



# StorageCraft ConnectWise PSA User Guide

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# StorageCraft ConnectWise PSA User Guide

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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 ConnectWise 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 PSA (ConnectWise).



**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 ConnectWise 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 ConnectWise.
- 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

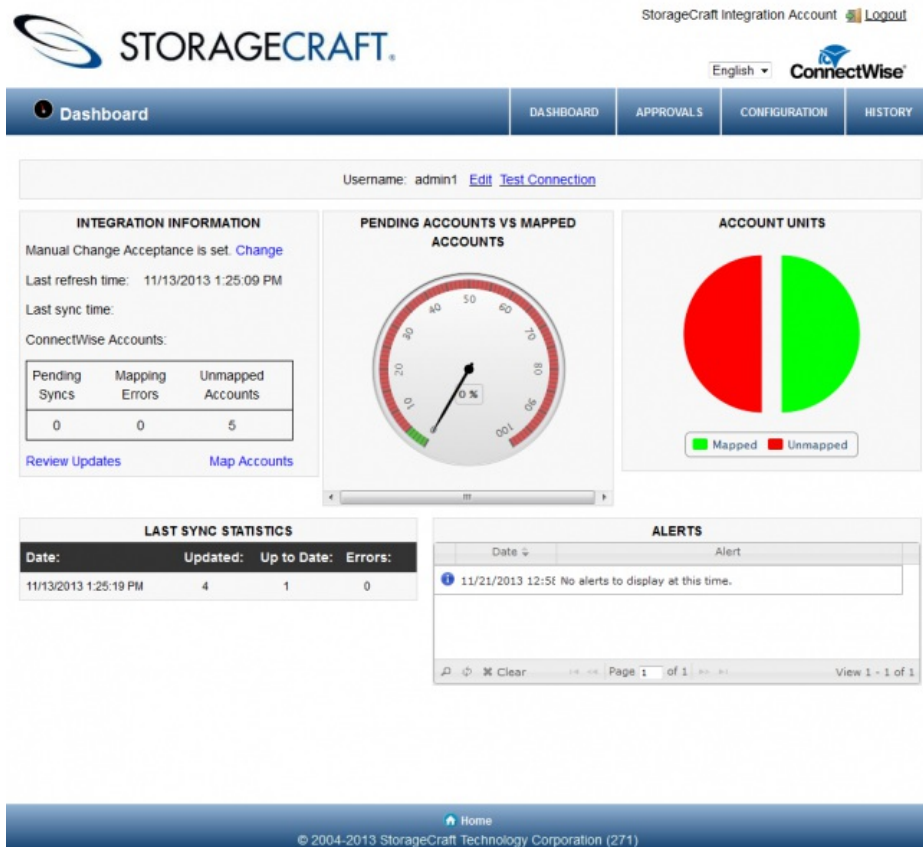
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The StorageCraft PSA Integration Portal main screen consists of a navigation header and a dashboard.

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

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

The dashboard is described [here](#).



StorageCraft Integration Account [Logout](#)

English [ConnectWise](#)

**Dashboard** DASHBOARD APPROVALS CONFIGURATION HISTORY

Username: admin1 [Edit](#) [Test Connection](#)

**INTEGRATION INFORMATION**

Manual Change Acceptance is set. [Change](#)

Last refresh time: 11/13/2013 1:25:09 PM


Last sync time:

ConnectWise Accounts:

Pending Syncs	Mapping Errors	Unmapped Accounts
0	0	5


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

**PENDING ACCOUNTS VS MAPPED ACCOUNTS**



0%

**ACCOUNT UNITS**



■ Mapped ■ Unmapped

**LAST SYNC STATISTICS**

Date:	Updated:	Up to Date:	Errors:
11/13/2013 1:25:19 PM	4	1	0

**ALERTS**

Date	Alert
11/21/2013 12:55	No alerts to display at this time.

Page 1 of 1 View 1 - 1 of 1

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## 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 ConnectWise 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 ConnectWise 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 ConnectWise PSA. This PSA account includes an associated agreement and Addition for desktop backup.

