



StorageCraft Autotask PSA User Guide

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StorageCraft Autotask PSA User Guide

The purpose of the StorageCraft Professional Services Automation (PSA) integration (PSA Integration) is to read license count and cloud usage data from the StorageCraft MSP portal so it can be synchronized with the Autotask PSA system.

The PSA Integration service lets you create mappings between your StorageCraft accounts and your PSA accounts to facilitate the license count and cloud usage synchronization. These accounts typically have a Contract and an associated Service offering. The PSA portal updates the number of those licenses for each account type to the related service offering within that account.

In other words the PSA tool synchronizes license counts from the StorageCraft MSP portal to the Autotask PSA.



Important: The PSA tool does NOT pull actual licenses out of the MSP portal to place them into the PSA. It only pulls down license-counts so that service agreements can be updated.

Prerequisites and Requirements

The StorageCraft PSA Integration portal requires:

- An internet connection.
- Up to date versions of Firefox, Internet Explorer, Safari, or Google Chrome.
- An active StorageCraft MSP account with applicable contracts and services.
- An appropriately configured Autotask PSA system which includes:
 - Defined contracts and agreements.
 - Defined products and services.

Features

Account Mapping

- Map and manage accounts.
- Synchronize data from the StorageCraft MSP portal to Autotask.
- Automatic inactivity logout after 20 minutes

Update Accounts

- Update unit counts for all accounts
- More accurate tracking of usage
- More accurate billing

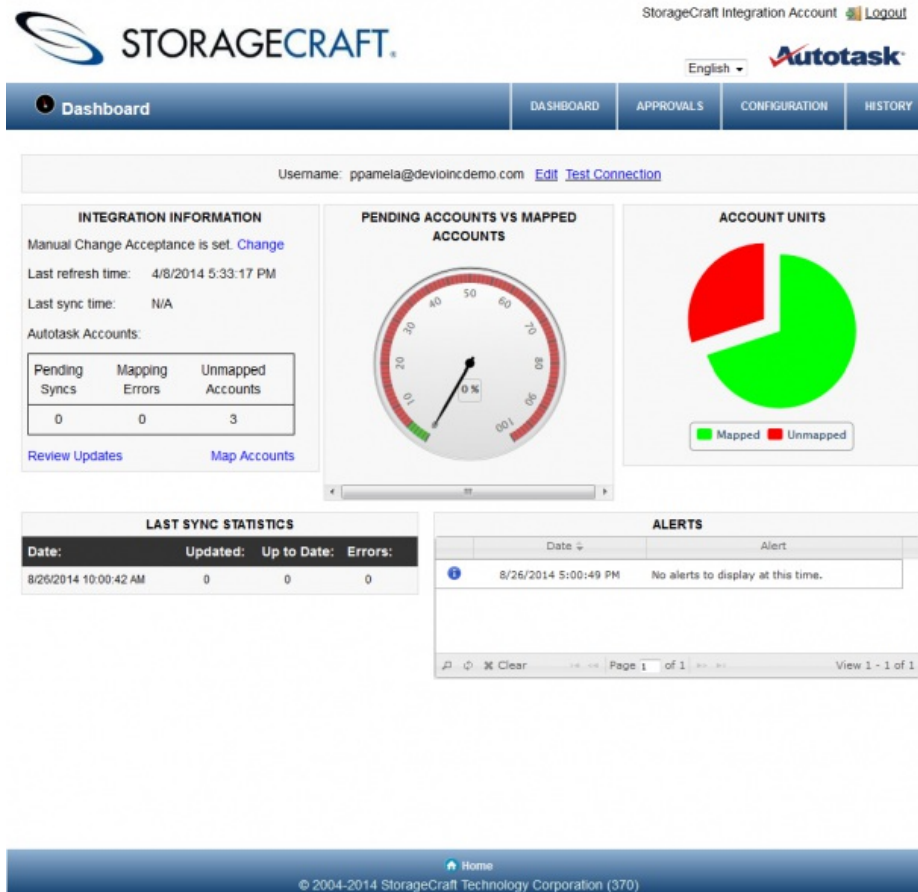
1 StorageCraft PSA Portal Overview

The StorageCraft PSA Integration Portal main screen consists of a navigation header and a dashboard.

The [navigation header](#) contains the following navigation links:

- [Dashboard](#)
- [Approvals](#)
- [Configuration](#)
- [History](#)

The dashboard is described [here](#).



