ConnectWise Integration User Guide

Arcserve UDP Cloud Direct

v6.2.2

arcserve

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Contact Support

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- You can open a support ticket. By opening a support ticket online, you can expect a callback from one of our experts in the product area you are inquiring about.
- You can access other helpful resources appropriate for your Arcserve Support product.

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Chapter 1: Introduction

The Arcserve UDP Cloud Direct integration with ConnectWise enables Arcserve partners to have their customer's Billable Usage, Backup Summaries, and Backup Events federated to the partner's ConnectWise instance.

- Billable Usage is updated on a scheduled basis, concurrent to the partner's invoice date with Arcserve, ensuring that the customer usage in ConnectWise aligns with the usage on the partner's Arcserve invoice.
- Backup Summaries is sent as Service Tickets for each partner's customer in ConnectWise once a day.
- Backup Events is sent as Service Tickets for each partner's customer in ConnectWise at the conclusion of each backup job.

Chapter 2: How to Set up ConnectWise Integration

You can download the ConnectWise Internet Client from the link.

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Create an Integrator Login

The Arcserve UDP Cloud Direct ConnectWise integration requires a ConnectWise Integrator login account that has access to at least the following APIs: the Service Ticket API, the Agreement API, the Company API, and the Reporting API.

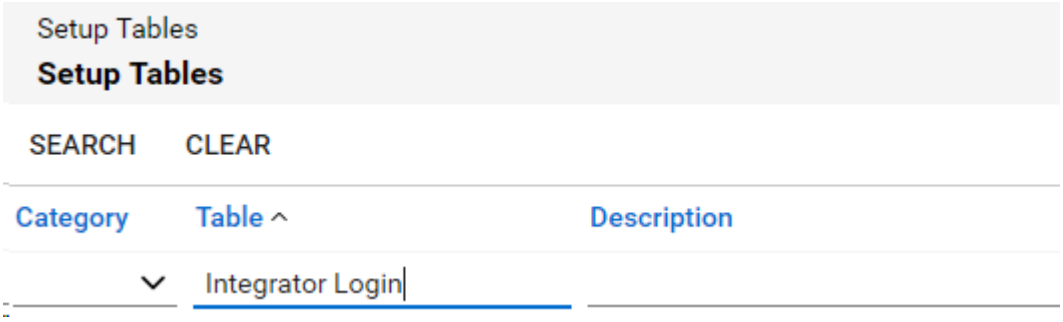
Note: You can skip this step if an Integrator login account is already configured with access to the appropriate APIs. You can use this account to set up the integration.

To create an Integrator login, follow these steps:

1. Launch the ConnectWise Internet Client.

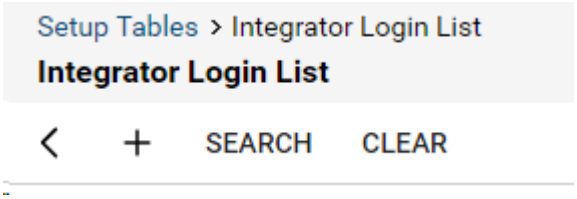
2. Log into ConnectWise using valid credentials.
3. Click System from the menu displayed in the left pane.
4. Click Setup Tables from the menu.

5. In the Table field, type in *Integrator Login* and click **Search**.



6. From the search results, click the **Integrator Login**.

7. Click the + icon to create a new Integrator Login.



8. Enter a Username and Password. Verify that the **All Records** option is selected from the **Access Level** drop-down list, and select the check boxes next to the following APIs to grant the appropriate access:
   - Service Ticket API (Set **Service Board** to Integration)
   - Company API
   - Reporting API
   - Agreement API (only required if Billing integration is desired)
   - Document API
9. Click **Save**.

You have created the Integrator login successfully.

Create a Product Item

Important! Mandatory step for Billing Integration.

ConnectWise uses *Products* to track different services for which you want to bill customers. You can use any name for the products that you create. The integration between the products you create now in ConnectWise and Arcserve takes place later.

