.000000
<input type="checkbox"/>	<a href="#">ShadowProtect BDR Wks</a>	EFS ShadowProtect BDR Workstatio...	10.0000...	0.000000



## Step 4. Configure the eFolder Management Solution in ConnectWise

A management solution must be setup in ConnectWise to represent the eFolder services.

1. In ConnectWise, navigate to the Setup tab and choose the **Setup Tables** tab.
2. Search for and open the *Management IT* 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 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.



Updated: 7/24/2012 11:00:49 AM by Admin1

Name: eFolder

Management IT Solution: Custom

Custom Solution Name: eFolder

Set one login to be used by all members.

Username:

Password:

## Step 5. Cross-reference ConnectWise Products with eFolder Services

Skip this step if you are not setting up billing integration. Otherwise, complete the following steps (refer to Figure 6):

1. In ConnectWise, navigate to the *Setup* tab and click the **Setup Tables** tab.
2. Search for and open the *Managed Devices Integration* table.
3. Select the management solution you 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.

Setup Tables ► Managed Devices Integration

**Company**

Last Updated 11/30/2011 4:38:38 PM by Admin1

Name:  Portal URL:  Username:

Solution:  Login By:  Password:

Integrator Login:   Disable Newly discovered Cross-References:

Defaults for Configurations: Location:  Business Unit:

Defaults for Agreements: Billing Level:  Match on Serial Number:

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

Level	Type	Configuration Type	Agreement Type	Product
Select	Online Storage		Managed Service	EFS Online Backup Select Storage
Basic	Online Storage		Managed Service	EFS Online Backup Basic Storage
ShadowProtect BDR	Online Storage		Managed Service	EFS ShadowProtect BDR Storage
# Servers	Local Backups			
# Desktops	Local Backups			

12. For each ConnectWise product that needs to be cross-referenced with an eFolder service, perform the following steps.
  - a. Click the **New** icon in the top-left corner of the cross-reference table.
  - b. Complete the *Level*, *Type*, and *Configuration Type* fields based on the table below:

Type	Level	Configuration Type
Online Storage	Select	Backup Stats
Online Storage	Basic	Backup Stats
Online Storage	ShadowProtect BDR	Backup Stats
Online Storage	# Servers	Backup Stats
Online Storage	# Desktops	Backup Stats
Local Storage		Backup Stats
Local Backups	# Servers	Backup Stats
Local Backups	# Desktops	Backup Stats
Other Licenses	ShadowProtect	License
Other Licenses	ShadowProtect	License
Email Archiving	Exchange	License
Email Filtering		License

- c. In the *Agreement Type* field, select **Managed Service** (or whatever is appropriate for your system. Any agreement type is okay).
- d. In the *Product* field, select the correct ConnectWise product to associate with the corresponding eFolder service.

## 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. Enter the URL where the ConnectWise PSA is hosted in the *ConnectWise Site URL* field.  
Note: ConnectWise requires **https** for integration. This entry should start with **https://** in the URL.
5. Enter your *ConnectWise Company ID*, *Integrator Login Username*, and *Password* (created in *Step 2. Create an Integrator Login*) in their respective fields.
6. Click **Save Changes**.

The screenshot displays the 'Integration Credentials' page in the eFolder Web Portal. The page title is 'Integration Credentials'. Below the title, there is a paragraph explaining the page's purpose: 'This page allows you to setup integration with other systems, such as professional services automation (PSA) and customer relationship management (CRM) systems. When saving changes, be sure to use the Save button at the very bottom of the page. Detailed setup instructions for each provider are available in the documentation section in the [partner center](#).' Below this, there is a section titled 'CHOOSE INTEGRATION PROVIDERS' with a sub-heading 'Choose the integration providers that you want to enable and configure:'. Two checkboxes are visible: 'Autotask' (unchecked) and 'ConnectWise PSA' (checked). Below this, there is a section titled 'CONFIGURE CONNECTWISE PSA INTEGRATION CREDENTIALS' with a sub-heading 'This integration provides the ability to automatically open tickets when backups, other services, or appliances fail. Backup statistics on executive summary reports can also be updated. It also provides billing integration for online backups, local backups, email archiving, and other services.' Below this, there are four input fields: 'ConnectWise Site URL' (https://test.connectwise.com), 'Company ID' (yourCompanyID), 'Integrator Login Username' (efolder-api), and 'Integrator Login Password' (masked with dots). The 'Management Solution Name' field contains 'efolder'. Below the input fields, there is a link '(advanced settings)'. At the bottom of the form, there are two buttons: 'Save Changes' and 'Cancel'. The footer of the page contains the text 'Phone: 000-000-0000 | Email: support4@securewebportal.net'.