### The Value of PSA Integration

After mapping Computech to Bob's Dentistry in ConnectWise, 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 Addition from 3 to 4).

Now, when Computech runs their billing for the ConnectWise 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.

### Addition per License Type

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

## 3 Integration Portal Header

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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 PSA applications).

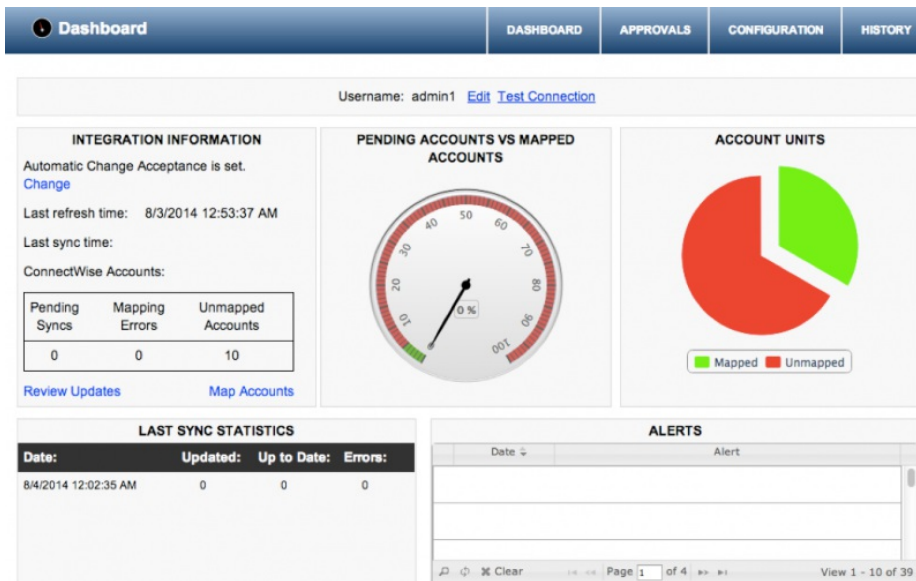
### History

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

## 4 StorageCraft PSA Dashboard

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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.



StorageCraft Integration Account [Logout](#)

English [ConnectWise](#)

**Dashboard** DASHBOARD APPROVALS CONFIGURATION HISTORY

Username: admin1 [Edit](#) [Test Con](#)

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

Pending Syncs	Mapping Errors	Unmapped Accounts
1	0	3

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

**PENDING ACCOUNTS VS MAPPED ACCOUNTS**

14.29%

**ALERTS**

Date	Alert
4/23/2014 4:13:35 PM	No alerts to display at this time.

