Cloud Billing Studio for

INGRAM MICRO CloudMarketplace

INTEGRATION WITH AUTOTASK & CONNECTWISE PSA SYSTEMS

MSP Marketplace License Info
Easy Invoicing
Automated Data Entry - Fast, Simple, Efficient

Autotask®

ConnectWise CERTIFIED INTEGRATOR

What is it? What Purpose?

ConnectWise

Autotask®

Billing info automatically flows from the Ingram Subscription to the <u>EXACT</u> PSA record without further handling.

IDSYNC®

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Today's Learnings in less than 30 Minutes

- What is the IDSync® Billing Studio?
- How does it Work? How does it Help?
- Where does it fit in the invoicing process?
- How does it help with license management?
- What is the technical infrastructure required?
- How does my staff get trained?
- How do I purchase it from the marketplace?

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Minimizes Cost & Effort - "Set It and Forget It"

- Eliminates recurring Manual Data Entry
- Just Imagine…
  - No batch files
  - No download/upload effort
  - No Sorting/Collating
  - Automated Data Entry
  - Direct Insertion into PSA system
  - No Handling, No Clerical Errors

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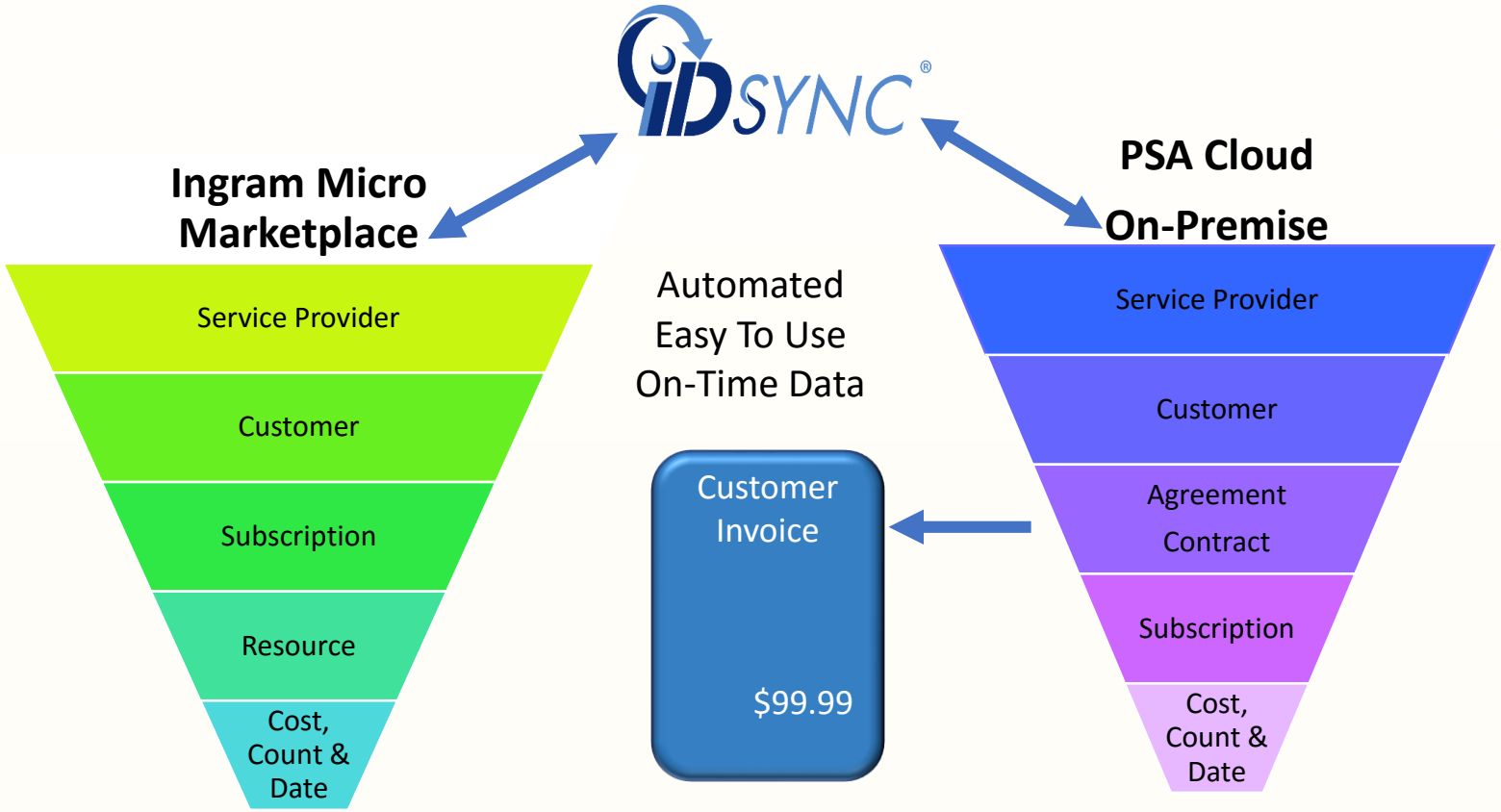
Billing Studio – Work Flow