## 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 Backup Statistics on the executive management report.

The screenshot shows the 'Integration Setup' page in the eFolder web portal. At the top, there is a navigation bar with links for Home, My Account, My Partnership, Accounts, Reports, Support, Web Access, and Logout. Below the navigation bar is a search bar with the text 'Account Quick Search:' and a dropdown menu set to 'in (Auto)'. The main heading is 'Integration Setup'. Below the heading, there is a paragraph explaining the page's purpose and a link to the partner center. The section 'SETUP INTEGRATION PROVIDERS' is followed by 'CONFIGURE CONNECTWISE PSA INTEGRATION'. A paragraph describes the integration's capabilities. Below this, there is a 'Ticket Subject Prefix' input field. Two checkboxes are highlighted with a yellow box: 'Update Backup Statistics' and 'Update Invoice Descriptions', both of which are checked. A link for '(advanced settings)' is provided. Below this, a section titled 'Select the services that you want to use in the ConnectWise billing integration:' lists several services with checkboxes. A yellow box highlights the checkboxes for 'Online Backup Storage Integration', 'Online Backup # Computers', 'Local Backup Storage Integration', 'Local Backup Licenses Integration', and 'Integration for Other Licenses', all of which are checked. At the bottom, there are two buttons: 'Save Changes' and 'Cancel', with 'Save Changes' highlighted by a yellow box.

4. Check the **Update Invoice Descriptions** checkbox to update the billing invoice line item descriptions with detailed, per-account disk-usage amounts.
5. If you are using billing integration, check the desired checkboxes to enable the services that you configured for billing integration in Step 5. *Cross-reference ConnectWise Products with eFolder Services.*
6. Click **Save Changes** to save your changes.

## Step 7. Configure Partner-Wide Ticket Notification on the Web Portal

This section can be skipped if you do not push tickets about eFolder events into ConnectWise.

Otherwise, to configure such 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 *NotificationAction* 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).
6. In most cases, you can just leave the *Subscribe to All Event Types* field to its default value of Yes so that you are notified for a warning or error of any type (for example: backup failure, archiving failure, BDR hardware failure, and so forth).
7. Finally, click **Create**.

Setting	Value
<b>Notification Action</b>	Open a ConnectWise ticket
<b>Include Sub-Brands</b>	Yes
<b>Subscribe to OK Events</b>	No
<b>Subscribe to Warnings</b>	Yes
<b>Subscribe to Errors</b>	Yes
<b>Subscribe to All Event Types</b>	Yes
<b>Comments</b>	<input type="text"/>
<input type="button" value="Create"/> <input type="button" value="Cancel"/> <a href="#">Back to Partner Notifications List</a>	

## Step 8. Configure Partner-Wide ConnectWise Data Synchronization

This section can be skipped if you do not synchronize backup statistics or perform billing integration. To enable these features, follow these steps:

- Login and choose the **My Partnership->Partner Notifications** on the Main Menu.
  - Click the [Create a new notification](#) link at the bottom of the page.
1. Select **Synchronize with ConnectWise** in the *Notification Action* field.
  2. Select **Yes** in the *Subscribe to All Event Types* field to subscribe to all event severities.
  3. Select **Yes** in all the other fields to subscribe to all event types.
  4. Click **Create** to create a new integration.