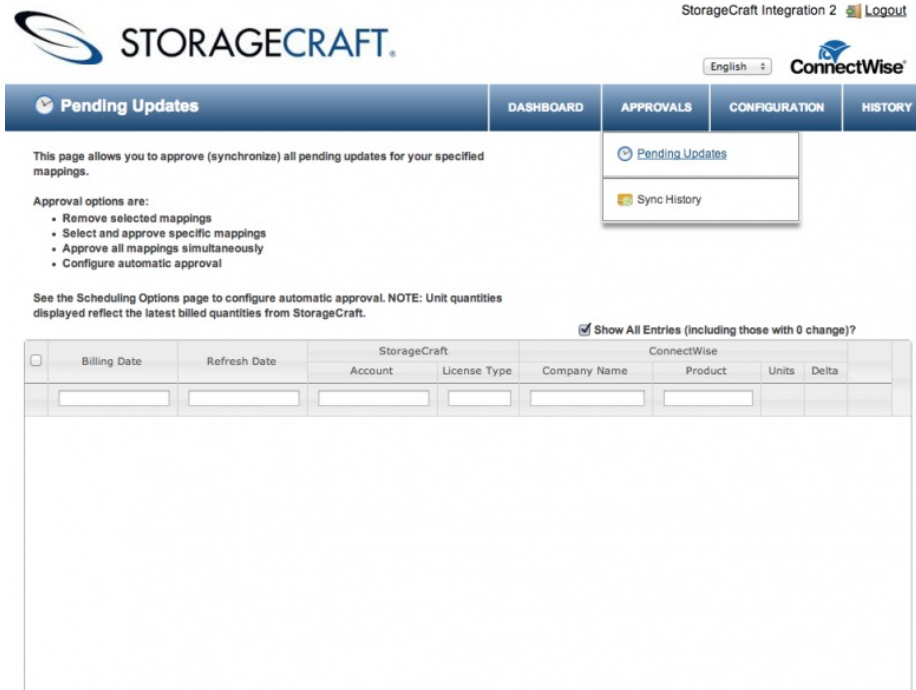
Page 1 of 1

## 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 2 [Logout](#)

English [ConnectWise](#)

**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. NOTE: Unit quantities displayed reflect the latest billed quantities from StorageCraft.

Show All Entries (including those with 0 change)?

	Billing Date	Refresh Date	StorageCraft		ConnectWise			Units	Delta
			Account	License Type	Company Name	Product			
<input type="checkbox"/>									

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.

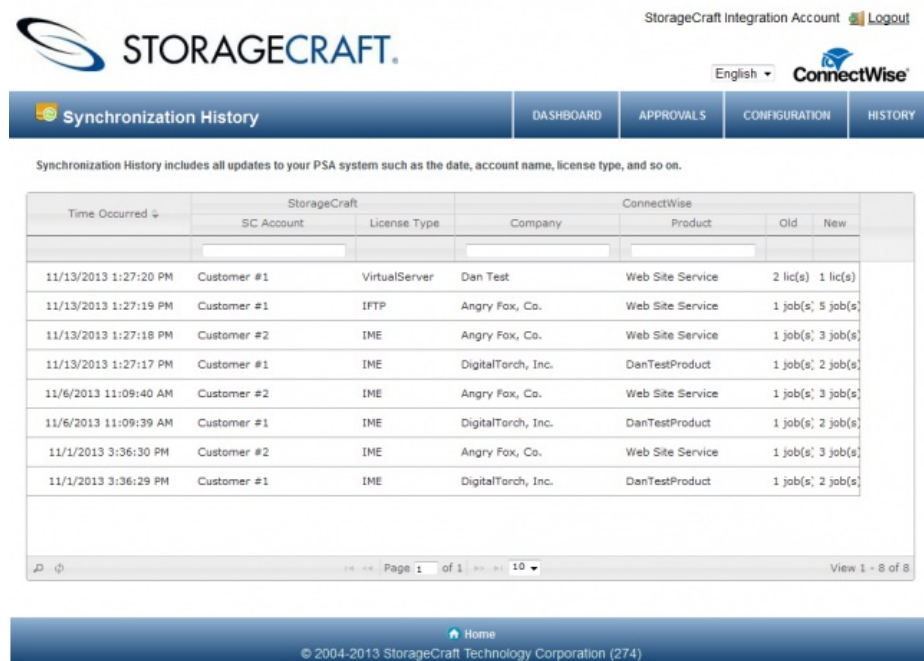
## 5.2 StorageCraft PSA Synchronization History

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.



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		ConnectWise			
	SC Account	License Type	Company	Product	Old	New
11/13/2013 1:27:20 PM	Customer #1	VirtualServer	Dan Test	Web Site Service	2 lic(s)	1 lic(s)
11/13/2013 1:27:19 PM	Customer #1	IFTP	Angry Fox, Co.	Web Site Service	1 job(s)	5 job(s)
11/13/2013 1:27:18 PM	Customer #2	IME	Angry Fox, Co.	Web Site Service	1 job(s)	3 job(s)
11/13/2013 1:27:17 PM	Customer #1	IME	DigitalTerch, Inc.	DanTestProduct	1 job(s)	2 job(s)
11/6/2013 11:09:40 AM	Customer #2	IME	Angry Fox, Co.	Web Site Service	1 job(s)	3 job(s)
11/6/2013 11:09:39 AM	Customer #1	IME	DigitalTerch, Inc.	DanTestProduct	1 job(s)	2 job(s)
11/1/2013 3:36:30 PM	Customer #2	IME	Angry Fox, Co.	Web Site Service	1 job(s)	3 job(s)
11/1/2013 3:36:29 PM	Customer #1	IME	DigitalTerch, Inc.	DanTestProduct	1 job(s)	2 job(s)

