



Breach Secure Now Partner Guide

— ConnectWise PSA Integration Setup Notifications, Alerts, and Client Integration

Questions, Concerns? Want a 1-on-1 on-boarding
with our Operations team?

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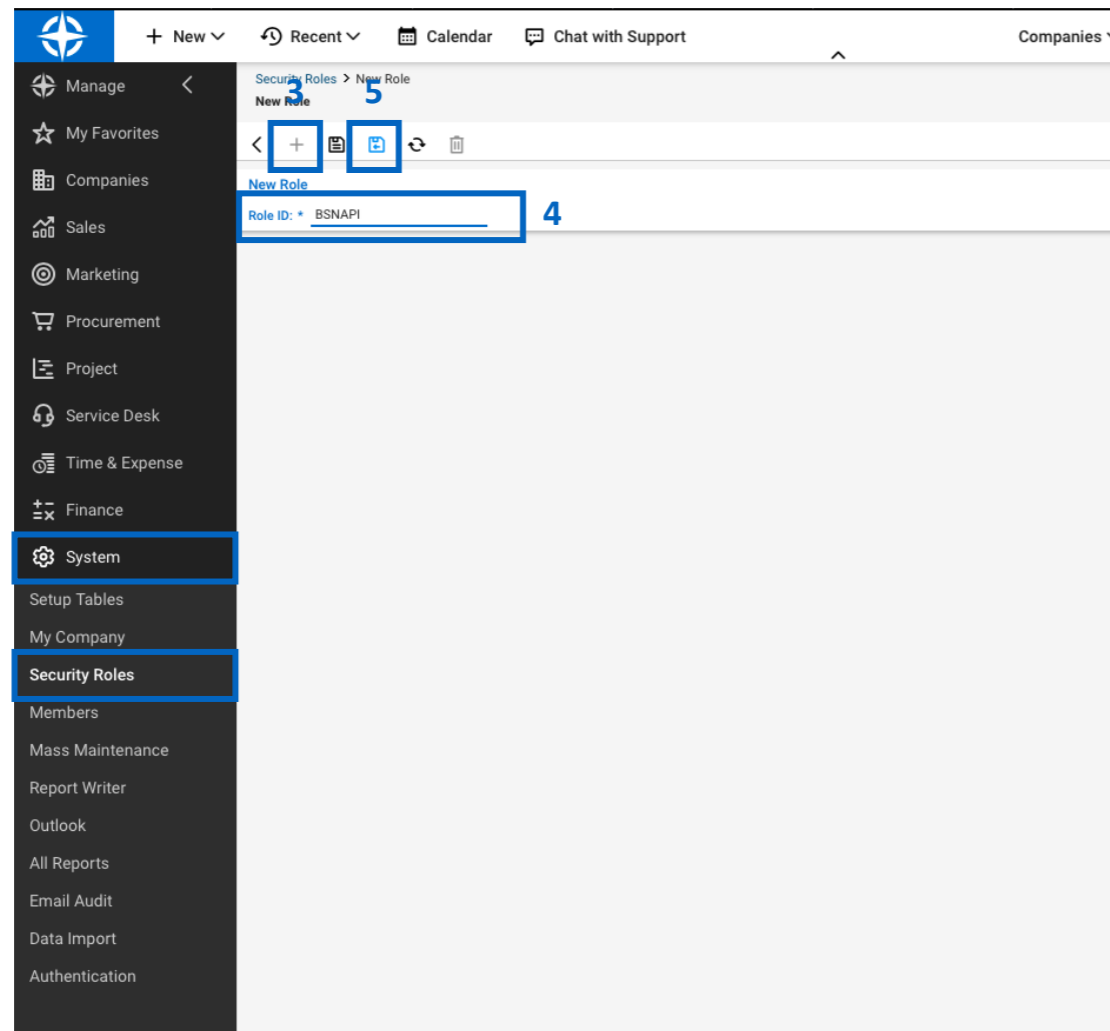
ConnectWise PSA Integration Setup

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Configuring Settings in the ConnectWise Console

