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.

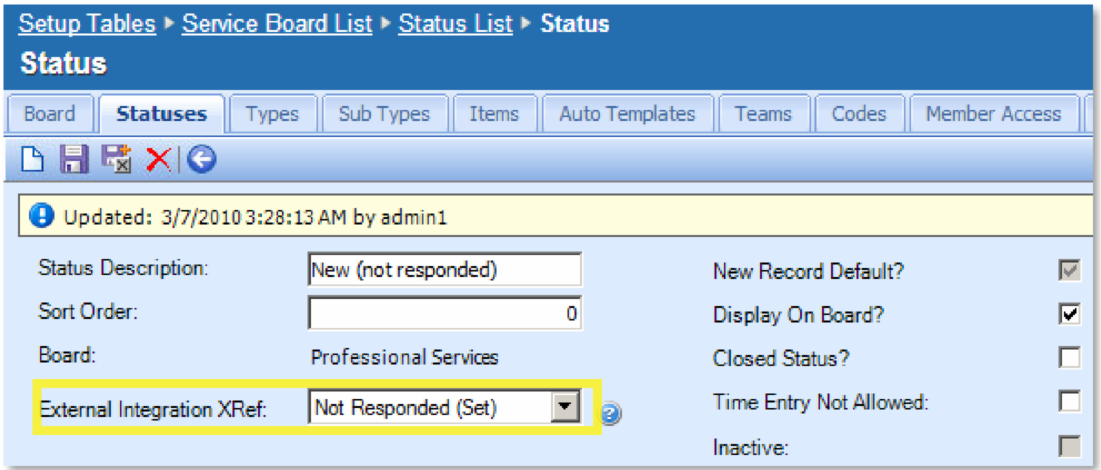
If billing integration is desired, ConnectWise products are cross-referenced to eFolder services. Next, the ConnectWise integration is configured within the eFolder web portal. Then, after every backup or service status update, eFolder automatically updates the quantity of additions on each agreement 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).*



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

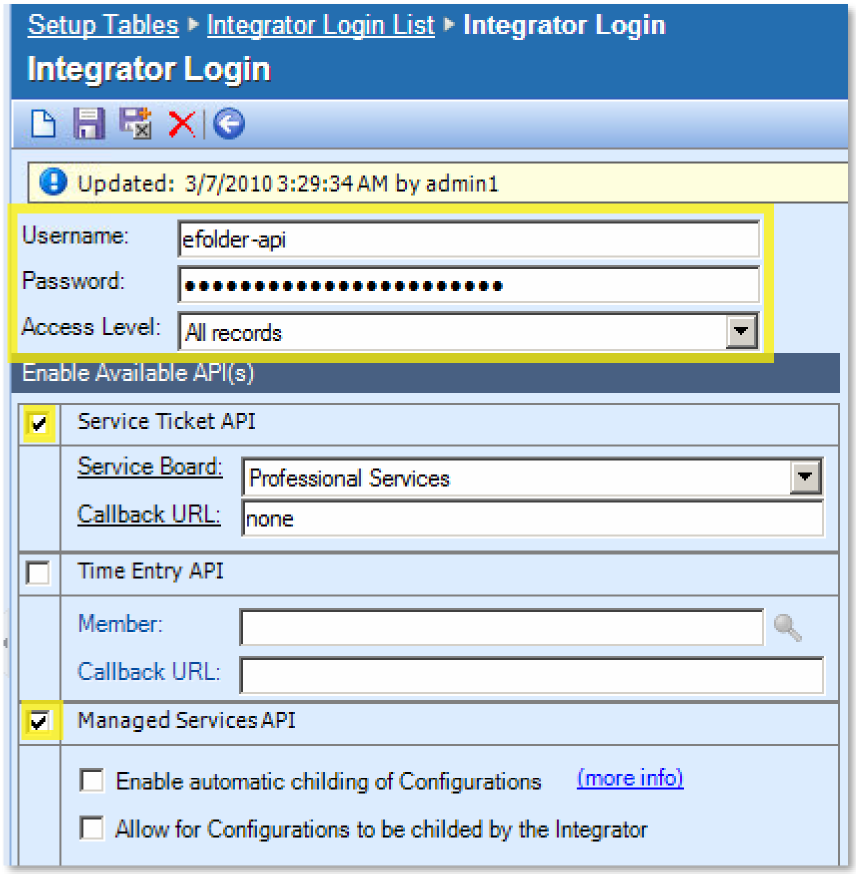
Step 2. Create an Integrator Login

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:

