

# ConnectWise INTEGRATION USER GUIDE



A new section for Integrations was added to the Partner Dashboard. Click on the "+ ADD NEW INTEGRATION" button to start defining your ticketing integration.





You have not added any integrations.

# STEP 2

Select your intended ticketing system. In this case, we're selecting "ConnectWise."



# STEP 3

**Name your Integration** - It is possible to have multiple integrations of the same type, so we recommend naming your integrations as needed.

# STEP 4

Enter your ConnectWise Information.

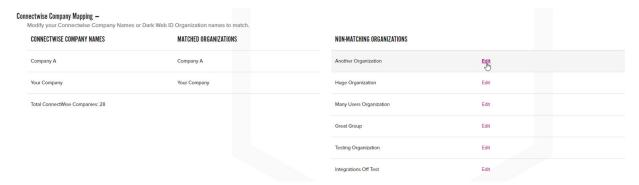
- If your Organizations are spread out between multiple Manage sites, you will need to set up multiple ConnectWise integrations.
- ConnectWise documentation suggests creating an API Member for 3<sup>rd</sup> party use.
  - o From ConnectWise Documentation:



- Using the same setup screen as creating a Member an API Member allows granular control over what type of information an integration has access to. A global user allows integrations to be turned on and off easily without requiring the person who initially setup the integration.
- API Members are the recommended route for most integrations.
- The Members screen can be found by going to the System Module and opening the Members page. After accessing the Members page, click on the API Members tab. Here you can create a new user and generate API Keys for them.
- API Members do not require a user license.
- In addition to Username and Password, this step also accepts Public and Private API Keys.

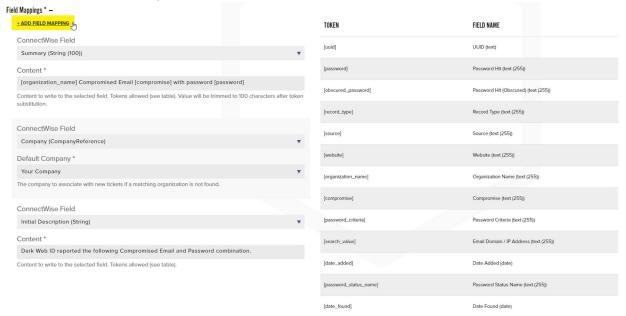


Edit your Organization names so that your Dark Web ID Organization names match your ConnectWise Company Names exactly.





Populate required content as it should map to ConnectWise Service Ticket fields. Utilize the Dark Web ID Tokens to add context to your Service Tickets.



### **Available Dark Web ID Tokens**

[uuid] UUID (text) - Dark Web ID's unique identifier for the Compromise

[password] Password Hit (text (255)) – The password hit associated with the Compromise

[obscured\_password] Password Hit (Obscured) (text (255)) – The password hit associated with the Compromise obscured with asterisks after the first four characters.

[record\_type] Record Type (text (255)) - The type of record monitored: Email, Domain, or IP.

[source] Source (text (255)) – The record source as reported in Dark Web ID.

[website] Website (text (255)) – The record website as reported by Dark Web ID.

[organization\_name] Organization Name (text (255)) – The name of the Organization to which the Compromise belongs.

[compromise] Compromise (text (255)) – The record compromise as reported in Dark Web ID.

[password\_criteria] Password Criteria (text (255)) – An indication of whether the Compromised Password meets the Organization's Password Criteria: 'N/A' 'Matches' 'Doesn't Match'

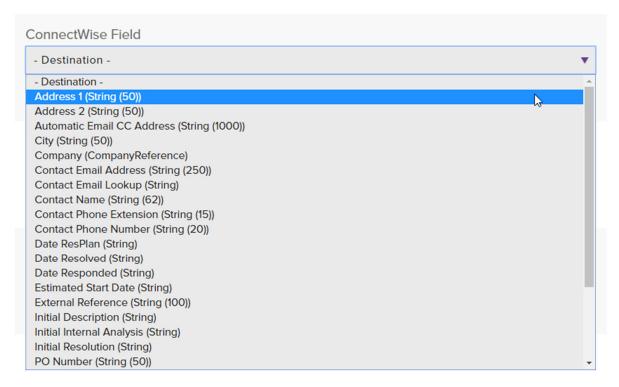
[search\_value] Email Domain / IP Address (text (255)) - The Email or IP Address found by Dark Web ID.