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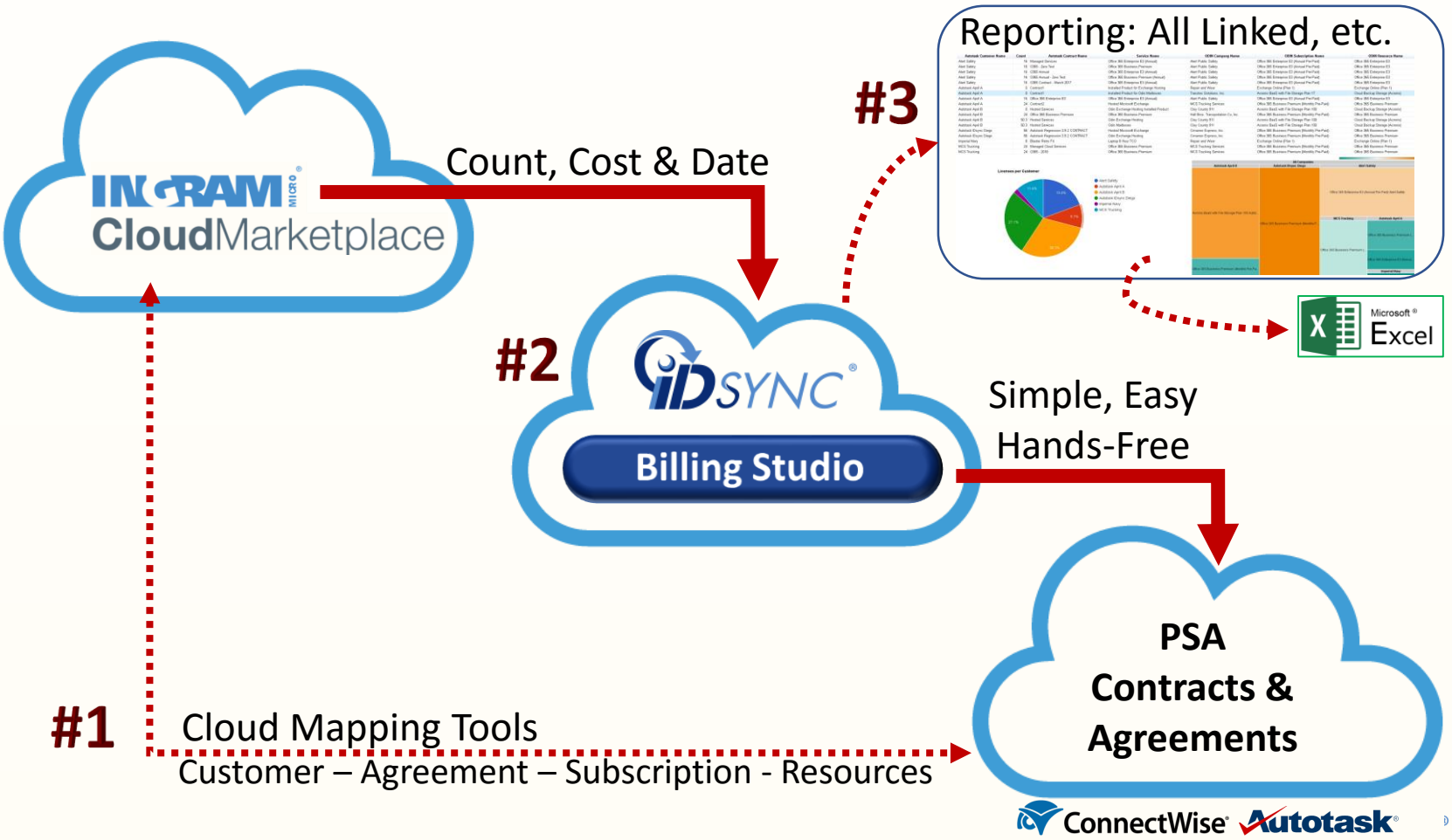
Billing Studio – Setup, Operations, Process