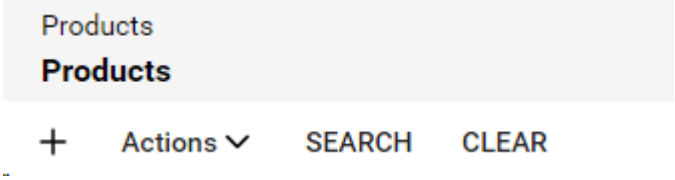
You may make as many Products as you like. Later, you will link a Product to a customer Agreement using cross-references created using Levels.

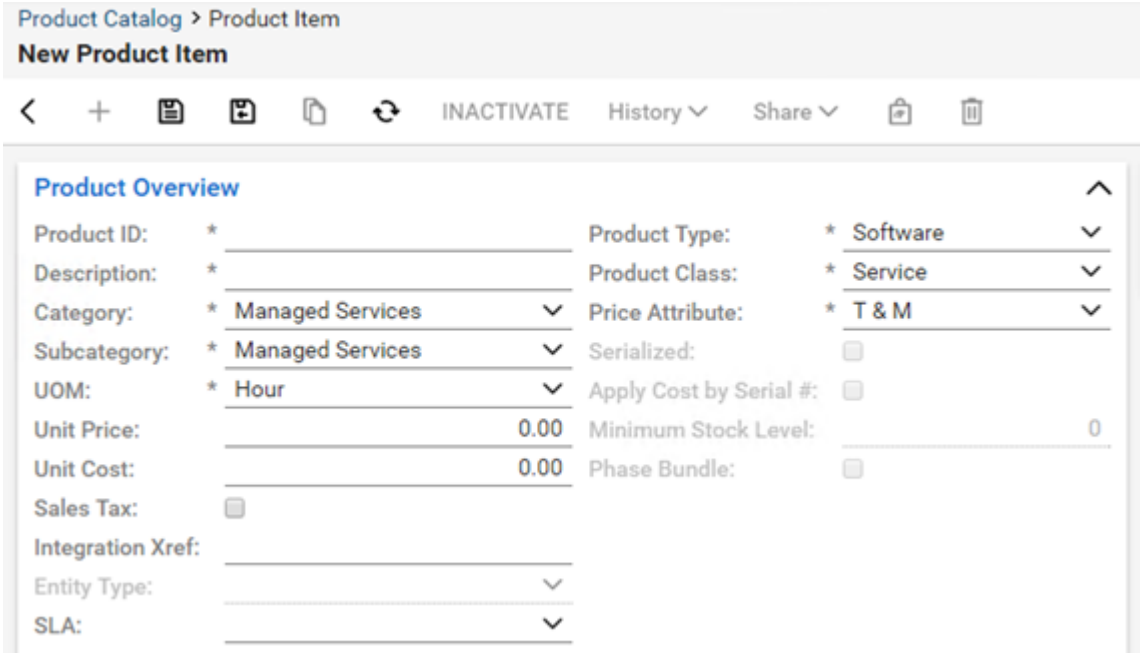
Note: You can skip this step if you already have existing products that you wish to reference during Arcserve integration. You can use these products to set up integration.

To create a product item, follow these steps:

1. Launch the ConnectWise Internet Client.

2. Log into ConnectWise using valid credentials.
3. Click Procurement from the menu displayed in the left pane.
4. Click Products from the menu.
5. Click the + icon to create a new Product Item.





6. Configure the Product Item identifiers accordingly. Some recommendations for your consideration:
   - Set **Product ID** to Arcserve UDP Cloud Direct.
   - Set **Description** to Arcserve UDP Cloud Direct Usage.
   - Set **Category** to Managed Services.
   - Set **Product Type** to Software.
   - Set **Product Class** to Service.
   - Set **Unit of Measure** to Each.
   - Set a **Unit Price** and **Unit Cost**.
7. Click **Save**.

You have created the Product Item successfully.

Create an Agreement Type

Important! Mandatory step for Billing Integration.

ConnectWise uses unique *Agreement Types* to find and update the appropriate customer agreements with the billing information.

Note: You can skip this step if you already have an existing Agreement Type that you want to reference during Arcserve integration.