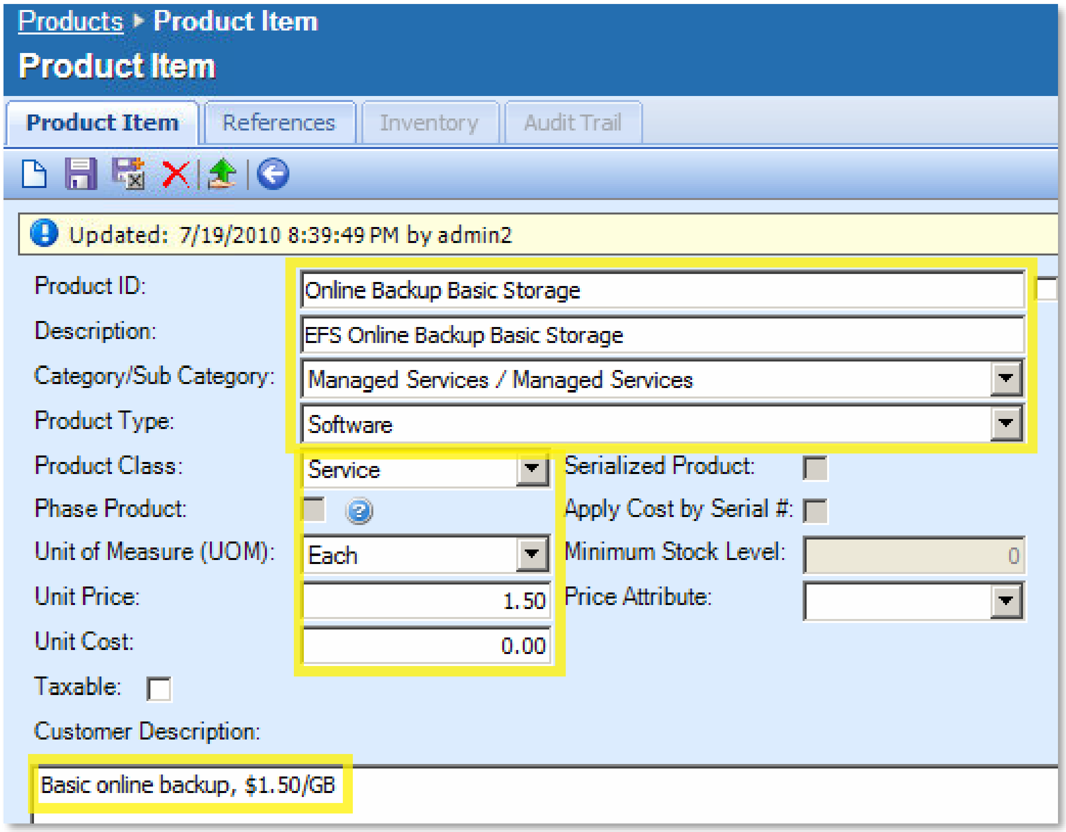
• Select Online Backup Storage	• ShadowProtect BDR Desktops
• Basic Online Backup Storage	• Local Backup # Servers
• Online Backup # Servers	• Local Backup # Desktops
• Online Backup # Desktops	• Local Backup Storage
• ShadowProtect BDR Storage	• Email Archiving # Mailboxes
• ShadowProtect BDR Servers	• Email Filtering # Mailboxes

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.

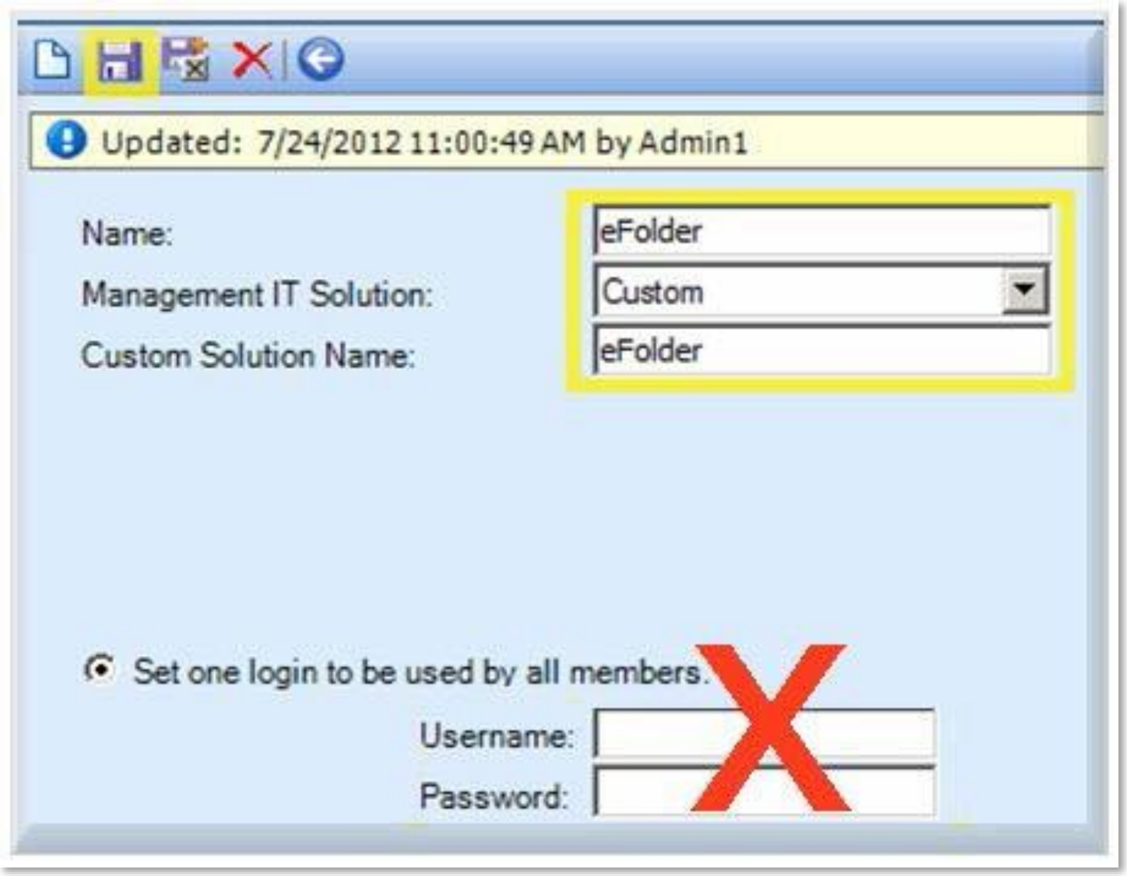
After you have configured your products, your product list might look like the one shown