[date\_added] Date Added (date) - The date on which the Compromise was added to Dark Web ID.

[date\_found] Date Found (date) – The date on which the Compromise was found.



Add additional fields as necessary.



### **Available ConnectWise Fields**

Address 1 (String(50)) **Estimated State Date (String)** Address 2 (String(50)) External Reference (String (100)) Automatic Email CC Address (String (1000)) Initial Description (String) City (String(50)) **Initial Internal Analysis (String)** Company (CompanyReference) Initial Resolution (String) Contact Email Address (String (250)) Item (ServiceItemReference) **Contact Email Lookup (String)** PO Number (String (50)) **Contact Name (String (62))** Priority (PriorityReference) **Contact Phone Extension (String (15))** Required Date (String) **Contact Phone Number (String (20))** Resources (String) Date ResPlan (String) Site Name (String (50)) **Date Resolved (String)** Source (ServiceSourceReference) **Date Responded (String)** State (String (50))



Status (ServiceStatusReference) Summary (String (100))

Sub Date Accepted (String)

Type (ServiceTypeReference)

Sub Type (ServiceTypeReference) Zip (String (12))

# STEP 8

**Save Your Integration** - In the bottom right corner of the page, you will have the option to Save your configuration or Save and Submit a Test Compromise. This option will populate a Service Ticket as you've constructed here with test data in your ConnectWise platform. If you receive an Error upon saving, check your Field Mapping and try again. Contact <a href="mailto:support@idagent.com">support@idagent.com</a> if you experience any unexpected behavior.



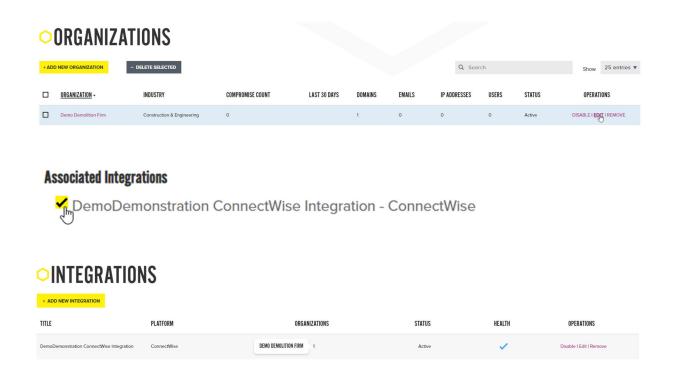
**Health Indicators** – There are two Health statuses for Integrations. Healthy, represented by a blue checkmark, means that your most recent Integrations request was successful! And Unhealthy, represented by a red X, means that your most recent Integrations request was unsuccessful, or resulted in an error. This state will persist until a successful Integrations request is completed.

STATUS	HEALTH	OPERATIONS
Active	~	Disable I Edit I Remove
Inactive	×	Enable   Edit   Remove

# STEP 9

Associate Organizations with Integrations – Edit an existing Organization or Add New Organization and click the appropriate Integration checkbox, then click save. Organizations can be associated with multiple integrations and New Organizations are associated with all Integrations by default. A count of associated Organizations is displayed in the Integrations table. Hovering over the count will list the associated Integrations.





**Enable your Integration** - Integrations are Inactive by default. Activate your Integration by clicking 'Enable'. After which, all new Compromises imported to DWID will attempt to create a Service Ticket with the associated platform. Disabling an Integration will cease the attempts to create Service Tickets with the associated platform. You are able to Enable or Disable your Integrations at any time.



If you have questions or need further assistance, please contact your Partner Success Manager or email <a href="mailto:support@idagent.com">support@idagent.com</a>.