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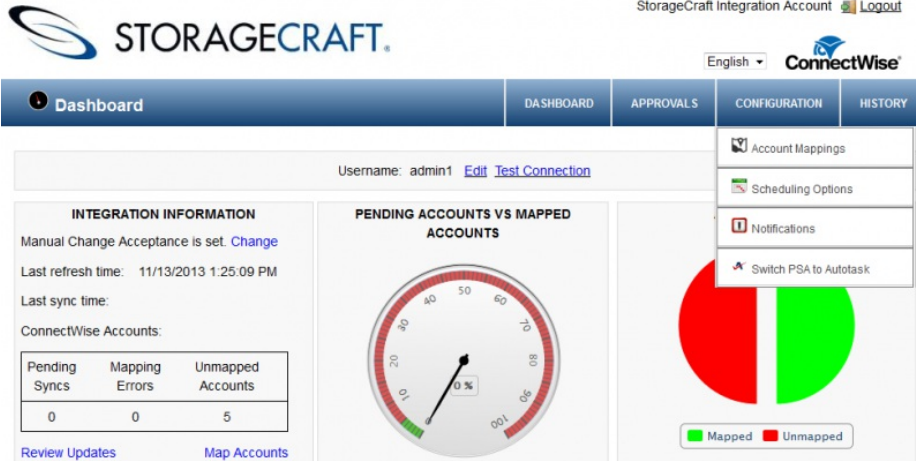
## 6 StorageCraft PSA Configuration

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.





StorageCraft Integration Account [Logout](#)

English [ConnectWise](#)

**Dashboard** | DASHBOARD | APPROVALS | CONFIGURATION | HISTORY

Username: admin1 [Edit](#) [Test Connection](#)

**INTEGRATION INFORMATION**  
 Manual Change Acceptance is set. [Change](#)  
 Last refresh time: 11/13/2013 1:25:09 PM  
 Last sync time:  
 ConnectWise Accounts:

Pending Syncs	Mapping Errors	Unmapped Accounts
0	0	5

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

**PENDING ACCOUNTS VS MAPPED ACCOUNTS**

0%


100%

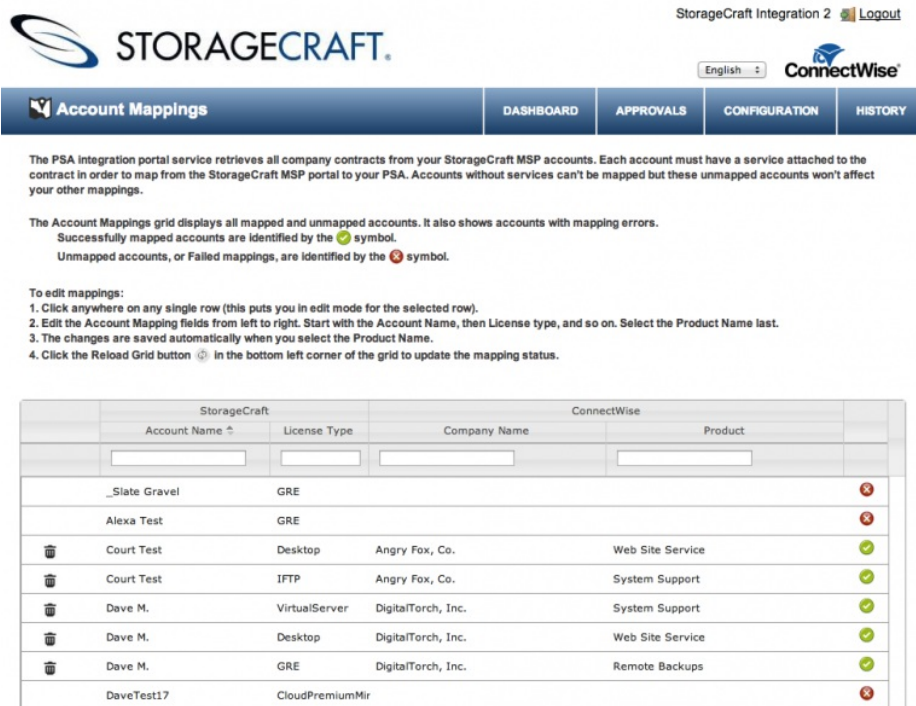
■ Mapped ■ Unmapped

- Account Mappings
- Scheduling Options
- Notifications
- Switch PSA to Autotask

## 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 ConnectWise PSA system. 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 2 [Logout](#)


English [ConnectWise](#)














**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:



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

StorageCraft		ConnectWise		
Account Name	License Type	Company Name	Product	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
_Slate Gravel	GRE			
Alexa Test	GRE			
 Court Test	Desktop	Angry Fox, Co.	Web Site Service	
 Court Test	IFTP	Angry Fox, Co.	System Support	
 Dave M.	VirtualServer	DigitalTorch, Inc.	System Support	
 Dave M.	Desktop	DigitalTorch, Inc.	Web Site Service	
 Dave M.	GRE	DigitalTorch, Inc.	Remote Backups	
DaveTest17	CloudPremiumMir			



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.

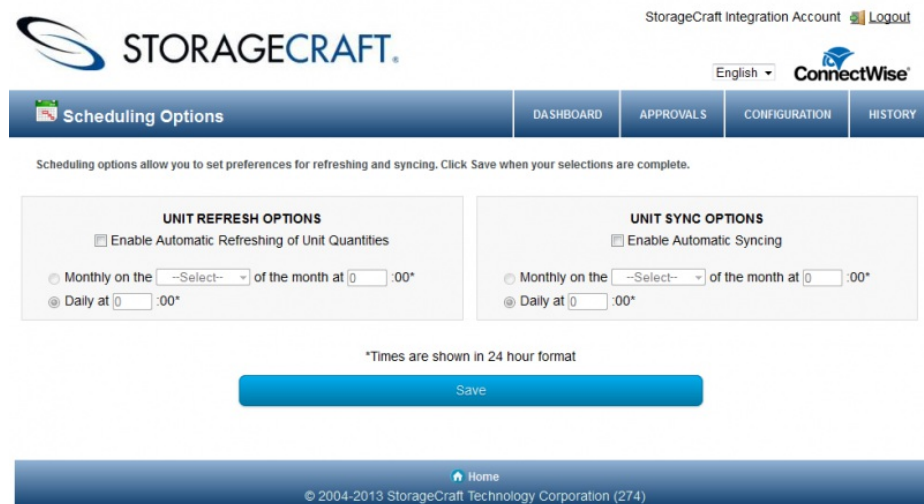
	<b>Important:</b> If you need to change any selections in a previously (successfully) mapped account (such as the Contract Name or Service Name) you need to remap the account.
--	---