2 StorageCraft PSA Integration Use Case

Overview

Before creating the PSA integration tool, scenarios like this had to be processed and maintained manually. Now, when the mappings are correct between the StorageCraft MSP account and the Autotask PSA account, the synchronization is done automatically.

The Scenario

A StorageCraft MSP company named Computech has an account in the StorageCraft MSP portal for Bob's Dentistry. Bob has three desktop computers that are protected with ShadowProtect Desktop. This means Bob is using and being billed for three active keys. The StorageCraft MSP portal contains this information which is available to Computech.

Computech is using Autotask for Professional Services Automation (PSA). When the MSP logs into the StorageCraft PSA integration service, he will link Bob's Dentistry from the StorageCraft MSP portal to an account called Bob's Dentistry in the Autotask PSA. This PSA account includes an associated contract and a service offering for desktop backup.

The Value of PSA Integration

After mapping Computech to Bob's Dentistry in Autotask, Bob's Dentistry decides to get a new (additional) desktop. The MSP installs another instance of ShadowProtect on the new desktop and activates a new key. Now the StorageCraft MSP portal indicates that Bob's Dentistry has four (4) ShadowProtect Desktop license activations instead of three (3). At the end of the next billing cycle, or when scheduled by the system, the PSA integration service detects that the ShadowProtect Desktop license count for Bob's Dentistry has increased by one (1). Whether the synchronization was done manually or automatically the PSA integration tool now shows an additional license (it updates the unit count in the PSA integration service agreement from 3 to 4).

Now, when Computech runs their billing for the Autotask PSA tool, they can properly invoice Bob's Dentistry with the accurate count of four (4) licenses.

The PSA integration works for all license types:

- Server,
- SBS,
- StorageCraft Cloud usage (GB),
- etc.

Service Offering per License Type

As an MSP you should configure your PSA to have a service offering for each license type. This is standard practice in the PSA world. It makes using the PSA Integration tool easier.

3 Integration Portal Header

The navigation header displays the name of the current page on the left side. The navigation links are shown on the right side of the navigation header.

The navigation links are activated by hovering your cursor over the chosen link.



The Dashboard and History navigation links take you directly to their respective pages (there are no drop down lists associated with these two buttons).

The Approvals and Configuration buttons each have drop down links that take you to the pages described below.

Dashboard

The dashboard allows you to see the data for all your integrations at a glance.

Approvals

The [Approvals](#) menu provides the following features:

- Pending Updates (updates that require approval).
- Sync History (log showing the updates that have been completed).

Configuration

The [Configuration](#) menu provides the following information and functions:

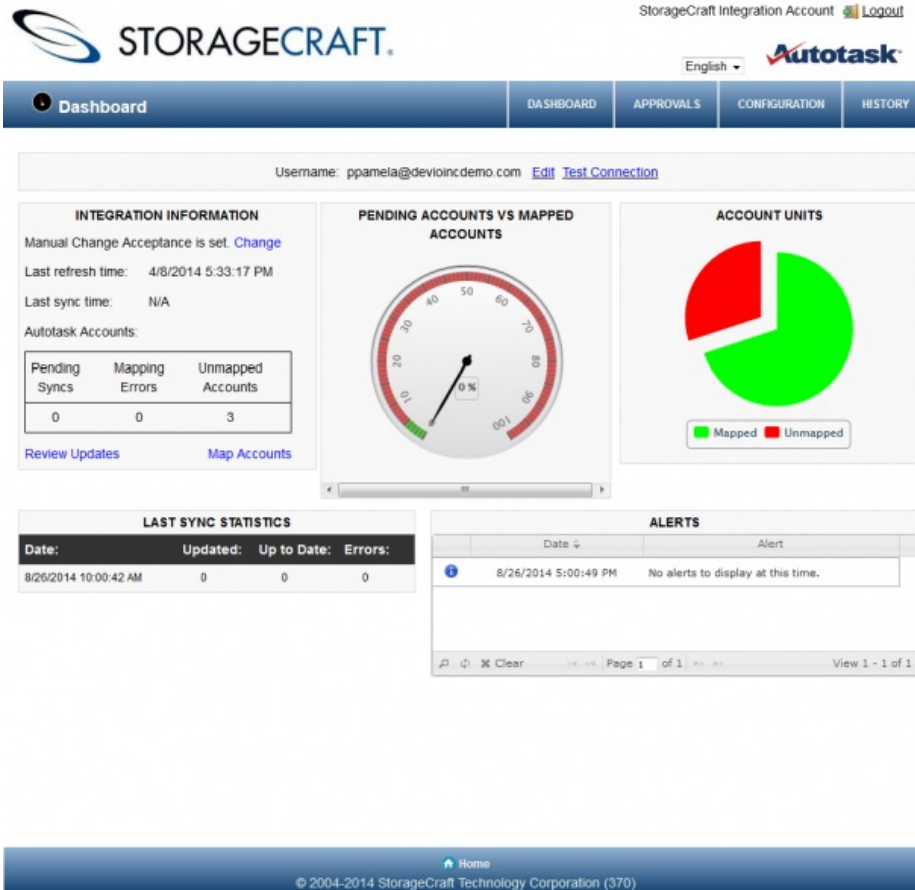
- Account Mappings displays all mapped accounts and allows you to edit accounts that are unmapped or have errors.
- Scheduling Options (preference settings for refresh intervals, approvals and reporting),
- Notifications (manages notification reporting).
- Switch PSA (allows you to switch between Autotask and other PSA tools).