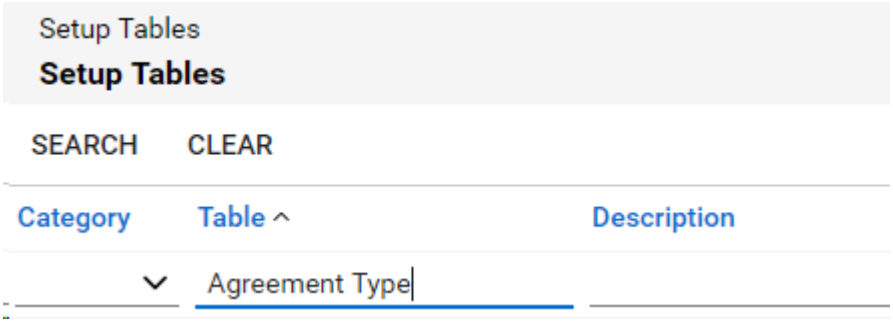
We recommend to establish a unique Agreement Type to use with Arcserve to easily keep everything being referenced in the Arcserve workflow unique and identifiable. Using the option helps to prevent any confusion if you need to perform future maintenance in ConnectWise.

Follow these steps:

1. Launch the ConnectWise Internet Client.

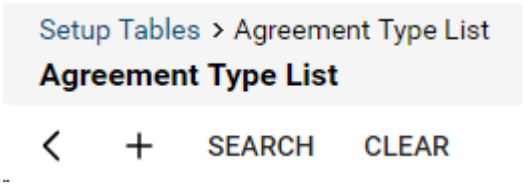
2. Log into ConnectWise using valid credentials.
3. Click System from the menu displayed in the left pane.
4. Click Setup Tables from the menu.

5. In the Table field, type in *Agreement Type* and click **Search**.



6. From the search results, click **Agreement Type**.

7. Click the + icon to create a new Agreement Type.



8. Perform the following steps to configure the Agreement Type:
   - Add a Description for the Agreement Type.
   - Modify the rest of the fields to configure an Agreement Type that corresponds to your business model details.

     We recommend monthly billing to align with your Arcserve invoices.
9. Click **Save**.

You have created the Agreement Type successfully.

Create Managed Services Integration

Important! Mandatory step for Billing Integration.

The Managed Device is the integration object that Arcserve references when sending information to ConnectWise. This option involves creating the integration and then configuring a cross reference.

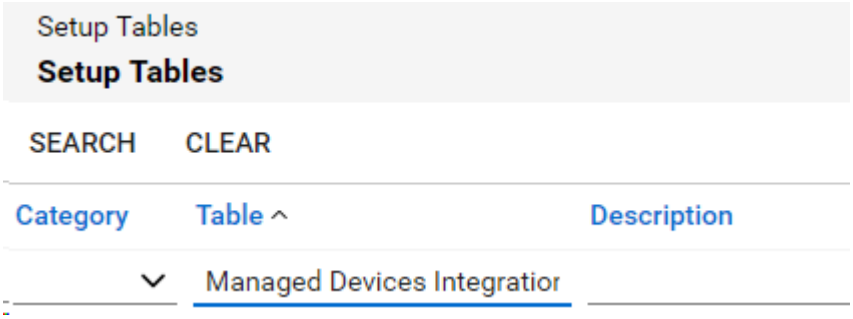
Create Managed Services Integration

Follow these steps:

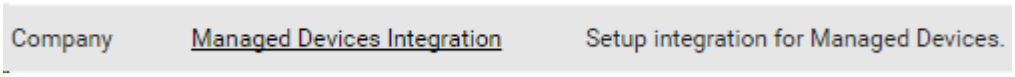
1. Launch the ConnectWise Internet Client.

2. Log into ConnectWise using valid credentials.
3. Click System from the menu displayed in the left pane.
4. Click Setup Tables from the menu.