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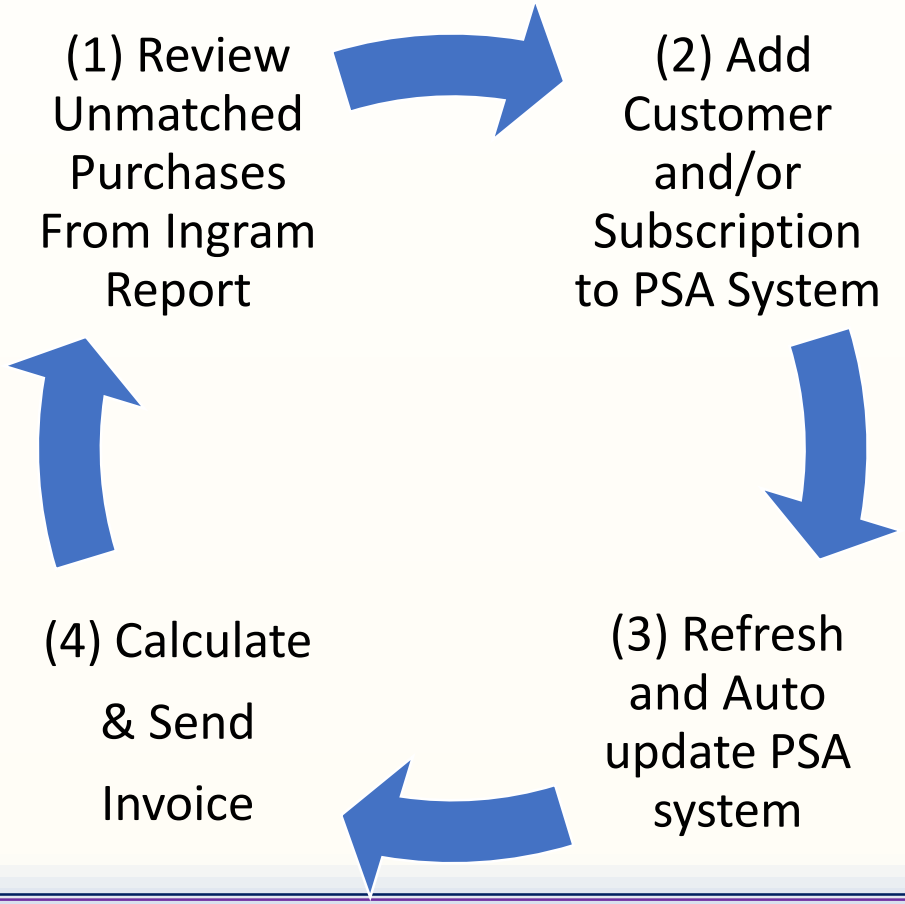
Simple Month End Process



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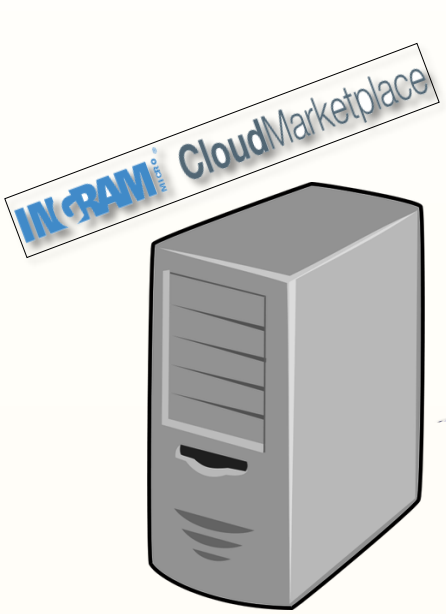
Flexible Mapping Between Systems

Accounts for Differences in Naming Conventions



Monitor for Changes & Synchronize

Example:
- Acme Mfg. Inc.
- Office 365 E3

Customer & Subscription #1
Customer & Subscription #2
Customer & Subscription #3
Customer & Subscription #4
Customer & Subscription #5
Etc., Etc.,

