IDSync®
Ingram Marketplace
CLOUD BILLING STUDIO

**Upgrading IDSync Billing Studio
On Premise Version to Cloud-based version**

Includes Instructions for both Autotask and ConnectWise Integrations

Oct., 2018

IDSync® Cloud Billing Studio

Cloud Based Billing Integration

Document Summary

- Announcement of immediate availability of IDSync/Ingram Cloud Billing Studio software.
- Upgrade plan for MSP's with the original "on premise" version to transition to the new software version.
- Links to additional information about the new software upgrade.

- **PLEASE NOTE: If any questions or guidance is needed regarding this software upgrade, please direct your inquiries to <u>support@idsync.com</u>. A ticket will be opened, and we will respond quickly.**

Introduction

IDSync is pleased to announce the upgrade to the software integration between the Ingram Marketplace and the Autotask and Connectwise PSA systems.

While the new software is similar in many ways to the older version, along with other benefits, included in the new software is a faster and streamlined Customer and subscription mapping process and graphical reporting capabilities.

We will continue to support the current on-premise version of the Billing Studio product through March of 2019. For customers who prefer staying on the current version, there is no requirement that they upgrade to the new Cloud version, however after that date, new software updates will only be available for the newer version of the Cloud Billing Studio product.
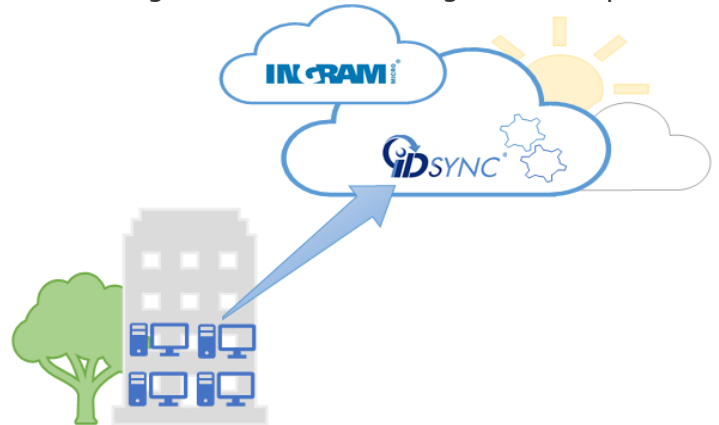
NEW FEATURES

- ✓ No hardware or software to maintain and monitor on premise (reducing operational costs, increasing effectiveness of IT processes, gaining flexibility to access the software, and even easier configuration and troubleshooting)

- ✓ Automatic updates to latest release (forget about downtime, backup processes and other periodic tasks associated with software maintenance).

- ✓ New and re-engineered interfaces, graphical reporting and improved color-coded product mapping screens.

- ✓ Graphical display of management reports.

- ✓ Reduced need for on premise technical support of software or infrastructure
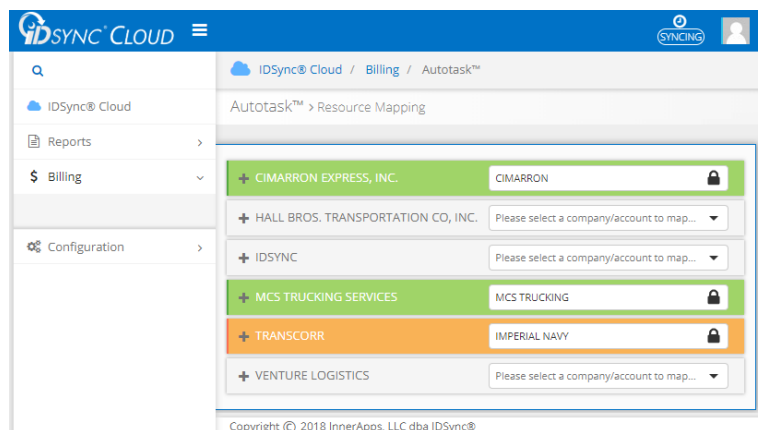
The Migration Process

From the current "on premise" version of Billing Studio to the new Cloud version

CUSTOMER AND PRODUCT MAPPING

Based on the current quantity of established links/relations between the Ingram Marketplace and your on-premise PSA system, you have a choice of deciding the easiest upgrade path, whether you prefer for IDSync to convert your data from old to new format or you prefer to simply abandon the old version and remap using the new mapping screens.

UPGRADE OPTIONS - CUSTOMER PREFERENCES

Option #1 – DO IT YOURSELF
Most of our customers with less than 50 relationships set, opt for a clean approach, since they appreciate the benefits of starting with a blank system that can be quickly and easily set up: simply get a new subscription from Ingram, cancel the 'old' one, get your credentials to access the cloud system and start working. This is estimated to take approximately 1-2 hours of effort re-mapping the customers and subscriptions. In most cases, this approach is quicker and easier for the smaller MSP.