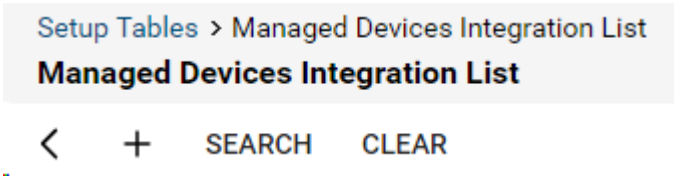
5. In the Table field, type in *Managed Devices Integration* and click **Search**.



6. From the search results, click **Managed Devices Integration**.

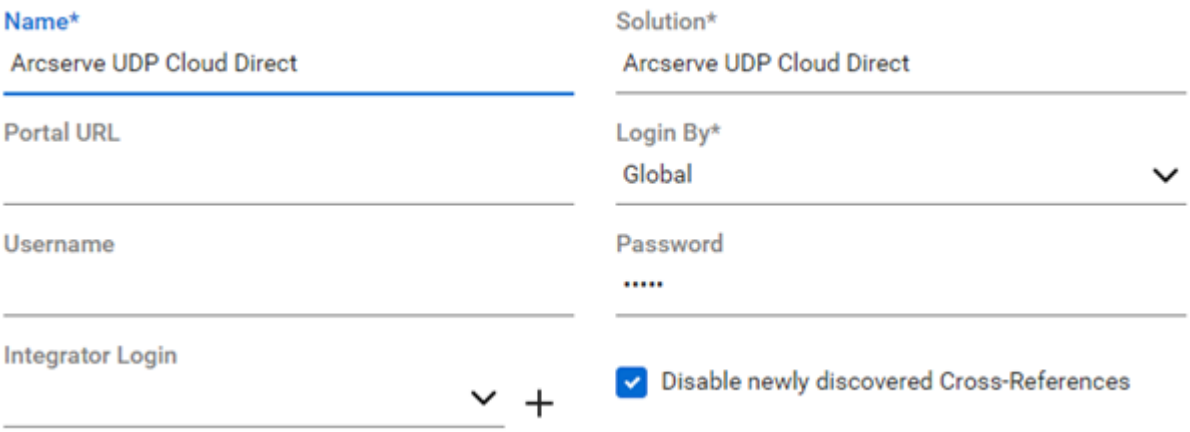


7. Click the + icon to create a new Managed Devices Integration.



8. Name the device and the solution *Arcserve UDP Cloud Direct*.

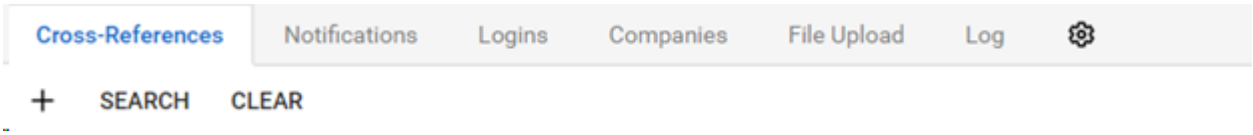
   Note: You need to perform this step with the exact syntax described or the integration will fail. The texts are case sensitive.



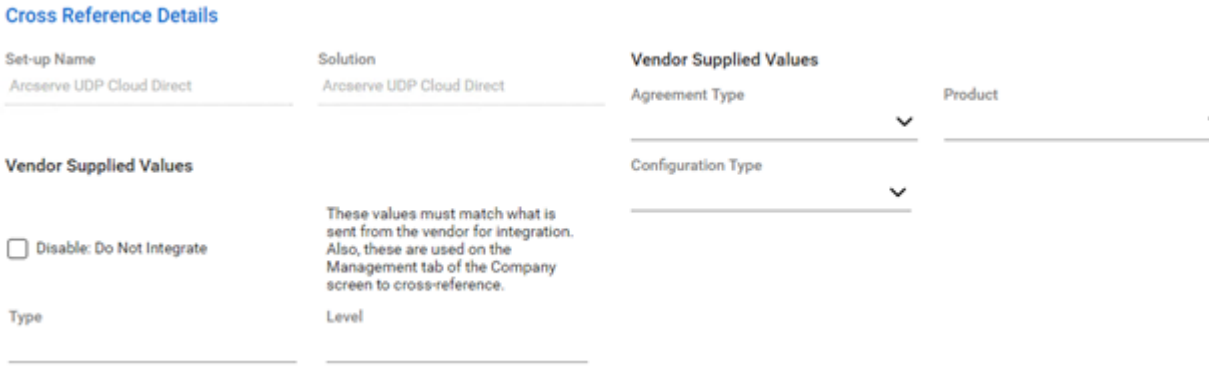
Configure Cross-Reference(s) on the lower portion of the Managed Devices Integration page