Customer & Subscription #1
Customer & Subscription #2
Customer & Subscription #3
Customer & Subscription #4
Customer & Subscription #5
Etc., Etc.,

- Acme Co.
- Email License

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Billing Studio – Primary Features

- Designed for MSP invoicing & Ingram Marketplace
- Minimizes Manual Data Entry, Errors & Efforts
- Simple to Use & ~~Easy~~ nothing to Install
- Quicker, more accurate Invoices
- No Change in Standard Billing Practices
- Quick/Timely updates to PSA System
  - Near real-time
- License Management Reports

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Process is Important

- If you don't know what you purchased …
- And if the status in the PSA system is uncertain…
- How do you know what to do next?

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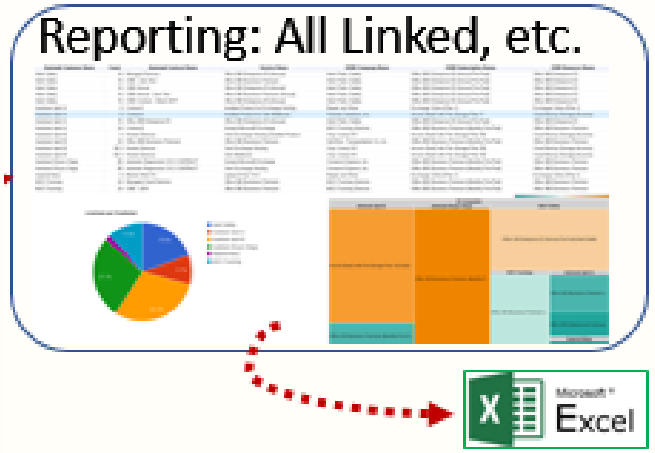
Management Reporting

- Online, web-based data tables
- Dynamic Pie Chart graphics for key metrics
- Search, Sort, select, filter
- Real-Time Refresh Button
- Export to Microsoft Excel
  - All Data
  - Filtered Data
- Extensible Framework
  - IDSync Professional Services



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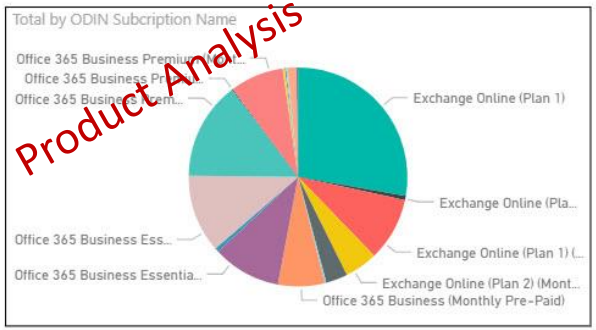
All Marketplace Subscriptions

