



ConnectWise Manage

Integration Guide

SONICWALL[®]

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ConnectWise Manage

ConnectWise Manage is a professional services automation platform dedicated in automating business processes. The Services Provider would like to manage the professional services for SonicWall products via standard PSA platforms like ConnectWise Manage. This solution allows the service provider to synchronize the SonicWall products alerts information to ConnectWise Manage, allowing them to manage the customers via the PSA platform.

This document describes how MySonicWall helps integrate product and services consoles with ConnectWise Manage (CWM) through MySonicWall. This integration helps automate the invoicing and billing of security services for service providers via ConnectWise Manage. In addition, the integration automates the creation and processing of service tickets within ConnectWise Manage, including the automatic closure of tickets when alerts are closed in the product consoles. For more information about the integration, refer to KB article, [ConnectWise Manage Integration - Frequently Asked Questions](#).

From the ConnectWise Manage Integration page, you can perform the following operations:

- **Search** for a specific tenant in the table.
- **Filter** Tenants in the table.
- **Sort** the table data in ascending or descending order.
- **Configure** the ConnectWise Manage Integration.
- **Manually Sync** the mapped companies and agreements to ConnectWise Manage.
- **Refresh** to get the latest additions of companies and agreements in the table.
- **Reset** the existing configuration and mappings.

Topics:

- [Acronyms](#)
- [Prerequisites](#)
- [Options for the ConnectWise Manage Table](#)
- [Advanced Filter](#)
- [Sorting the ConnectWise Manage Table](#)
- [Configuring ConnectWise Manage](#)
- [Configuring the ConnectWise Manage Integration](#)
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- [Validating Product Catalog of the Synced Tenant](#)
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- [Integration Benefits](#)
- [SonicWall Support](#)

Acronyms

Here are the list of acronyms used throughout the document.

MSW	MySonicWall
CWM	ConnectWise Manage
PSA	Professional Services Automation

Prerequisites

Before starting with the configuration, make sure that:

- CWM instance is accessible through the internet over HTTPS (port 443).
- An API member in CWM with the admin role and an API key pair is created.

① **NOTE:** It is recommended to provide an admin role to an API user. If any partner is not willing to provide an admin role due to any compliance or security reasons, they can create a custom role according to the below table. For more information, refer to KB article, [Security permissions required to integrate ConnectWise Manage with MySonicWall](#).

	Custom Role	Add Level	Edit Level	Delete Level	Inquire Level
Companies	Company Maintenance	None	None	None	All
	Configurations	All	All	All	All
	Manage Attachment	All	None	None	All
Finance	Agreements	All	All	None	All
Procurement	Product Catalog	All	All	None	All
Service Desk	Knowledge Base Creator	All	All	None	All
	Service Ticket - Dependencies	All	All	None	All
	Service Tickets	All	All	None	All
System	API Reports	All	All	None	All
	Data Import	All	All	None	All
	Report Writer	All	All	None	All
	System Reports	All	All	None	All
	Table Setup	All	All	None	All








- An MSW account, part of a SonicWall SecureFirst Partner organization with PSA Integration access to configure and manage the integration.

① **NOTE:**

- By the default, PSA Integration is enabled for all **Monthly Billing** partners. If any partner does not have PSA Integration Access on MySonicWall account, create a Customer Service Request on [Support & Resources > Create Support Case](#) page.
- Currently, SonicWall supports single PSA integration instance per organization.

- Companies and Agreements are created in CWM.

Options for the ConnectWise Manage Table

Icon	Description
	Use the Advanced Filter icon to filter the table data for specific results according to SYNC ENABLED , AGREEMENTS MAPPED , HAS NETWORK PRODUCTS , and HAS MONTHLY PRODUCTS groups. For more information, refer to Advanced Filter .
	Use the Search icon to filter the table data with a specific string.
	Use the Configure icon to configure the ConnectWise Manage Integration in MySonicWall to sync companies and agreements to ConnectWise Manage.
	Use the Sync Now icon to manually sync the mapped tenant information to companies and agreements on ConnectWise Manage.
	Use the Refresh icon to get status of sync and newly added companies and agreements to the ConnectWise Manage.
	Use the Reset icon to reset the existing configuration and mappings.
	Use the Sort icon to sort the table data in ascending or descending order.






Advanced Filter

The Advanced Filter reduces the number of tenants being displayed based on the filters set for **SYNC ENABLED**, **AGREEMENTS MAPPED**, **HAS NETWORK PRODUCTS**, and **HAS MONTHLY PRODUCTS** groups.

To filter data by Advanced Filter:

1. Click the **Advanced Filter** icon available at top left corner of the table.

NOTE: By the default, **All** the filters are included.

 <input type="text" value="Search Tenant"/>		   	
SYNC ENABLED	AGREEMENTS MAPPED	HAS NETWORK PRODUCTS	HAS MONTHLY PRODUCTS
<input checked="" type="radio"/> All	<input checked="" type="radio"/> All	<input checked="" type="radio"/> All	<input checked="" type="radio"/> All
<input type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes
<input type="radio"/> No	<input type="radio"/> No	<input type="radio"/> No	<input type="radio"/> No

2. Set the filter options to reduce the number of tenants being displayed in the table.
3. Type a **Search** string to find any specific detail from the filtered results.