Follow these steps:

1. Click the + icon to create a new Cross-Reference.



2. Enter the following fields:
   - Set **Level** to some unique and meaningful value. Such as, Gold, Default, and so on.
   - Set **Type** to something meaningful. Such as Backup Usage.
   - Set **Configuration Type** to Backup Stats.
   - Set **Agreement Type** to the Agreement Type you created (or decided to use) in Step 3.
   - Set **Product** to the product you created (or decided to use) in Step 2



3. Click **Save** to create the new cross reference.
4. Repeat these steps to create as many cross references as desired.

You have created the Managed Services Integration successfully.

Add Agreement to ConnectWise Companies

Important! Mandatory step for Billing Integration.

Add agreement for companies is required for any customer who need to receive billing metrics from Arcserve.

Using the billing information provided, you need to add an Agreement for the same Agreement Type used when creating the cross-reference to the Arcserve UDP Cloud Direct product.

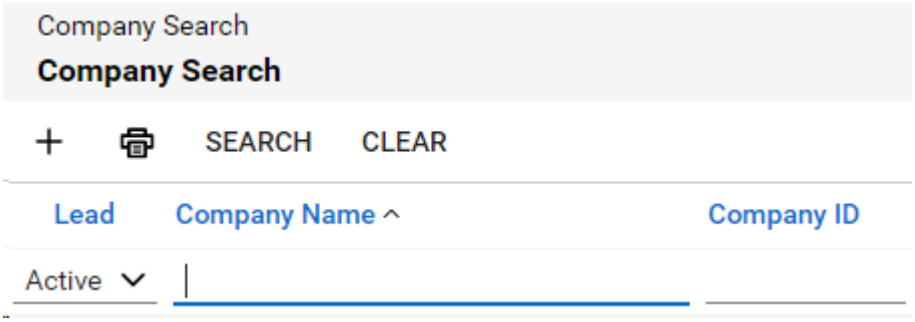
Follow these steps:

1. Launch the ConnectWise Internet Client.

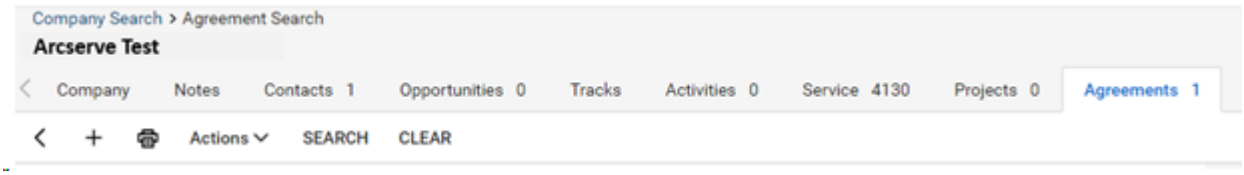
2. Log into ConnectWise using valid credentials.
3. Click

from the menu displayed in the left pane.
4. Click **Companies** from the menu.
5. Locate the company that needs integration with Arcserve billing.
    - To create a new company entry, click the **+** icon.
    - To find an existing company, you can enter the company's name and click **Search**. You can also simply click Search to get a list of all com-

