



## Syncing Proofpoint to PSA

Overview and User Guide



# Overview & User Guide

## PURPOSE

The primary purpose of this document is to show users how to sync Proofpoint 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 Proofpoint subscription

## LAST UPDATED

January 2021



# Overview & User Guide

## 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 Advanced, Business, and Pro.

### **Billing:**

- Product is billed to partners in arrears, based on a snapshot of endpoints taken on the 19th of the month. Example: An April invoice will include March charges based on a 3/19 snapshot
- No proration, partner billed for the full month based on a snapshot taken on the 19<sup>th</sup>
- 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 month's final 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.

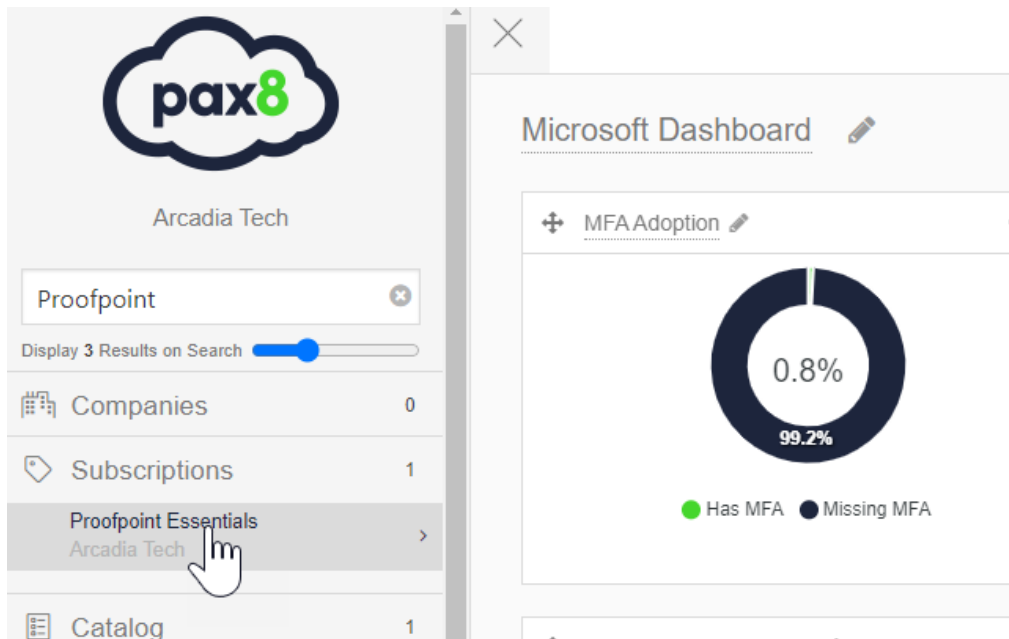
**\*\*NOTE\*\*** Pax8 understands that keeping up with these dates can be confusing. We will be releasing auto-syncing functionality in Q1 of 2021 to automatically push these changes to your PSA tool.



# Overview & User Guide

## Steps:

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





# Overview & User Guide

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

Arcadia Tech

**Proofpoint Essentials**

ID: 102395  
SKU: PAX-PROOF-POINT-ESSEN  
Term: Monthly  
Renews: 8/1/2019

Quantity 1	Retail Price \$0.00 \$0.00 total	Partner Cost \$0.00 \$0.00 total	Term Monthly	Start Date 5/3/2019
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Cancel Subscription

[Usage](#)
[History](#)
[Support Tickets](#)

### Usage Summaries

[Allow Customers to See Usage](#)
[Set Markup](#)

Name	Quantity	Current Charges	Current Profit	Projected Charges	Projected Profit	
arcadiatech.com Arcadia Tech	—	\$0.00	\$0.00	\$0.00	\$0.00	Show Details ...
blueskygroupcw.com Blue Sky Group	—	\$10.66	\$3.74	\$10.66	\$3.74	Show Details ...
		\$10.66	\$3.74	\$10.66	\$3.74	

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:

[Usage](#)
[History](#)
[Support Tickets](#)