Create New Security Role

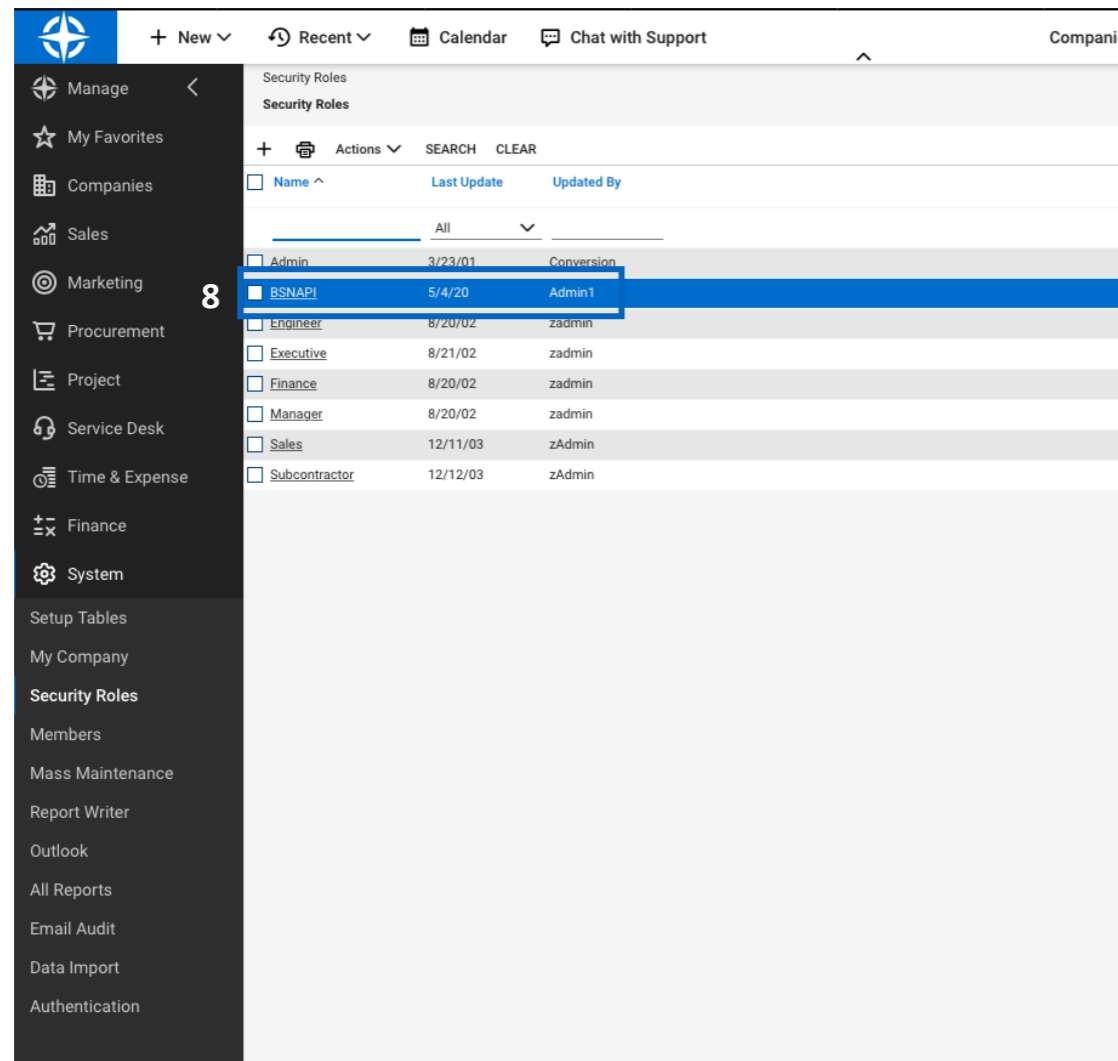


Log into the ConnectWise console and create a new Security Role

1. From the left-hand toolbar select “**System**”
2. From the System menu, select “**Security Role**”
3. Click the **+** symbol to add a new Security Role
4. For **Role ID** enter: “BSNAPI”
5. Click the “**Save**” icon

