



# ConnectWise PSA Integration Guide

Revised August 2015



Contents

Integration Overview ..... 3

Process Overview ..... 3

    Step 1. Service Status Setup (Only If Using Ticket Integration) ..... 4

    Step 2. Create an Integrator Login ..... 4

    Step 3. Create ConnectWise Products for eFolder Services ..... 5

    Step 4. Configure the eFolder Management Solution in ConnectWise ..... 8

    Step 5. Cross-reference ConnectWise Products with eFolder Services ..... 9

    Step 6a. Configure ConnectWise Credentials in the eFolder Web Portal ..... 11

    Step 6b. Configure ConnectWise Integration in the eFolder Web Portal ..... 12

    Step 7. Configure Partner-Wide Ticket Notification on the Web Portal..... 13

    Step 8. Configure Partner-Wide ConnectWise Data Synchronization..... 14

Per-Company Setup Overview with ConnectWise ..... 15

    Step 1. Configure the Managed ID for a ConnectWise Company..... 15

    Step 2. Setup Agreements to Bill for eFolder Services in ConnectWise..... 18

    Step 3. Add New ConnectWise Client Companies under Management ID..... 19

Global Integration Diagnostics Overview..... 20

Establish the eFolder Web Portal Testing Integration Sync ..... 20

    A. In the eFolder Web Portal: ..... 20

    B. In ConnectWise: ..... 21

Common Integration Issues and Resolution Steps: ..... 22

    A. Duplicate Tickets being created with ConnectWise Integration ..... 22

    B. ConnectWise Integration Sync is not working ..... 23

    C. ConnectWise Management ID Error ..... 23

Conclusion..... 24

Additional Assistance ..... 24

Copyright © 2015 eFolder Inc. All rights reserved. eFolder Inc. is the sole author of this document; use of ConnectWise trademarks does not imply official endorsement by ConnectWise. eFolder and the eFolder logo are trademarks of eFolder Inc. ConnectWise PSA and related logos are trademarks of ConnectWise. EFOLDER AND CONNECTWISE MAKE NO WARRANTIES, EXPRESSED OR IMPLIED, IN THIS DOCUMENT.

## 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 the desired 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 trail at the top is 'Setup Tables > Service Board List > Status List > Status'. The 'Statuses' tab is selected. A yellow banner 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"/>

Figure 1

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 (see Figure 2).
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.

Setup Tables > Integrator Login List > Integrator Login

**Integrator Login**

Updated: 3/7/2010 3:29:34 AM by admin1

Username: efolder-api

Password: .....

Access Level: All records

Enable Available API(s)

☒ Service Ticket API

Service Board: Professional Services

Callback URL: none

☐ Time Entry API

Member:

Callback URL:

☒ Managed Services API

☐ Enable automatic childing of Configurations [\(more info\)](#)

☐ Allow for Configurations to be childed by the Integrator

Figure 2

### 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
- Basic Online Backup Storage
- Online Backup # Servers
- Online Backup # Desktops
- ShadowProtect BDR Storage
- ShadowProtect BDR Servers
- ShadowProtect BDR Desktops
- Local Backup # Servers
- Local Backup # Desktops
- Local Backup Storage
- Email Archiving # Mailboxes
- 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.

The screenshot shows the 'Product Item' form in ConnectWise. The form is titled 'Products > Product Item' and 'Product Item'. It has tabs for 'Product Item', 'References', 'Inventory', and 'Audit Trail'. A status bar indicates 'Updated: 7/19/2010 8:39:49 PM by admin2'. The form fields are as follows:

Product ID:	Online Backup Basic Storage		
Description:	EFS Online Backup Basic Storage		
Category/Sub Category:	Managed Services / Managed Services		
Product Type:	Software		
Product Class:	Service	Serialized Product:	<input type="checkbox"/>
Phase Product:	<input type="checkbox"/> ?	Apply Cost by Serial #:	<input type="checkbox"/>
Unit of Measure (UOM):	Each	Minimum Stock Level:	0
Unit Price:	1.50	Price Attribute:	
Unit Cost:	0.00		
Taxable:	<input type="checkbox"/>		
Customer Description:	Basic online backup, \$1.50/GB		