Setting	Value
<b>Notification Action</b>	Synchronize with ConnectWise
<b>Include Sub-Brands</b>	Yes
<b>Subscribe to OK Events</b>	Yes
<b>Subscribe to Warnings</b>	Yes
<b>Subscribe to Errors</b>	Yes
<b>Subscribe to All Event Types</b>	Yes
<b>Comments</b>	

[Back to Partner Notifications List](#)

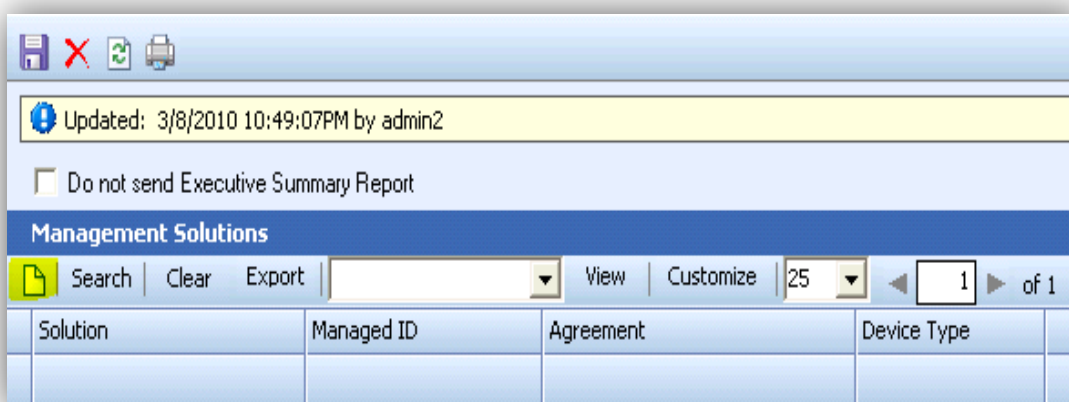
## Per-Company Setup Overview with ConnectWise

Now that ConnectWise integration 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.

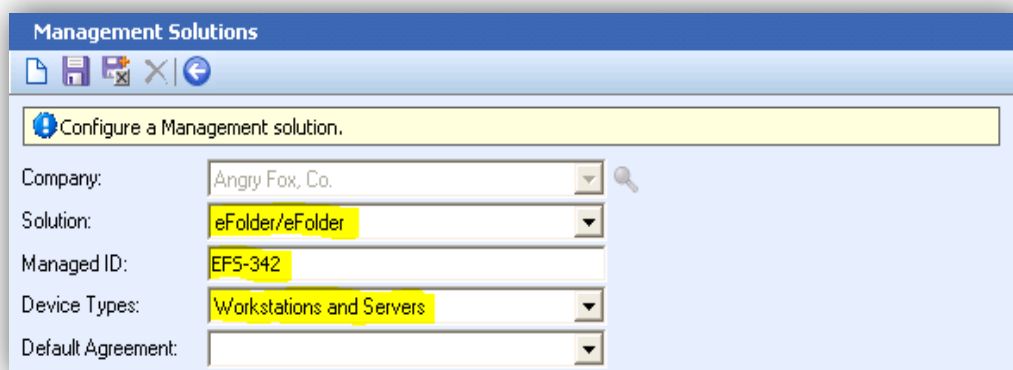
Note: The following sections describe the steps you *must* perform for *each* ConnectWise company.

### Step 1. Configure the Managed ID for a ConnectWise Company

1. Open the **Company** tab in ConnectWise and find the company record to configure. Click the **Company Name** button to start editing the company record.



2. Click the **Management** tab. If the **New** button is grayed out, click the **Save** button.
3. Click the **New** button in the *Management Solutions* list:
4. In the *Solution* field, select the management solution you created for eFolder in Step 4. Configure the eFolder Management Solution in ConnectWise.
5. In the *Managed ID* field, enter EFS-[efoldercustomerid](for example, EFS-342). To find the *eFolder Customer ID* for an account, see the instructions below.





**Note:** To find the eFolder Customer ID for an account, login to the eFolder Web Portal, select **Account List (Detailed View)** on the Main Menu bar, enter the user account in the *Quick Search* box and click *Search*. Find the eFolder account in the Account List and use the value of the CID column for that account:

**Accounts Matching Search Criteria** [Refresh](#)

Show  rows starting at row #

Highlight:

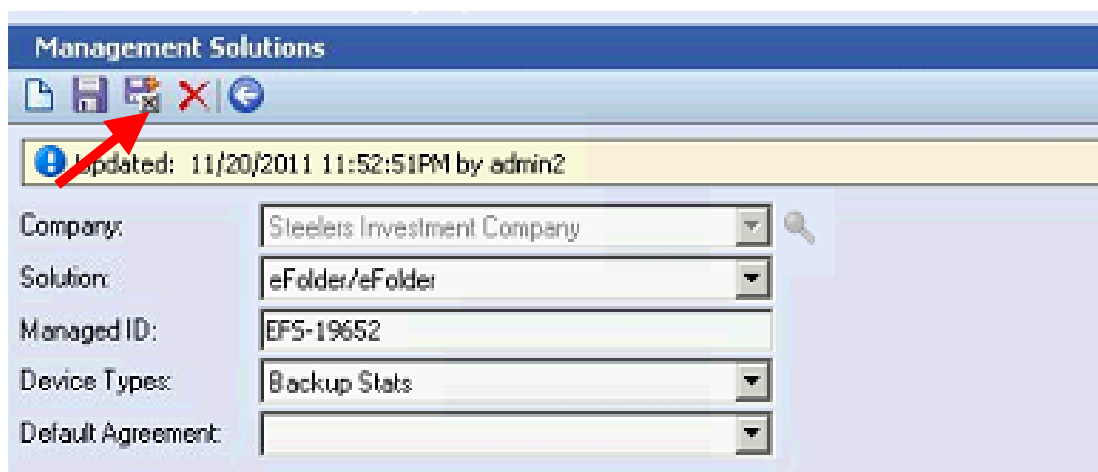
Number of rows matching filter: 8

ID	PID	CID	Brand	Account No	User Name	Role	SPlan
<input checked="" type="checkbox"/>	356	0	342	doc	DOC30199001	ETV-Primary	User
<input checked="" type="checkbox"/>	359	356	342	doc	DOC30199002	ETV-FrontOffice	Select
<input checked="" type="checkbox"/>	368	356	342	doc	DOC30199004	ETV-Truck01	Select
<input checked="" type="checkbox"/>	360	0	342	doc	DOC30199003	ETV-RepairShop	Trial
<input checked="" type="checkbox"/>	369	0	342	doc	DOC30199005	ETV-Truck02	Select
<input checked="" type="checkbox"/>	395	0	342	doc	DOC30199007	ETV-BDR	BDR Appliance
<input checked="" type="checkbox"/>	396	0	342	doc	DOC30199008	ETV-email-filtering	Email Filtering Appliance
<input checked="" type="checkbox"/>	383	0	355	doc	DOC30199006	ETV-Prim	Select

Alternatively, if you choose to use the **Account Center (Visual View)** in the eFolder Web Portal, the customer ID is displayed in the *Cust. ID* column and is listed in the *Account Details* pane:

The screenshot shows the eFolder Account Center interface. At the top, there is a menu bar with 'New', 'Actions', 'Options', and 'View: Account Details'. Below this is a table of accounts with columns for 'Cust. ID', 'Brand', 'Company', 'User Name', 'Service Plan', and 'Expires'. The first row is selected, showing 'Cust. ID: 342', 'Brand: doc', 'Company: Eddie's TV Repair', 'User Name: ETV-Primary', 'Service Plan: Select', and 'Expires: 04/02/2009'. Below the table is a 'Page 1 of 1' indicator. The bottom section is titled 'Account Summary' and contains several tabs: 'Service Plan', 'Contact Information', and 'Status Details'. The 'Status Summary' section shows 'ETV-Primary [Select]' with details like 'Online backup (0.00 GB)' and 'Never had a remote backup.'. The 'Account Information' section displays 'Brand: doc', 'Account No.: DOC30199001', 'Login State: OK', and 'Internal Desc: Quickbooks Server'. The 'Customer ID: 342' is highlighted in yellow.

6. In the *Device Types* field, select **Workstations and Servers**.
7. Leave the *Default Agreement* field blank.
8. Click the **Save and Close** button to return to the *Management* tab.
9. In the *Managed ID* field, enter EFS-[efoldercustomerid] (for example, EFS-19652; See below):
10. In the *Device Types* field, select **Backup Stats**.
11. Leave the *Default Agreement* field blank.