### Usage Summaries

[Allow Customers to See Usage](#)
[Set Markup](#)

Name	Quantity	Current Charges	Current Profit	Projected Charges	Projected Profit	
arcadiatech.com Arcadia Tech	—	\$0.00	\$0.00	\$0.00	\$0.00	Show Details ...
blueskygroupcw.com Blue Sky Group	—	\$10.66	\$3.74	\$10.66	\$3.74	Show Details ...
		\$10.66	\$3.74	\$10.66	\$3.74	

Assign Company

Set Threshold

Sum Invoice Lines



# Overview & User Guide

Assign Company

Usage Summary

blueskygroupcw.com  
Current Charges: \$10.66  
Projected Charges: \$10.66

Company

- Arcadia Tech
- Arcadia Tech
- ✓ Blue Sky Group
- Dynamo Corporation
- Tanner's Computers
- Troy Wire and Cable

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

Name	Quantity	Partner Cost	Current Charges	Current Profit	Projected Charges	Projected Profit	
arcadiatech.com Arcadia Tech	—	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	<div>Sync</div> <div>Show Details</div> <div>...</div>
blueskygroupcw.com Blue Sky Group	—	\$6.92	\$10.52	\$3.60	\$10.52	\$3.60	<div>Sync</div> <div>Show Details</div> <div>...</div>
		\$6.92	\$10.52	\$3.60	\$10.52	\$3.60	



# Overview & User Guide

## 5. Select your PSA tool:

Proofpoint Essentials — frontierwealth.com

ID: 298970

Term: Monthly

SKU: PRF-SEC-ESS-C100

Renews: 5/1/2019

Cancel Sync

Select Vendor

Autotask

Connectwise

Kaseya

Syncro

Tigerpaw

## 6. Bind the Proofpoint 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 Advanced, Business, Pro, etc., **it is recommended to create a generic product for Proofpoint** as the integration will breakdown the components like Advanced, Business, Pro, etc. into separate line items on your Agreement/Contract as well as show the version in the description.

Change

CONNECTION

Connectwise

COMPANY

Frontier Wealth Management, LLC

PRODUCT

AGREEMENT

REVIEW

0 item(s)

Previous

Next

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



# Overview & User Guide

6a. If you click Bind Product, you will need to bind over 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 Advanced, Business, Pro, etc. with ones you have in your PSA. If you don't already have Advanced, Business, Pro, 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

Proofpoint Essentials

Connectwise Product

Bind Arrears Subproducts

Pax8 Product Id	Pax8 Product Name	CW Product Id	CW Product Name	
2755	Proofpoint Essentials - Beginner		<input type="text" value="Search Connectwise Product"/>	<input type="button" value="Bind"/>
2756	Proofpoint Essentials - Business		<input type="text" value="Search Connectwise Product"/>	<input type="button" value="Bind"/>
2757	Proofpoint Essentials - Advanced		<input type="text" value="Search Connectwise Product"/>	<input type="button" value="Bind"/>
2758	Proofpoint Essentials - Professional		<input type="text" value="Search Connectwise Product"/>	<input type="button" value="Bind"/>
2800	Proofpoint Essentials Archive Monthly Data		<input type="text" value="Search Connectwise Product"/>	<input type="button" value="Bind"/>

## Manage Products

Hide Bound Products

Pax8 Product Id	Pax8 Product Name	Connectwise Product ID	Connectwise Product Name	Action(s)
100025	Proofpoint Essentials	1226	Proofpoint Essentials	<input type="button" value="Unbind"/>

1 1 - 1 of 1

10

Bind Arrears Subproducts

Pax8 Product Id	Pax8 Product Name	CW Product Id	CW Product Name	
100026	Proofpoint Essentials - Advanced	1310	Proofpoint Essentials - Advanced	<input type="button" value="Unbind"/>
100027	Proofpoint Essentials - Beginner	1311	Proofpoint Essentials - Beginner	<input type="button" value="Unbind"/>
100028	Proofpoint Essentials - Business	1312	Proofpoint Essentials - Business	<input type="button" value="Unbind"/>
100029	Proofpoint Essentials - Professional	1313	Proofpoint Essentials - Professional	<input type="button" value="Unbind"/>
100030	Proofpoint Essentials Archive Ingestion (per GB)		<input type="text" value="Search Connectwise Product"/>	<input type="button" value="Bind"/>