① **NOTE:** Click the **Advanced Filter** icon available at top-left corner of the table to show or hide the filter groups at any point.

Sorting the ConnectWise Manage Table

ConnectWise Manage table shows the below listed columns. You can sort the table data in ascending or descending order.

Column Heading	Description
Tenant	Shows a list of Tenants
Network	Shows a count of Network Products for each Tenant
Monthly	Show a count of Monthly Billed products for each Tenant
Last Updated	Shows the time when sync was successful last time
Company	Shows a list of Companies from CWM
Agreement	Shows a list of Agreements from CWM
Auto Sync	Shows Auto Sync status for each Tenant (disabled/enabled)

To sort the table data:

Click the table headings to sort the table data in ascending or descending order.

ConnectWise

Server

Company ID

Service Board

staging.connectwise.dev.com

sonicwall_f

SonicWall Board

Last Sync

21 minutes ago

Synced Companies

Ignored Tenants

Errors

1

8

1

Configure

Sync Now

Refresh

Reset

Tenant	Network	Monthly	Last Updated	Company	Agreement	Auto Sync
snwl Products	3	0	N/A	Select Company	Select Agreement	--
TCM-1	11	15	N/A	Select Company	Select Agreement	--
TCM-4	5	8	N/A	Select Company	Select Agreement	--
TCM-5	3	3	N/A	ypv_prodsim	Select Agreement	<div><div></div></div> 3 Errors

Configuring ConnectWise Manage

1. Login to CWM Portal using the admin credentials.
2. Navigate to **System > Members**.

Members - Regular

Licensing: Regular (3 active/99 licensed), Mobile (0 active/99 licensed), StreamlineIT (0 active), Subcontractor(0 active)

Regular StreamlineIT Subcontractors API Members API Keys API Callbacks

+ Actions SEARCH CLEAR Export View (No View) 1 - 3 of 3

Member ID	First Name	Last Name	Inactive	Location	Type	Role ID	Work Role	Business Unit	Time Approver	Exp Approver	Utilization
Admin1	Training	Admin1	Active	Tampa Office		Admin	System Engineer	Professional Services	Admin1	Admin1	
Admin2	Training	Admin2		Tampa Office		Admin	System Engineer	Professional Services	Admin1	Admin1	
Admin3	Training	Admin3		Tampa Office		Admin	Consultant	Professional Services	Admin3	Admin3	

3. Navigate to the **API Members** tab and create an API member.

Members - API Members

Licensing: Regular (3 active/99 licensed), Mobile (0 active/99 licensed), StreamlineIT (0 active), Subcontractor(0 active)

Regular StreamlineIT Subcontractors API Members API Keys API Callbacks

+ SEARCH CLEAR RESYNC KEYS

Member ID	Member Name	Location	Role ID	Inactive
	Demo Member		Admin	All
Demo Member	Demo Member	Tampa Office	Admin	

- Click the API member you created and assign the **Role ID** as mention in the **Prerequisites**.

Members - API Members > Detail
Demo Member (Demo Member)

Details API Keys API Logs

< + HISTORY ▾

Profile

Member ID*
Demo Member

Time Zone*
US Pacific

Member Name*
Demo Member

Email

Notes ⓘ

System

Role ID*
Admin

Location*
Tampa Office

Level*
Corporate (Level 1)

Business Unit*
Admin

Name*
Corporate

Default Territory*
Corporate

Service Defaults

Service Board

Default Board

Restrict Board Access

- Navigate to the API Keys tab available on the top panel.

Members - API Members > Public API Keys > API Keys

Demo Member (Demo Member)

Details API Keys API Logs

< + HISTORY ▾

Public API Key

Description*
Demo API Key

Public Key*

Private Key*

Note: The private key is only available at the time the key is created. Please make a note of it.

- Generate a new API Key by clicking on the + sign.
- Click **Save** to generate the API credentials and save the Public Key and Private Key somewhere.

ⓘ **IMPORTANT:**

- The Private Key cannot be retrieved once you navigate away from this screen.
- Make sure that the Public and Private keys are copied and saved to use for integration.

- Navigate to **System > Setup Tables**.

9. Search for the **Table > Configuration Status**.

Setup Tables					
Setup Tables					
SEARCH CLEAR					
Category	Table ^	Description	Done	By	Date
▼	Configuration Status		▼		
Company	Configuration Status	Defines valid statuses to be used on the configuration screen.			

10. Verify that **Configuration Status List** is set up with one item selected as the default value.

Setup Tables > Configuration Status List		
Configuration Status List		
< + SEARCH CLEAR		
Description ^	Default	Inactive
Active	✓	
Inactive		

11. Verify that the **Closed** state has the **Closed Status** flag checked.

Setup Tables > Service Board List > Status List > Status

Status

Board Statuses Types Subtypes Items Auto Templates Teams Standard Notes Member Access Auto Assign

< + HISTORY ▾

Status Details

Status Overview

Status Description*
Closed (resolved)

Escalation Status
We have created a plan.

