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
- Mapping Companies and Agreements
- Auto Syncing of Tenant
- Manual Syncing of Tenant
- Validating Product Catalog of the Synced Tenant
- Validating Network Devices of the Synced Tenant
- Creating Tickets from Alerts
- Troubleshooting
- 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.

  ⓘ **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.

  ⓘ **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.

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.

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

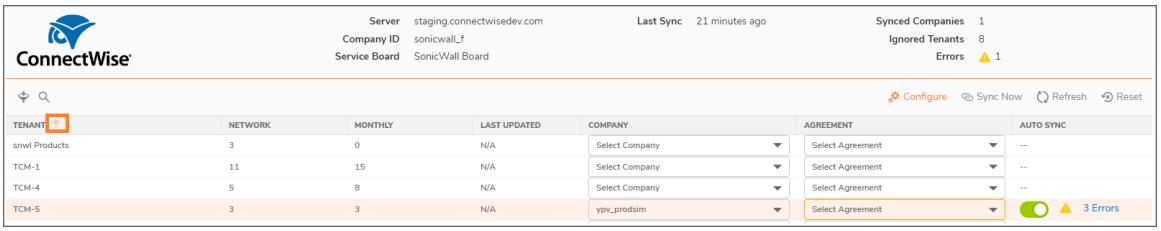
Sorting the ConnectWise Manage Table

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)

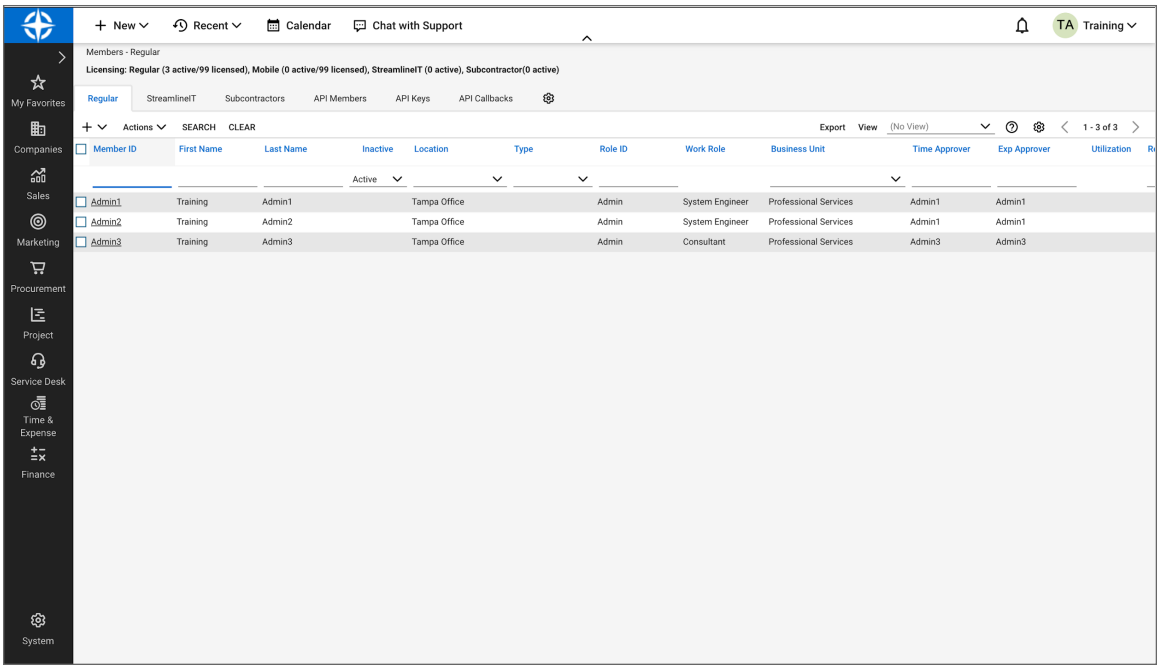
To sort the table data:

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

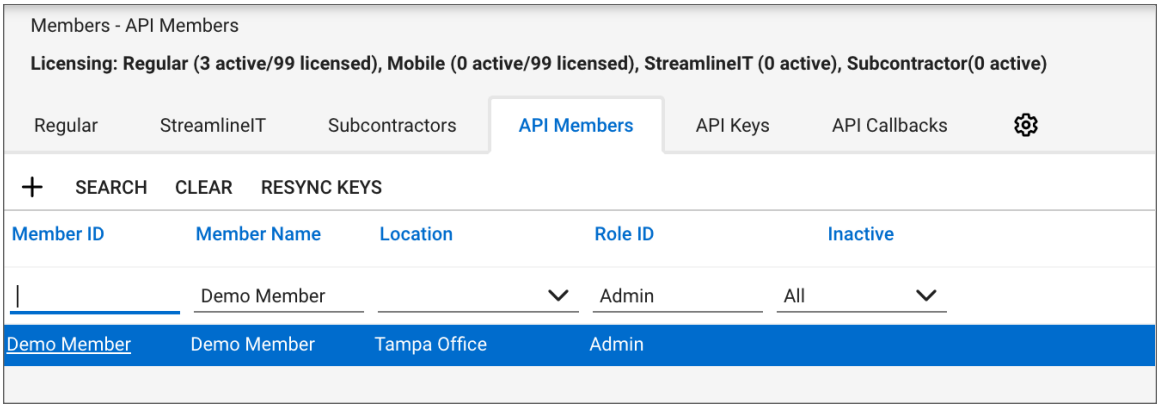


Configuring ConnectWise Manage

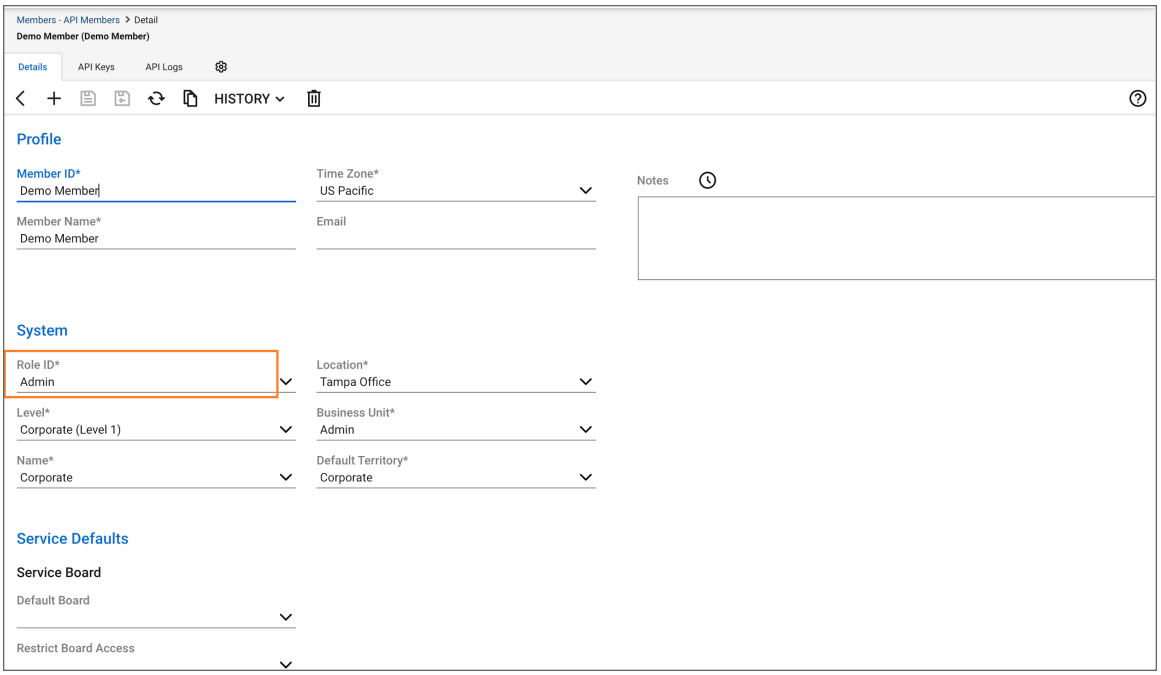
1. Login to CWM Portal using the admin credentials.
2. Navigate to **System > Members**.



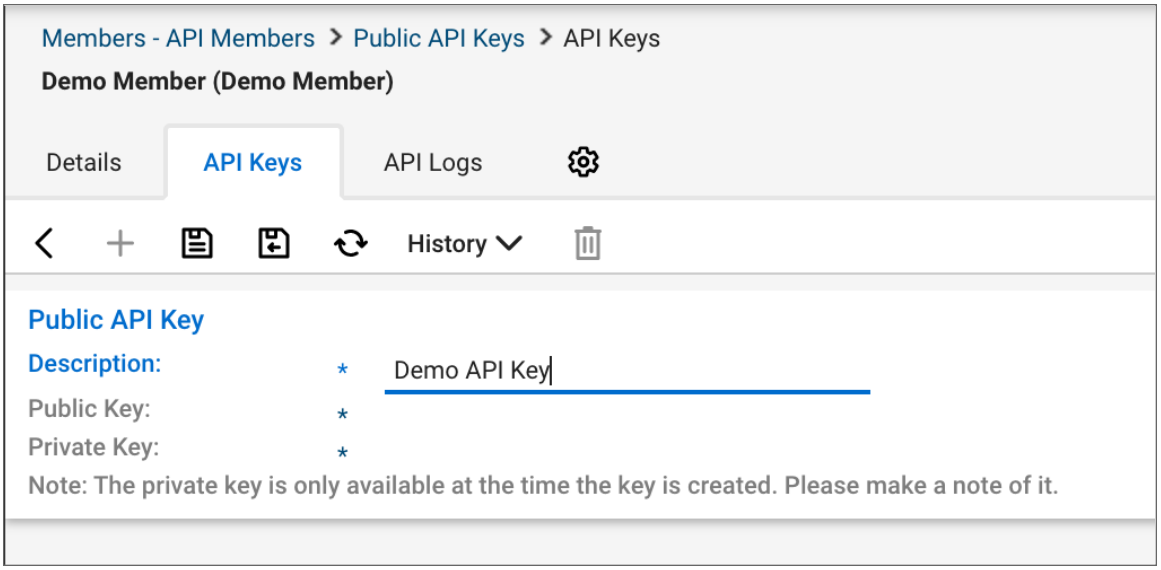
3. Navigate to the **API Members** tab and create an API member.



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



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



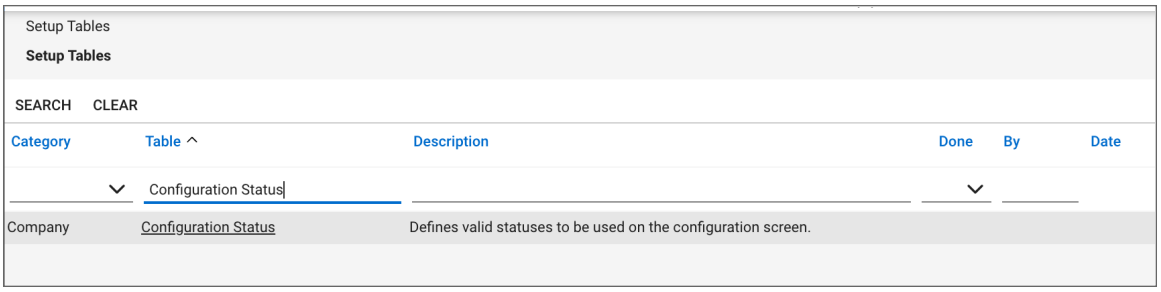
6. Generate a new API Key by clicking on the + sign.
7. Click **Save** to generate the API credentials and save the Public Key and Private Key somewhere.