Figure 3

**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 in Figure 4:

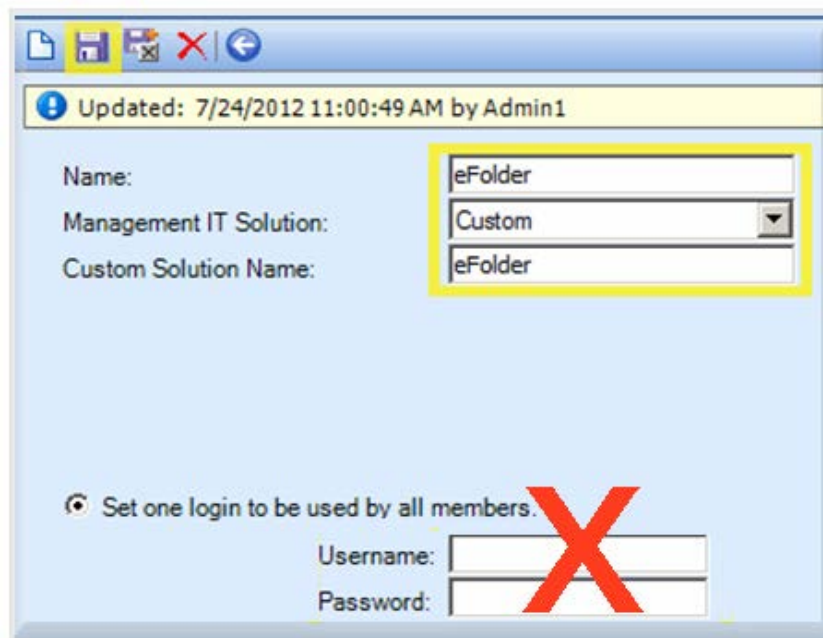
Product Search ▶ Product				
Product Item Search				
<input type="checkbox"/> Action ▾   Search   Clear				
	ID	Description	Price	Cost
<input type="checkbox"/>		EFS		
<input type="checkbox"/>	Email Archiving # Mailboxes	EFS Email Archiving # Mailboxes	2.500000	0.000000
<input type="checkbox"/>	Email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

**Figure 4**

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

A management solution must be setup in ConnectWise to represent the eFolder services. Refer to Figure 5:

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: [Redacted]

Password: [Redacted]

Figure 5



## 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:	eFolder	Portal URL:		Username:	
Solution:	eFolder	Login By:	Global	Password:	
Integrator Login:	efolder-api	Disable Newly discovered Cross-References:	<input checked="" type="checkbox"/>		

Defaults for Configurations

Location:

Business Unit:

Defaults for Agreements

Billing Level: Detailed

Match on Serial Number: ☒

Figure 6

11. The **Cross-References** tab appears on the bottom half of the screen (see Figure 7):

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			

Figure 7

12. For **each** ConnectWise product that needs to be cross-referenced with an eFolder service, perform the following steps (refer to Figure 7):

- Click the **New** icon in the top-left corner of the cross-reference table.
- Complete the *Level*, *Type*, and *Configuration Type* fields according to the table below (see Figure 8).

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 Servers	License
Other Licenses	ShadowProtect Desktops	License
Email Archiving	Exchange	License
Email Filtering		License

Figure 8

- In the *Agreement Type* field, select *Managed Service* (or whatever is appropriate for your system—any agreement type is okay).
- 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 (refer to the example in Figure 9a):

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 to be active. This entry should start with **https://** in the URL.
5. Enter your ConnectWise *Company ID*, *Integrator Login Username*, and *Password* (which you created in *Step 2. Create an Integrator Login*) in their respective fields.
6. Click **Save Changes** to save your changes.