History

The [History](#) page displays the site log for all the transactions.

4 StorageCraft PSA Dashboard

The dashboard provides an overview and summary of accounts and data managed in the portal.



The dashboard contains the following sections:

UserName Account

The user name section:

- Shows the name of the currently logged in user.
- The Edit button shows and allows you to change the PSA credentials associated with the integration account.
- Allows you to 'test connection' for those credentials.

Integration Information

The integration information section includes:

- Number of pending accounts.
- Errors since last refreshed.
- Unmapped accounts since last refreshed.
- A change link to toggle between automatic and manual account updates.
- Review Updates function.
- Map Accounts function.

Pending Accounts vs Mapped Accounts Gauge

This gauge shows the ratio of pending accounts compared to mapped accounts.

Account Units

The account units section shows:

- The total number of accounts in the portal.
- A breakdown of the mapped versus unmapped accounts.

Historical Data

This Historical Data section contains a log of:

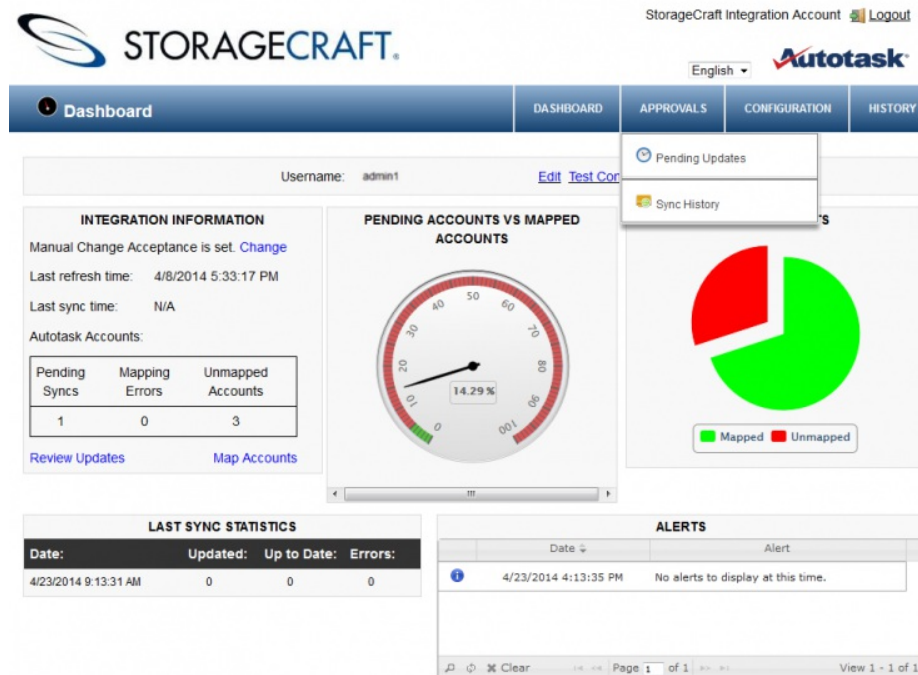
- Statistics since the last update (sync).
- The number of mappings updated (synced) successfully.
- The number of mapping errors.
- The number of changes since the previous update (sync).