IMPORTANT:

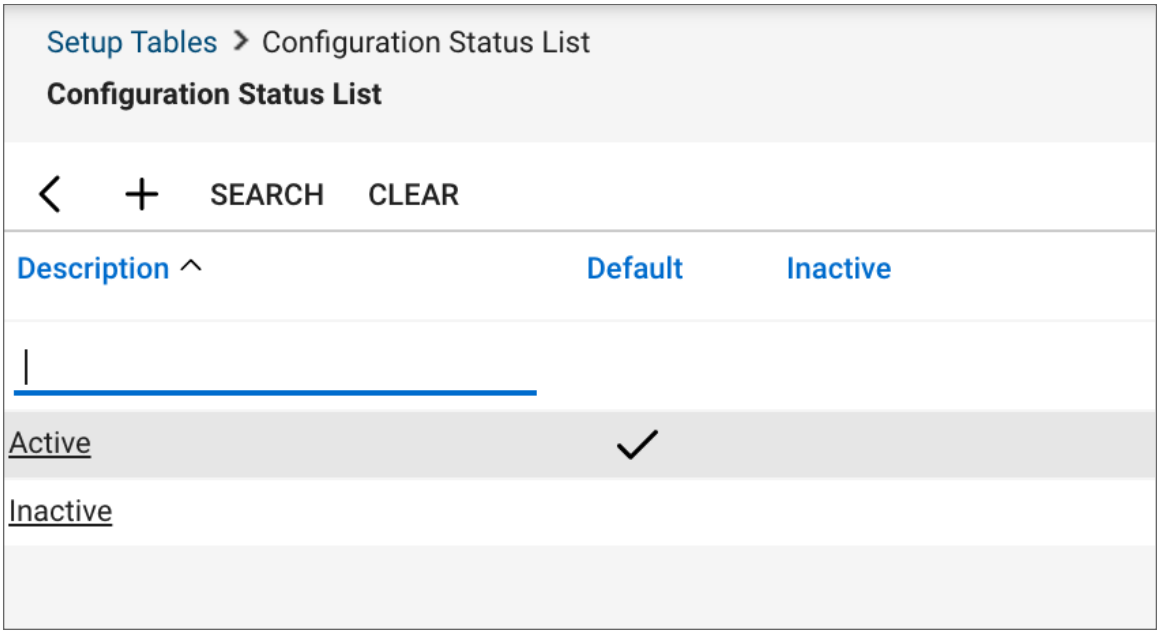
- The Private Key cannot be retrieved once you navigate away from this screen.
- Make sure that the Public and Private keys are copied and saved to use for integration.

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

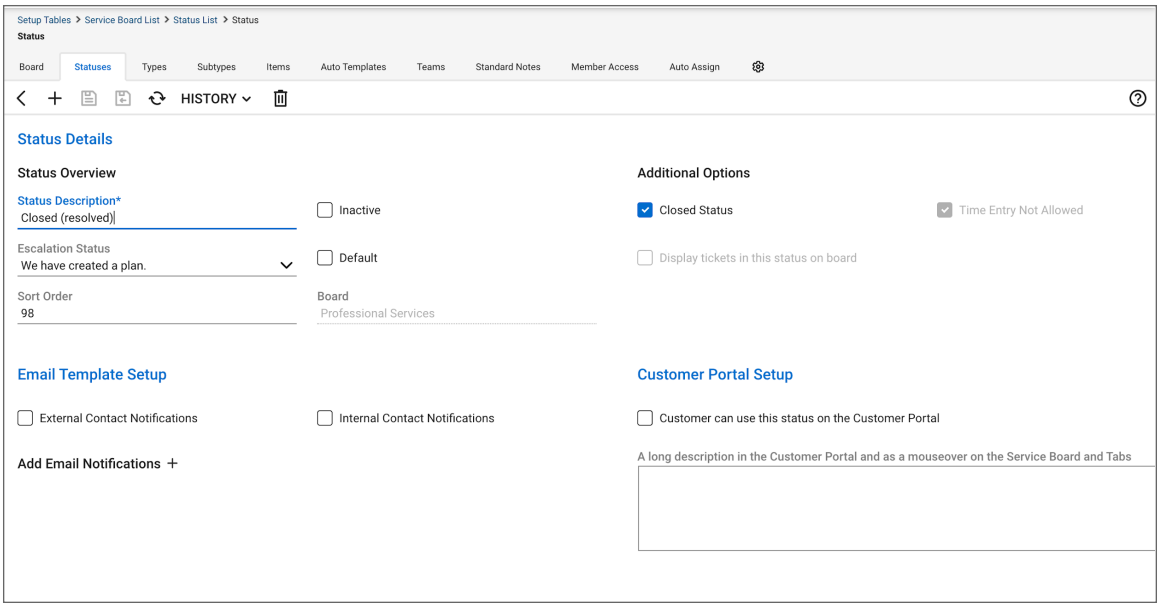
9. Search for the **Table > Configuration Status**.



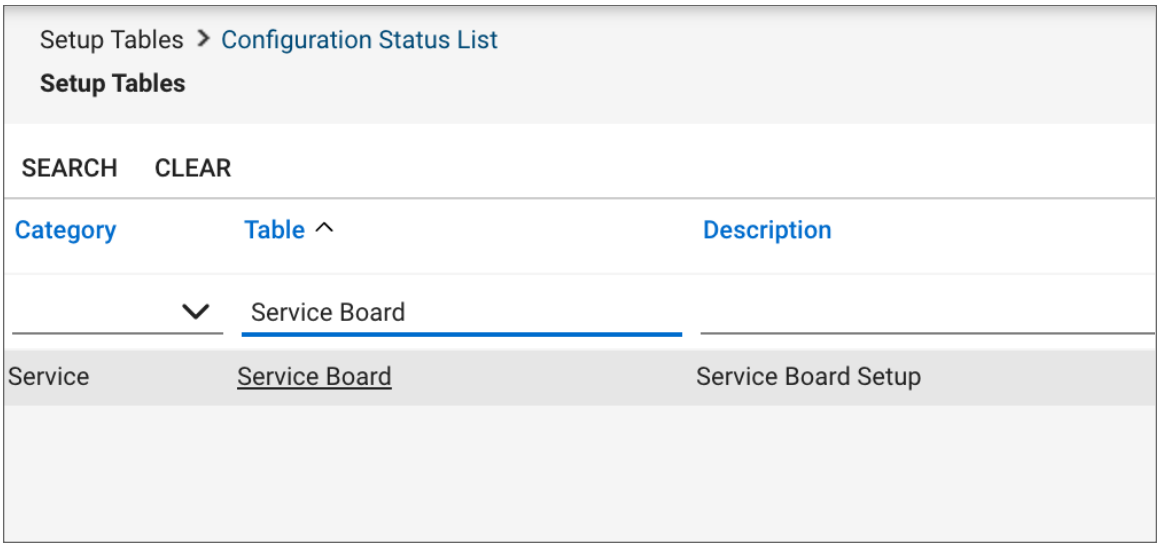
10. Verify that **Configuration Status List** is set up with one item selected as the default value.