The screenshot displays the 'Integration Credentials' page in the eFolder Web Portal. The page has a navigation bar at the top with links: Home, My Account, My Partnership, Accounts, Reports, Support, Web Access, and Logout. Below the navigation bar is a search bar labeled 'Account Quick Search:' with a dropdown menu set to 'In (Auto)' and a 'Search' button. The main content area is titled 'Integration Credentials' and includes a brief explanation of the page's purpose. It then presents a section titled 'CHOOSE INTEGRATION PROVIDERS' with a list of providers: 'Autotask' (unchecked) and 'ConnectWise PSA' (checked). Below this is a section titled 'CONFIGURE CONNECTWISE PSA INTEGRATION CREDENTIALS' with a detailed description of the integration. The configuration fields are: 'ConnectWise Site URL' (https://test.connectwise.com), 'Company ID' (yourCompanyID), 'Integrator Login Username' (efolder-api), 'Integrator Login Password' (masked with dots), and 'Management Solution Name' (efolder). A link for '(advanced settings)' is provided below the 'Management Solution Name' field. At the bottom of the form are 'Save Changes' and 'Cancel' buttons. The footer of the page shows contact information: 'Phone: 000-000-0000' and 'Email: support4@securewebportal.net'.

Figure 9a

**Note:** ConnectWise has divided cloud hosting into two or more different areas/clouds. This will require different host addresses as follows:

- Hosted URLs should use the URL: *https://na.myconnectwise.net/CompanyID*
- If you are using integrations via the API's, use the URL: *api-na.myconnectwise.net*
- For any partner that is on hosted ConnectWise (for example, myconnectwise.net), use either the URL: *https://api.myconnectwise.net* or the URL: *https://theirbrandsubdomain.myconnectwise.net*.
- If the URLs listed above do not work, please open a ticket with ConnectWise Support to find out your company's correct URL to use.

## 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. (refere to the example in Figure 9b):
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.

Home My Account My Partnership Accounts Reports Support Web Access Logout

Account Quick Search: [ ] in (Auto) Search

### Integration Setup

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](#).

#### SETUP INTEGRATION PROVIDERS

##### CONFIGURE CONNECTWISE PSA INTEGRATION

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.

Ticket Subject Prefix: [ ]

Update Backup Statistics: ☒

Update Invoice Descriptions: ☒

[\(advanced settings\)](#)

Select the services that you want to use in the ConnectWise billing integration:

Online Backup Storage Integration: ☒

Online Backup # Computers: ☒

Local Backup Storage Integration: ☒

Local Backup Licenses Integration: ☒

Email Archiving Integration: ☐

Email Filtering Integration: ☐

Integration for Other Licenses: ☒

Save Changes Cancel

Figure 9b

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

This section can be skipped if you do not want to 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**.

Setting	Value
Notification Action	Open a ConnectWise ticket
Include Sub-Brands	Yes
Subscribe to OK Events	No
Subscribe to Warnings	Yes
Subscribe to Errors	Yes
Subscribe to All Event Types	Yes
Comments	

Create
Cancel
Back to [Partner Notifications List](#)

Figure 10

Step 8. Configure Partner-Wide ConnectWise Data Synchronization

This section can be skipped if you do not want to synchronize backup statistics or perform billing integration. To enable these features, follow these steps (refer to Figure 11):

- 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.
- 3. Select **Synchronize with ConnectWise** in the *Notification Action* field.
- 4. Select **Yes** in the *Subscribe to All Event Types* field to subscribe to all event severities.
- 5. Select **Yes** in all the other fields to subscribe to all event types.
- 6. Click **Create** to create a new integration.