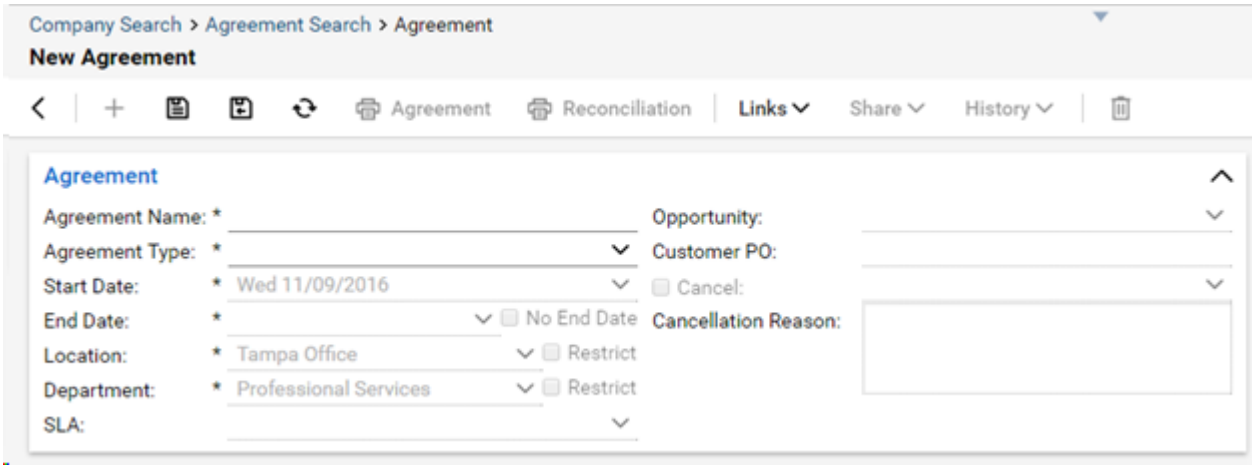
panies.



6. Click the **Agreements** tab.



7. Click the **+** icon to and enter the following details to create a new Agreement:



   - Enter a name for **Agreement Name**.
   - Set the **Agreement Type** to match the Agreement Type used to create the Cross-Reference. For more details, refer the link.
   - Set any other fields according to your business requirement.

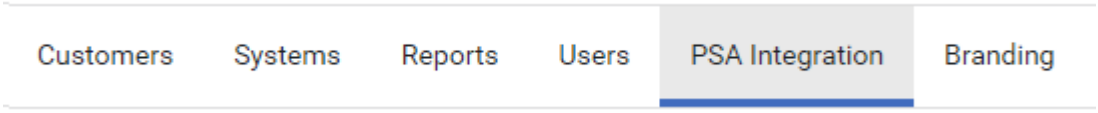
8. Repeat this step for each Company that requires Arcserve billing integration.

You have added the Agreement Type to ConnectWise companies successfully.

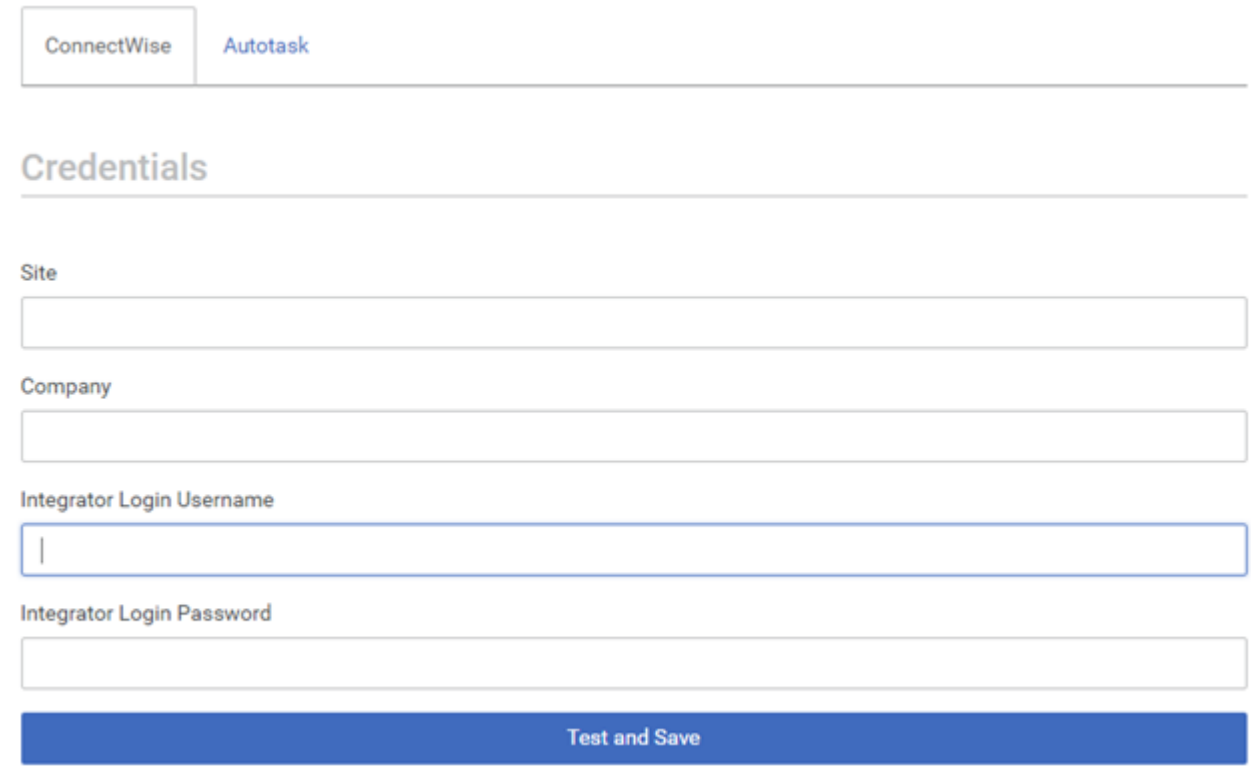
Configure ConnectWise Integration in the UDP Cloud Direct Portal

