



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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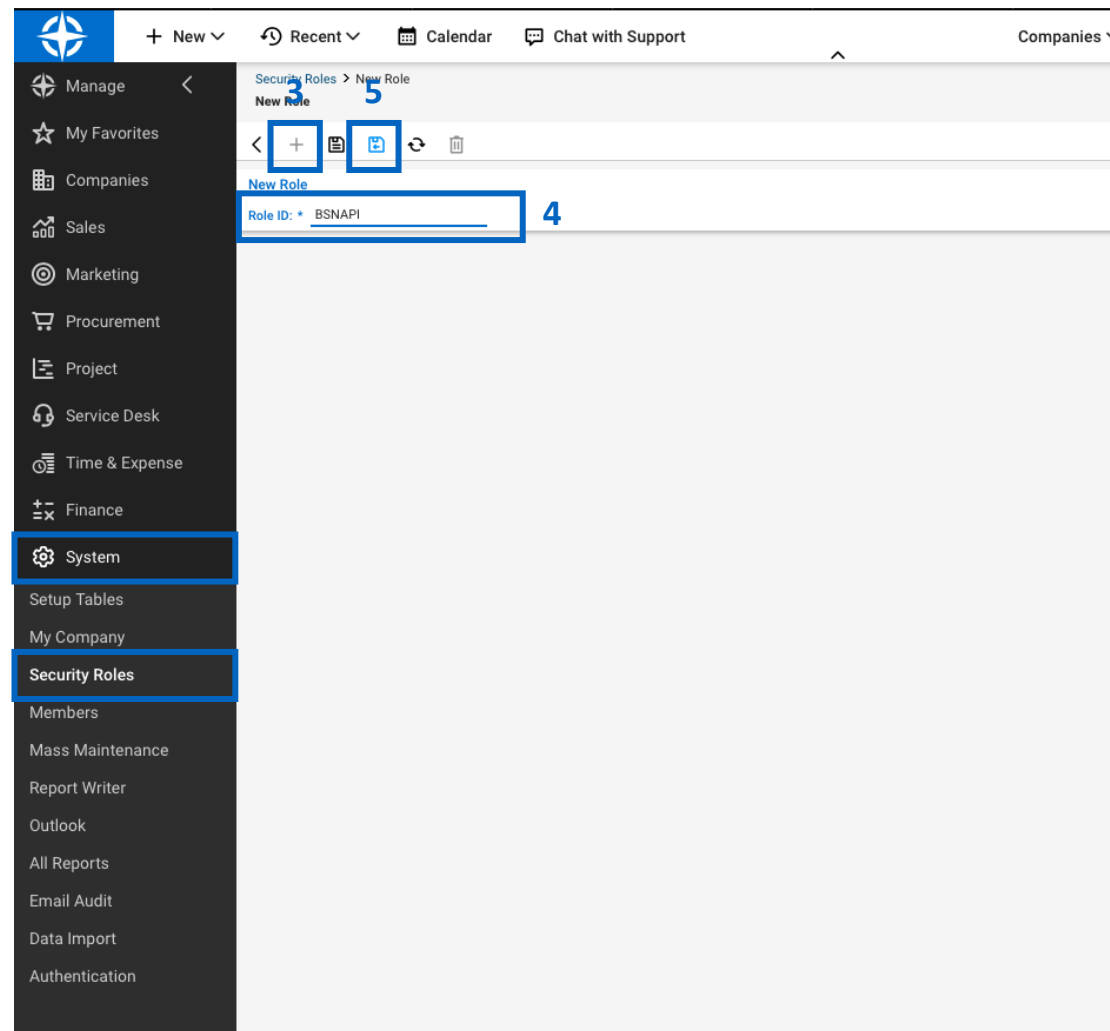
# ConnectWise PSA Integration Setup

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# Configuring Settings in the ConnectWise Console