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

Step 4. Configure the eFolder Management Solution in ConnectWise

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

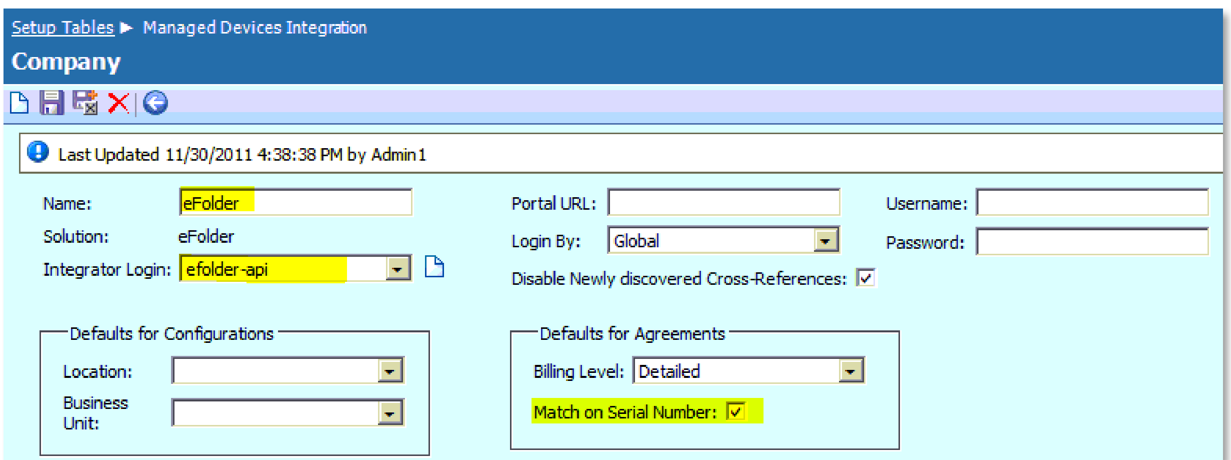
1. In ConnectWise, navigate to the Setup tab and choose the **Setup Tables** tab.
2. Search for and open the *Management IT* table.
3. Click the **New** icon and choose a management solution name (such as *eFolder*).
4. In the *Management IT Solution* field, select **Custom.**
5. In the *Custom Solution 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.**



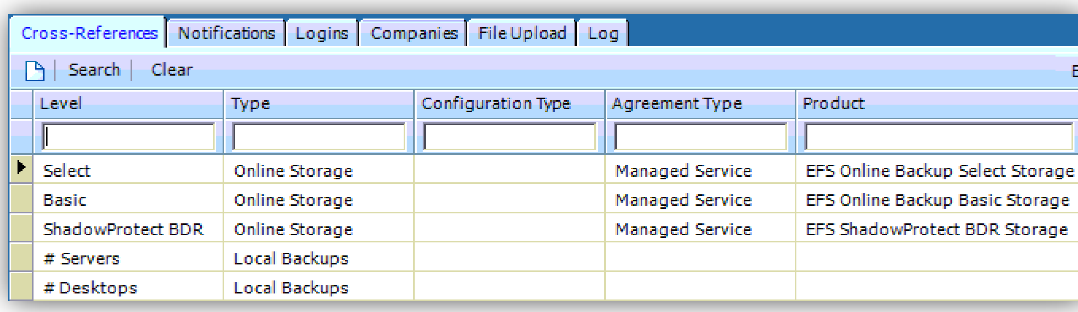
Step 5. Cross-reference ConnectWise Products with eFolder Services

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.



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



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.

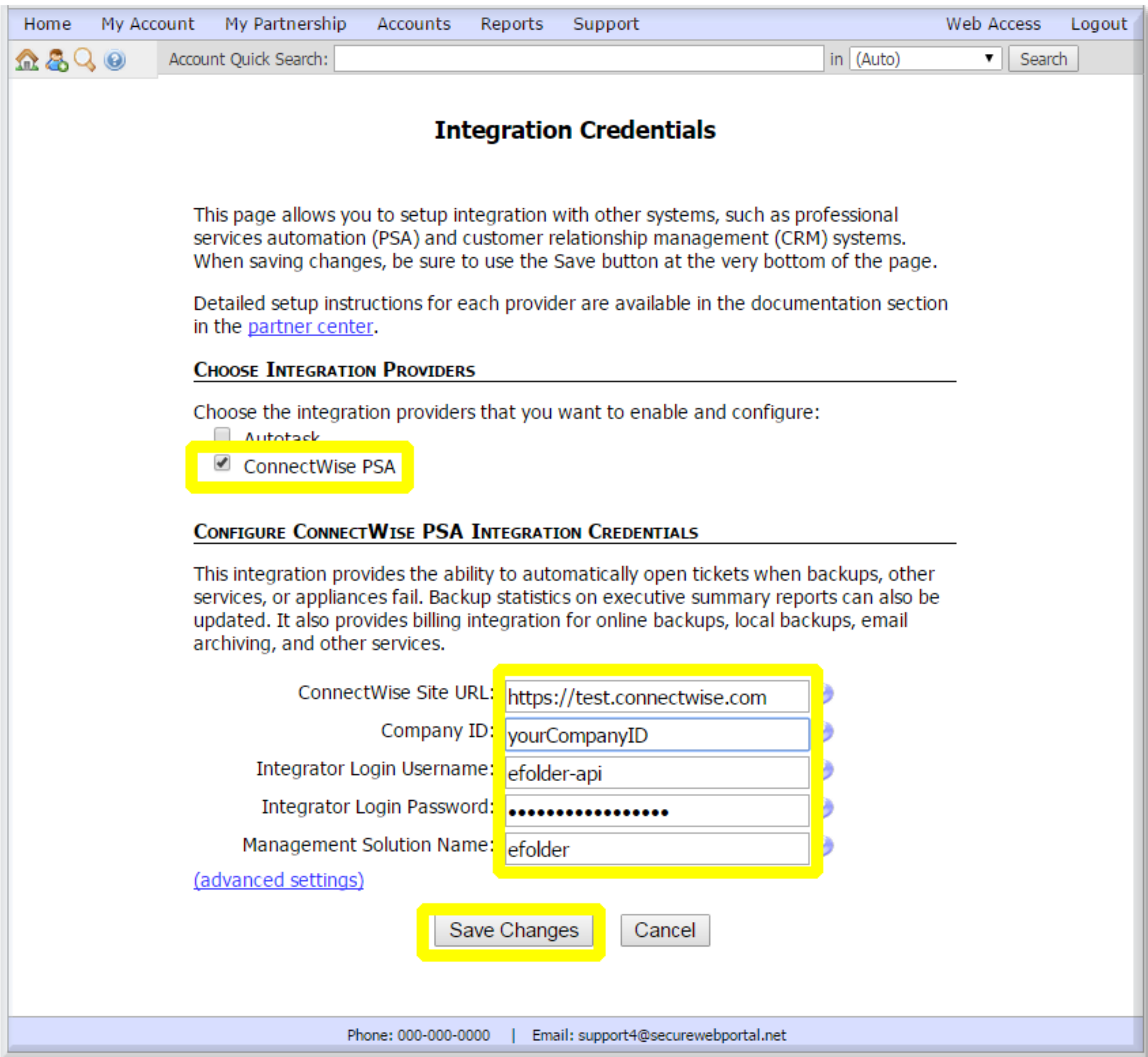
Step 6a. Configure ConnectWise Credentials in the eFolder Web Portal

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.