Configuring Settings in the ConnectWise Console

Create New Security Role



The screenshot displays the ConnectWise console interface. On the left is a dark sidebar with navigation options: Manage, My Favorites, Companies, Sales, Marketing, Procurement, Project, Service Desk, Time & Expense, Finance, System, Setup Tables, My Company, Security Roles, Members, Mass Maintenance, Report Writer, Outlook, All Reports, Email Audit, Data Import, and Authentication. The 'Security Roles' option is highlighted. The main content area shows a table of Security Roles with columns for Name, Last Update, and Updated By. The 'BSNAPI' role is highlighted in blue. A large number '8' is overlaid on the sidebar.

Name	Last Update	Updated By
Admin	3/23/01	Conversion
BSNAPI	5/4/20	Admin1
Engineer	8/20/02	zadmin
Executive	8/21/02	zadmin
Finance	8/20/02	zadmin
Manager	8/20/02	zadmin
Sales	12/11/03	zAdmin
Subcontractor	12/12/03	zAdmin

7. Once saved, navigate back to your list of Security Roles
8. Select the **BSNAPI** role that was just created

Configuring Settings in the ConnectWise Console

Change BSNAPI Security Permissions

The screenshot shows the 'Security Modules for Role - BSNAPI' configuration page. The role is set to 'BSNAPI'. The 'Companies' role is expanded, and the 'Company Maintenance' row is highlighted. The 'Inquire Level' dropdown is set to 'All'. The table below shows the permissions for various security modules.

	Add Level	Edit Level	Delete Level	Inquire Level	Last Update	Updated By
Companies				All	5/4/20	Training Admin1
Company Maintenance	None	None	None	All		
Company/Contact Group Maintenance	None	None	None	None		
Configuration - Display Passwords	None	None	None	None		
Configurations (customize)	None	None	None	None		
Contacts	None	None	None	None		
CRM/Sales Activities	None	None	None	None		
Import Contacts	None	None	None	None		
Manage Attachments	None	None	None	None		
Management	None	None	None	None		
Notes	None	None	None	None		
Reports (customize)	None	None	None	None		
Surveys	None	None	None	None		
Team Members	None	None	None	None		
Tracks	None	None	None	None		
UserCentric	None	None	None	None		
Finance					3/23/20	Training Admin1
Marketing					3/23/20	Training Admin1
Procurement					3/23/20	Training Admin1
Project					3/23/20	Training Admin1
Sales					3/23/20	Training Admin1
Service Desk					5/4/20	Training Admin1
System					3/23/20	Training Admin1
Time & Expense					3/23/20	Training Admin1

Change Security Permissions

9. Expand the **Companies Role**

10. Change **Company Maintenance** "Inquire Level" to "All"

Configuring Settings in the ConnectWise Console

Change BSNAPI Security Permissions

The screenshot shows the ConnectWise console interface. The left sidebar contains a navigation menu with categories like Manage, My Favorites, Companies, Sales, Marketing, Procurement, Project, Service Desk, Time & Expense, Finance, System, Setup Tables, My Company, Security Roles, Members, Mass Maintenance, Report Writer, Outlook, All Reports, Email Audit, Data Import, and Authentication. The main content area displays the 'Security Roles' configuration for the 'BSNAPI' role. The 'Service Desk' role is expanded, and the 'Service Tickets' row is highlighted. The 'Add Level' and 'Inquire Level' dropdowns are set to 'All'. The 'Save and Close' button is highlighted in blue.