Alerts

This section presents a summary of alerts for pending issues.

5 StorageCraft PSA Approvals

[Pending Updates](#) and [Sync History](#) are found under the Approvals navigation header.



5.1 StorageCraft PSA Pending Updates

Pending Updates

The Pending Updates page displays the mappings that have not yet been synchronized.

To access the page, click the Approvals navigation link, then click Pending Updates.



StorageCraft Integration Account [Logout](#)

English [Autotask](#)

Pending Updates DASHBOARD APPROVALS CONFIGURATION HISTORY

This page allows you to approve (synchronize) all pending updates for your specified mappings.

Approval options are:

- Remove selected mappings
- Select and approve specific mappings
- Approve all mappings simultaneously
- Configure automatic approval

See the Scheduling Options page to configure automatic approval.

☐ Show All Entries (including those with 0 change)?

Billing Date	Refresh Date	StorageCraft Account	License Type	Company	Autotask Customer	Service	Units	Delta

Page 1 of 1 10 No records to view

Refresh Remove Selected Approve All Approve Selected

Home
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Approval options are:

- Remove selected mappings.
- Select and approve specific mappings.
- Approve all mappings simultaneously.
- Configure automatic approval.

You can also Show all entries (including those that haven't changed) by checking the box.

5.2 StorageCraft PSA Synchronization History

The Synchronization History page displays all updated mappings for your PSA.

This includes the:

- Date
- Account name
- Specific changes.

To access the Synchronization History page, hover your cursor over the Approvals navigation link, then click Synchronization

History.


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StorageCraft Integration Account [Logout](#)

English 

Synchronization History
DASHBOARD
APPROVALS
CONFIGURATION
HISTORY

Synchronization History includes all updates to your PSA system such as the date, account name, license type, and so on.

Time Occurred ↓	StorageCraft		Autotask				Old	New
	SC Account	License Type	Company	Customer	Service			
4/23/2014 12:22:37 PM D	M	CloudPlus	BDG of Minnesota	MSP Monitoring	Gold, Laptop	2 GB	34 GB	

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6 StorageCraft PSA Configuration

PSA Configuration Options (and navigation links):

- [Account Mappings](#)
- [Scheduling Options](#)
- [Notifications](#)
- [Switch PSA](#)

Click the Configuration navigation link then select the configuration option you want.


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StorageCraft Integration Account [Logout](#)

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Dashboard
DASHBOARD
APPROVALS
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HISTORY

Username: ppamela@devioincdemo.com [Edit](#) [Test Connection](#)

INTEGRATION INFORMATION
Manual Change Acceptance is set. [Change](#)
Last refresh time: 4/8/2014 5:33:17 PM
Last sync time: N/A
Autotask Accounts:

Pending Syncs	Mapping Errors	Unmapped Accounts
0	0	3

[Review Updates](#) [Map Accounts](#)

PENDING ACCOUNTS VS MAPPED ACCOUNTS




Mapped Unmapped

LAST SYNC STATISTICS

Date:	Updated:	Up to Date:	Errors:
8/26/2014 3:20:15 PM	0	0	0

ALERTS

Date ↓	Alert
8/26/2014 10:20:17 PM	No alerts to display at this time.

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6.1 StorageCraft PSA Account Mappings

The PSA integration portal service retrieves all company contracts from your StorageCraft MSP accounts. The Account Mappings page lets you map your account information from the StorageCraft MSP portal to your PSA system (Autotask or ConnectWise). Each Account Name/Contract Name combination must also have a Service Name associated with the specific account/contract combination if you are going to map that account. Some contracts don't have services.



Note: Contract Names that don't have any attached or associated Service Names can't be mapped. You can safely ignore these unmapped accounts because they won't affect or interfere with your other mappings.



StorageCraft Integration Account [Logout](#)
 English 

Account Mappings
DASHBOARD
APPROVALS
CONFIGURATION
HISTORY

The PSA integration portal service retrieves all company contracts from your StorageCraft MSP accounts. Each account must have a service attached to the contract in order to map from the StorageCraft MSP portal to your PSA. Accounts without services can't be mapped but these unmapped accounts won't affect your other mappings.

The Account Mappings grid displays all mapped and unmapped accounts. It also shows accounts with mapping errors.

Successfully mapped accounts are identified by the  symbol.

Unmapped accounts, or Failed mappings, are identified by the  symbol.