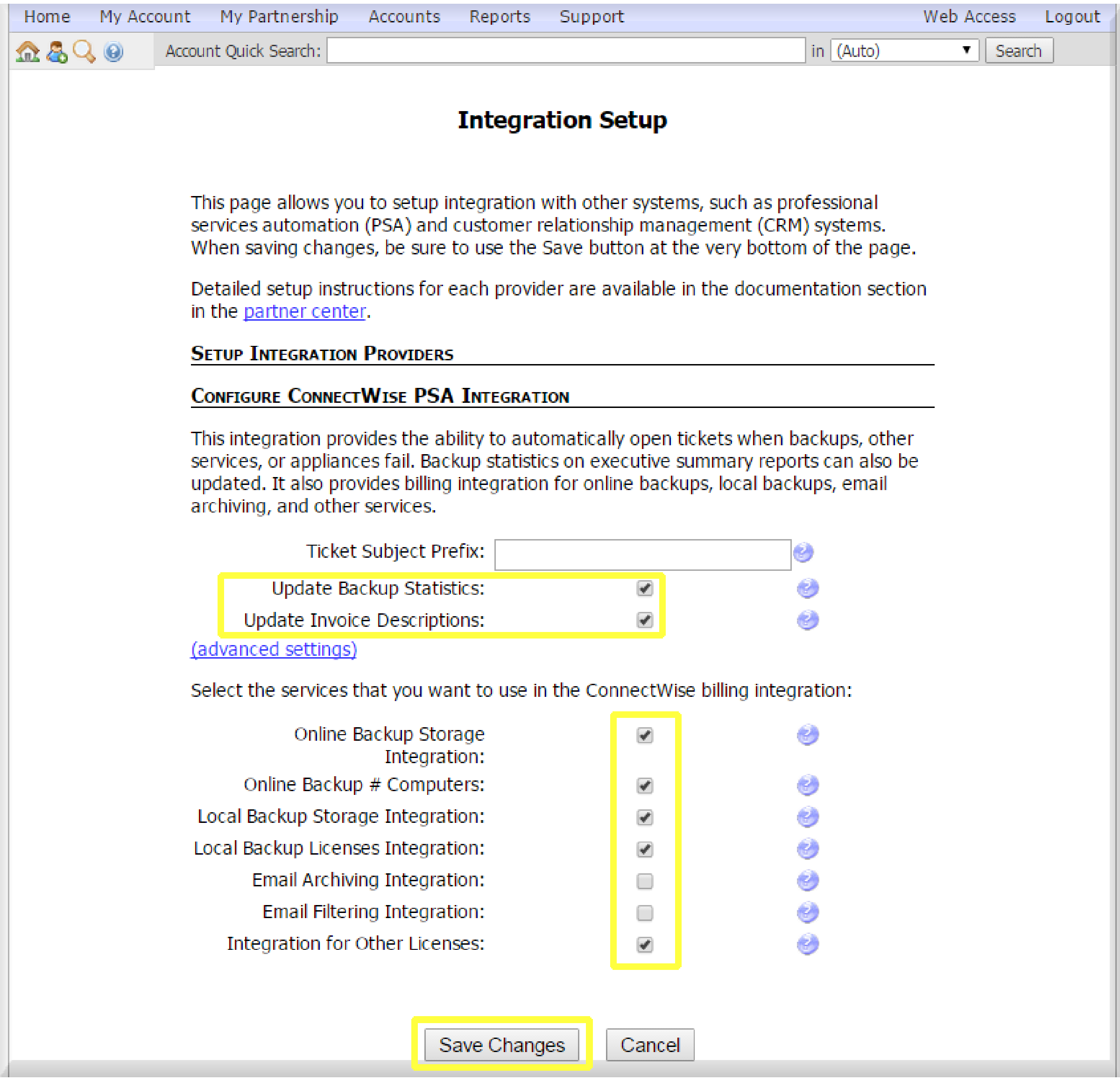
Note: ConnectWise requires https for integration. This entry should start with https:// in the URL.

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**.



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.



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 *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).
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.**

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.

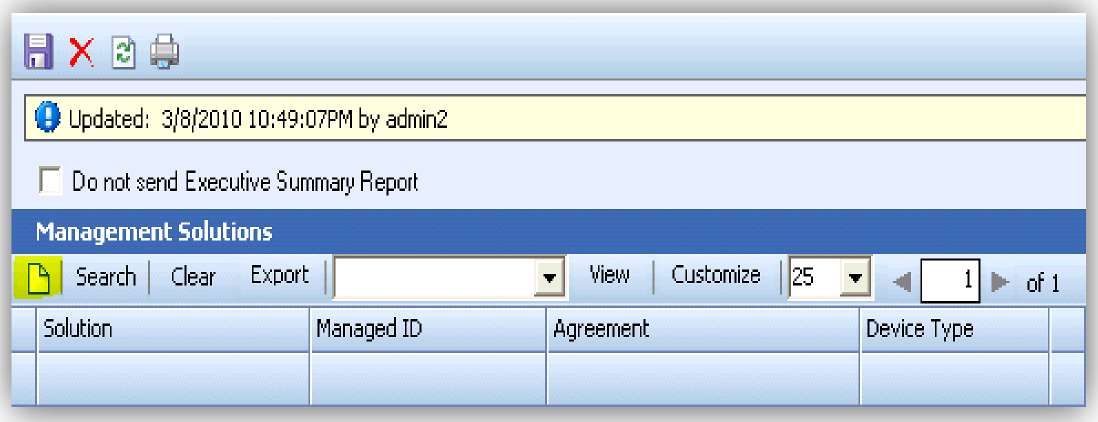
Per-Company Setup Overview with ConnectWise

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.