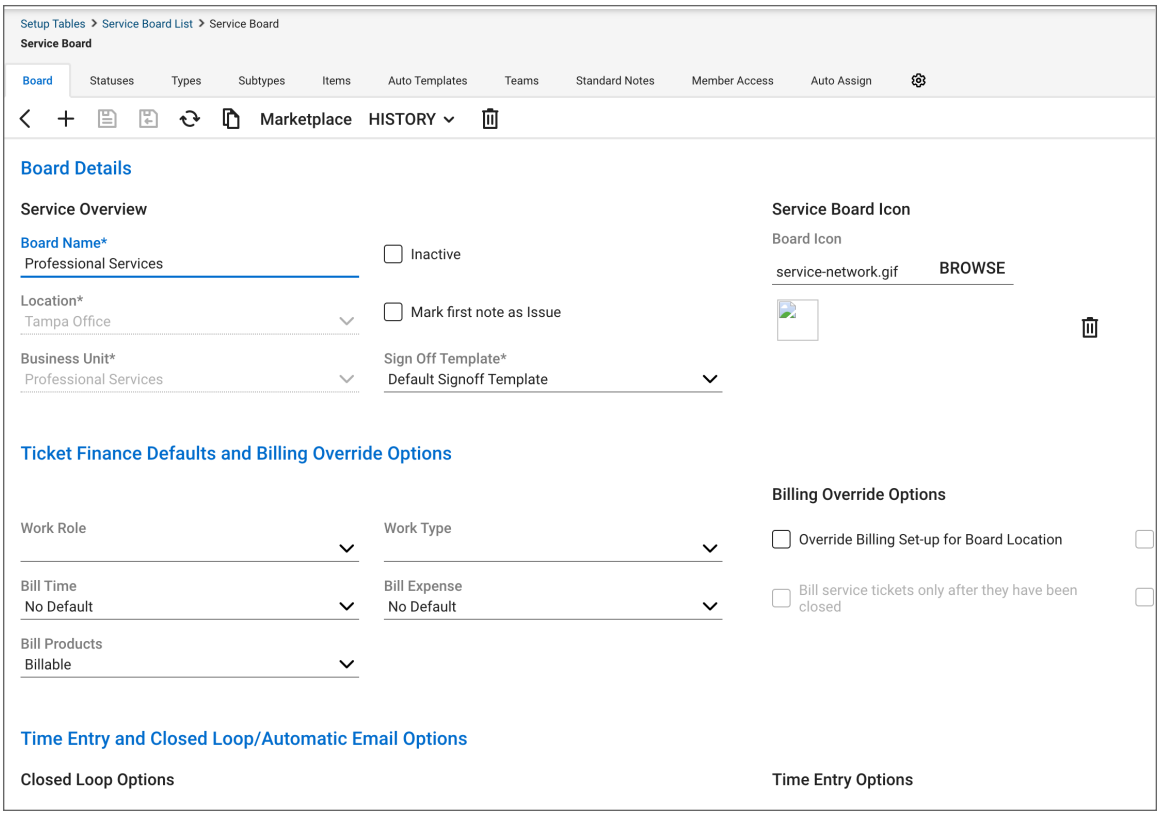
11. Verify that the **Closed** state has the **Closed Status** flag checked.



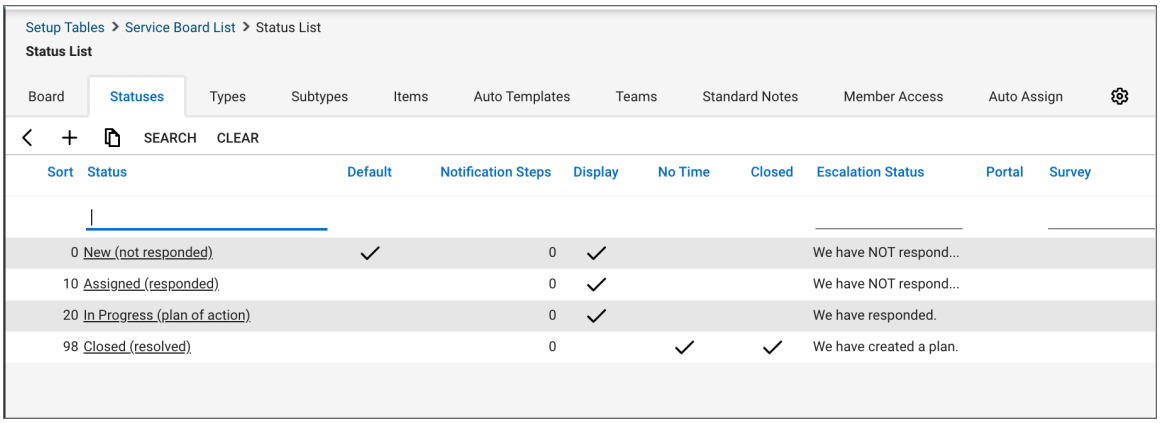
12. Search for **Service Board** on the **Setup Tables** page.



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

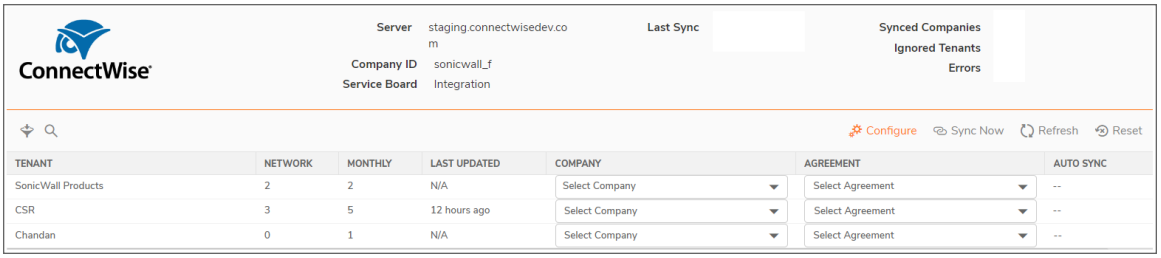


14. Navigate to the **Statuses** tab and verify the status:
    - A status named **Closed** should be present.
    - One state should be marked as **Default**.