All Marketplace Purchases

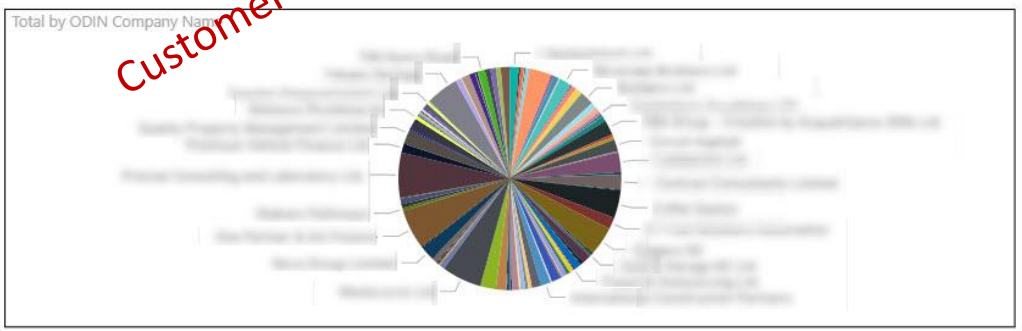
ODIN Subscription Report

ODIN Company Name	ODIN Account ID	ODIN Subcription Name	ODIN Subscription ID	ODIN Resource Name	ODIN Resource ID	Included Amount	Additional Amount	Total
[redacted]	1200000501	Exchange Online (Plan 1)	1000823	Exchange Online (Plan 1)	100234	1.00	3.00	4.00
[redacted]	1200000503	Exchange Online (Plan 1)	1000825	Exchange Online (Plan 1)	100234	1.00	19.00	20.00
[redacted]	1200000582	Exchange Online (Plan 1)	1000925	Exchange Online (Plan 1)	100234	1.00	3.00	4.00
[redacted]	1200000881	Exchange Online (Plan 1)	1001374	Exchange Online (Plan 1)	100234	1.00	7.00	8.00
[redacted]	1200001003	Exchange Online (Plan 1)	1001540	Exchange Online (Plan 1)	100234	1.00	0.00	1.00
[redacted]	1200001639	Exchange Online (Plan 1)	1002335	Exchange Online (Plan 1)	100234	1.00	2.00	3.00
[redacted]	1200002500	Exchange Online (Plan 1)	1003427	Exchange Online (Plan 1)	100234	1.00	4.00	5.00
[redacted]	1200002707	Exchange Online (Plan 1)	1003864	Exchange Online (Plan 1)	100234	1.00	10.00	11.00
[redacted]	1200002943	Exchange Online (Plan 1)	1004219	Exchange Online (Plan 1)	100234	1.00	13.00	14.00
[redacted]	1200002944	Exchange Online (Plan 1)	1004220	Exchange Online (Plan 1)	100234	1.00	3.00	4.00
[redacted]	1200002945	Exchange Online (Plan 1)	1004221	Exchange Online (Plan 1)	100234	1.00	0.00	1.00
[redacted]	1200002968	Exchange Online (Plan 1) (Monthly Pre-Paid)	1031509	Exchange Online (Plan 1)	100234	1.00	5.00	6.00
[redacted]	1200003001	Exchange Online (Plan 1)	1004307	Exchange Online (Plan 1)	100234	1.00	7.00	8.00
[redacted]	1200003526	Exchange Online (Plan 1)	1005115	Exchange Online (Plan 1)	100234	1.00	5.00	6.00
[redacted]	1200003640	Exchange Online (Plan 1)	1005270	Exchange Online (Plan 1)	100234	1.00	3.00	4.00
[redacted]	1200003874	Exchange Online (Plan 1)	1005631	Exchange Online (Plan 1)	100234	1.00	0.00	1.00
[redacted]	1200003967	Exchange Online (Plan 1)	1005786	Exchange Online (Plan 1)	100234	1.00	6.00	7.00
[redacted]	1200004928	Exchange Online (Plan 1) (Annual Pre-Paid)	1009715	Exchange Online (Plan 1)	100234	1.00	0.00	1.00
Total						189.00	653.00	842.00

Product Analysis



Customer Analysis



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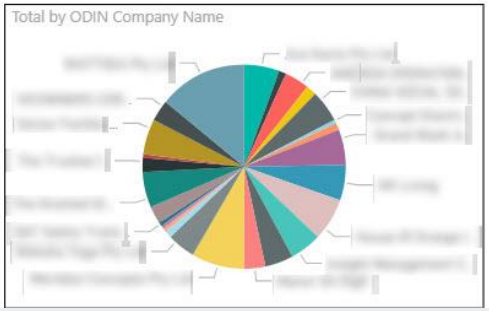
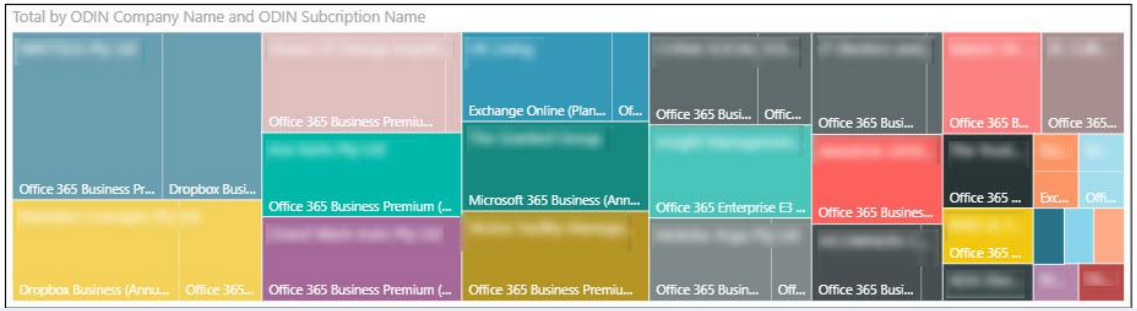
Unlinked Licenses

