Syncing Webroot to PSA

Overview and User Guide

Overview & User Guide

PURPOSE

The primary purpose of this document is to show users how to sync Webroot to a PSA tool using the multi-product workflow in the Pax8 Platform.

AUDIENCE

This document was designed for partners who integrate with a PSA tool and have an active Webroot subscription

LAST UPDATED

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SUMMARY

The multi-product sync workflow allows you to maintain a month over month sync for endpoints. This means that you are only required to take action when there is a change in billable endpoints. It also allows for syncing of sub-level products like SAEP, DNSP, WSAT, etc.

Billing:

- Pax8 bills partners monthly in arrears on the 5th of the month for the previous month's usage, separated by Endpoint Protection, DNS Protection (true usage), and Security Awareness Training.
- There is no proration, if an endpoint checks in at any point between the 1st day and the last day of the month, the partner will be charged for the full month.
- PSA syncs will not be available for 30 days from initial effective date since Webroot is on a 30-day rolling period for showing usage.
- Endpoint counts are updated from a nightly job every night in the Pax8 Platform.
- Pax8 runs billable line items on the 3rd of each month. This means that on the 3rd you will be able to sync over the previous months finable billable endpoints to your PSA tool.
- Pax8 recommends utilizing the Unsynced subscription report shown in this guide so that you only have to sync over customer subscription which have had month over month changes.
- Customers that have no changes in endpoints will have a re-occurring subscription in your respective PSA tool with the configuration shown in this guide.

NOTE Pax8 understands that keeping up with endpoint changes can be time consuming. We will be releasing auto-syncing functionality in Q1 of 2021 to automatically push these changes to your PSA tool.

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Steps:

1. Search for and click the Webroot subscription in the Pax8 Platform:

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2. The Webroot subscription will open in the panel to the right and display all customers that are reporting usage:

3. On the customer row, click the ellipsis next to the Show Details button and click Assign Company to assign the customer that was created or imported into Pax8:

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4. To start the binding process to a PSA tool, click **Sync**

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5. Select your PSA tool:

Select Vendor

Autotask	Connectwise	Kaseya
Syncro	Tigerpaw	

6. Bind the Webroot product to an existing product in the PSA tool or export the product record from the Pax8 Platform as new and white label the product as desired:

NOTE Our integration allows you to bind a top-level product and sub-products underneath. If you have separate products in you PSA tool for DNS, SAEP, etc., **it is recommended to create a generic product for Webroot** *as the integration will breakdown the components DNS, SAEP, etc. into separate line items on your Agreement/Contract as well as show the version in the description.*

CONNECTION	COMPANY	PRODUCT	AGREEMENT	REVIEW	Previous	Next
Connectwise	Frontier Wealth Management, LLC			0 item(s)		

Change

Manage Products

Bind Product

Bind an existing Pax8 product in the command console with an existing product found on your Connectwise account.   [Bind Product]

OR

Export Product

Export and bind an existing Pax8 product to Connectwise. (You will only have to do this once per product.)   [Export Product]

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6a. If you click Bind Product, you will need to bind to a top-level product. This is a generic product and does not have any functionality beyond the subscription. You can then bind your sub-level products like DNS, SAEP, etc. with ones you have in your PSA. If you don't already have DNS, SAEP, etc. built out in the PSA tool, you will need to navigate to Tools>Business Automation>Select your PSA tool and connection>scroll to the bottom of the screen and use the Export Product field:

Manage Products

Bind Pax8 Product

Pax8 Product
Webroot SecureAnywhere

Connectwise Product

Webroot SecureAnywhere			Bind	Cancel

Bind Arrears Subproducts

Pax8 Product Id	Pax8 Product Name	CW Product Id	CW Product Name	—
100023	Webroot Security Awareness Training - Arrears Charge		Search Connectwise Product	Bind
100021	Webroot Business Endpoint Protection - Arrears Charge		Search Connectwise Product	Bind
100022	Webroot DNS Protection - Arrears Charge		Search Connectwise Product	Bind

onnectwise Product

Webroot SecureAnywhere			Bind	Cancel

Bind Arrears Subproducts

Pax8 Product Id	Pax8 Product Name	CW Product Id	CW Product Name	—
100023	Webroot Security Awareness Training - Arrears Charge		Search Connectwise Product	Bind
100021	Webroot Business Endpoint Protection - Arrears Charge	1308	Webroot Business Endpoint Protection	Unbind
100022	Webroot DNS Protection - Arrears Charge		Search Connectwise Product	Bind

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If you do not have products for all sub-products, click Next in the sync workflow.