	Add Level	Edit Level	Delete Level	Inquire Level	Last Update	Updated By
Procurement					3/23/20	Training Admin1
Project					3/23/20	Training Admin1
Sales					3/23/20	Training Admin1
Service Desk					5/4/20	Training Admin1
Agile Board	None	None	None	None		
Change Approvals	None	None	None	None		
Close Service Tickets	None	None	None	None		
CloudConsole	None	None	None	None		
ConnectWise Chat	None	None	None	None		
ConnectWise Control	None	None	None	None		
ConnectWise Manage Network	None	None	None	None		
ITBoost	None	None	None	None		
Knowledge Base Approver	None	None	None	None		
Knowledge Base Creator	None	None	None	None		
Launch Remote Access	None	None	None	None		
Merge Tickets	None	None	None	None		
Print Service Signoff	None	None	None	None		
Reports (customize)	None	None	None	None		
Resource Scheduling (customize)	None	None	None	None		
Service Dashboard	None	None	None	None		
Service Ticket - Dependencies	None	None	None	None		
Service Tickets	All	None	None	All		
Service Tickets - Finance	None	None	None	None		
SLA Dashboard	None	None	None	None		
Ticket Templates	None	None	None	None		
System					3/23/20	Training Admin1
Time & Expense					3/23/20	Training Admin1

Change Security Permissions

11. Expand the **Service Desk** role
12. Change **Service Tickets** “Add Level” and “Inquire Level” to “All”
13. Click the “**Save and Close**” button

Configuring Settings in the ConnectWise Console

Create New API Member

Members - API Members > Detail
New Member

Detail 16 18 Keys API Logs

< + [] [] [] HISTORY v []

✓ You have successfully updated this record.

Profile

Member ID*
BSNAPIMember

Time Zone*
US Eastern

Member Name*
BSN API Member

Email
support@bsn.com

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

Log into the ConnectWise console and create a new API Member:

14. From the left-hand toolbar, select “**System**”
15. From the System menu, select “**Members**”
16. Click the **+** symbol to add a new API Member
17. Under the **Details** tab enter the following information:

Profile:

Member ID: BSNAPIMember
Member Name: BSN API Member
Time Zone: Specific to your business
Email: Valid email for account notifications to be sent

System:

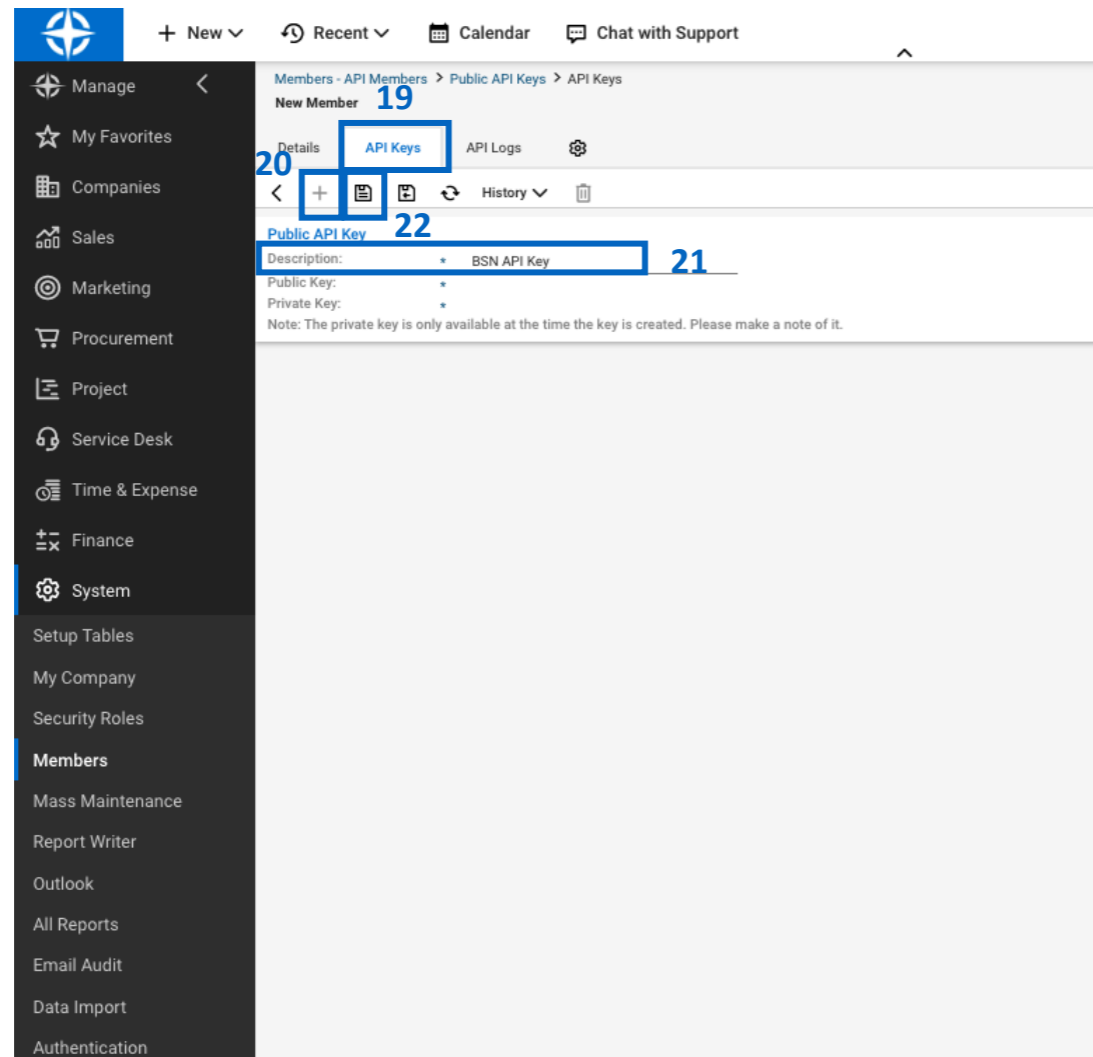
Role ID: BSNAPI

Fill in all other mandatory fields

18. Click the **Save** button

Configuring Settings in the ConnectWise Console

Create New API Member



19. Navigate to the **API Keys** tab

20. Click the **+** symbol

21. Enter “**BSN API Key**” for the description

22. Click the **Save** button and record the **Public** and **Private** key

ConnectWise has now been successfully set up to integrate with Breach Secure Now!

Continue to the next page to configure your ConnectWise integration inside the PII Protect portal.

Configuring ConnectWise Within the PII Protect Portal

Navigating to the ConnectWise Integration Settings

Actions: [New Client](#) [ESS Dashboard](#) [Configure Messages](#) [Dark Web Monitoring](#) [Switch to Manager](#) **EVA** TEST DRIVE

2

[Partner Resources](#) [Billing Report](#) [Search](#)

Name	Product Type	Insurance	Manager Code	Employee Code	RA Completed	Registered Users 38/5000	Created	Password Breaches	Active	Actions
Client 1	EVA-MD	Print			0		05/30/19 9:28 pm	1806	Yes	View Edit Consolidate
Client 2	Unlimited Cybersecurity Training	N/A			0		06/04/19 9:56 am	41	Yes	View Edit
Client 3	Breach Prevention Platform (BPP)	Purchase			08/02/18	5	04/17/18 10:16 am	26	Yes	View Edit Consolidate

1. Login as a Partner Administrator to the PII-Protect portal [here](#). Once logged in you will be taken to your client list as the home screen (above).
2. Select “**Configure Messages**” to navigate to the ConnectWise PSA settings.

Configuring ConnectWise Within the PII Protect Portal

Configure Notification Settings

Customized Messages

Actions:

Enter email address(es) to receive Contact Us notification

If entering more than 1 email address, please separate with semicolon ";" (no spaces between addresses)
 If no email(s) entered, or all have been removed, you will not receive these notifications

Choose PSA system for Integration: 3 Connectwise

4 5

Check if using Connectwise On Premise 7

6

3. Click the “**Choose PSA system for Integration**” dropdown and select “ConnectWise”
4. Enter the **Public API Key** and **Private API Key** noted on [page 8](#).
5. Fill in your **Company ID** from your ConnectWise System
- 6. On Premise ConnectWise only:** If you are using the On Premise Version of ConnectWise, check the “**On Premise**” box and enter your **ConnectWise Site Name**. Be sure to include the https:// in the name
7. Click “**Connect**”.

