



## 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

January 2021



## **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:**

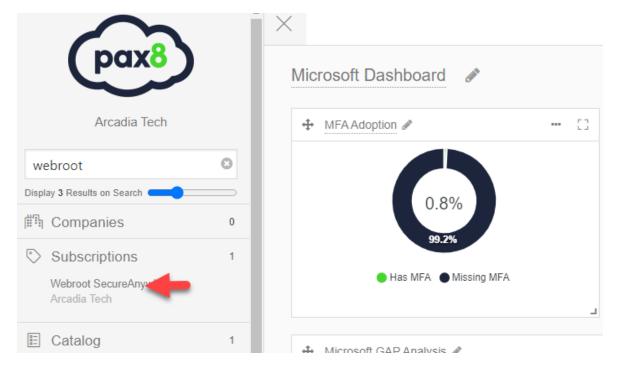
- Pax8 bills partners monthly in arrears on the 5th of the month for the previous month's usage, separated by Endpoint Protection, DNS Protection (true usage), and Security Awareness Training.
- There is no proration, if an endpoint checks in at any point between the 1st day and the last day of the month, 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 3<sup>rd</sup> of each month. This means that on the 3<sup>rd</sup> 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.



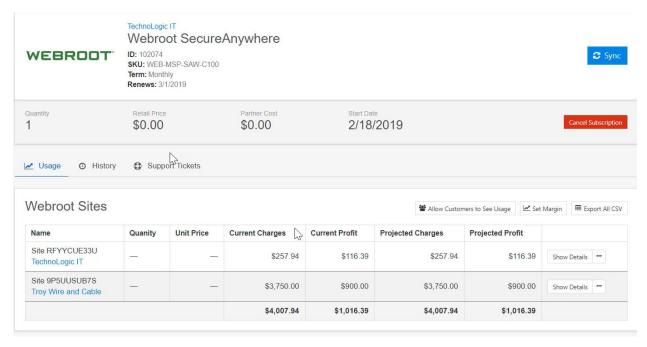
## Steps:

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

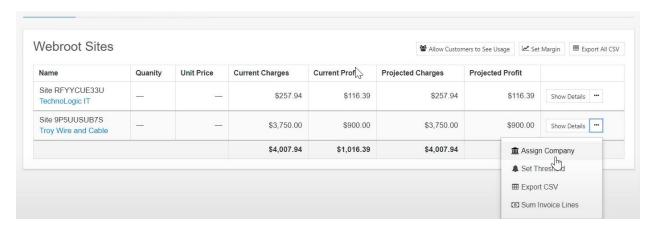




2. The Webroot subscription will open in the panel to the right and display all customers that are reporting usage:

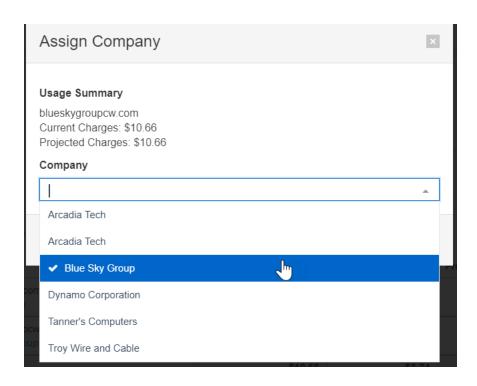


3. On the customer row, click the ellipsis next to the Show Details button and click Assign Company to assign the customer that was created or imported into Pax8:





Mark Allow Custom



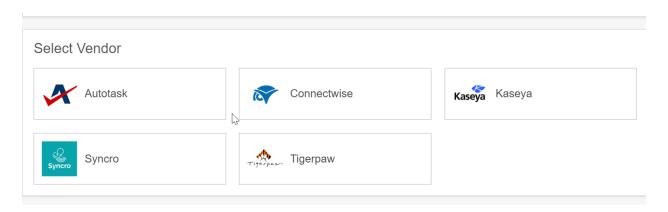
## 4. To start the binding process to a PSA tool, click Sync

# Usage Summaries

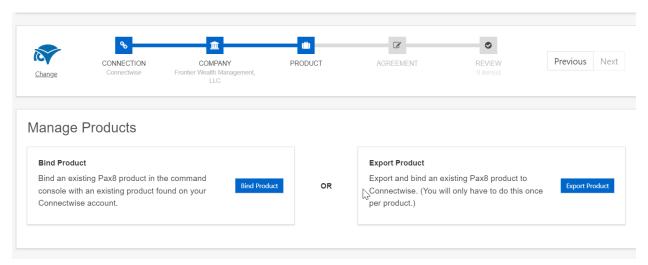
Name	Quantity	Partner Cost	Current Charges	Current Profit	Projected Charges	Projected Profit	
Site 9P5UUSUB7S Blue Sky Group	_	\$1,900.00	\$2,500.00	\$600.00	\$2,500.00	\$600.00	<b>⊘</b> Sync Show I
Site RFYYCUE33U PSA Demo Trial Ends: Invalid date	_	\$273.50	\$0.00	\$86.20	\$359.70	\$86.20	Show I
		\$2,173.50	\$2,500.00	\$686.20	\$2,859.70	\$686.20	



#### 5. Select your PSA tool:

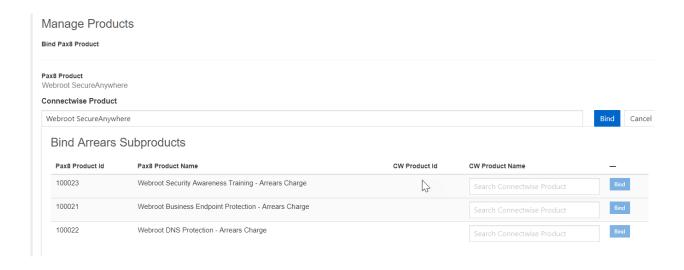


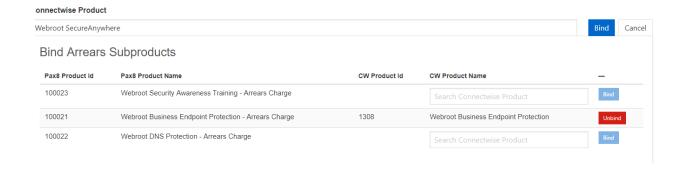
- 6. Bind the Webroot product to an existing product in the PSA tool or export the product record from the Pax8 Platform as new and white label the product as desired:
- \*\*NOTE\*\* Our integration allows you to bind a top-level product and sub-products underneath. If you have separate products in you 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.