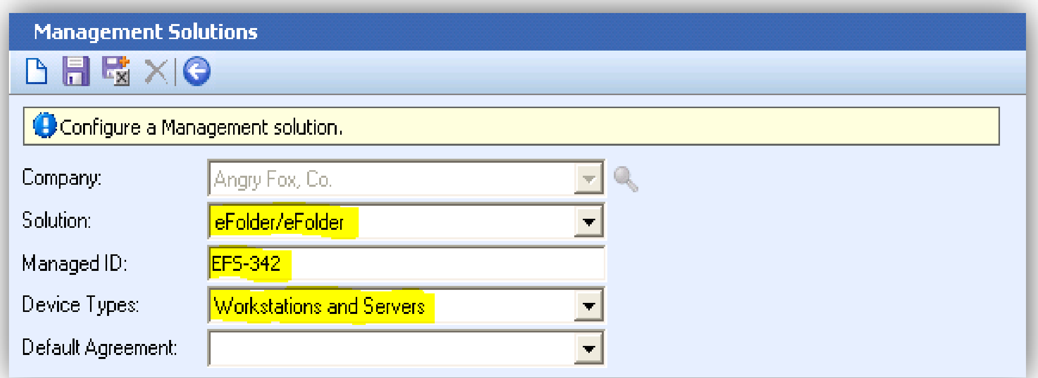
Step 1. Configure the Managed ID for a ConnectWise Company

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.

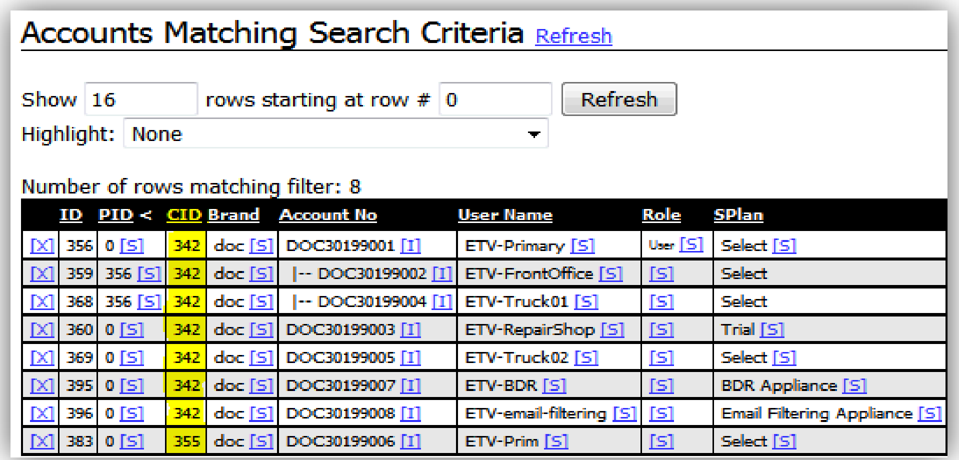


2. Click the **Management** tab. If the **New** button is grayed out, click the **Save** button.
3. Click the **New** button in the *Management Solutions* list:

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:

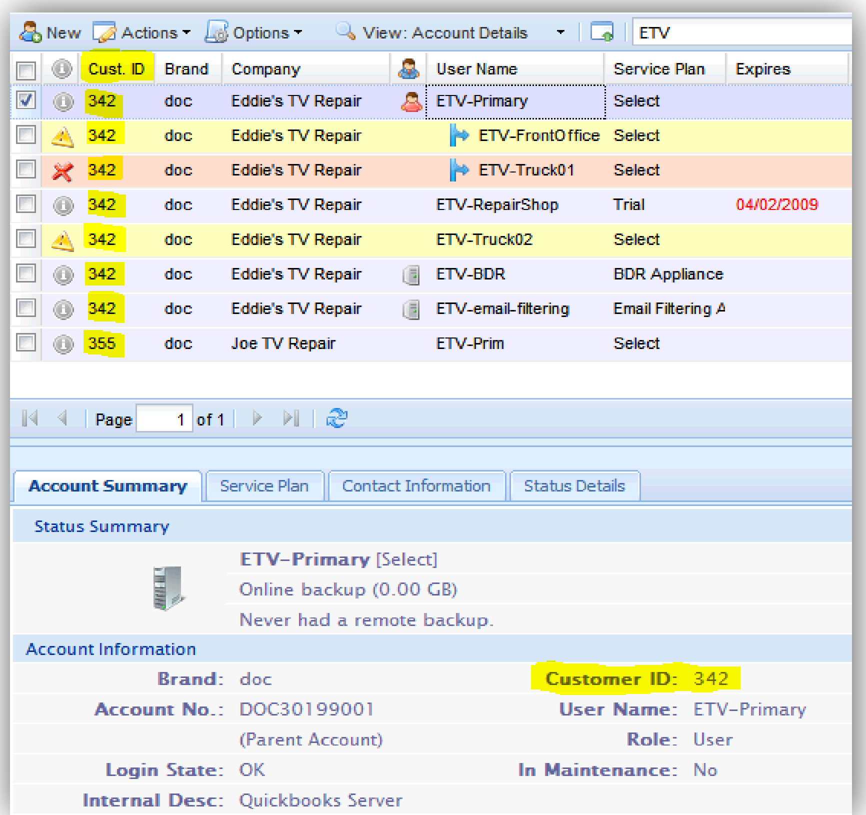

Accounts Matching Search Criteria Refresh

Show 16 rows starting at row # 0 Refresh
Highlight: None

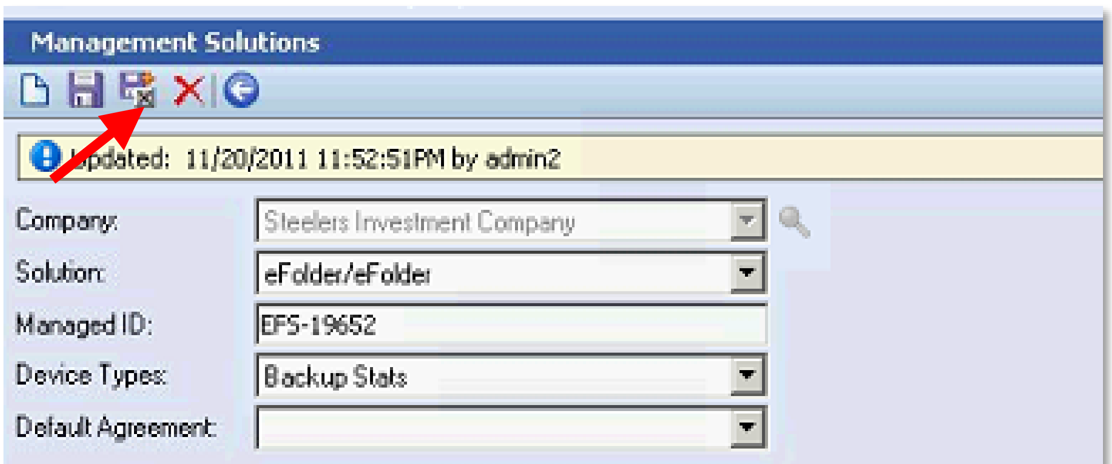
Number of rows matching filter: 8

	ID	PID <	CID	Brand	Account No	User Name	Role	SPlan
[X]	356	0 [S]	342	doc [S]	DOC30199001 [I]	ETV-Primary [S]	User [S]	Select [S]
[X]	359	356 [S]	342	doc [S]	|-- DOC30199002 [I]	ETV-FrontOffice [S]	[S]	Select
[X]	368	356 [S]	342	doc [S]	|-- DOC30199004 [I]	ETV-Truck01 [S]	[S]	Select
[X]	360	0 [S]	342	doc [S]	DOC30199003 [I]	ETV-RepairShop [S]	[S]	Trial [S]
[X]	369	0 [S]	342	doc [S]	DOC30199005 [I]	ETV-Truck02 [S]	[S]	Select [S]
[X]	395	0 [S]	342	doc [S]	DOC30199007 [I]	ETV-BDR [S]	[S]	BDR Appliance [S]
[X]	396	0 [S]	342	doc [S]	DOC30199008 [I]	ETV-email-filtering [S]	[S]	Email Filtering Appliance [S]
[X]	383	0 [S]	355	doc [S]	DOC30199006 [I]	ETV-Prim [S]	[S]	Select [S]

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:



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.

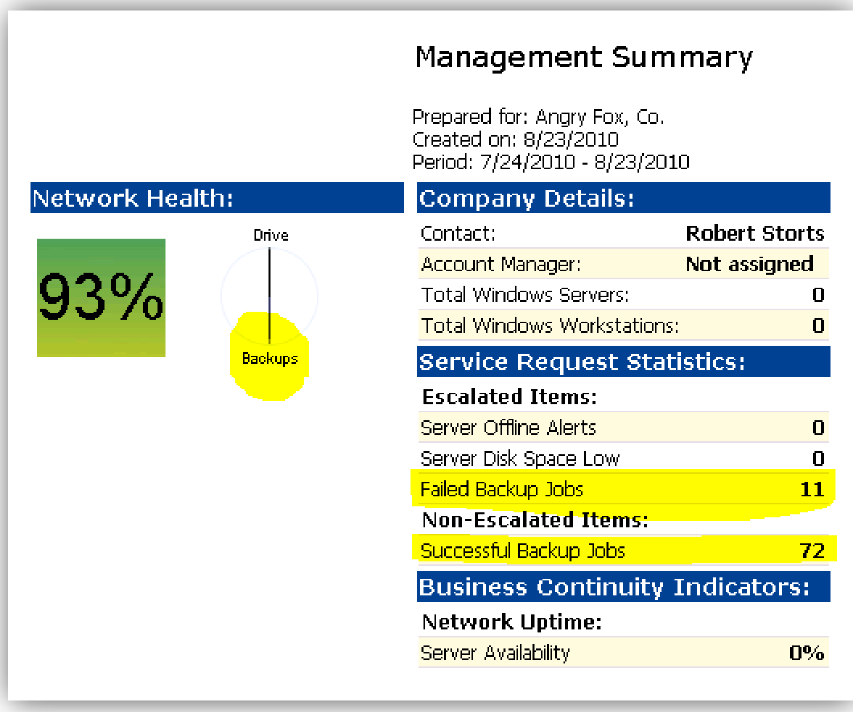


12. Click the **Save** and **Close** button to return to the *Management* tab.
13. Ensure the entry order has *Workstations and Servers* first and *Backup Stats* second.

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

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.