To configure ConnectWise Integration in the UDP Cloud Direct portal, follow these steps:

1. Log into the UDP Cloud Direct Portal using your Arcserve UDP Cloud Direct Partner Account credentials.
2. Click the **PSA Integration** tab.



3. Click the **ConnectWise** tab.



4. Enter the following appropriate ConnectWise credentials:
   - *Site:* Enter your Site name (For example, staging.connectwisedev.com).
   - *Company:* Enter your ConnectWise Company name (For example, company_f).
   - *Company ID:* Enter your Company ID.

- *Integrator Username and Password:* Enter the credential for the user you set up. For more details, view the link.

5. Click **Test and Save** to initiate integration.

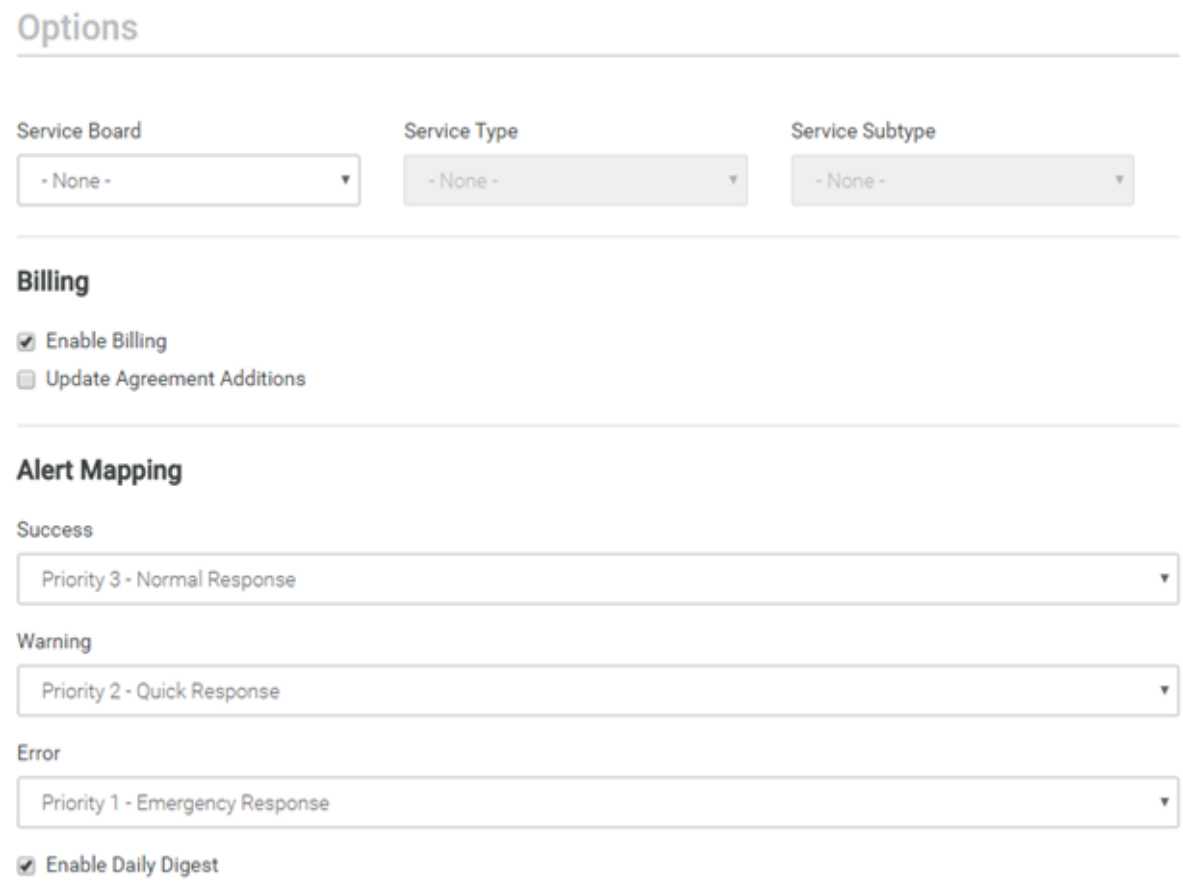
You have configured ConnectWise Integration in the Arcserve UDP Cloud Direct Portal successfully.