## 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.



## 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.

<b>Notifications</b>	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 ▼

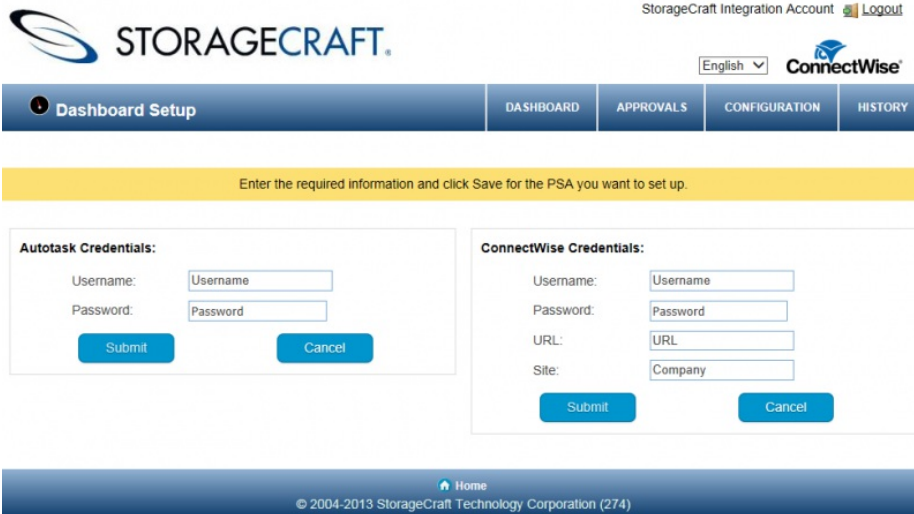
## 6.4 StorageCraft PSA Dashboard Setup

The StorageCraft PSA Integration Portal currently supports ConnectWise and one other competitor.

- ⚠ 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:

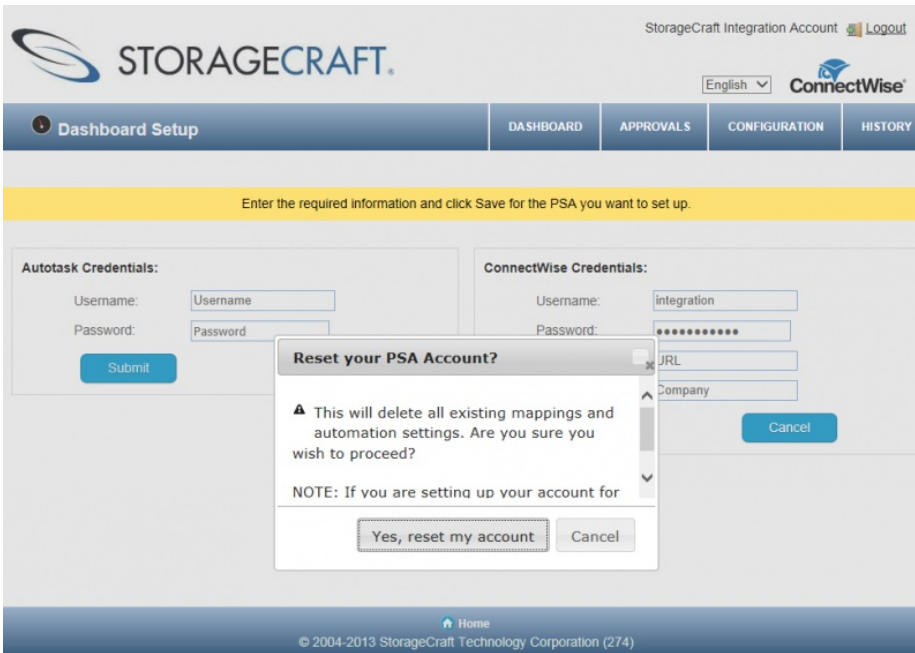
1. Log into the StorageCraft PSA Integration portal with the required credentials.
2. Move your cursor over the Configuration navigation header, then click Change PSA . . .
3. Enter the credentials for ConnectWise (username, password, url, and site/company name).



- ⚠ 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.



StorageCraft Integration Account [Logout](#)

English [ConnectWise](#)

**Dashboard Setup** DASHBOARD APPROVALS CONFIGURATION HISTORY

Enter the required information and click Save for the PSA you want to set up.

**Autotask Credentials:**

Username:

Password:

**ConnectWise Credentials:**

Username:

Password:

JRL

Company

**Reset your PSA Account?**

⚠ This will delete all existing mappings and automation settings. Are you sure you wish to proceed?

NOTE: If you are setting up your account for

[Home](#)

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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.

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
	11/13/2013 1:27:20 PM	Sync complete. 5 records have been synced with 0 records resulting in errors.
	11/13/2013 1:27:15 PM	Sync started...
	11/13/2013 1:25:19 PM	Sync started...
	11/13/2013 1:25:12 PM	Refresh Units complete. 5 records added to pending updates.
	11/13/2013 1:25:09 PM	Refresh Units started...
	11/13/2013 1:24:34 PM	Mapped Customer #1 to Dan Test.
	11/13/2013 1:22:49 PM	Mapped Customer #1 to Angry Fox, Co..
	11/13/2013 1:22:37 PM	ConnectWise account listing updated. No new accounts added.
	11/13/2013 1:22:30 PM	Updating ConnectWise account listing...
	11/13/2013 1:21:53 PM	StorageCraft account listing updated. No new accounts added.