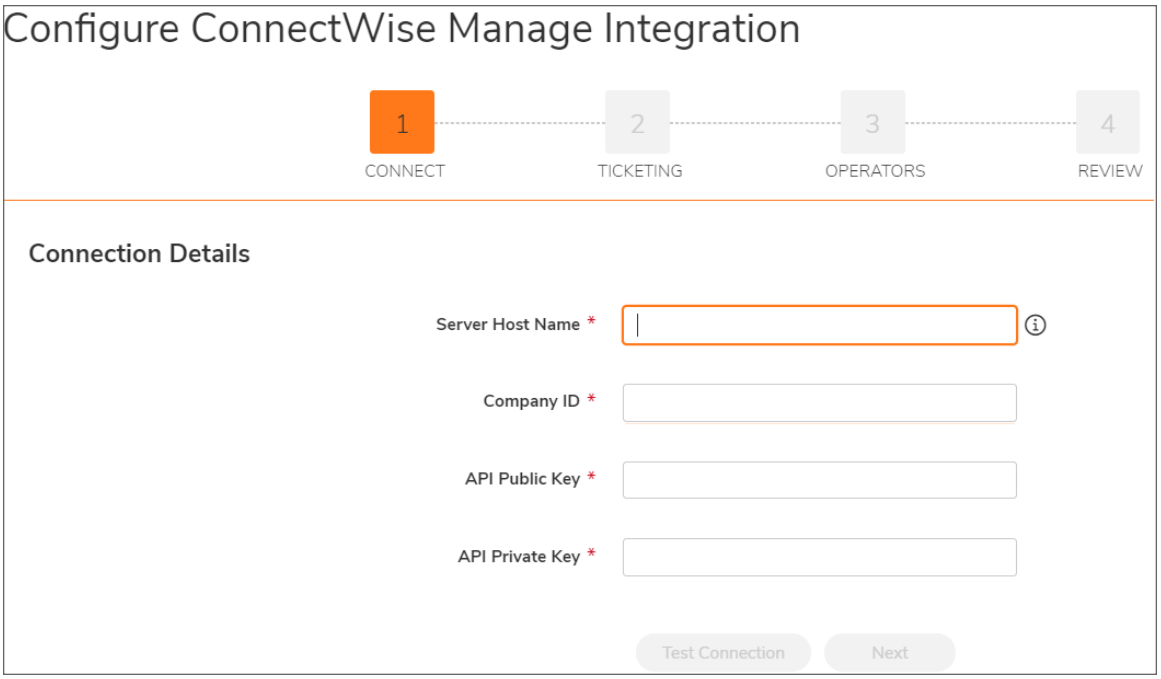
Configuring the ConnectWise Manage Integration

1. Login to MySonicWall.
2. Navigate to **My Workspace > PSA Integration > ConnectWise Manage**.
   The tenants having access to this account are listed.



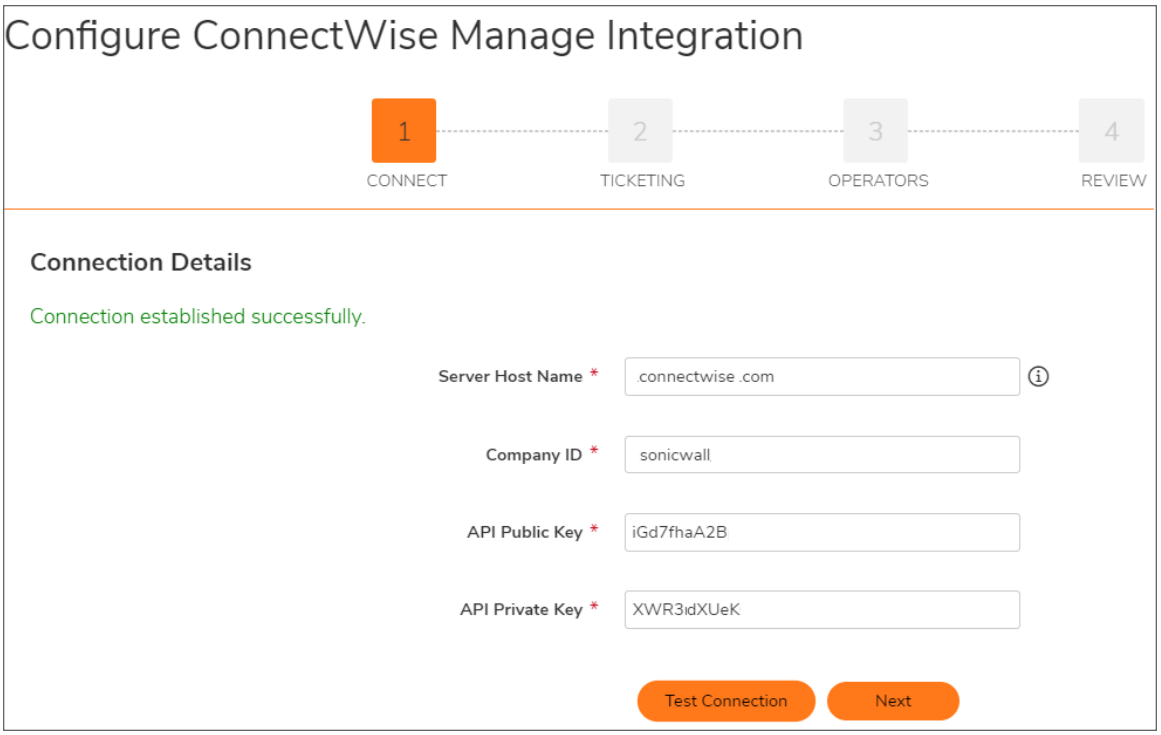
3. Do one of the following:
   a. Create a new configuration by clicking the **Configure** icon.
   b. Edit an existing configuration by clicking on the **Configure** icon.