Map your ConnectWise Customers to your Arcserve Organizations and Assign Billing Levels

When the integration test completes successfully, the PSA Integration page is updated to provide more configuration options. You can map the customers to Arcserve organizations and assign billing levels.

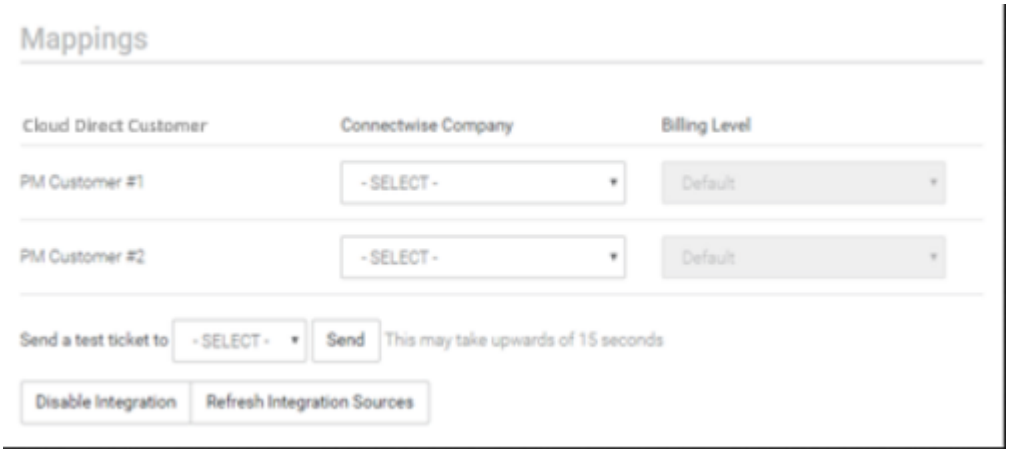
Follow these steps:

1. Select a configured ConnectWise Service Board to provide the desired **Service Type** and **Service Subtype**.
2. If required, select check boxes of **Enable Billing** and **Update Agreement Additions**. You may also configure priorities for the different alert types, and select respective check box of **Enable Daily Digest** report that is sent to ConnectWise.



3. If Billing is enabled, you can map each Arcserve organization to respective

matching ConnectWise Company and specify the desired billing level.



You have mapped your ConnectWise customers to your Arcserve organizations and assigned Billing Levels successfully.