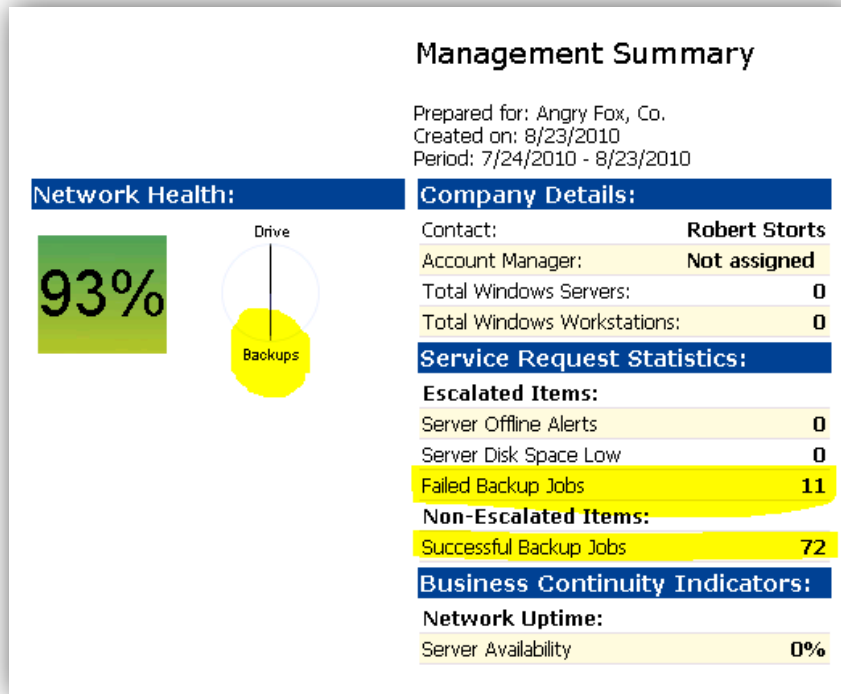
12. Click the **Save and Close** button to return to the *Management* tab.
13. Ensure the entry order has *Workstations and Servers* first and *Backup Stats* second.

**There will be a ConnectWise data flow issue if these two entries are switched:**

Solution	Managed ID	Agreement	Device Type
eFolder	EFS-19652		Workstations and Servers
eFolder	EFS-19652		Backup Stats

14. Select the **Company > Management** tab and then click the **Printer** icon. This will generate the *ConnectWise Executive Management Report* and display if the Backup Status sync is working properly.

After the two entries have been fully configured, the backup statistics on the Executive Management report will be updated after each backup completes. Here is an example report with the backup statistics updated by the eFolder integration process:



## Step 2. Setup Agreements to Bill for eFolder Services in ConnectWise

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

If you are not using billing integration, skip this step.

Otherwise, perform the following steps:

1. Open the *Company* screen in ConnectWise and find the company record to configure. Click the *Company Name* to start editing the company record.
2. Click the *Agreements* tab. Find the agreement to which you want to add the eFolder agreement additions or create a new agreement.
3. Click the **Additions** tab.
4. For *each* eFolder service you want to bill for, click the **New** button and edit the new agreement addition as follows:

- a. Click the **magnifying glass icon** to find and select the appropriate ConnectWise product associated with the eFolder service you want to bill for (as determined in Step 5. Cross-reference ConnectWise Products with eFolder Services)
- b. If the other line items on the agreement already include a certain amount of the resource that is being billed for, enter that amount in the *Less Included* field. For example, if this agreement addition is for BDR offsite storage, you might use 150 in this field.
- c. Customize the unit price, if necessary.
- d. If you wish to track your cost, enter the *Unit Cost* as well (for example, 0.30).
- e. Set the *Effective Date* to the first day of the billing cycle.
- f. In the *SerialNumber* field, enter EFS-[efoldercustomerid] (for example, EFS-342)
- g. If eFolder is *not* configured to update invoice line item descriptions, then enter the description you want to appear on the invoice in the *Invoice Description* field.


Company Search ▶ Company ▶ Agreement Maintenance

### Managed Services for Angry Fox

Agreement | **Additions** | Adjustments | Agreements | Work Roles | Work Types | Sites | Invoice | Service

📄 📁 🗑️ ✕ ⏪

🔍 Add a new agreement detail line.