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

Create

Cancel

Back to [Partner Notifications List](#)

Figure 11

## 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 you need 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 (see Figure 12):

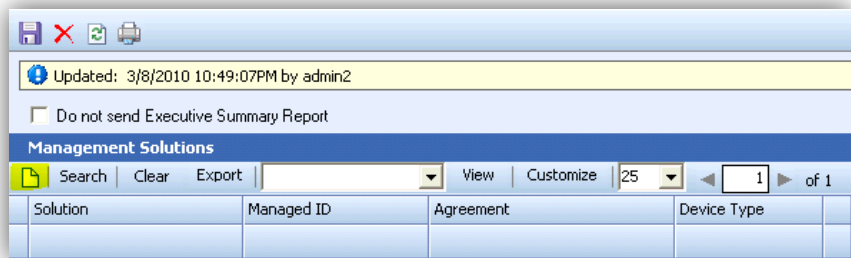


Figure 12

4. In the *Solution* field, select the management solution you created for eFolder in Step 4. Configure the eFolder Management Solution in ConnectWise (see Figure 13).
5. In the *Managed ID* field, enter EFS-[efoldercustomerid](for example, EFS-342). To find out the *eFolder Customer ID* for an account, see the instructions below Figure 13.

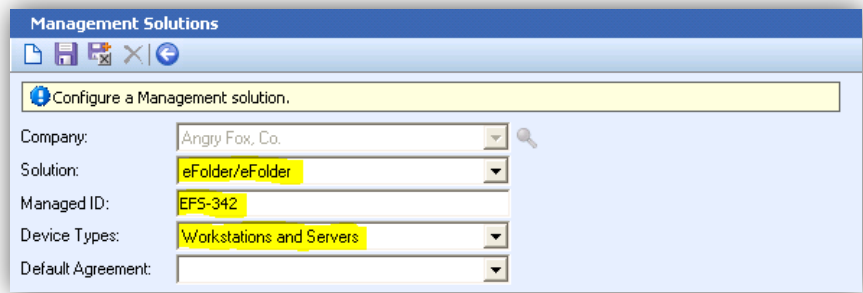


Figure 13

**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 (see Figure 14), and click **Search**. Find the eFolder account in the Account List and use the value of the CID column for that account (see Figure 14):

Accounts Matching Search Criteria [Refresh](#)

Show  rows starting at row #  [Refresh](#)  
Highlight:

Number of rows matching filter: 8

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

Figure 14

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 and is listed in the *Account Details* pane (see Figure 15):

New Actions Options View: Account Details ETV

<input checked="" type="checkbox"/>	Cust. ID	Brand	Company	User Name	Service Plan	Expires
<input checked="" type="checkbox"/>	342	doc	Eddie's TV Repair	ETV-Primary	Select	
<input checked="" type="checkbox"/>	342	doc	Eddie's TV Repair	ETV-FrontOffice	Select	
<input checked="" type="checkbox"/>	342	doc	Eddie's TV Repair	ETV-Truck01	Select	
<input checked="" type="checkbox"/>	342	doc	Eddie's TV Repair	ETV-RepairShop	Trial	04/02/2009
<input checked="" type="checkbox"/>	342	doc	Eddie's TV Repair	ETV-Truck02	Select	
<input checked="" type="checkbox"/>	342	doc	Eddie's TV Repair	ETV-BDR	BDR Appliance	
<input checked="" type="checkbox"/>	342	doc	Eddie's TV Repair	ETV-email-filtering	Email Filtering A	
<input checked="" type="checkbox"/>	355	doc	Joe TV Repair	ETV-Prim	Select	

Page 1 of 1

Account Summary Service Plan Contact Information Status Details

Status Summary

**ETV-Primary** [Select]  
Online backup (0.00 GB)  
Never had a remote backup.

Account Information

Brand: doc **Customer ID: 342**  
Account No.: DOC30199001 (Parent Account) User Name: ETV-Primary Role: User  
Login State: OK In Maintenance: No  
Internal Desc: Quickbooks Server

Figure 15



- 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-342) (see Figure 16).
- 10. In the *Device Types* field, select **Backup Stats**.
- 11. Leave the *Default Agreement* field blank.



Figure 16

- 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 (see Figure 17).