# Overview & User Guide

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

Manage Products

Show Bound Products

Bind Arrears Subproducts

Pax8 Product Id	Pax8 Product Name	CW Product Id	CW Product Name	
2755	Proofpoint Essentials - Beginner		<input type="text" value="Search Connectwise Product"/>	<a href="#">Bind</a>
2756	Proofpoint Essentials - Business	2056	Proofpoint Essentials Email Security (Business)	<a href="#">Unbind</a>

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:

## Export Products

Export Pax8 Product  
Proofpoint Essentials

**Description**

Pax8 - Proofpoint Essentials

**Unit Price**

0

**Unit Cost**

0

**Customer Description**

Proofpoint Essentials protects small and medium-sized enterprises from today's advanced threats, compliance risks and digital fraud. It offers enterprise-grade security technology and infrastructure—used to protect some of the largest organizations in the world—tailored to the needs of smaller enterprises.

**Category**

**Subcategory**

**Type**

Standalone

**Class**

Service

**Unit Of Measure**

**Vendor SKU**



# Overview & User Guide

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

**Configure Recurring Additions** Flat Rate **Multi Products** Usage Summary Usage Lines

This option creates a recurring Addition for each sub-product usage in the subscription incurred in the previous month. The complete usage for the previous month is pulled on the 3rd of each month.

Agreement\* Date: 06/26/2020 Effective Date\* 2/1/2021

Email Security Billable Taxable ☒ Yes

Set Markup Edit All Unselect All

Synced	Name	Status	Usage Date	Effective Date	Synced Quantity	Quantity	Cost	Price	Total To CW	Actions
	1stvestinsurance.com - 1stvestinsurance.com - Proofpoint Business	Updating	01/02/2021	07/01/2020	44.00	44.00	1.79	3.25	\$143.00	

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/invoices cancel the sync and ensure you have correctly assigned the site to the customer (shown in step 3)




# Overview & User Guide

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
	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 Proofpoint

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



# Overview & User Guide

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 - 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 x 44 units)
Recurring Price:	\$0.00	\$143.00 (\$3.25 x 44 units)
Effective Date:	05/09/2019	07/01/2020
Bill Customer:	N/A	Billable
Taxable:	N/A	false



# Overview & User Guide

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

Usage							
Usage Summaries							
Name	Quantity	Partner Cost	Current Charges	Current Profit	Projected Charges	Projected Profit	
<b>SYNCED</b> Aradia Tech Arcadia Tech	—	\$78.76	\$120.56	\$41.80	\$120.56	\$41.80	<a href="#">Re-Sync</a> <a href="#">Show Details</a>
<b>SYNCED</b> Blue Sky Group Blue Sky Group	—	\$61.00	\$93.25	\$32.25	\$93.25	\$32.25	<a href="#">Re-Sync</a> <a href="#">Show Details</a>

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.**

Quotes0

One Time Charges183

Proofpoint Essentials - Professional  
Ridewell Corporation

Proofpoint Essentials - Professional  
Missouri Association of Manufacturers

Proofpoint Essentials - Professional  
DiFronzo & Co.-MS

Proofpoint Essentials - Professional  
Rocky Mountain Health Network

Proofpoint Essentials - Professional  
Northern Wyoming Surgical Center

Trials0

Users0

ADVANCED

Admin

Tools

Orders

↻

Unsynced Subscriptions

View Subscriptions Not Synced With Other Vendors



# Overview & User Guide

All subscriptions in which customers had delta changes in their endpoints since the previous month will be listed and you can sync them over to your respective PSA:

Arrears Subscriptions			
Id	Company	Subscription	Action(s)
365826	Nova Coast	Proofpoint Essentials	

## CONCLUSION

I hope this article provided you some targeted guidance on syncing Proofpoint 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](mailto: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](mailto:support@pax8.com)
  - Hours: 24/7