6b. If you click Export Product, select the term and white label any of the information as desired. You will still need to **bind or export** the sub-products after exporting the **top-level** product:

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7. Next, the multi-product screen will display with the customer's endpoints selected. There are 4 sync options on this page that we have created to accommodate various partner workflows. You will want to select the multi-product option at the top right corner

Multiproduct provides the ability to have a reoccuring sync month over month. It also provides the ability to write multiple product lines if a customer has more than one product (ie. Business and Pro). The complete usage of the previous month is pulled on the 3rd of the curent month. i.e. on April 3rd we will show you billable usage from March:

8. Select the agreement/contract/invoice

NOTE If you do not see the correct agreements/contracts/invocies cancel the sync and ensure you have correctly assigned the site to the customer (shown in step 3)

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9. In the line item you can see the following settings:

a. **Synced Status**- - Sync status shows [icon] if this has previously been synced over to an agreement/contract/invoice.

b. **Name**- The name is what is syncing over to the invoice description.

Synced	Name
[icon]	1stwestinsurance.com - 1stwestinsurance.com - Proofpoint Business

c. **Status**- reflects if we are updating an existing line item in PSA or if we are creating net new. Updating an existing line item just pushes the new quantiy to PSA

d. **Usage Date-** today's date

e. **Effective date**- the start date of your subscription (as a whole, not just for this customer).

Status	Usage Date	Effective Date
Updating	01/02/2021	07/01/2020

f. **Sync Quantity**-total endpoint count synced to PSA

g. **Quantity-**total endpoint count pulled from Webroot

h. **Cost**- partner buyrate

i. **Price** – customer buyrate

j. **Total to <PSA Tool>-** total price that will be synced into the PSA tool which is invoiced to the customer

Synced Quantity	Quantity	Cost	Price	Total To CW
15.00	15.00	2.44	3.00	$45.00

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10. Click Continue to go to the summary page. Then, click Confirm Sync to write over to the PSA tool:

Arrears Recurring Additions

ProofpointDomain	Resource	CW Product	Agreement	Effective Dt	Current Price	CW Price	Current Qty	Synced Qty	CW Qty	Usage Dt	Action(s)
frontierwealth.com	frontierwealth.com	Proofpoint Essentials Email Security (Business)	Active Maintenance Partner	2019-06-01	2.7500	0.0000	81.0000	0.0000	0.0000	2019-05-31	

1 - 1 of 1   10 ▾   Previous   Next

Usages

ProofpointDomain	Current	This Month Projected	Threshold	Last Month	Projected Recurring	Status	Last Active
frontierwealth.com	$303.75	$300.00	n/a	n/a	n/a	Active	May 31, 2019

Continue

Review

Please review each Addition below and click confirm to complete the sync process for this order.

Updating current Connectwise addition.

	Pax8	Connectwise
Product Name:	Proofpoint Essentials	Proofpoint Business
Invoice Description:	N/A	Arcadia Tech - Proofpoint Essentials
Term:	Monthly	Monthly
Quantity:	1 unit	44 units
Unit Cost:	$0.00	$1.79
Unit Price:	$0.00	$3.25
Recurring Cost:	$0.00	$78.76 ($1.79 × 44 units)
Recurring Price:	$0.00	$143.00 ($3.25 × 44 units)
Effective Date:	05/09/2019	07/01/2020
Bill Customer:	N/A	Billable
Taxable:	N/A	false

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11. After the customer is synced, the record will display a synced flag on the Webroot subscription page. This will be a recurring, month by month sync if there are no changes in endpoints:

12. If there are delta changes in endpoints, audit prior to invoicing by navigating to the Unsynced Subscription page in the Pax8 Platform and looking under the Arrears Subscription section. **Navigate to Tools>Unsynced Subscriptions**

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Click the green sync icon, you will be redirected to the main Webroot subscription page

Id	Company	Subscription	Action(s)
365826	Nova Coast	Webroot	

Arrears Subscriptions

All customers that had delta changes in their endpoints since the previous month will have dropped the synced tag and you can sync them over to your respective PSA again:

Usage Summaries

Name	Quantity	Partner Cost	Current Charges	Current Profit	Projected Charges	Projected Profit	
Site 9P5UUSUB7S Blue Sky Group	—	$1,900.00	$2,500.00	$600.00	$2,500.00	$600.00	Sync Show Details ...
Site RFYYCUE33U PSA Demo SYNCED Trial Ends: Invalid date	—	$273.50	$0.00	$86.20	$359.70	$86.20	Re-Sync Show Details ...
		$2,173.50	$2,500.00	$686.20	$2,859.70	$686.20	

CONCLUSION

I hope this article provided you some targeted guidance on syncing Webroot subscriptions using the multi-product workflow. Any feedback to improve this guide further would be greatly appreciated and can be sent to the following email:

feedback@pax8.com

For all other questions or additional assistance, please reach out to your account manager or our support team:

Support (Existing Partners Only)
•Support: 1-855-884-7298 Ext. 3
•Email: support@pax8.com
•Hours: 24/7