Product:	ShadowProtect BDR Storage	
Description:	EFS ShadowProtect BDR Storage	
Total Quantity:		Bill Customer? <input checked="" type="checkbox"/>
Less Included:	150	Taxable? <input type="checkbox"/>
Quantity to Bill:	-150	UOM: Each
Unit Price:	0.50	Ext. Price: -75.00
Unit Cost:	0.00	Ext. Cost: 0.00
Effective Date:	Tue 07/20/2010	Margin: -75.00
Cancelled Date:		SerialNumber: EFS-342
Invoice Description:	ShadowProtect BDR Off-site storage, \$0.50/GB	

### Step 3. Add New ConnectWise Client Companies under Management ID

After the 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 integrated with eFolder services, you **must** add the two Management ID entries you previously configured in ConnectWise. (Repeat instructions under [Step 1. Configure the Managed ID for a ConnectWise Company](#))

### Global Integration Diagnostics Overview

- Every time a backup ends (or a service status update is pushed into the eFolder Web Portal), eFolder will attempt to push information into ConnectWise within 60 seconds.
- eFolder will not update ConnectWise for a given customer more frequently than every twelve hours.
- We record the success or failure of pushing information into ConnectWise in the partner Event Log in the Web Portal:



### Establish the eFolder Web Portal Testing Integration Sync In eFolder’s Web Portal:

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

Search Results: Showing 1-3 of 3

ID	PID <	CID	Brand	Account No	User Name	Role
<input checked="" type="checkbox"/>	26343	0 [S]	19652 sic [S]	15212001 [I] [L] [E]	benroethlisberger [S]	Partner Senior Manager [S]

- In the *Event Information* column (third labeled column from the left), each row represents a different event. After notifications are processed by the notification system, you can see details on actions taken by clicking the [\[Notifications\]](#) link.
- When you click the [\[Reprocess Notification\]](#) link, the notification process re-syncs within the next several minutes instead of waiting for the normal 12-hour daily sync to occur.

Search Results: Showing 1-10 of 604 View ▾

When [EDT] >	Account	Event Information
2014-05-31 12:05pm	benroethlisberger <a href="#">[V]</a>	<p><b>Remote Backup no online backup notification for account [benroethlisberger / 15212001] <a href="#">[Details]</a> <a href="#">[Notifications]</a></b></p> <p>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.</p> <p><a href="#">[Reprocess Notifications]</a></p>

- It is possible to search the event log **only** for events that encountered problems while processing their notification actions. To search for such events, at the top of the *Event Log* page, click the **Advanced Search** tab, choose the **Notification Processed Error List** in the drop-down field, select the **LIKE** operator, enter **?\*** for the search term, and click the **Search** button:

Quick Search **Advanced Search**

Use these fields to search for data within Event Log to display in the list below.

You can use the wildcards \* and ? for the CONTAINS, LIKE, and NOT LIKE operators. When using the IN operator, separate values by commas. The format of all date/time fields is YYYY-MM-DD HH:MM:SS.

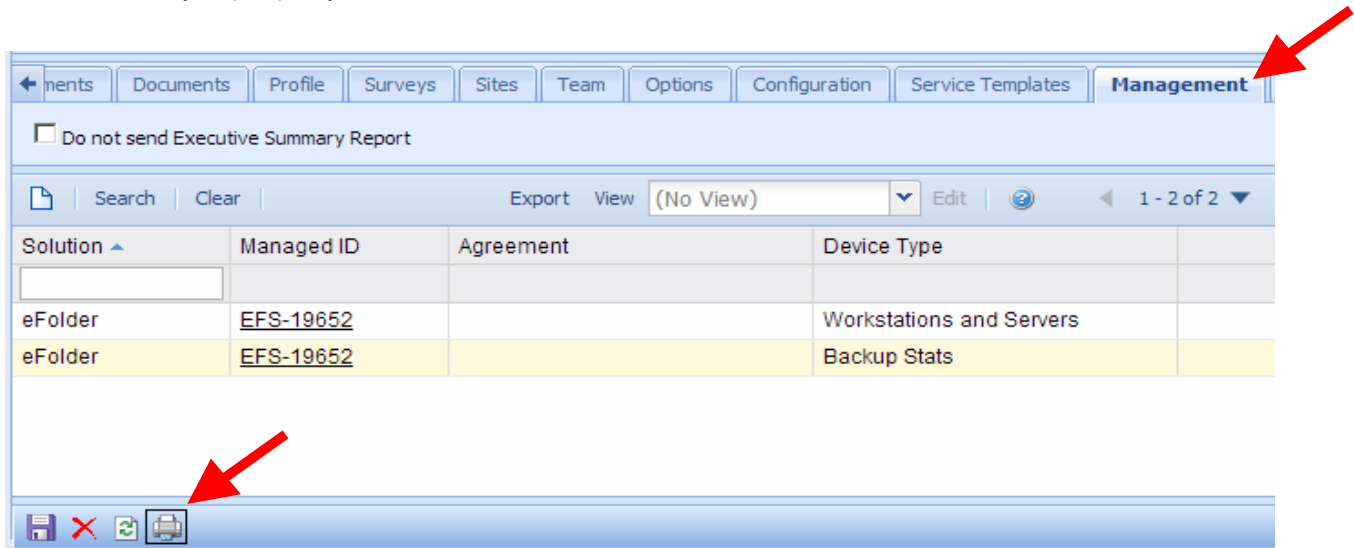
Show  search fields.