Once you hit Connect, our portal will connect to your ConnectWise PSA. There may be a delay for the configuration settings to appear.

Configuring ConnectWise Within the PII Protect Portal

Configure Notification Settings

Choose PSA system for Integration: Connectwise

Disconnect

8

- Auto Phish - Campaign Ending
- Auto Phish - Campaign Notification
- Dark Web Monitoring - Breach Report
- Dark Web Monitoring - Large Breach Notice
- Directory Sync - Digest
- Email - Bounced Report
- Email - Not Delivered Report
- Email - Spam Report
- Email - Unsubscribed Report
- Purchase - Notification

9

- Enable Email Notification
- Enable Email Notification
- Enable Email Notification
- Enable Email Notification
- Enable Email Notification
- Enable Email Notification
- Enable Email Notification
- Enable Email Notification
- Enable Email Notification
- Enable Email Notification

Not sure which notification to setup?

Jump to [pages 12 – 13](#) for more details on the notifications and their descriptions.

Once ConnectWise has connected to the PII Protect portal, you will be able to configure notification settings.

8. **Click the checkbox** next to the notification(s) you would like to enable. For more details on these notification settings and descriptions, see [page 12](#)
9. If you would NOT like to receive an email notification in addition to the ConnectWise notification, uncheck the “**Enable Email Notification**” box next to the associated notification.

Jump to [page 14](#) for individual client notification setup.

Configuring ConnectWise Within the PII Protect Portal

Configure Notification Settings – Notification Details & Descriptions

Choose PSA system for Integration: Connectwise

[Disconnect](#)

<input type="checkbox"/> Auto Phish - Campaign Ending	<input checked="" type="checkbox"/> Enable Email Notification
<input type="checkbox"/> Auto Phish - Campaign Notification	<input checked="" type="checkbox"/> Enable Email Notification
<input type="checkbox"/> Dark Web Monitoring - Breach Report	<input checked="" type="checkbox"/> Enable Email Notification
<input type="checkbox"/> Dark Web Monitoring - Large Breach Notice	<input checked="" type="checkbox"/> Enable Email Notification
<input type="checkbox"/> Directory Sync - Digest	<input checked="" type="checkbox"/> Enable Email Notification
<input type="checkbox"/> Email - Bounced Report	<input checked="" type="checkbox"/> Enable Email Notification
<input type="checkbox"/> Email - Not Delivered Report	<input checked="" type="checkbox"/> Enable Email Notification
<input type="checkbox"/> Email - Spam Report	<input checked="" type="checkbox"/> Enable Email Notification
<input type="checkbox"/> Email - Unsubscribed Report	<input checked="" type="checkbox"/> Enable Email Notification
<input type="checkbox"/> Purchase - Notification	<input checked="" type="checkbox"/> Enable Email Notification

AutoPhish – Campaign Ending: Get an alert when a scheduled AutoPhish phishing campaign has ended.

AutoPhish – Campaign Notification: Get an alert 2 days before a scheduled AutoPhish phishing campaign is about to be initiated.

Dark Web Monitoring – Breach Report: Get an alert when your customer has been involved in a data breach.

Dark Web Monitoring – Large Breach Notice: Running a scan on a domain with over 5,000 results takes a few moments to process. Get notified once your large breach report is ready.

Directory Sync – Digest: Get a summary report of your Azure AD, On-Premise, or Bulk Upload results and any associated errors.

Details & descriptions continued on next page.