4. Enter the **Connection Details**:
    - Server Host Name
    - Company ID
    - API Public Key
    - API Private Key

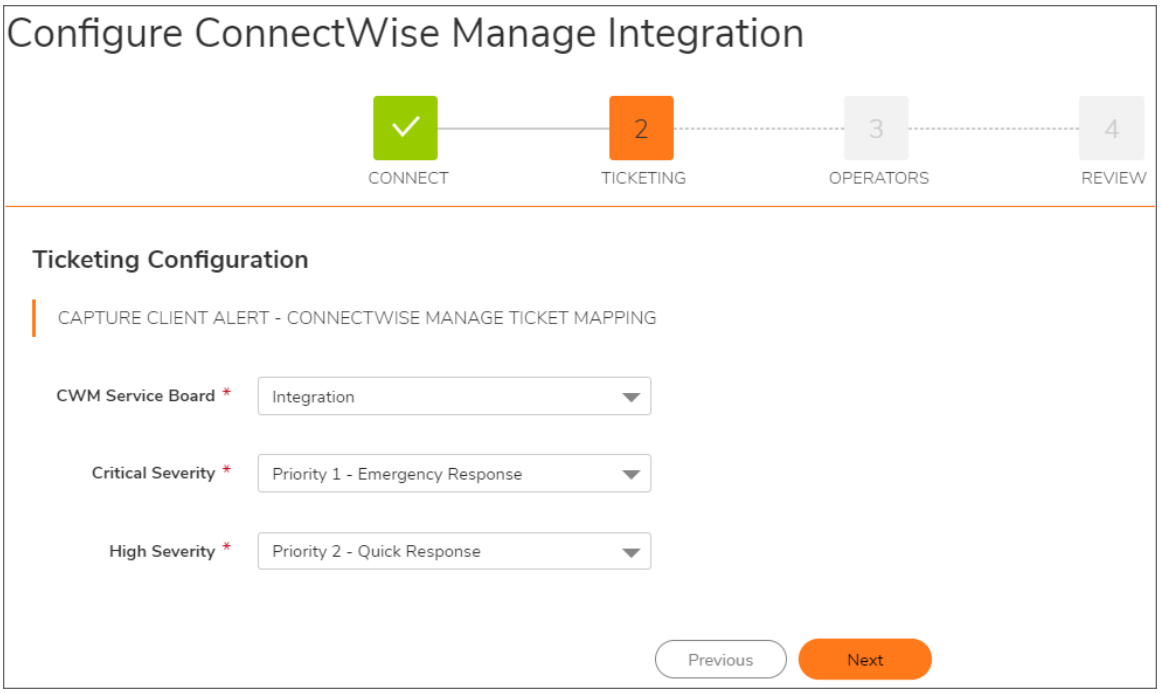


5. Click **Test Connection** to verify the connection details.

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



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



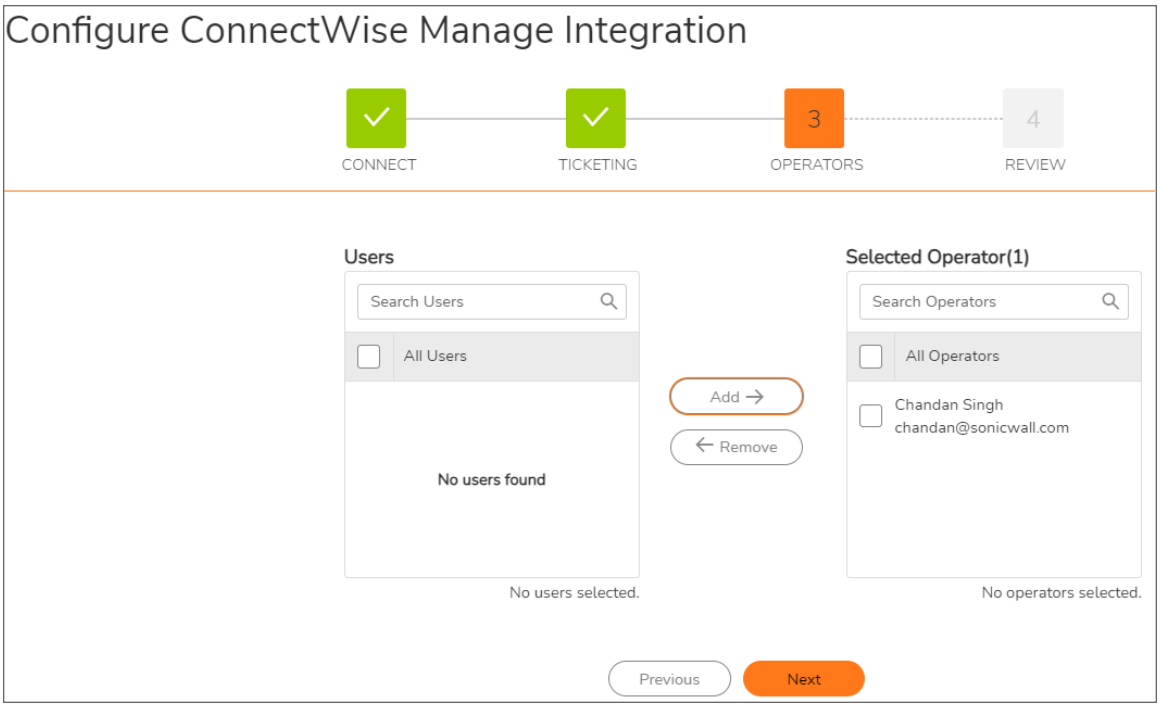
7. Select the **Service Board** from the list in which you want to create the Capture Client alerts as tickets.

   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.



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.

    a. Check the required user box or **All Users** box from **Users** group.

    b. Use **Search** option to filter the required user from the list if required.

    c. Click **Add**.

    d. Selected users are moved to **Selected Operators** group.