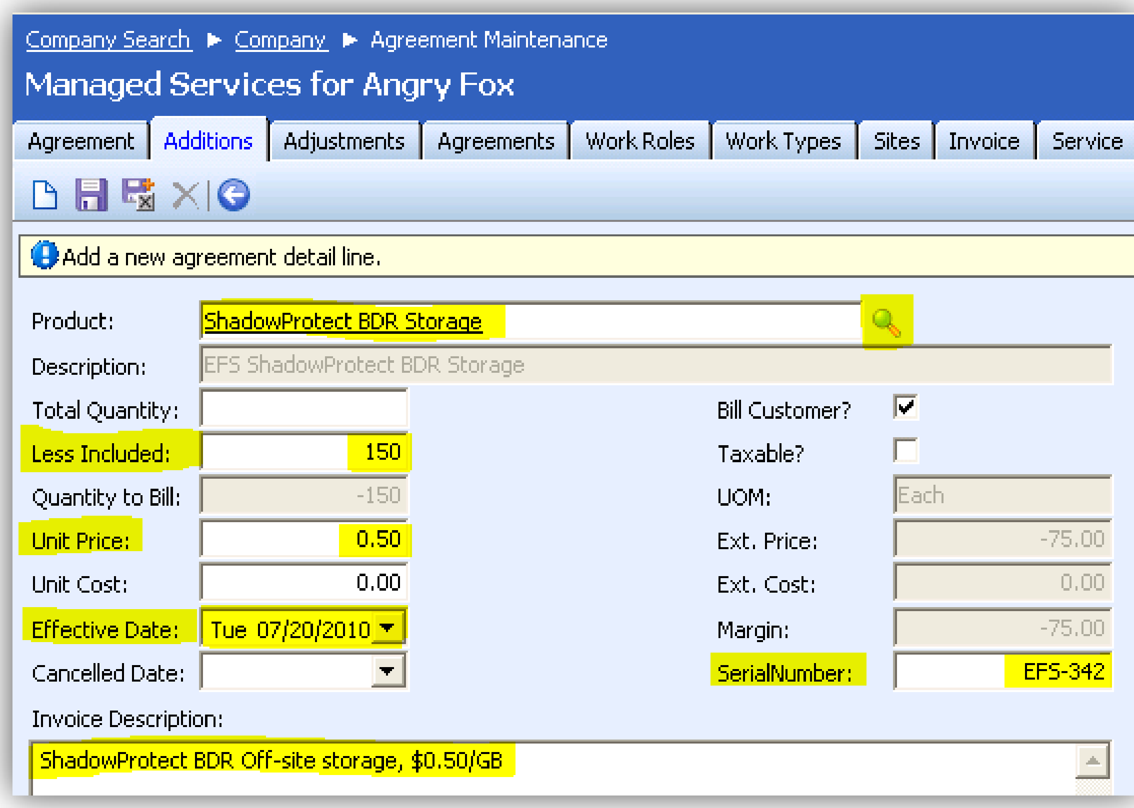
c. Customize the unit price, if necessary.

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.



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:

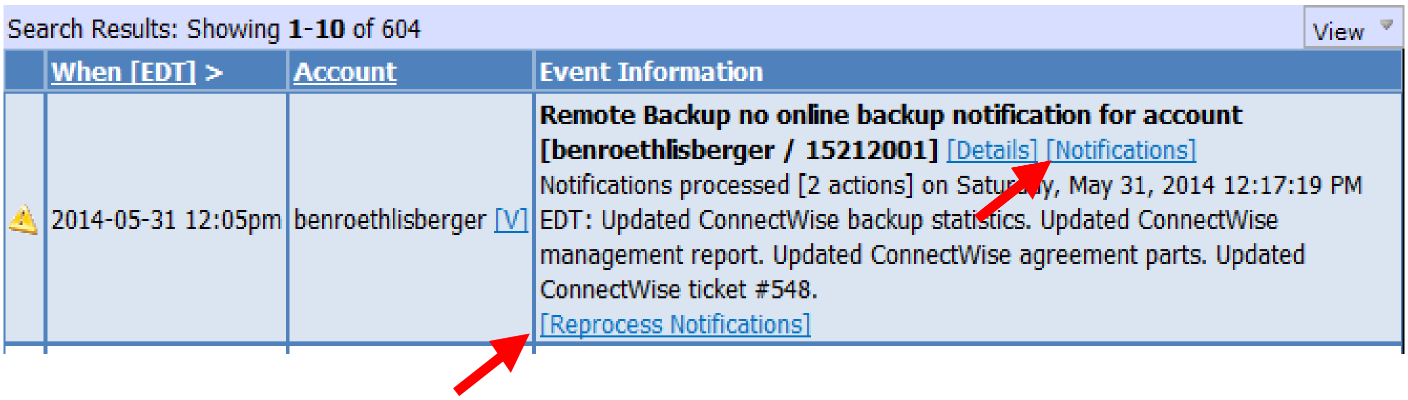
A. Select **Accounts> Account List (Detailed View)** on the Main Menu bar. Enter the user account in the *Quick Search* box and click **Search**.
B. In the *Account No.* column (fifth labeled column from the left), click the **[E]** beside the Account Number.


Search Results: Showing 1-3 of 3

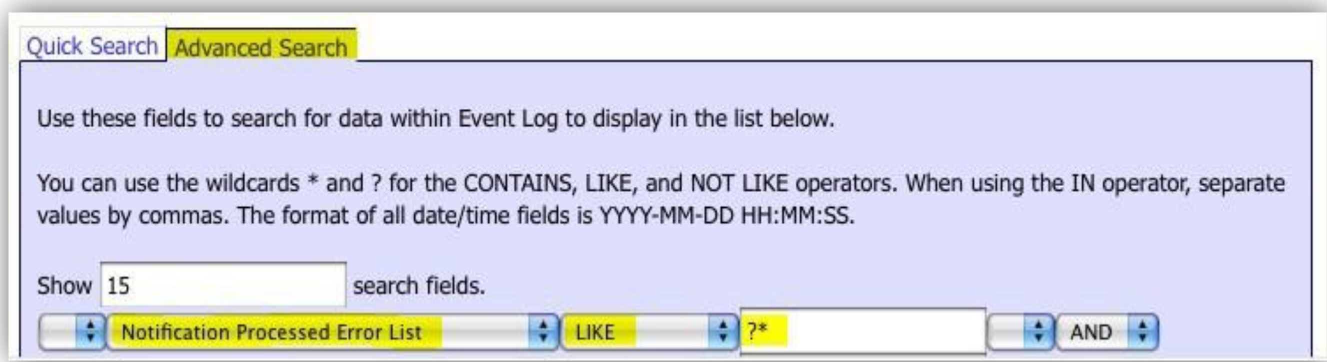
	ID	PID <	CID	Brand	Account No	User Name	Role
[X]	26343	0 [S]	19652	sic [S]	15212001 [I] [L] [E]	benroethlisberger [S]	Partner Senior Manager [S]

- 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.