To edit mappings:

1. Click anywhere on any single row (this puts you in edit mode for the selected row).
2. Edit the Account Mapping fields from left to right. Start with the Account Name, then License type, and so on. Select the Service Name last.
3. The changes are saved automatically when you select the Service Name.
4. Click the Reload Grid button  in the bottom left corner of the grid to update the mapping status.

StorageCraft			Autotask			
Account Name ↑	License Type	Company Name	Contract Name	Service Name		
 Customer #1	VirtualServer	Angry Fox, Co.	MSP Monitoring	Gold/Premium Server		
 Customer #1	GRE	Angry Fox, Co.	MSP Monitoring	Bronze/Basic Server		
 Customer #1	Server	Angry Fox, Co.	MSP Monitoring	Gold/Premium Server		
 Customer #1	IME	Angry Fox, Co.	MSP Monitoring	Bronze/Basic Desktop		
 Customer #2	IME	Biermann Homes	MSP Monitoring	Gold, Laptop		
 Dave McConkie	CloudPlus	BDG of Minnesota	MSP Monitoring	Gold, Laptop		
 Dave McConkie	CloudPremium					
 Dave McConkie	CloudPremium					

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[Refresh StorageCraft Accounts](#)

[Home](#)
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The Account Mappings page enables you to:

- Create new mappings for unmapped accounts.
- Fix Unmapped or Failed account mappings.
- View and manage all mapped and unmapped accounts.
- Delete unwanted mappings.

To map new accounts or edit incomplete (unmapped) or failed mappings:

1. Click anywhere in the row of an account you want to edit.
(Work from left to right)
2. Select the License Type from the drop down menu.
3. Type the name of the company in the Company Name field. This field should autopopulate after typing the first few characters of the company name.
4. Select the contract type from the Contract Name drop down.
5. Select that service type from the Service Name drop down.
6. The changes are automatically saved when you select the Service Name.
7. Click the  Reload Grid button on the left side at the bottom of the grid to update the status indicators.
8. Click the  symbol if you want to delete a mapping.

Status Indicators

The  symbol on the right side of a row indicates that the account is successfully mapped. The  symbol on the right side of a row indicates that the account is either unmapped or the mapping failed.



Important: If you need to change any selections in a previously (successfully) mapped account (such as the Contract Name or Service Name) you need to remap the account.

6.2 StorageCraft PSA Scheduling Options

The 'Scheduling Options' page allows you to configure automatic refresh and synchronization schedules.

To configure the unit refresh options:

1. Check the box for either "Enable Automatic Refreshing of Unit Quantities" or "Unit Sync Options".
2. Select the radio button for either Monthly or Daily refresh.
 1. For Monthly refresh select the day of the month and the hour of the day
 2. For Daily refresh select the hour of the day.
3. Click Save.



StorageCraft Integration Account [Logout](#)
 English [Autotask](#)

 Scheduling Options
DASHBOARD
APPROVALS
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HISTORY

Scheduling options allow you to set preferences for refreshing and syncing. Click Save when your selections are complete.

UNIT REFRESH OPTIONS

☐ Enable Automatic Refreshing of Unit Quantities

☐ Monthly on the --Select-- of the month at 0 : 00*

☒ Daily at 0 : 00*

UNIT SYNC OPTIONS

☐ Enable Automatic Syncing

☐ Monthly on the --Select-- of the month at 0 : 00*

☒ Daily at 0 : 00*

*Times are shown in 24 hour format

Save

[Home](#)
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6.3 StorageCraft PSA Notifications

This page allows you to specify a list of recipients for notifications.

1. Check the Send Notifications box.
2. Enter the email address, or addresses for the recipient(s).
3. Separate multiple email addresses with commas.
4. Click Save when all addresses have been entered.

 Notifications
DASHBOARD
APPROVALS
CONFIGURATION
HISTORY

ConnectWise sends an email notification to the recipients in the list when the "Send Notifications" box is checked.

Multiple email addresses can be added:

- One email address per rows
- All email addresses on the same row (separated by commas).

Click Save when all addresses have been added.