## Create New Security Role

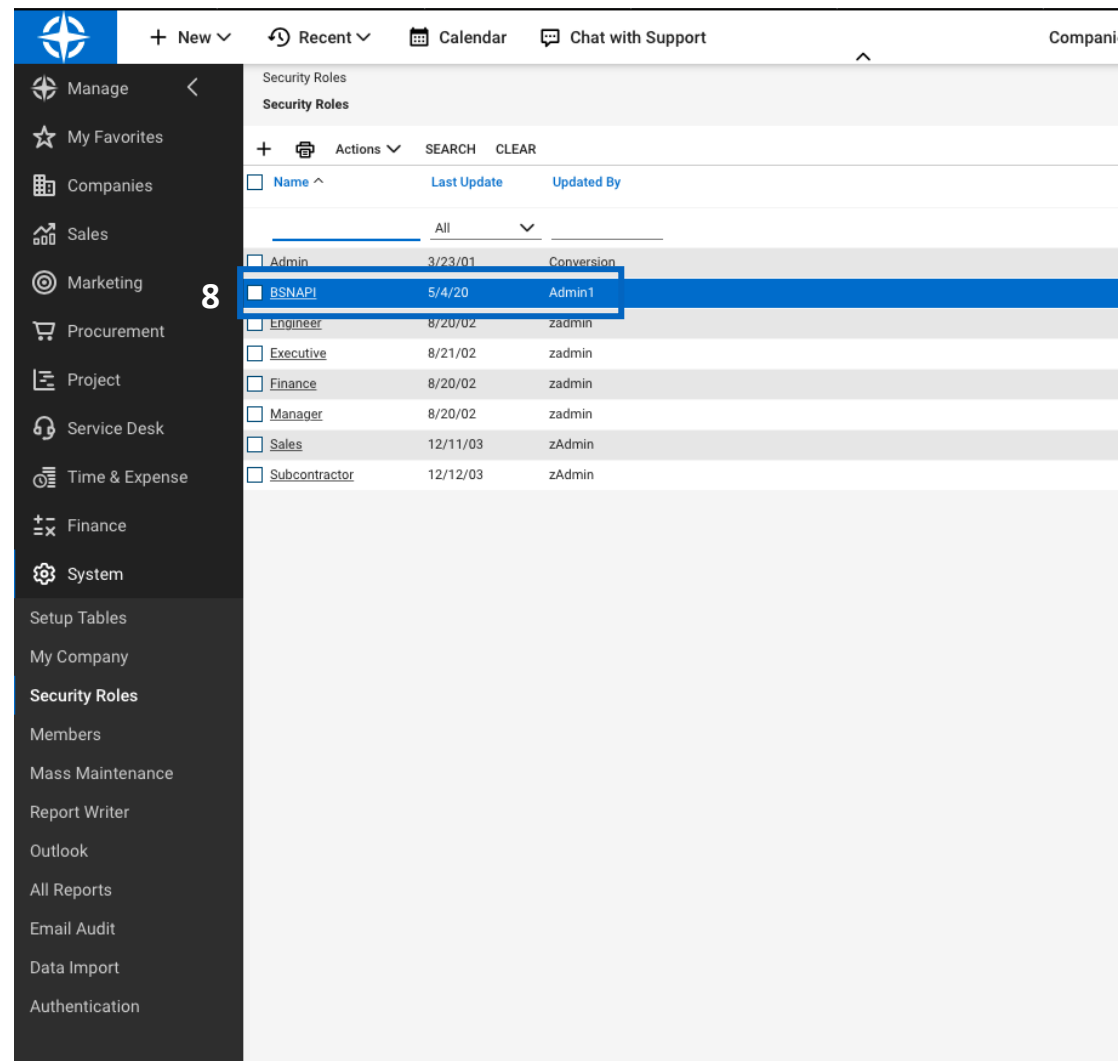


Log into the ConnectWise console and create a new Security Role

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 'Security Roles' page in the ConnectWise console. The left sidebar shows the navigation menu with 'Security Roles' selected. The main content area shows a table of security roles. The 'BSNAPI' role is highlighted in blue. A red circle with the number '8' is placed over the 'Name' column header.

<input type="checkbox"/>	Name ^	Last Update	Updated By
<input type="checkbox"/>	Admin	3/23/01	Conversion
<input checked="" type="checkbox"/>	BSNAPI	5/4/20	Admin1
<input type="checkbox"/>	Engineer	8/20/02	zadmin
<input type="checkbox"/>	Executive	8/21/02	zadmin
<input type="checkbox"/>	Finance	8/20/02	zadmin
<input type="checkbox"/>	Manager	8/20/02	zadmin
<input type="checkbox"/>	Sales	12/11/03	zAdmin
<input type="checkbox"/>	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 'Companies' role is expanded, and the 'Company Maintenance' row is selected. The 'Inquire Level' dropdown is set to 'All'. The table below shows the permissions for various security modules.