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

Figure 17

- 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 (see Figure 18):

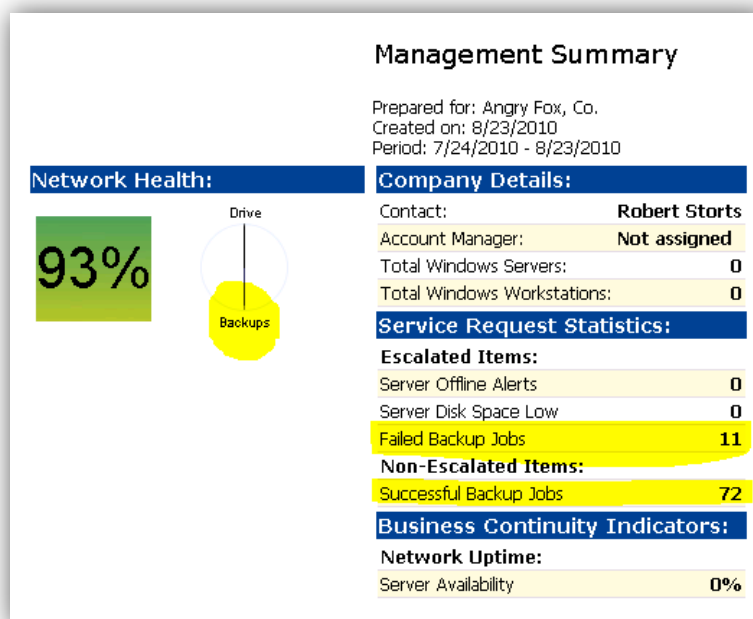


Figure 18

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

In this step, we will 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 you need 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 (refer to Figure 19):
  - 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:

Less Included: 150

Quantity to Bill: -150

Unit Price: 0.50

Unit Cost: 0.00

Effective Date: Tue 07/20/2010

Cancelled Date:

Bill Customer? ☒

Taxable? ☐

UOM: Each

Ext. Price: -75.00

Ext. Cost: 0.00

Margin: -75.00

SerialNumber: EFS-342

Invoice Description: ShadowProtect BDR Off-site storage, \$0.50/GB

Figure 19

### 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 that needs to integrate with eFolder services, you must add the two Management ID entries you previously configured in ConnectWise. (Repeat steps 1 through 14 under *Step 1. Configure the Managed ID for a ConnectWise Company* on pages 15-17 of this Guide)

## Global Integration Diagnostics Overview

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.) We record the success or failure of pushing information into ConnectWise in the partner **Event Log** in the Web Portal (see Figure 20).

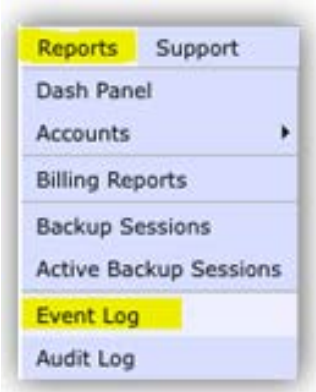


Figure 20

## Establish the eFolder Web Portal Testing Integration Sync

### A. In the eFolder Web Portal:

1. Select **Accounts> Account List (Detailed View)** on the Main Menu bar. Enter the user account in the *Quick Search* box and click **Search**.
2. In the *Account No.* column (fifth labeled column from the left), click the **[E]** beside the Account Number (for example: "EFS123456789 [I] [L] **[E]** [License Keys]") to view the Event Log (see Figure 21).

Search Results: Showing 1-3 of 3

ID	PID <	CID	Brand	Account No	User Name	Role
<a href="#">[X]</a>	26343	0 <a href="#">[S]</a>	19652	sic <a href="#">[S]</a> 15212001 <a href="#">[I]</a> <a href="#">[L]</a> <a href="#">[E]</a>	benroethlisberger <a href="#">[S]</a>	Partner Senior Manager <a href="#">[S]</a>

Figure 21

3. 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, details about what notification actions were taken are available by clicking the **[Notifications]** link in the *Event Information* row.
4. Click the **Reprocess Notification** link (see Figure 22). This will reprocess the old notification that was listed and force the notification process to re-sync within the next several minutes instead of waiting for the normal 12-hour daily sync to occur.