Sort Order
98

☐ Inactive

☐ Default

Board
Professional Services

Additional Options

☒ Closed Status

☒ Time Entry Not Allowed

☐ Display tickets in this status on board

Email Template Setup

☐ External Contact Notifications

☐ Internal Contact Notifications

Add Email Notifications +

Customer Portal Setup

☐ Customer can use this status on the Customer Portal

A long description in the Customer Portal and as a mouseover on the Service Board and Tabs

12. Search for **Service Board** on the **Setup Tables** page.

Setup Tables > Configuration Status List		
Setup Tables		
SEARCH CLEAR		
Category	Table ^	Description
	Service Board	
Service	Service Board	Service Board Setup

13. Select the **Service Board** where the tickets should be created for alerts.

Setup Tables > Service Board List > Service Board

Service Board

Board | Statuses | Types | Subtypes | Items | Auto Templates | Teams | Standard Notes | Member Access | Auto Assign | ⚙️

< + 📄 ↺ 📁 Marketplace HISTORY ▾ 🗑️

Board Details

Service Overview

Board Name*
Professional Services ☐ Inactive


Location*
Tampa Office ▾ ☐ Mark first note as Issue

Business Unit*
Professional Services ▾

Sign Off Template*
Default Signoff Template ▾

Service Board Icon

Board Icon
service-network.gif **BROWSE**

 🗑️

Ticket Finance Defaults and Billing Override Options

Work Role ▾ **Work Type** ▾

Bill Time
No Default ▾ **Bill Expense**
No Default ▾

Bill Products
Billable ▾

Billing Override Options

☐ Override Billing Set-up for Board Location ☐

☐ Bill service tickets only after they have been closed ☐

Time Entry and Closed Loop/Automatic Email Options

Closed Loop Options **Time Entry Options**

14. Navigate to the **Statuses** tab and verify the status:

- A status named **Closed** should be present.
- One state should be marked as **Default**.

Setup Tables > Service Board List > Status List

Status List

Board | **Statuses** | Types | Subtypes | Items | Auto Templates | Teams | Standard Notes | Member Access | Auto Assign | ⚙️

< + 📄 SEARCH CLEAR

Sort	Status	Default	Notification Steps	Display	No Time	Closed	Escalation Status	Portal	Survey
	0 <u>New (not responded)</u>	✓	0	✓			We have NOT respond...		
	10 <u>Assigned (responded)</u>		0	✓			We have NOT respond...		
	20 <u>In Progress (plan of action)</u>		0	✓			We have responded.		
	98 <u>Closed (resolved)</u>		0		✓	✓	We have created a plan.		

4. Enter the **Connection Details**:

- Server Host Name
- Company ID
- API Public Key
- API Private Key

Configure ConnectWise Manage Integration

1

2

3

4

CONNECTTICKETINGOPERATORSREVIEW

Connection Details

Server Host Name *

i

Company ID *

API Public Key *

API Private Key *

Test Connection

Next

5. Click **Test Connection** to verify the connection details.

On successful verification of connection details, it shows the **Connection established successfully** message.

Configure ConnectWise Manage Integration

1

2

3

4

CONNECT

TICKETING

OPERATORS

REVIEW

Connection Details

Connection established successfully.

Server Host Name *

i

Company ID *

API Public Key *

API Private Key *

Test Connection

Next

6. Click **Next** for **Ticketing Configuration**.

Configure ConnectWise Manage Integration

✓

2

3

4

CONNECTTICKETINGOPERATORSREVIEW

Ticketing Configuration

CAPTURE CLIENT ALERT - CONNECTWISE MANAGE TICKET MAPPING

CWM Service Board * Integration ▼

Critical Severity * Priority 1 - Emergency Response ▼

High Severity * Priority 2 - Quick Response ▼

PreviousNext

7. Select the **Service Board** from the list in which you want to create the Capture Client alerts as tickets.

NOTE:

- Make sure that the Service Board has default status and other statuses defined in ConnectWise Manage along with team details, else alert tickets are not created.
- The **Service Board** generates the alerts only for companies with **Active** status.
- The **Service Board** shows the appropriate error messages in the log if you map any company having status other than **Active**.

8. Map the ConnectWise Manage ticket priority for **Critical** and **High** severity of the Capture Client alerts. For more information, refer to [Capture Client Getting Started Guide](#) to set Capture Client Alert severities.

NOTE: Currently, SonicWall supports only **Critical** and **High** severity alerts from Capture Client Native and Capture Client MDR.

9. Click **Next** to add or remove **OPERATORS** from the configuration.

Configure ConnectWise Manage Integration

CONNECT TICKETING OPERATORS REVIEW

Users

Search Users

All Users

No users found

No users selected.

Selected Operator(1)

Search Operators

All Operators

Chandan Singh
chandan@sonicwall.com

No operators selected.