☐ Send Notifications

Select your time zone:

America/Los_Angeles ▼

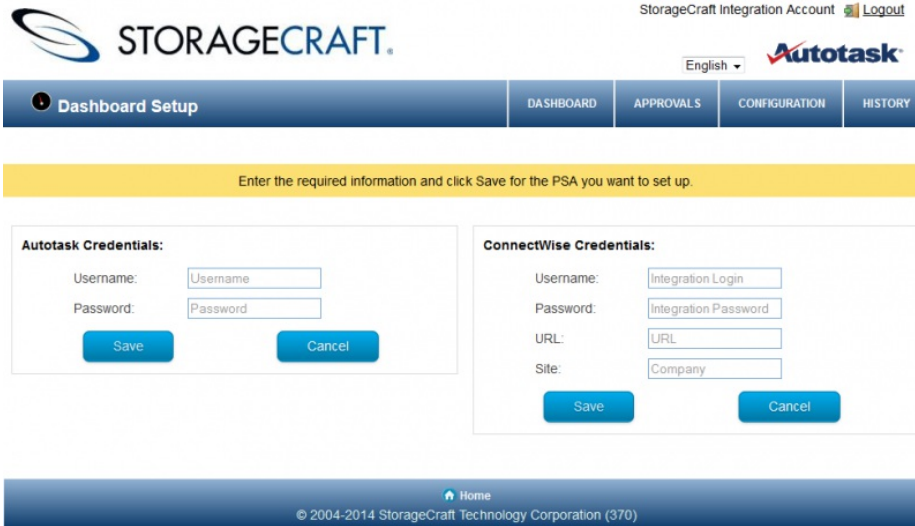
Save

6.4 StorageCraft PSA Dashboard Setup

Note: StorageCraft recommends setting up an "integration" account in your PSA with its own username and password that won't change. This will save you from having to edit this information in the StorageCraft PSA integration portal each time you change PSAs.

To change between PSAs:

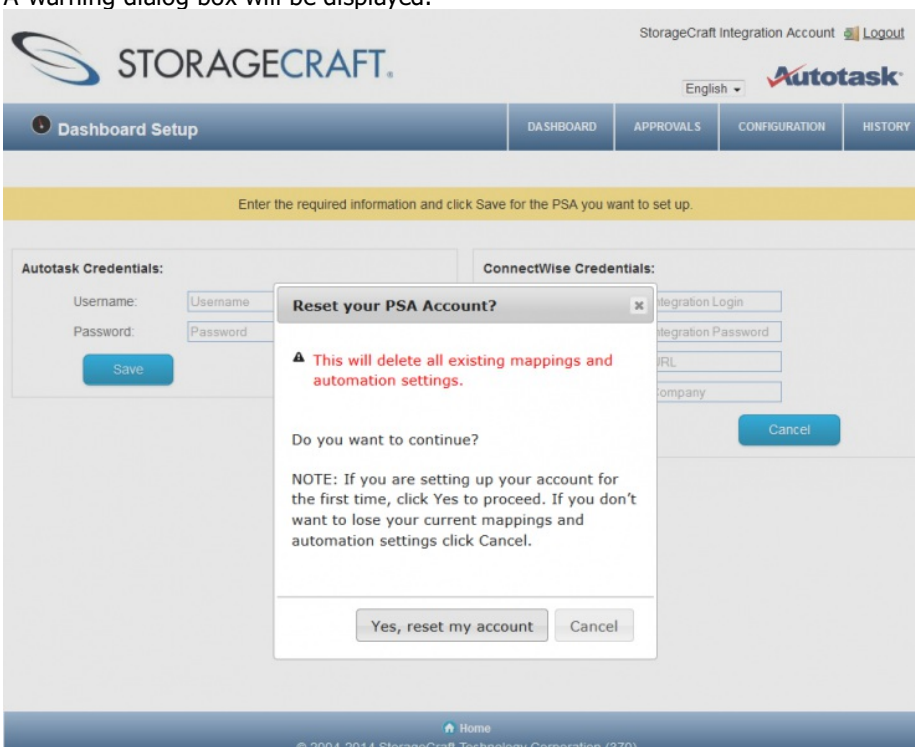
1. Log into the StorageCraft PSA Integration portal with the required credentials.
2. Move your cursor over the Configuration navigation header, then click Change PSA . . .
3. Enter the credentials (username, password, url, and site/company name) for the PSA you want to use.



Note: You can only have one current PSA setup. Setting up another PSA will delete all data and mappings.

4. Click Submit to change or reset the PSA.

A warning dialog box will be displayed.



5. Click Yes to reset your PSA account.

Warning: Clicking Yes resets your account. All previous data and mappings will be deleted because you are configuring the portal for a new PSA.