11. Remove the **OPERATORS** from the configuration.

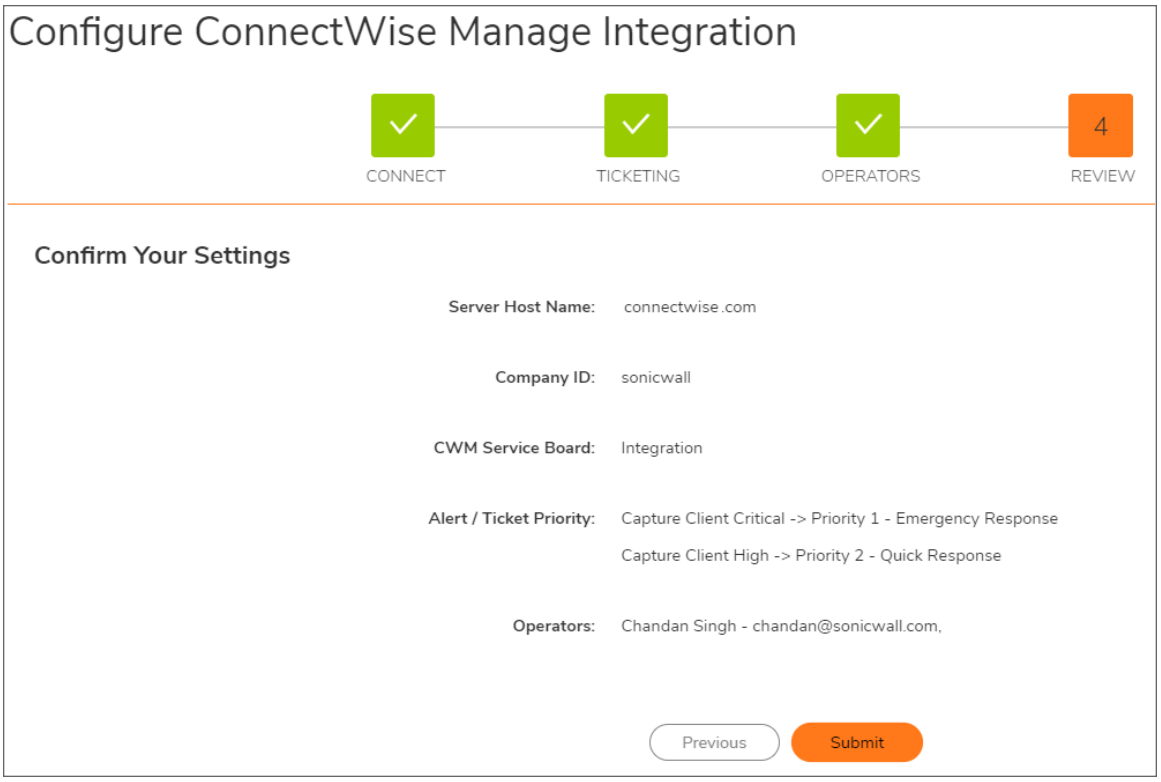
    a. Check the required user box or **All Operators** box from **Selected Operators** group.

    b. Use **Search** option to filter the required user from the list if required.

    c. Click **Remove**.

    d. Selected users are moved to **Users** group.

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



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	• SonicWall • Miscellaneous

Categories/Subcategories	• Cloud
	  • Cloud Services
	  • Software
	• Hardware/Virtual
	  • Network Device
	• Miscellaneous
	  • 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).

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.

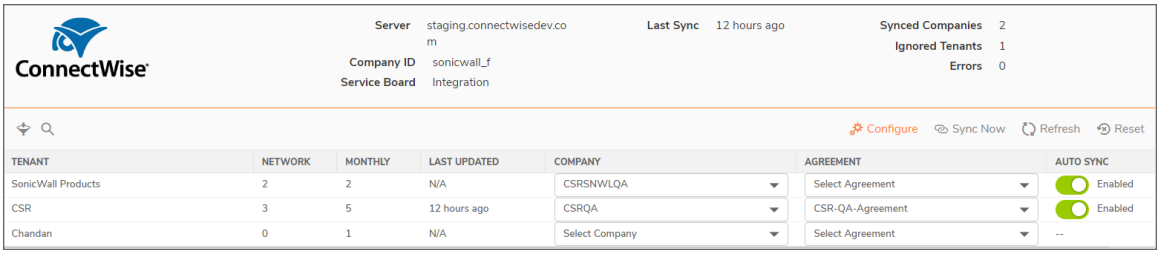
   The MySonicWall interface does not automatically refresh and relies on manual refresh action. Run a manual **Sync Now** if company and agreement are not populated yet.
4. Select a **COMPANY** and corresponding **AGREEMENT** from the respective drop-down menu for a **TENANT**.

   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**.

     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.

     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.



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.

ⓘ **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

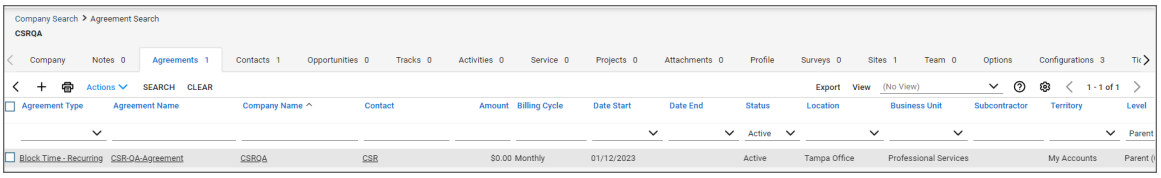
Network Product	CWM Configuration Type
FIrewalls (All Models) - TZ, NSa, NSsp, NSv, SM)	SonicWall Firewall
SMA100 series (All Models)	SonicWall SRA
SMA1000 series (All Models)	SonicWall SMA
Access Points (All Models)	SonicWall Access Points
Switches (All Models)	SonicWall Switch
Email Security (All Models)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

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

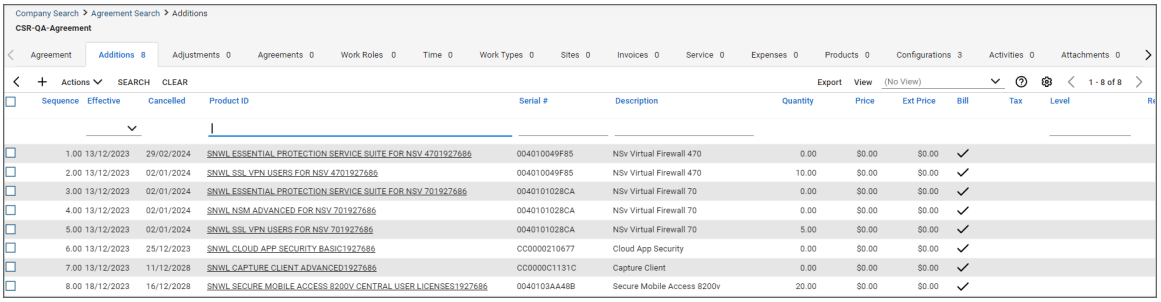
1. Login into the CWM portal.
2. Navigate to **Procurement > Product Catalog**.
3. Search for products with a product ID starting with SonicWall.