Add →

← Remove

Previous Next

10. Add the **OPERATORS** to the configuration to enable Sharing of CWM Setup across users of the same organization.

- NOTE:** Operators cannot edit or modify the Integration configuration. They can only:
- Map SonicWall Tenants to CWM Company and Agreements.
 - Enable or disable **Auto Sync**.
 - Perform manual sync on CWM Integration page.

- Check the required user box or **All Users** box from **Users** group.
 - Use **Search** option to filter the required user from the list if required.
 - Click **Add**.
 - Selected users are moved to **Selected Operators** group.
11. Remove the **OPERATORS** from the configuration.
- Check the required user box or **All Operators** box from **Selected Operators** group.
 - Use **Search** option to filter the required user from the list if required.
 - Click **Remove**.
 - Selected users are moved to **Users** group.

12. Click **Next** to **REVIEW** the configured details.

Configure ConnectWise Manage Integration

✓

✓

✓

4

CONNECTTICKETINGOPERATORSREVIEW

Confirm Your Settings

Server Host Name: connectwise.com

Company ID: sonicwall

CWM Service Board: Integration

Alert / Ticket Priority: Capture Client Critical -> Priority 1 - Emergency Response
Capture Client High -> Priority 2 - Quick Response

Operators: Chandan Singh - chandan@sonicwall.com,

PreviousSubmit

13. Click **Submit** to save your settings.

On successful submission of the request, back end service creates the Product types, categories, and subcategories automatically. Create them manually per below if they do not exist. For more information, refer to the [ConnectWise Documentation](#).

Types	<ul style="list-style-type: none">• SonicWall• Miscellaneous
Categories/Subcategories	<ul style="list-style-type: none">• Cloud<ul style="list-style-type: none">• Cloud Services• Software• Hardware/Virtual<ul style="list-style-type: none">• Network Device• Miscellaneous<ul style="list-style-type: none">• Miscellaneous

Mapping Companies and Agreements

On successful submission of the **Configuration**, the integration fetches all the available companies with their agreements from ConnectWise Manage (CWM).

① NOTE:

- Integration takes a few minutes to fetch the details for the first time.
- Integration does not populate the companies with no agreements.
- Irrespective of the CWM status, integration populates all companies and agreements.


The **ConnectWise Manage** page shows the list of all the tenants added under your account in a tabular form with an option to map **Company** and **Agreement**.

To map companies and agreements:

1. Login to **MySonicWall**.
2. Navigate to **My Workspace > PSA Integration > ConnectWise Manage**.
3. Click the **Refresh** icon to get the latest products synchronization status.
The MySonicWall interface does not automatically refresh and relies on manual refresh action. Run a manual **Sync Now** if company and agreement are not populated yet.
4. Select a **COMPANY** and corresponding **AGREEMENT** from the respective drop-down menu for a **TENANT**.

① NOTE:

- If a tenant name has unicode characters, synchronization fails for that tenant.
- **AUTO SYNC** gets enabled by the default when both the **COMPANY** and **AGREEMENT** are selected for a **TENANT**.
 - ① **NOTE:** Mapping of both **COMPANY** and **AGREEMENT** are mandatory to sync the **Monthly Billing** products to **Additions**.
- You can also enable **AUTO SYNC** for a tenant when only **COMPANY** is selected. By the default, **AUTO SYNC** is disabled.
 - ① **NOTE:** Mapping of **COMPANY** is required only to sync **Network Product** details to **Configurations** for inventory purposes only.
- The **Last Sync** shows the last time when the products were synced for the **TENANT**.
- **Synced Companies** show the count of companies mapped for syncing the data.
- **Ignored Tenants** shows the count of tenants which have not been mapped.



Server

staging.connectwisdev.co

Company ID

sonicwall_f

Service Board

Integration

Last Sync

12 hours ago

Synced Companies


2


Ignored Tenants

1

Errors

0





Configure

Sync Now

Refresh

Reset

Tenant	Network	Monthly	Last Updated	Company	Agreement	Auto Sync
SonicWall Products	2	2	N/A	CSRSNWLQA	Select Agreement	<div><div></div>Enabled</div>
CSR	3	5	12 hours ago	CSRQA	CSR-QA-Agreement	<div><div></div>Enabled</div>
Chandan	0	1	N/A	Select Company	Select Agreement	--

The details of products or services synced as a part of the operation are listed below:

- All **Monthly Billable** products and their service details from SonicWall to CWM.
- Automated accounting and billing
The integration creates and updates **Additions in Agreements** in the ConnectWise Manage platform for SonicWall products billed via the SonicWall Monthly Billing Program.
- Automated asset documentation
The integration creates and updates **Configurations** in the ConnectWise Manage platform for SonicWall Network products (All Firewall models, All SMA 100 & SMA 1000 models, SonicWall Switches, and Email Security models).
- Closed Loop Ticket Workflows
The integration automatically creates Tickets for Capture Client **Critical** and **High** severity alerts and automatically closes the tickets when the alert is resolved.