Option #2 – IDSYNC ASSISTED
For the larger MSP, with more than 50 Customer/product Mappings, it is likely IDSync assistance is the fastest path to the completing the upgrade. With this in mind, we will need for you to export and upload your database of mappings it to the cloud. We will install that export in the Cloud and then you'll get credentials to access the system and continue with the data as currently mapped with no reentry of data. This option is included without charge.

Independent of the option you choose, IDSync is happy to support and help you to successfully carry out this process.

The Migration Process

UPGRADE OPTIONS – DETAILED STEPS

Option #1 – D.I.Y.

- Get in touch with us (support@idsync.com) to let us know you'll be starting the migration process, so we can work with you until you're up and running again.
- Print out the Linked Subscriptions Report, this will be your starting point: it shows the subscriptions that you currently have linked to the PSA System's Contracts or Agreements (these are the ones you probably want to check first and link again in the Cloud billing system).
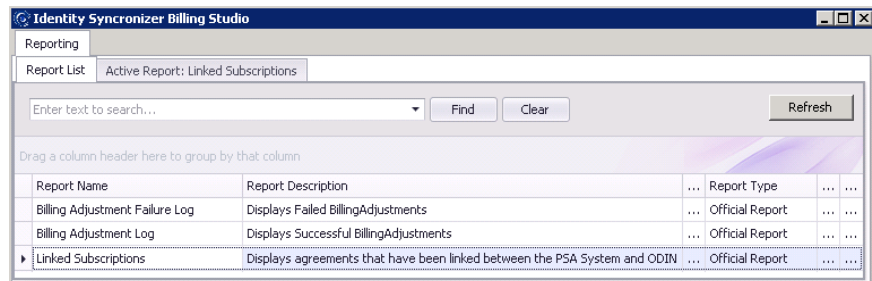
- Go to the Ingram Micro Marketplace to Cancel your current IDSync subscription. Part of this process is manual at Ingram and does not occur immediately (so, it is recommended that you contact Ingram Support Desk and send them the cancellation order number and a screenshot of the order and request that the support desk Terminate the Subscription immediately).
- Once you have confirmation from Ingram that the subscription has been cancelled, you should be able to Purchase a new IDSync Billing package subscription (remember some details you'll need: purchase a connector for resellers, define a subscription period and add the corresponding Resource to the PSA system you use -Autotask or ConnectWise).
- Stop using the on-premise software. Make sure you stop all IDSync services (if required, you may still access the system, but the services need to be stopped so they don't try to communicate with Ingram or your PSA system).
- We'll send you the required credentials, so you can access the Cloud Billing portal, configure it and start mapping (the report from the first step we'll be useful now).
- Once comfortable with the idea, Uninstall the on-premise software.

The Migration Process - Upgrade Options

Option #2 – IDSync Assisted Process

- Contact IDSync at support@idsync.com and schedule a time and date to have your existing subscription changed to a Cloud-Based Subscription. We will respond with a suggested conversion date and a complete roadmap with detailed instructions.

- On the scheduled conversion date:

  o Stop using your on-premise version of IDSync services and applications. Make sure you stop all IDSync services, so they don't try to communicate with Ingram's or your PSA's systems.
  o Perform a database backup and make sure you label it as the 'before-pre-conversion' backup file.
  o Download the IDSync Pre-Conversion utility and run it. This tool will check your data and will prepare it to be exported to the Cloud.
  o Make a backup of your IDSync database and label it properly ('ready-for-conversion' and include your company's name).
  o Send it to IDSync at the specified web-folder.
  o IDSync will restore this database, complete the conversion of your data and upload it to the Cloud platform.
  o You will then be provided login credentials for the new software migrated Cloud billing subscription and more instructions on how to use the system.

Since we expect all this process to occur in one day (so, posts to your PSA system are not affected) it is imperative that we receive the database backup before noon (U.S.-EST).

Get to know the IDSync Cloud Billing Studio

Please visit our website for user guides and videos to learn more about the new version:

☞ **Autotask Cloud Billing User's Guide & Video:**

https://idsync.atlassian.net/wiki/spaces/ACB/pages/338952211

☞ Autotask Cloud Billing Demo:

https://idsync.atlassian.net/wiki/spaces/ACB/pages/320110701

☞ **ConnectWise Cloud Billing User's Guide & Video:**

https://idsync.atlassian.net/wiki/spaces/CCB/pages/338952193

☞ ConnectWise Cloud Billing Demo:

https://idsync.atlassian.net/wiki/spaces/CCB/pages/316637249