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

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

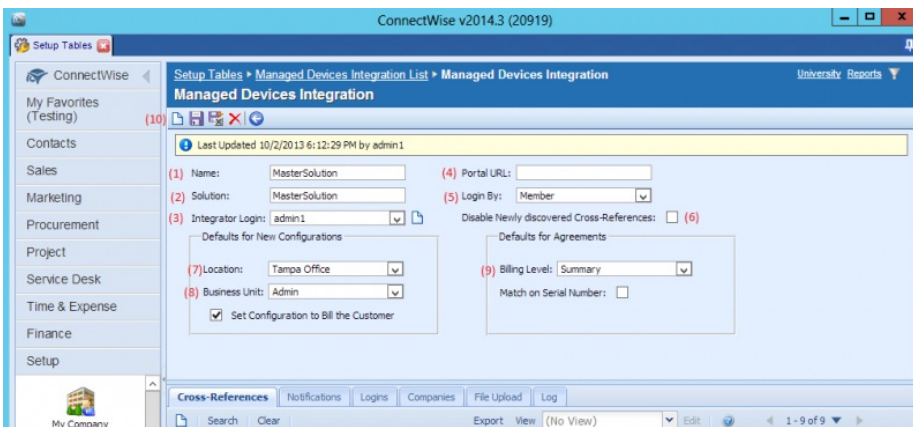
## 8 StorageCraft PSA ConnectWise Setup

ConnectWise Setup Instructions for Compatibility with STC PSA Integration Portal

1. In the left navigation pane, select 'Setup'.
2. In the expanded area, select 'Setup Tables'.
3. Click 'Search' in the upper left corner.
4. Locate 'Managed Devices Integration'. Click the underlined text.

 **Note:** Locate this entry with the leftmost filter and choose 'Company' from the dropdown.

5. To create a new Management Solution, click the 'New Item' button. The New Item button looks like a piece of white paper with the top-right corner folded over (the button is located in the upper-left corner). Clicking the New Item button displays the Managed Devices Integration page.



6. Complete the fields listed below. These fields are identified by the red numbers in the Managed Devices Integration page

above.

- Name: MasterSolution (1)
- Solution: MasterSolution (2)
- Integrator Login: (See the Detailed Integrator Login heading below for requirements) (3)
- Portal URL: <blank> (4)
- Login By: Member (5)
- Disable Newly discovered Cross-References: (Make sure the box is NOT checked) (6)
- Location: <blank> (7)
- Business Unit: <blank> (8)
- Billing Level: Summary (9)

### Integrator Login Details

- Integrator Login: Click the white paper icon to create a new integrator login. (10)
- Enter a username and password (used to log into the ConnectWise PSA portal).
- Set Access Level to "All records" (as shown in the image below).
- Enable the following APIs (make sure the boxes are checked as shown in the image below):
  - Service Ticket API
  - Managed Services API
  - Company API
  - Product API
  - Reporting API
  - System API


**⚠ Important:** Make sure you set the Access Level option to "All records". This is essential to make the ConnectWise integration work.



7. Click Save (the disk icon).
8. (Optional) Create Cross-References between your Products and the Managed Service agreement type.

**⚠ Note:** If you have not created products at this point, go and do so now before creating cross-references.

- Enter a type and level of your choice into the respective fields.
- For 'Agreement Type' select 'Managed Service'
- For 'Product', select the desired product
- For Configuration Type, enter a configuration type of your choice or leave the field blank.

 **Note:** The Configuration Type is optional. The field can be used by MSPs to define configuration type labels (e.g. workstation, server, VM, etc.) as needed. The PSA integration system auto-generates a configuration type to complete synchronization if one hasn't been defined by the user.