Auto Syncing of Tenant

The Tenant sync operation works in the background and executes on 1st of next month at 2 AM (timezone of the master account) based on the count taken on 25th of every month..

Manual Syncing of Tenant

The manual sync service performs the same tasks as Automatic Sync. Manual sync can be run at any time to sync the tenant products or services.

① NOTE:

- If you just provisioned a new product under a tenant, wait for 5-10 mins before running a manual sync to reflect on CWM.
- In case of **Monthly Billing** product's service downgrade or upgrade, wait for 20-30 mins to reflect the updated service or license type on CWM.

To sync the Tenant details manually:

1. Login to **MySonicWall**.
2. Navigate to **My Workspace | PSA Integration > ConnectWise Manage**.

3. Click **Sync Now**.

Validating Product Catalog of the Synced Tenant

All the **Monthly Billable** products fetched from the enabled tenants are synchronized with CWM's product catalog. If a product already exists, the entry is updated. All products are set with the type SonicWall. Categories and Sub- Categories are set per product type as follows:

MONTHLY PRODUCTS ADDITIONS

Product	Category	Sub-Category
Firewall	Hardware/Virtual	Network Device
SMA 8200v	Hardware/Virtual	Network Device
Capture Client	Cloud	Software
Capture Client MDR Services	Cloud	Software
Cloud App Security	Cloud	Cloud Service
Hosted Email	Cloud	Cloud Service
Firewall Services	Hardware/Virtual	Network Device
SSL-VPN (for Firewall)	Hardware/Virtual	Network Device
NSM Services	Cloud	Cloud Service
Cloud Secure Edge	Cloud	Cloud Service

NETWORK CONFIGURATIONS

Network Product	CWM Configuration Type
Firewalls (All Models) - TZ, NSa, NSsp, NSv, SM)	SonicWall Firewall
SMA100 series (All Models)	SonicWall SRA
SMA1000 series (All Models)	SonicWall SMA
Access Points (All Models)	SonicWall Access Points
Switches (All Models)	SonicWall Switch
Email Security (All Models)	SonicWall Email Security

To validate that the tenants are synchronized with the Product Catalog:

1. Login into the CWM portal.
2. Navigate to **Procurement > Product Catalog**.
3. Search for products with a product ID starting with SonicWall.
Products with a sub-category of Cloud Services and Software are synchronized as additions within the CWM company agreement.

4. Navigate to selected **Company > Agreement**.

Company Search > Agreement Search														
CSRQA														
<	Company	Notes 0	Agreements 1	Contacts 1	Opportunities 0	Tracks 0	Activities 0	Service 0	Projects 0	Attachments 0	Profile	Surveys 0	Sites 1	Team 0
<	+	Actions	SEARCH	CLEAR										
<input type="checkbox"/>	Agreement Type	Agreement Name	Company Name ^	Contact	Amount	Billing Cycle	Date Start	Date End	Status	Location	Business Unit	Subcontractor	Territory	Level
<input type="checkbox"/>	Block Time - Recurring	CSRQA-Agreement	CSRQA	CSR	\$0.00 Monthly		01/12/2023		Active	Tampa Office	Professional Services	My Accounts	Parent (

5. Navigate to the **Additions** tabs and review the products added within the agreement.

Company Search > Agreement Search > Additions														
CSRQA-Agreement														
<	Agreement	Additions 8	Adjustments 0	Agreements 0	Work Roles 0	Time 0	Work Types 0	Sites 0	Invoices 0	Service 0	Expenses 0	Products 0	Configurations 3	Activities 0
<	+	Actions	SEARCH	CLEAR										
<input type="checkbox"/>	Sequence	Effective	Cancelled	Product ID	Serial #	Description	Quantity	Price	Ext Price	Bill	Tax	Level		
<input type="checkbox"/>	1.00	13/12/2023	29/02/2024	SNWL ESSENTIAL PROTECTION SERVICE SUITE FOR NSV 4701927686	004010049F85	NSv Virtual Firewall 470	0.00	\$0.00	\$0.00	✓				
<input type="checkbox"/>	2.00	13/12/2023	02/01/2024	SNWL SSL VPN USERS FOR NSV 4701927686	004010049F85	NSv Virtual Firewall 470	10.00	\$0.00	\$0.00	✓				
<input type="checkbox"/>	3.00	13/12/2023	02/01/2024	SNWL ESSENTIAL PROTECTION SERVICE SUITE FOR NSV 701927686	0040101028CA	NSv Virtual Firewall 70	0.00	\$0.00	\$0.00	✓				
<input type="checkbox"/>	4.00	13/12/2023	02/01/2024	SNWL NSM ADVANCED FOR NSV 701927686	0040101028CA	NSv Virtual Firewall 70	0.00	\$0.00	\$0.00	✓				
<input type="checkbox"/>	5.00	13/12/2023	02/01/2024	SNWL SSL VPN USERS FOR NSV 701927686	0040101028CA	NSv Virtual Firewall 70	5.00	\$0.00	\$0.00	✓				
<input type="checkbox"/>	6.00	13/12/2023	25/12/2023	SNWL CLOUD APP SECURITY BASIC1927686	CC0000210677	Cloud App Security	0.00	\$0.00	\$0.00	✓				
<input type="checkbox"/>	7.00	13/12/2023	11/12/2028	SNWL CAPTURE CLIENT ADVANCED1927686	CC0000C1131C	Capture Client	0.00	\$0.00	\$0.00	✓				
<input type="checkbox"/>	8.00	18/12/2023	16/12/2028	SNWL SECURE MOBILE ACCESS 8200V CENTRAL USER LICENSES1927686	0040103AA48B	Secure Mobile Access 8200v	20.00	\$0.00	\$0.00	✓				

Products with a sub-category of Cloud Services and Software are synchronized as additions within the CWM company agreement.