Configuring ConnectWise Within the PII Protect Portal

Configure Notification Settings – Notification Details & Descriptions

Choose PSA system for Integration:

[Disconnect](#)

<input type="checkbox"/> Auto Phish - Campaign Ending	<input checked="" type="checkbox"/> Enable Email Notification
<input type="checkbox"/> Auto Phish - Campaign Notification	<input checked="" type="checkbox"/> Enable Email Notification
<input type="checkbox"/> Dark Web Monitoring - Breach Report	<input checked="" type="checkbox"/> Enable Email Notification
<input type="checkbox"/> Dark Web Monitoring - Large Breach Notice	<input checked="" type="checkbox"/> Enable Email Notification
<input type="checkbox"/> Directory Sync - Digest	<input checked="" type="checkbox"/> Enable Email Notification
<input type="checkbox"/> Email - Bounced Report	<input checked="" type="checkbox"/> Enable Email Notification
<input type="checkbox"/> Email - Not Delivered Report	<input checked="" type="checkbox"/> Enable Email Notification
<input type="checkbox"/> Email - Spam Report	<input checked="" type="checkbox"/> Enable Email Notification
<input type="checkbox"/> Email - Unsubscribed Report	<input checked="" type="checkbox"/> Enable Email Notification
<input type="checkbox"/> Purchase - Notification	<input checked="" type="checkbox"/> Enable Email Notification

Purchase – Notification: Get notified when one of your Partner Administrators makes a purchase in the portal

Email delivery notifications for automated security tip or welcome emails:

Email Bounced Report: Receive a notification each time an email bounces, contains user details.

Email Not Delivered Report: Receive a notification each time an email cannot be delivered, contains user details.

Email Spam Report: Receive a notification when a user marks an email as spam, contains user details.

Email Unsubscribed Report: Receive a notification when a user unsubscribes from the email list, contains user details.


This can be turned back on in the portal.

1. On the client list (home screen) click **“View”** on the Client account the user is associated with.
2. Scroll down to the **User Details** table.
3. Click **Edit** on the unsubscribed user, uncheck the **“Don't send Micro-Training/Monthly Newsletter”** and click **Submit** to re-subscribe them.

ConnectWise Client Configuration

Setup ConnectWise Notifications for a Client

Clients

Actions: [New Client](#) [ESS Dashboard](#) [Configure Messages](#) [Dark Web Monitoring](#) [Switch to Manager](#) 

[Partner Resources](#)
[Billing Report](#)

[Search](#)

Name	Product Type	HSN Branding	SRA Consulting	Insurance	Manager Code	Employee Code	RA Completed	Registered Users 5246/5000	Created	Password Breaches	Active	Actions
AI's new client Upgrade	Unlimited Cybersecurity Training	No	No	N/A	38e62iugll	5jlr7k4trw		5	03/15/19 12:47 am		Yes	View Edit Connectwise
Boston University School of Business Update	Breach Prevention Platform (BPP)	No	No	Purchase	96bf4ooiv5	yh2m2t6z45		94	01/29/19 10:02 am	75569	Yes 2	View Edit Connectwise
BU UT Department Upgrade	Unlimited Cybersecurity Training	No	No	N/A	rkt9fx8jf9	ae1rt9ruq2		7	03/01/19 9:24 am	37	Yes	View Edit Connectwise

1. Login as a Partner Administrator to the PII-Protect portal [here](#). Once logged in you will be taken to your client list as the home screen (above).
2. Under the “**Actions**” column, click the “**ConnectWise**” button for a client you’d like to configure ConnectWise notifications for.

ConnectWise Client Configuration

Setup ConnectWise Notifications for a Client

That's it! You've just configured ConnectWise notification for this client! Repeat steps 2 – 6 on [pages 14 – 15](#) for each client you wish to setup!

The ConnectWise button on the home screen will go from blue **Connectwise** to blue with a **green** outline **Connectwise** for each client that has been successfully configured.

3. Click the “**Enable ConnectWise PSA**” checkbox to configure and test the notification settings for this client.
4. Click the “**Enter Client**” dropdown to sync your PII Protect client account with the associated Client Name in ConnectWise. This list will populate based off client accounts already setup in your ConnectWise console.
5. Click the “**Select Template**” dropdown to choose the notification type you would like to test.
6. Click “**Test**” to send a test notification to your ConnectWise PSA system!



You're All Set!

_____ Your ConnectWise PSA Integration Setup is complete!

_____ Questions? Comments? Want a 1-on-1 onboarding with our Operations team?

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