ConnectWise Management ID Error GUIDE

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ConnectWise Management ID Error Overview

A common error you might receive after completing the initial eFolder ConnectWise Integration is the ConnectWise Management ID Error. 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 and provide the connection for the Integration Sync. To make these associations and establish this sync, complete the following steps on each user account and each ConnectWise company.

Step 1. Verify the existence of errors in the eFolder Web Portal Event Log

A. In the eFolder Web Portal:
1. Click **Account List (Detailed View)**, enter the *user account* in the *Quick Search* box and click **Search**.
2. In the Account No. column (fifth labelled column from the left), click the **[E]** beside the Account Number (for example: "EFS123456789 [I] [L] **[E]** [License Keys]") to view the Event Log.
3. In the Event Information column (third labelled column from the left), click the **Errors** link to view the error descriptions.
4. Verify that one or both of the following errors are listed in the error descriptions:
   - The error: "Could not update ticket: Managed ID not found in ConnectWise" (see Figure 1.1).

| ⚠ | 2013-06-03 10:01am | TroyPolamalu [V] | **Failed to update ConnectWise ticket #665. [TroyPolamalu / SIC15212001]** [Errors]
Could not update ticket: Managed ID not found in ConnectWise.
[Details] [Notifications] |

Figure 1.1

   - The error in the middle of the description coding: "Managed ID not found."

Step 2. Configure Managed ID for ConnectWise Company

A. Within ConnectWise:
1. Open the *Company* screen in ConnectWise and find the company record you need to configure. Click the **company name** 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 (see Figure 2.1):
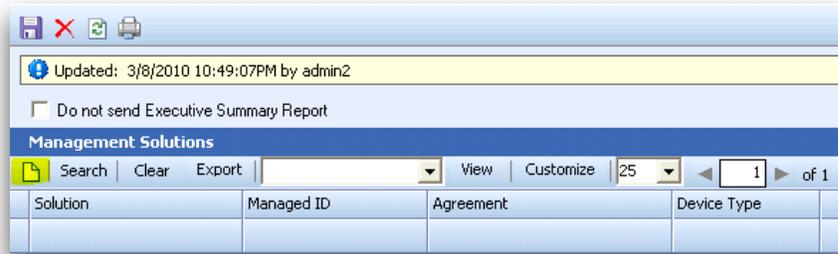
Figure 2.1

4. Set the *Device Types* to **Workstations and Servers**. Leave the *Default Agreement* blank.
5. In the *Managed ID* field, enter the EFS-efoldercustomerid (for example, EFS‑342) (see Figure 2.2):

Figure 2.2

To find out the eFolder customer ID for an account, login to the eFolder Web Portal, select **Account List (Detailed View)** from 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 (see Figure 2.3):

Figure 2.3

Or, if you are using the Account Center (Visual View) in the eFolder Web Portal, the customer ID is displayed in the *Cust. ID* column or is listed in the Account Details pane (see Figure 2.4):
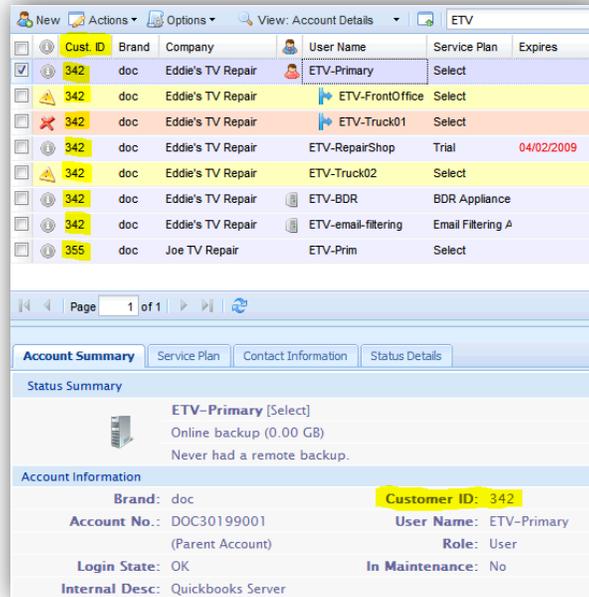

Figure 2.4

6. Click the **Save** and **Close** buttons to return to the *Management* tab.
7. Set the *Device Types* to **Backup Stats**. Leave the *Default Agreement* blank.
8. In the *Managed ID* field, enter the EFS-efoldercustomerid (for example, EFS-342) (see Figure 2.5):

Figure 2.5

9. Click the **Save** and **Close** buttons to return to the *Management* tab.
10. Ensure the entry order is exact with ***Workstations and Servers*** first and ***Backup Stats*** second. There will be a ConnectWise data flow issue if these two entries are switched (see Figure 2.6).

Figure 2.6

Step 3. Establish eFolder Web Portal Testing Integration Sync

A. In the eFolder Web Portal:
1. Select **Accounts> Account List (Detailed View)** from the Main Menu bar. Enter the user account in the *Quick Search* box and click **Search**.
2. In the *Account No*. column (fifth labelled column from the left), click the **[E]** beside the Account Number (for example: "EFS123456789 [I] [L] **[E]** [License Keys]") (see Figure 2.7) to view the Event Log.

Figure 3.1

3. In the Event Information column (third labelled column from the left), click the **Notifications** link and then click the **Reprocess Notification** link (see Figure 3.2). This will reprocess the old notification that was listed and force the notification process to re-sync within the next two to three minutes instead of waiting for the normal 12-hour daily sync to occur.

Figure 3.2

B. In ConnectWise:
4. Select *Company > Management Tab* and then click the **Printer** icon (see Figure 3.3). This will generate the *ConnectWise Executive Management Report* and display the Backup Status sync properly.
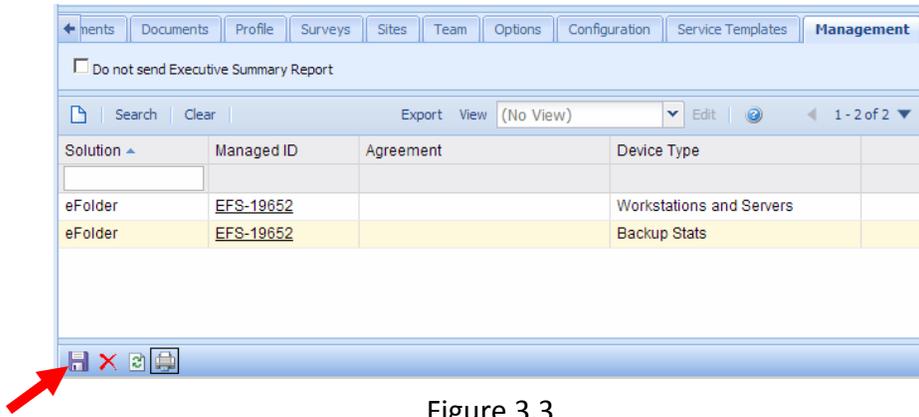
Figure 3.3

Conclusion

To resolve the Management ID Error ConnectWise issue, each web portal user account has to be changed by performing the steps listed above. In addition, the ConnectWise Company *Management* tabs will need to be added to each company accordingly.

Additional Assistance

We will assist you any way that we can. Please submit questions to support@efolder.net, call us at 800-352-0248, or browse our Knowledge Base at https://secure.efoldering.com/support/kb/.