- 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:

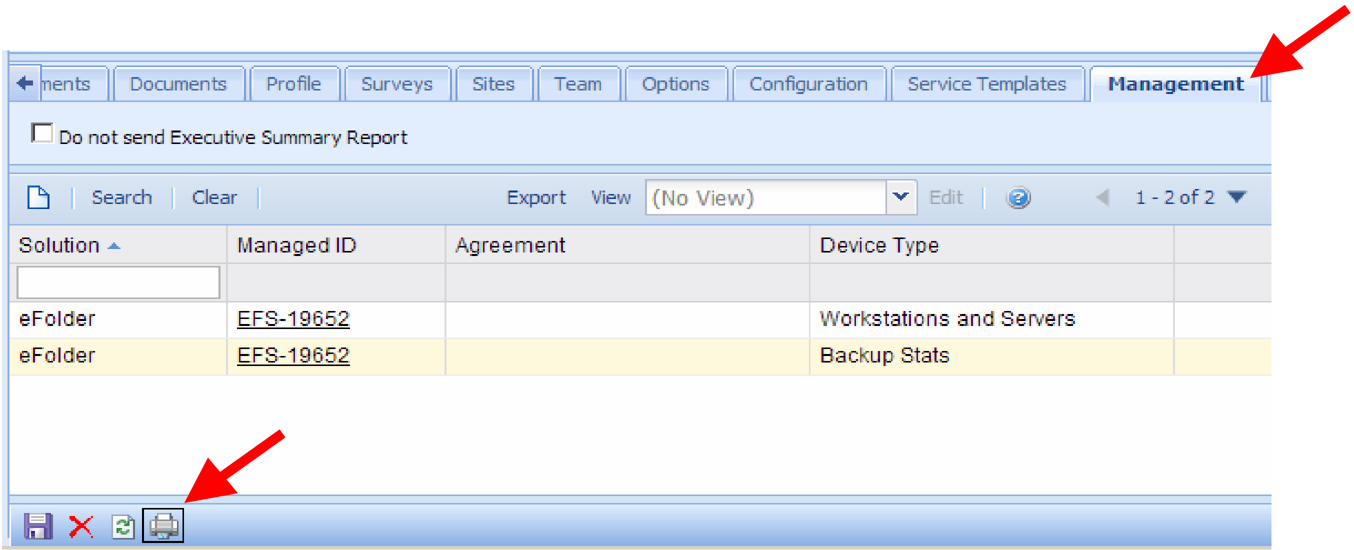


This will return a list of events with notification action problems (such as pushing information into ConnectWise).

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:

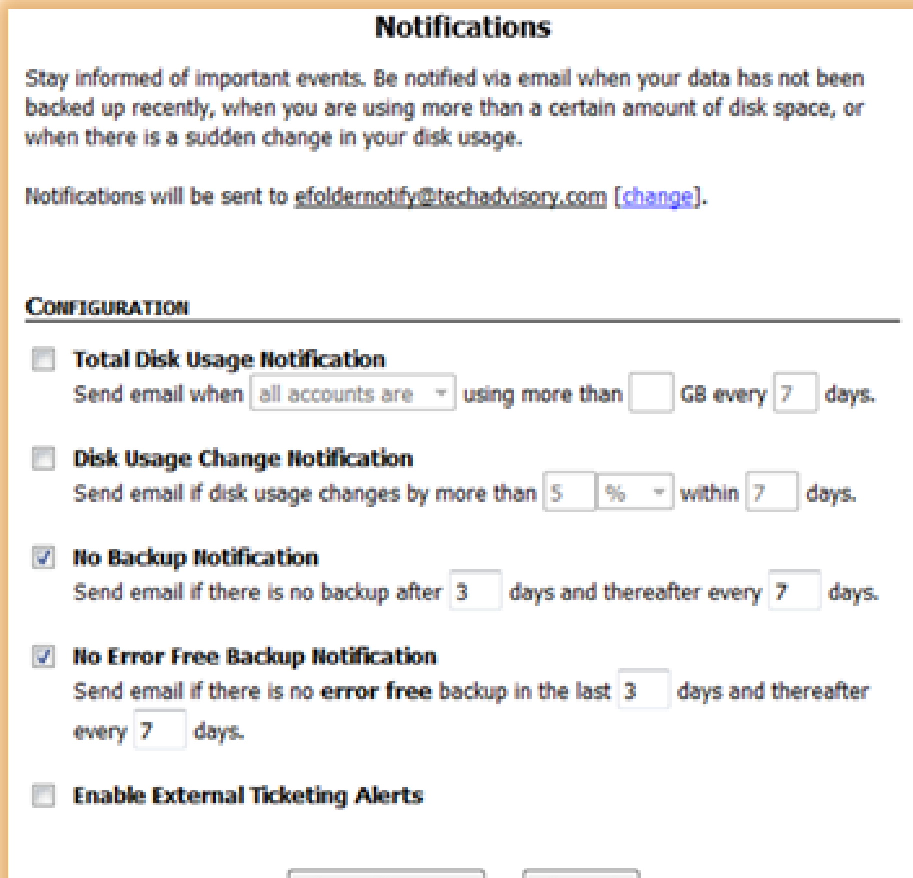
1. Create a separate email address to use for *Notifications and Contact Information.* For example, *backupnotify@companyname.net* is different from the ConnectWise Service Board address *Support@companyname.net* used to create tickets.

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 Porta)l 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 or call us at 800-352-0248

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