Ingram Micro Unlinked Subscription Report

All PSA System Subscriptions NOT Yet Linked to the Marketplace

ODIN Company Name	ODIN Account ID	ODIN Subcription Name	ODIN Subscription ID	ODIN Resource Name	ODIN Resource ID	Included Account	Additional Amount	Total
	1200024536	Office 365 Business Premium (Annual Pre-Paid)	1038755	Office 365 Business Premium	100180	1.00	9.00	10.00
	1200025634	Office 365 Business Premium (Annual Pre-Paid)	1040843	Office 365 Business Premium	100180	1.00	1.00	2.00
	1200021	Office 365 Business Premium (Annual Pre-Paid)	1019628	Office 365 Business Premium	100180	1.00	6.00	7.00
	1200027536	Office 365 Business Essentials (Annual Pre-Paid)	1044337	Office 365 Business Essentials	100181	1.00	2.00	3.00
	1200027528	Office 365 Business Essentials (Annual Pre-Paid)	1044341	Office 365 Business Essentials	100181	1.00	2.00	3.00
	1200027	Office 365 Business Premium (Annual Pre-Paid)	1044321	Office 365 Business Premium	100180	1.00	5.00	6.00
	1200021463	Office 365 Business Premium (Annual Pre-Paid)	1033523	Office 365 Business Premium	100180	1.00	0.00	1.00
	1200016517	Exchange Online Protection (Annual Pre-Paid)	1030033	Exchange Online Protection	100165	1.00	0.00	1.00
	1200016517	Office 365 Business Premium (Annual Pre-Paid)	1024812	Office 365 Business Premium	100180	1.00	0.00	1.00
	1200020900	Office 365 Business Premium (Annual Pre-Paid)	1032566	Office 365 Business Premium	100180	1.00	9.00	10.00
	1200027668	Exchange Online (Plan 1) (Monthly Pre-Paid)	1044565	Exchange Online (Plan 1)	100177	1.00	7.00	8.00
	1200027668	Office 365 Business Premium (Monthly Pre-Paid)	1044617	Office 365 Business Premium	100180	1.00	1.00	2.00
	1200027619	Exchange Online (Plan 1) (Monthly Pre-Paid)	1045604	Exchange Online (Plan 1)	100177	1.00	0.00	1.00
	1200027619	Office 365 Business Premium (Monthly Pre-Paid)	1044481	Office 365 Business Premium	100180	1.00	10.00	11.00
	1200017194	Office 365 Enterprise E3 (Annual Pre-Paid)	1025993	Office 365 Enterprise E3	100172	1.00	8.00	9.00
	1200025105	Office 365 Business Essentials (Annual Pre-Paid)	1039796	Office 365 Business Essentials	100181	1.00	6.00	7.00
	1200025105	Office 365 Business Premium (Annual Pre-Paid)	1048850	Office 365 Business Premium	100180	1.00	0.00	1.00
	1200002454	Office 365 Business Premium (Annual Pre-Paid)	1003314	Office 365 Business Premium	100180	1.00	5.00	6.00
Total						**44.00**	**134.00**	**178.00**





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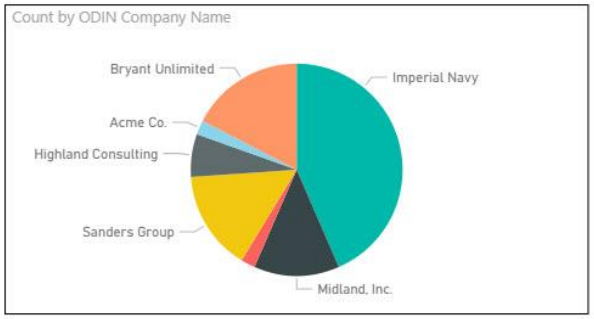
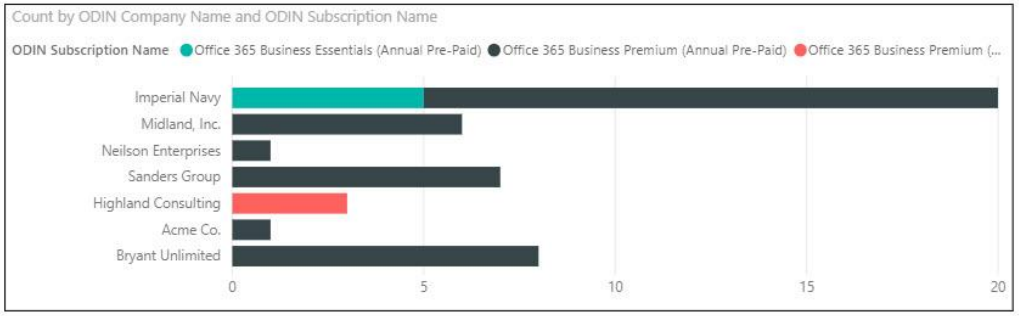
Linked Subscriptions