Search Results: Showing 1-10 of 604

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

Figure 22

It is possible to search the event log only for events that encountered problems 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 (see the example in Figure 23).

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 15 search fields.

Figure 23

This will return a list of those events that had trouble with their notification actions (such as pushing information into ConnectWise).

## B. In ConnectWise:

1. Select the **Company > Management** tab and then click the **Printer** icon (see Figure 24). This will generate the *ConnectWise Executive Management Report* and display the Backup Status sync properly.

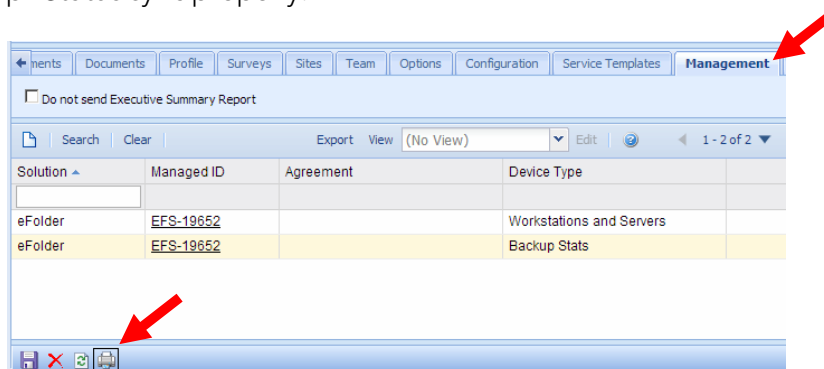


Figure 24

## Common Integration Issues and Resolution Steps:

## A. Duplicate Tickets being created with ConnectWise Integration

Complete the following steps on each Web Portal user name account and each ConnectWise Company Setup (refer to Figure 25).

1. Create a separate email address to use for *Notifications and Contact Information* (for example, *backupnotify@companyname.net*) which is different from the ConnectWise Service Board address (for example, *Support@companyname.net*) 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: **No Backup Notification** and **No Error Free Backup Notification**).
4. Uncheck the **Enable External Ticketing Alerts** checkbox.
5. Click **Save Changes**.
6. Click **Stop Impersonating** in the upper right corner.
7. Repeat these seven steps for each user name account to complete setup on all user accounts in the eFolder Web Portal.

**Notifications**

Stay informed of important events. Be notified via email when your data has not been backed up recently, when you are using more than a certain amount of disk space, or when there is a sudden change in your disk usage.

Notifications will be sent to [efoldernotify@techadvisory.com](mailto:efoldernotify@techadvisory.com) [\[change\]](#).

**CONFIGURATION**

☐ **Total Disk Usage Notification**  
Send email when  using more than  GB every  days.

☐ **Disk Usage Change Notification**  
Send email if disk usage changes by more than  % within  days.

☒ **No Backup Notification**  
Send email if there is no backup after  days and thereafter every  days.

☒ **No Error Free Backup Notification**  
Send email if there is no **error free** backup in the last  days and thereafter every  days.

☐ **Enable External Ticketing Alerts**

Figure 25



---

**Important!** ConnectWise Tickets must remain on the Integration Service Board configured. These 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 to be created.

---

## 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 username and password either in the ConnectWise Table and/or the eFolder Web Portal do *not* match up. The best way to resolve this issue is to 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:** Be sure to type this in rather than copying and pasting it due to extra blank spaces that may be 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 it in 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

A common error that occurs 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, establish this sync, and resolve this error, follow the instructions in the document entitled, [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

For specific questions about this eFolder product, please contact us directly:

- Submit all eFolder questions to [support@efolder.net](mailto:support@efolder.net).
- Call us at 800-352-0248.
- Browse our [Knowledgebase](#).



The People Behind Your Cloud