6. The Dashboard is displayed when the connection is successful.

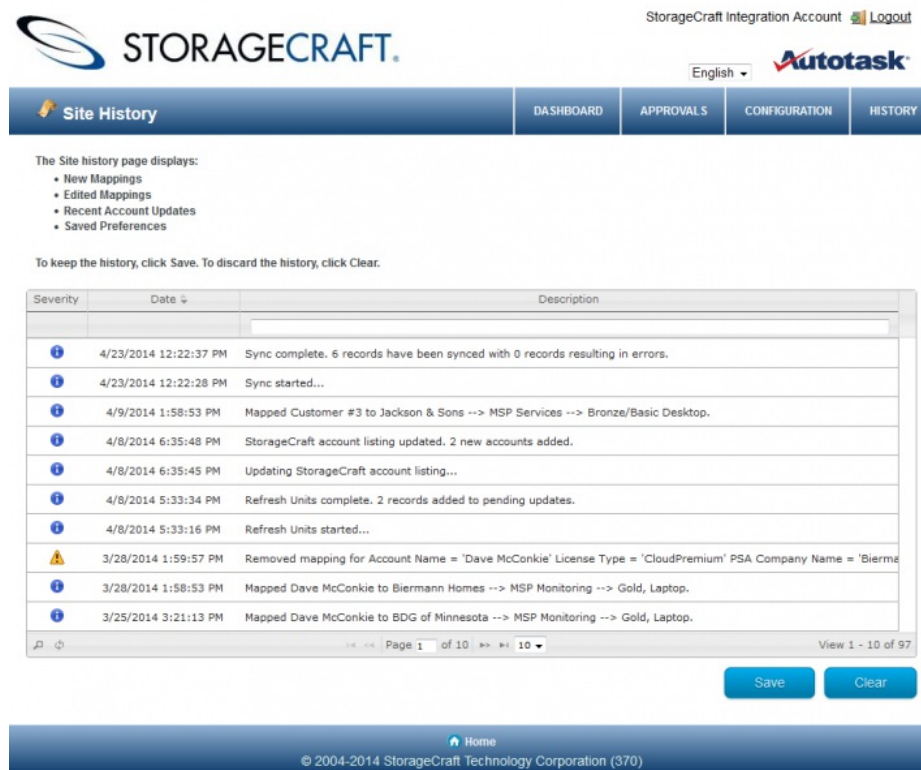
The StorageCraft PSA Integration portal now starts retrieving account information from the StorageCraft MSP portal and the selected PSA. It may take a few minutes to complete this process.

7 StorageCraft PSA History

The site history page displays:

- All integration actions that have been performed.
- Created or edited mappings.
- A list of new accounts and account changes.
- PSA changes and selected preferences.

To display the Site History page, click History the navigation header.



StorageCraft Integration Account Logout

English

Site History DASHBOARD APPROVALS CONFIGURATION HISTORY

The Site history page displays:

- New Mappings
- Edited Mappings
- Recent Account Updates
- Saved Preferences

To keep the history, click Save. To discard the history, click Clear.

Severity	Date	Description
	4/23/2014 12:22:37 PM	Sync complete. 6 records have been synced with 0 records resulting in errors.
	4/23/2014 12:22:28 PM	Sync started...
	4/9/2014 1:58:53 PM	Mapped Customer #3 to Jackson & Sons --> MSP Services --> Bronze/Basic Desktop.
	4/8/2014 6:35:48 PM	StorageCraft account listing updated. 2 new accounts added.
	4/8/2014 6:35:45 PM	Updating StorageCraft account listing...
	4/8/2014 5:33:34 PM	Refresh Units complete. 2 records added to pending updates.
	4/8/2014 5:33:16 PM	Refresh Units started...
	3/28/2014 1:59:57 PM	Removed mapping for Account Name = 'Dave McConkie' License Type = 'CloudPremium' PSA Company Name = 'Bierme
	3/28/2014 1:58:53 PM	Mapped Dave McConkie to Biermann Homes --> MSP Monitoring --> Gold, Laptop.
	3/25/2014 3:21:13 PM	Mapped Dave McConkie to BDG of Minnesota --> MSP Monitoring --> Gold, Laptop.

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Save Clear

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Click **Save** to create a CSV report of the current history.

Click **Clear** to delete the history log.