For every addition, the following properties are set/updated. The Bill Customer field and Description field are not modified if they have been updated manually by user.

Property	Value
Product ID	The product name as reported by MySonicWall.
Bill Customer	Product registration date: <ul style="list-style-type: none"> If earlier than the Agreement billing start date, the Agreement billing start date is used. If it is a Monthly Recurring Agreement, the next invoice date is used.
Canceled Dates	Product expiry date. All the services' expiry dates are considered. The latest expiry date is considered the product's expiry date.
Serial Number	Serial number of the product.
Total Quantity	The highest quantity from the list of sub-services.
Product Invoice Description	The product name as reported by MySonicWall.

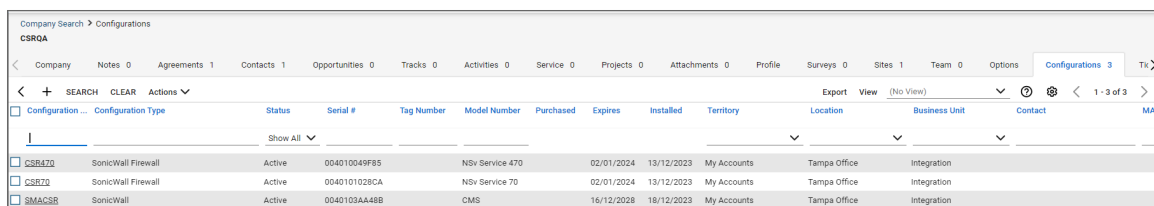
- ① **NOTE:** If the Agreement is set to a recurring type, then only Recurring - Monthly Billing types are supported. SonicWall does not set the cost, syncs the quantity only. Changes to Cost in the catalog on CWM does not affect the integration.

Validating Network Devices of the Synced Tenant

To validate that the Network Devices are added:

1. Login into the CWM portal.
2. Navigate to the Company that has been selected for tenant synchronization.

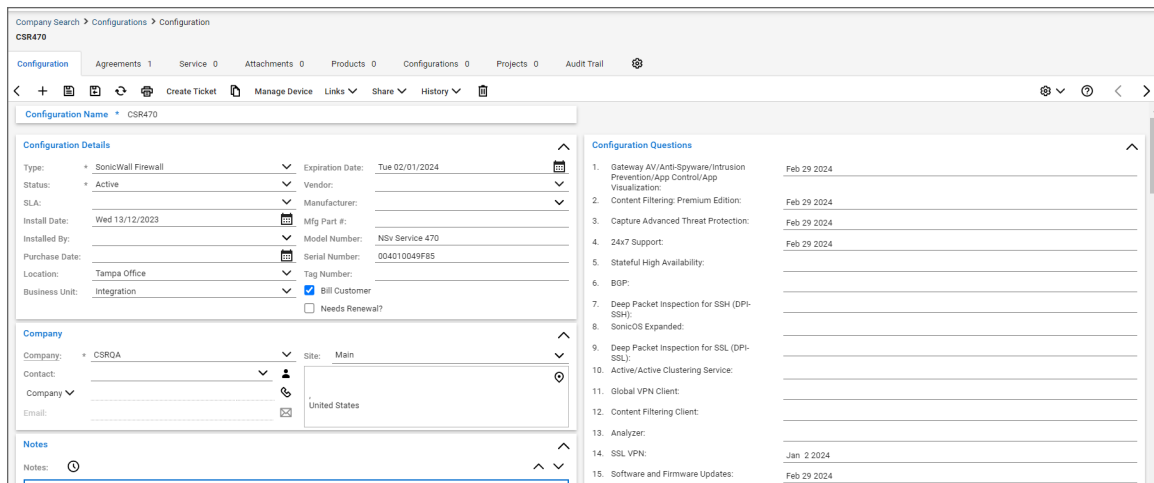
Products with a sub-category of Network Devices are reported as configurations attached to the Company.