This will return a list of events with notification action problems (such as pushing information into ConnectWise).

### In ConnectWise:

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

This will generate the *ConnectWise Executive Management Report* and display the Backup Status sync properly.



## Common Integration Issues and Resolution Steps

### A. Duplicate Tickets created with ConnectWise Integration

Complete the following steps for **each Web Portal user name** account and **each ConnectWise Company Setup**:

**1. Create a separate email address to use for Notifications and Contact Information.**

For example, *backupnotify@companyname.net* is different from the ConnectWise Service Board address *Support@companyname.net* used to create tickets.

**2. In the eFolder Web Portal, perform the following steps:**

- a. Click the [I] link to impersonate the user name account.
- b. Under *Contact Information*, enter *efoldernotify@companyname.com* in the *Email Address* and *Confirm Email Address* fields.
- c. Click SAVE at bottom of page.

**3. In the eFolder Web Portal:**

- a. Click **My Account > Notifications**.



- b. Ensure the appropriate checkboxes are checked so the associated notifications will be received. For example:

Be sure to check the box for **No Backup Notification**

Be sure to check the box for **No Error Free Backup Notification**

- c. Uncheck **Enable External Ticketing Alerts** checkbox.

4. Click **Save Changes**.

5. Click **Stop Impersonating** in the upper right corner.

6. Repeat these steps for each user name account.





**Important!** ConnectWise Tickets must remain on the originally-configured Integration Service Board. Tickets should not be moved to a different service board or changed to a child ticket. Doing so will break the Integration sync and cause duplicate tickets.

## B. ConnectWise Integration Sync is not working

What does it mean if you receive a **username or password error** (similar to the following example) in one or more of your eFolder Web Portal Event logs?

**\*ERROR: "Exception has been thrown by the target of an invocation. --- Username or password is incorrect --- End of inner exception stack trace"**

This error means the integrator usernames and passwords (either in the ConnectWise Table and/or the eFolder Web Portal) do **not** match. To resolve this issue, perform the following steps:

1. In ConnectWise, choose **Setup > Setup Tables > Integrator Login > Username and Password**. Then, reenter the username and password and click **Save**.  
**Note:** Manually type in the data rather than copy and paste, to avoid blank spaces being inserted.
2. In the eFolder Web Portal, choose **My Partnership > Integration Setup**. Be sure the **ConnectWise PSA** checkbox is checked. Retype the username and password in the corresponding fields, then click **Save**.



**Important!** Be sure to type this in rather than copying and pasting, due to extra blank spaces that may be inserted. Also, make sure these login credentials match **exactly** what you entered in the ConnectWise Integrator Login Table.

3. Reboot the ConnectWise Server.
4. Allow the eFolder Web Portal to sync up after the ConnectWise Server has rebooted. The sync will typically occur twelve hours after reboot.

## C. ConnectWise Management ID Error

The **ConnectWise Management ID Error** is a common problem which may occur after completing initial eFolder ConnectWise integration.

After you create new user accounts in the eFolder Web Portal, adding the two entries in ConnectWise **Company** (under the *Management* tab) will associate the *Customer ID number (CID)* with the *ConnectWise Company*, providing the connection for the Integration Sync.

If you experience this error and need help making these associations, establishing this sync, and resolving this problem, please use the instructions available here:

[eFolder ConnectWise Management ID Error Guide](#)

## Conclusion

The tight integration between eFolder and ConnectWise allow you to streamline your support processes, report to customers on backup health, and automate your billing processes.

## Additional Assistance

Please submit questions to [support@efolder.net](mailto:support@efolder.net) or call us at 800-352-0248



The People Behind Your Cloud