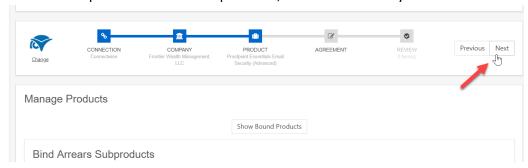
6a. If you click Bind Product, you will need to bind to a top-level product. This is a generic product and does not have any functionality beyond the subscription. You can then bind your sub-level products like DNS, SAEP, etc. with ones you have in your PSA. If you don't already have DNS, SAEP, etc. 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:



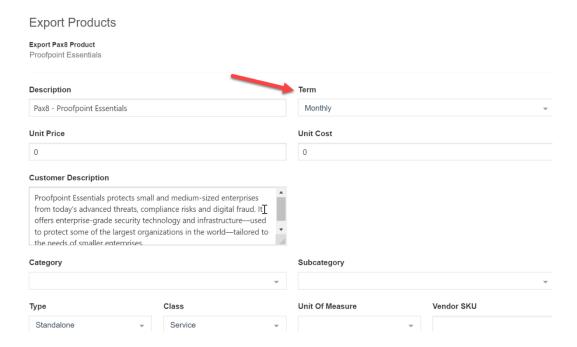




If you do not have products for all sub-products, click Next in the sync workflow.



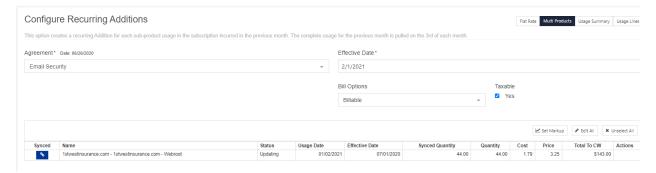
6b. If you click Export Product, select the term and white label any of the information as desired. You will still need to **bind or export** the sub-products after exporting the **top-level** product:





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 3<sup>rd</sup> of the curent month. i.e. on April 3<sup>rd</sup> we will show you billable usage from March:



8. Select the agreement/contract/invoice

# Configure Recurring Additions This option creates a recurring Addition for each sub-product usage in the subscription incurred in the previous month. The complete usa Agreement\* Date: 12/18/2015 Complete Care internal



\*\*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)



- 9. In the line item you can see the following settings:
- a. **Synced Status** - Sync status shows 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
8	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 quantity 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).

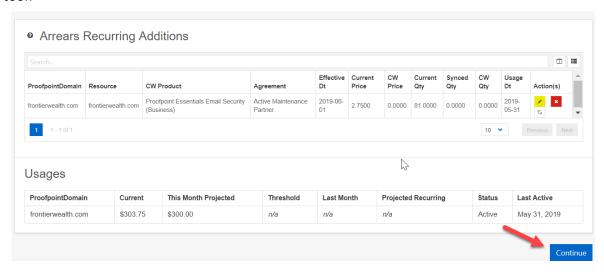
Status	Usage Date	Effective Date	
Updating	01/02/2021	07/01/2020	

- 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



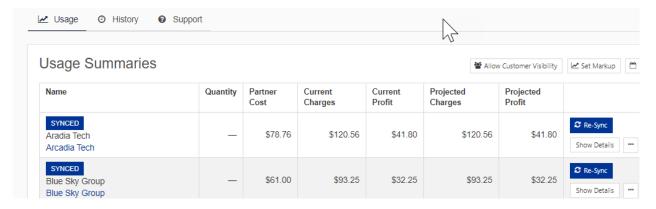
10. Click Continue to go to the summary page. Then, click Confirm Sync to write over to the PSA tool:



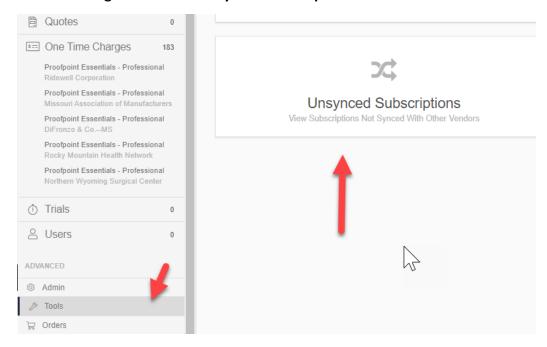
#### Review Please review each Addition below and click confirm to complete the sync process for this order Updating current Connectwise addition. Connectwise Product Name: Proofpoint Essentials Proofpoint Business Invoice Description: N/A Arcadia Tech - Proofpoint Essentials Term: Monthly Monthly Quantity: 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) 05/09/2019 07/01/2020 N/A



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** 

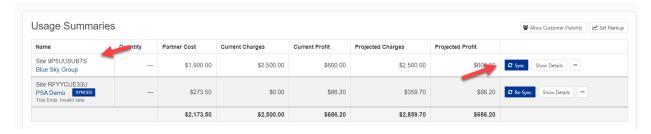




Click the green sync icon, you will be redirected to the main Webroot subscription page



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:



### 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