The screenshot shows the 'Configurations' page for company CSROA. The table lists three configurations:

Configuration Type	Status	Serial #	Tag Number	Model Number	Purchased	Expires	Installed	Territory	Location	Business Unit	Contact	MAC
CSR470	Active	004010049F85		NSv Service 470	02/01/2024	13/12/2023		My Accounts	Tampa Office	Integration		
CSR20	Active	0040101028CA		NSv Service 70	02/01/2024	13/12/2023		My Accounts	Tampa Office	Integration		
SMACSR	Active	0040103AA48B		CMS	16/12/2028	18/12/2023		My Accounts	Tampa Office	Integration		

3. Click a configuration to see more information.



The screenshot shows the 'Configuration Details' page for configuration CSR470. The details are as follows:

Configuration Details	
Type:	SonicWall Firewall
Status:	Active
SLA:	
Install Date:	Wed 13/12/2023
Installed By:	
Purchase Date:	
Location:	Tampa Office
Business Unit:	Integration
Expiration Date:	Tue 02/01/2024
Vendor:	
Manufacturer:	
Mfg Part #:	
Model Number:	NSv Service 470
Serial Number:	004010049F85
Tag Number:	
Bill Customer:	<input checked="" type="checkbox"/>
Needs Renewal?	<input type="checkbox"/>

Company

Company:	CSROA
Contact:	
Company:	
Email:	
Site:	Main
United States	

Configuration Questions

1. Gateway AV/Anti-Spyware/Intrusion Prevention/App Control/App Visualization:	Feb 29 2024
2. Content Filtering: Premium Edition:	Feb 29 2024
3. Capture Advanced Threat Protection:	Feb 29 2024
4. 24x7 Support:	Feb 29 2024
5. Stateful High Availability:	
6. BGP:	
7. Deep Packet Inspection for SSH (DPI-SSH):	
8. SonicOS Expanded:	
9. Deep Packet Inspection for SSL (DPI-SSL):	
10. Active/Active Clustering Service:	
11. Global VPN Client:	
12. Content Filtering Client:	
13. Analyzer:	
14. SSL VPN:	Jan 2 2024
15. Software and Firmware Updates:	Feb 29 2024

68. Cloud Backup Enabled:	YES
69. Number of SSLVPN licenses:	85
70. HA Cluster Role:	None
71. Last Phone-Home time:	
72. IP Address of managing GMS/NSM/CMS:	
73. Secondary node serial number:	
74. Primary node serial number:	
75. Intelligence Updates and Activation:	
76. SonicWall Capture Cloud:	
77. REST API Activation:	
78. Gateway AV/Anti-Spyware/Intrusion Prevention/Application Firewall:	
79. Support 24X7 Onsite:	
80. Capture Client Basic:	
81. Manage Volume Licensing:	
82. NSv Software:	Feb 29 2024

The Configuration properties that are defined as follows:

Property	Value
Type	Configuration type matching the product type. If the type is unavailable, a new type is automatically created.
Configuration Name	Network device name.
Install Date	Product registration date.
Expiration Date	Product expiry date. All the services' expiry dates are considered. The latest expiry date is considered the product's expiry date.
Serial Number	Serial number of the product.
Tag Number	Tag number of the product.
Status	Active.
Configuration Questions	The services and sub-services associated with the network device are reported as questions. The answer to each question (Service/Sub-Service) is the expiry date of the corresponding Service/Sub-Service.

Creating Tickets from Alerts

This integration of MySonicWall and ConnectWise Manage allows you to create tickets for alerts from the products managed via MySonicWall. Tickets are created in the Service Board selected during configuration in MySonicWall. If the alert is deleted or closed in the product console, the ticket is also closed in CWM.

Every ticket summary includes the alert message, priority (based on the configuration in MySonicWall) and the company and agreement mapped with MySonicWall tenant. The ticket also contains an attachment with the relevant URL for the Service Board operator to pivot to the product console for investigation.

Summary: * Capture Client alert: License expires in less than 30 days	
Age: 9m CONTROL SESSION FOLLOW	
Ticket #9800	
Board: * Professional Services	SLA: Standard SLA
Status: * New (not responded)	Agreement: Block Time - One time/Retainer Agree
Type:	Predecessor:
Subtype:	Estimated Start Date:
Item:	Due Date:
Ticket Owner: (Unassigned)	Duration:
	Impact/Urgency: Medium/Medium
	Priority: Priority 2 - Quick Response
	SLA Status: Respond by Tue 6/2/2020 12:...
Company: Big Design, Inc.	
Company: * Big Design, Inc.	Site: Main
Contact: John Doe	Address 1: 23 Central Avenue
Direct: (111) 999-8888 110	Address 2: Suite 200
Email: john.doe@bigdesign.com	City: Tampa
	State: FL
	Zip: 33618
	Country:

NOTE: The following notes apply:

- As part of this version of the integration, tickets are automatically created and closed only for Critical and High alerts from SonicWall Capture Client Native and SonicWall Capture Client MDR Services.
- The integration checks for up to 100 new alerts every 10 minutes and creates and closes tickets.
- As part of the synchronization operation, all the tenants that are configured and enabled for synchronization are considered.