   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**.



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



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: • If earlier than the Agreement billing start date, the Agreement billing start sate 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.

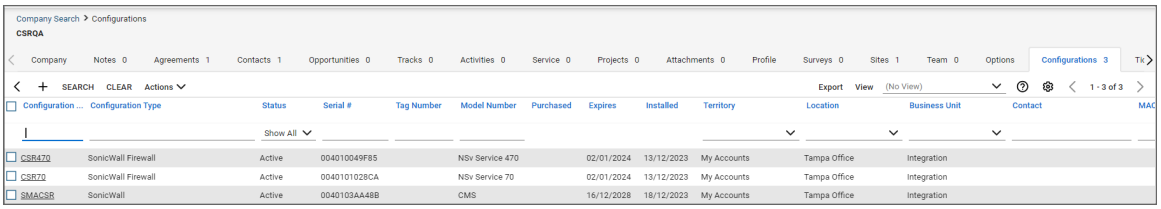
NOTE: If the Agreement is set to a recurring type, then only Recurring - Monthly Billing types are supported. SonicWall does not set the cost, syncs the quantity only. Changes to Cost in the catalog on CWM does not affect the integration.

Validating Network Devices of the Synced Tenant

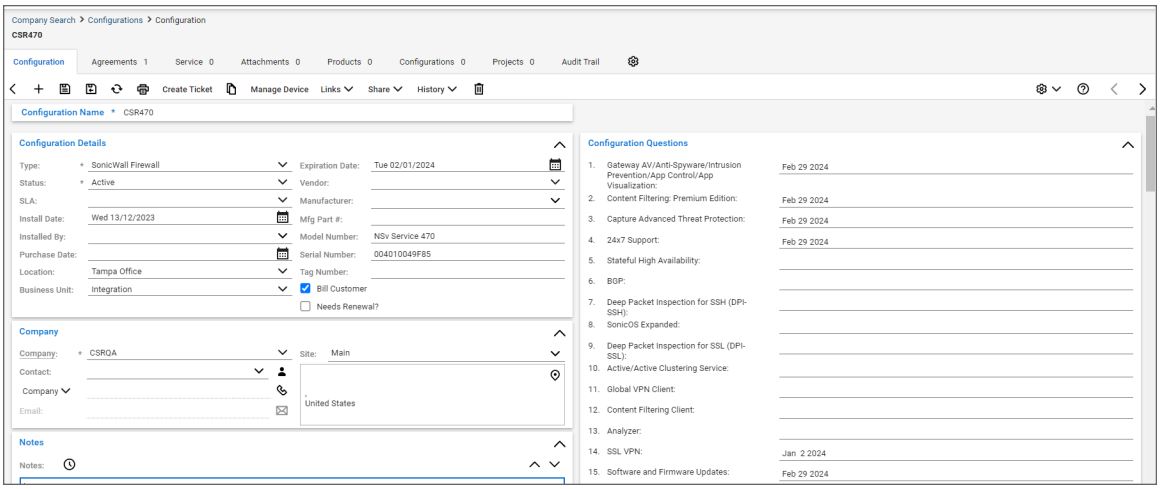
To validate that the Network Devices are added:

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.



3. Click a configuration to see more information.



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

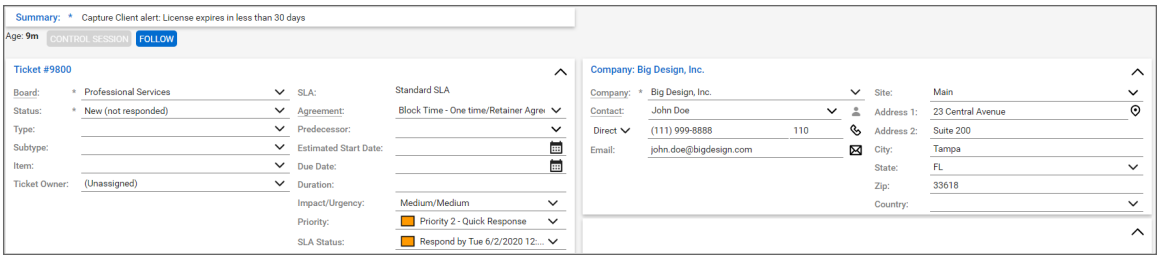
The Configuration properties that are defined as follows:

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.



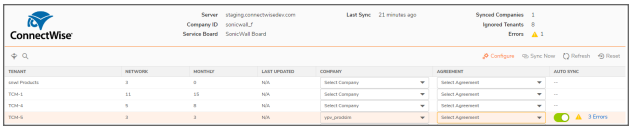
NOTE: The following notes apply:

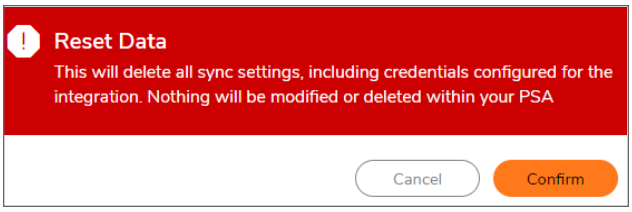
- As part of this version of the integration, tickets are automatically created and closed only for Critical and High alerts from SonicWall Capture Client Native and SonicWall Capture Client MDR Services.
- The integration checks for up to 100 new alerts every 10 minutes and creates and closes tickets.
- 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.
		 
		
		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	Only Integration Admin can perform this Reset Action.  • 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.

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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
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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/.

Open Source Code

SonicWall Inc. is able to provide a machine-readable copy of open source code with restrictive licenses such as GPL, LGPL, AGPL when applicable per license requirements. To obtain a complete machine-readable copy, send your written requests, along with certified check or money order in the amount of USD 25.00 payable to "SonicWall Inc.", to:

General Public License Source Code Request
Attn: Jennifer Anderson
1033 McCarthy Blvd
Milpitas, CA 95035