All Marketplace Purchases Linked to the PSA System

Ingram Micro Autotask Linked Subscription Report

ODIN Company Name	ODIN Subscription Name	ODIN Resource Name	Count	Autotask Customer Name	Autotask Contract Name	Name	Prorate On
Highland Consulting	Office 365 Business Premium (Monthly Pre-Paid)	Office 365 Business Premium	3.00	Highland Consulting	futureDatedContract	Gold Server Support	
Imperial Navy	Office 365 Business Premium (Annual Pre-Paid)	Office 365 Business Premium	15.00	Imperial Navy	O365 Annual	Office 365 Enterprise E3 (Annual)	
Midland, Inc.	Office 365 Business Premium (Annual Pre-Paid)	Office 365 Business Premium	6.00	Midland Corp.	Yearly futureDate Contract	Mara's Yearly Service I	
Neilson Enterprises	Office 365 Business Premium (Annual Pre-Paid)	Office 365 Business Premium	1.00	Neilson Ent.	futureDatedContract	Silver PC Support	
Sanders Group	Office 365 Business Premium (Annual Pre-Paid)	Office 365 Business Premium	1.00	Sanders Enterp.	futureDatedContract	Office 365 Business Premium (Annual)	
Sanders Group	Office 365 Business Premium (Annual Pre-Paid)	Office 365 Business Premium	6.00	Sanders Enterp.	Yearly futureDate Contract	Mara's Semi-Annual Service I	Last Day of the Month
Acme Co.	Office 365 Business Premium (Annual Pre-Paid)	Office 365 Business Premium	1.00	Acme Co.	Yearly futureDate Contract	Office 365 Business Premium (Annual)	
Bryant Unlimited	Office 365 Business Premium (Annual Pre-Paid)	Office 365 Business Premium	8.00	Bryant Unlimited	futureDatedContract	Platinum Server Support	
Bartlet Brewing	Office 365 Business Essentials (Annual Pre-Paid)	Office 365 Business Essentials	5.00	Bartlet Brewing	O365 Contract - March 2017	Office 365 Enterprise E3 (Annual)	
Total			**46.00**				





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Benefit Summary

- Direct integration between Ingram and PSA system
  - License Management Reports
- Be more efficient in your billing practices
  - Save Time, Save Money
  - No imports, no keyboarding required
- Improves Cash Flow
  - Reduces Delay
  - Improves Collections
  - Eliminates Data entry errors

- No change in invoice calculation process
- Supports ALL Marketplace, fixed resource licenses including Office 365

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Live Software – Look & Feel

- Billing Studio
  Marketplace / PSA Integration

1. Login & Configuration
2. Mapping
3. Posting
4. Reporting

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Why Use Billing Studio?

- SaaS software is typically a thin margin business
- Tracking licenses can be a never ending task
  - Billing Studio: A proven, efficient process that accounts for ALL licenses
- Eliminate cost & time
  - Paper handling
  - Missing license revenue
  - Eliminates “hair on fire” days
  - Sorting/collation of license data
  - Improves customer relations & cash flow

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QuickStart Services from IDSync®

Focus: Effective Use of Billing Studio

- Software Setup
- License Tracking
- Maximizing Revenue Capture

Deliverable:

- Guided, precise execution
- Accelerate startup & minimize learning efforts

Approved & Supported by

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Ingram Marketplace
IDSync® Portfolio - MSP Partner Program

Cloud Billing Studio

- Ingram Marketplace

Active Directory – Provision & Synch

- Office 365 w/Azure
- Hosted Exchange
- Connectwise
- Autotask
- Odin Automation

Active Directory Tools

- Active Directory Cloud Portal
- AD to AD synchronization

IDSYNC®