Troubleshooting

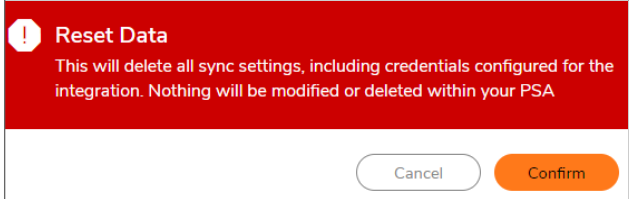
This section describes common problems with possible root causes, solutions or workarounds.

Problem Statement	Problem	Solution
Status Not Correct	The tenant synchronization completed and the products are synchronized on ConnectWise Manage. However, the status is not reflected on the MySonicWall user interface.	To correct this issue, verify the latest status by refreshing the interface. The MySonicWall interface does not automatically refresh and relies on manual refresh action.
Tenant Sync Errors	While some tenants synchronize successfully, one or more other tenants have synchronization errors.	When a tenant synchronization fails, the failed tenants count is displayed in MySonicWall. Whenever the count is greater than zero, the count becomes an active hyperlink that can be used to download logs to determine the problem. Review the error logs to find the root cause for the error.

SEARCH	NETWORK	STATUS	LAST UPDATED	COMPANY	AGREEMENT	ACTION
all Products	0	0	N/A	Select Company	Select Agreement	...
TCM-1	15	15	N/A	Select Company	Select Agreement	...
TCM-2	0	0	N/A	Select Company	Select Agreement	...
TCM-3	0	0	N/A	Select Company	Select Agreement	...

Some common situations which causes problems include:

- CWM API keys are invalid.
Authentication errors appear in logs for the CWM API.
For example:
`GET company/companies`
`company:sonicwall_f error:401 Auth Error.`
- An enabled tenant has a product with expiration date earlier than the billing start date of the associated CWM agreement.
The following is a sample error: Error occurred while creating/updating an addition for product.

Problem Statement	Problem	Solution
Reset	If the problem is not resolved	<p>Only Integration Admin can perform this Reset Action.</p> <div data-bbox="794 331 1421 533">  <p>Reset Data This will delete all sync settings, including credentials configured for the integration. Nothing will be modified or deleted within your PSA</p> <p>Cancel Confirm</p> </div> <ul style="list-style-type: none"> Remove stored configuration for PSA Integration from MSW including credentials, tenant-company mapping and other integration settings. Delete or disable the associated batch job for daily sync. Restore it to a state that allows fresh configuration. Force the Integration Admin to Confirm before a Reset is done. It does not delete any synced information from PSA Platform.
ConnectWise already integrated with same identifier	When a user from another Organization tries to configure PSA with the same entities (Server URL, Company ID) as existing integration, they get the following error message- There is already a ConnectWise PSA configuration present with the same PSA identifier. Please reach out to Customer Support.	Reach out to SonicWall Customer Support team to find out which account and Organization this ConnectWise PSA integration has been configured with.
ConnectWise already integrated for the same organization	When a user from the same Organization tries to configure PSA using same entities (Server URL, Company ID), they get the following error message- There is a ConnectWise configuration already available for the same organization identifier belonging to your organization. Please reach out to your Super Admin to add access to your account.	SonicWall supports only one CWM Integration instance per Organization, you can't configure second instance. Reach out to your organization's MSW Admin to share the PSA integration with you by adding you as an Operator.

Integration Benefits

As part of SonicWall's integration with ConnectWise Manage, service providers get the below listed benefits.

Benefit	Details	Service Provider Benefit
Automated accounting & billing	The integration creates and updates Additions in Agreements in the ConnectWise Manage platform for SonicWall products billed via the SonicWall Monthly Billing Program.	Eliminates the need to manually determine what customers should be billed for every month.
Automated asset documentation	The integration creates and updates Configurations in the ConnectWise Manage platform for SonicAlert Network products (All Firewall models, All SMA 100 and SMA 1000 models, SonicWall Switches, and Email Security models).	Eliminates the need to login to the MySonicWall portal to identify appliances that need a refresh (by model) and security services that need a renewal.
Closed Loop Ticket Workflows	The integration automatically creates Tickets for Capture Client alerts and automatically closes the tickets when the alert is resolved.	Enables the service provider Operations team to monitor for issues via a single pane of glass for alerts from Capture Client along with other (non-SonicWall) products they may be managing for the customer.

SonicWall Support

Technical support is available to customers who have purchased SonicWall products with a valid maintenance contract.

The [Support Portal](#) provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year.

The [Support Portal](#) enables you to:

- View [Knowledge Base articles](#) and [Technical Documentation](#)
- View and participate in the [Community Forum](#) discussions
- View [Video Tutorials](#)
- Access [MySonicWall](#)
- Learn about [SonicWall Professional Services](#)
- Review [SonicWall Support services and warranty information](#)
- Register at [SonicWall University](#) for training and certification

About This Document

ConnectWise Manage Integration Guide
Updated - August 2024

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For more information, visit <https://www.sonicwall.com/legal>.

End User Product Agreement

To view the SonicWall End User Product Agreement, go to: <https://www.sonicwall.com/legal/end-user-product-agreements/>.

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Attn: Jennifer Anderson
1033 McCarthy Blvd
Milpitas, CA 95035