Security Module	None	None	None	All	Last Update	Updated By
Company Maintenance	None	None	None	All	5/4/20	Training Admin1
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 'Service Desk' item is highlighted with a blue box and the number 11. The main content area shows the 'Security Roles' configuration for 'BSNAPI'. The 'Service Desk' role is expanded, and the 'Service Tickets' row is selected. The 'Add Level' and 'Inquire Level' dropdowns are set to 'All', indicated by blue boxes and the number 12. The 'Save and Close' button is highlighted with a blue box and the number 13.

	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 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:

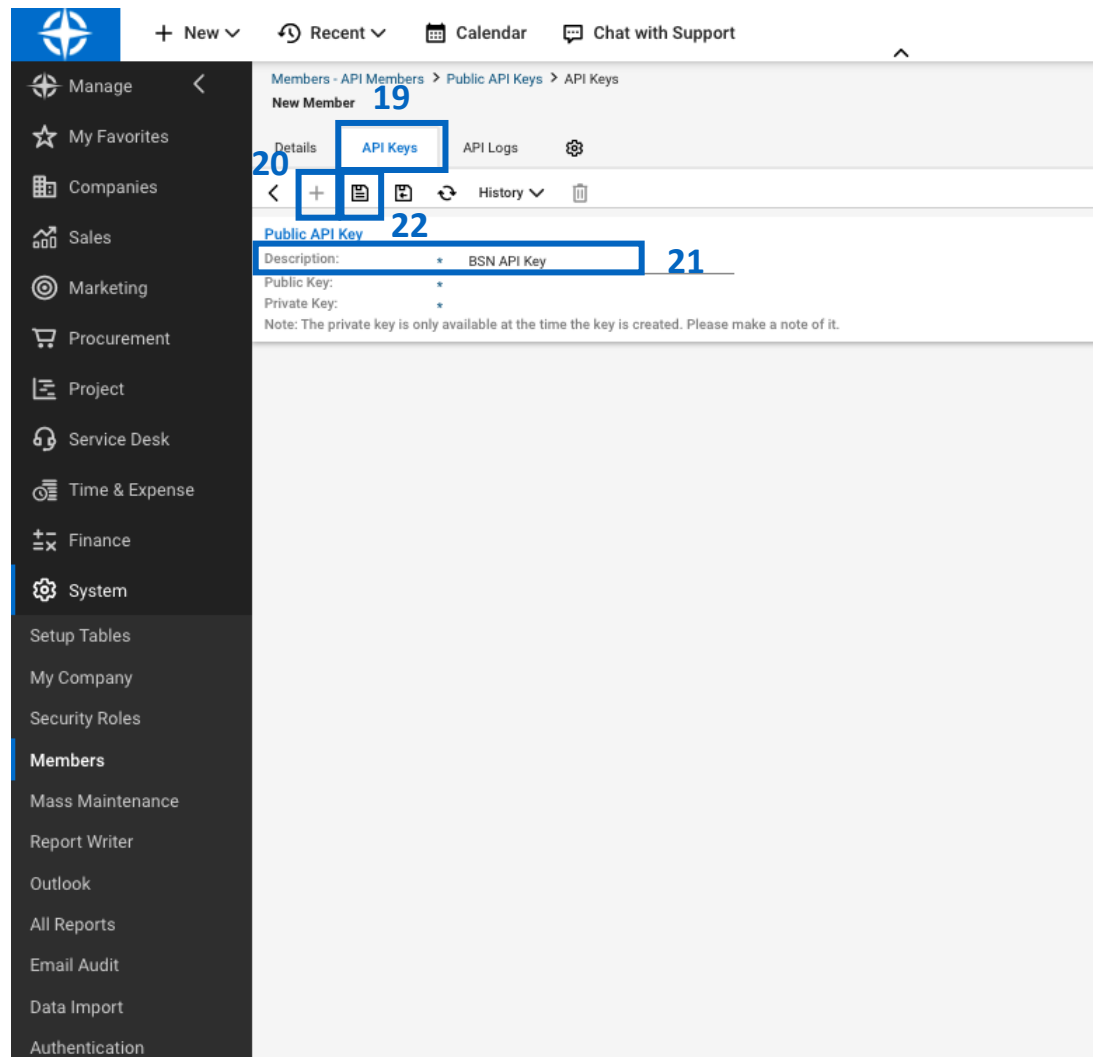
**Role ID:** BSNAPI

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

The screenshot displays the PII Protect Partner Profile interface. On the left, a dark blue sidebar contains navigation options: 'Your Logo Here', 'Wendy Smallfoot' (with 'Edit profile' link), 'My Dashboard', 'Newsfeed' (with a red notification badge '9'), 'My Company', 'Manage Clients', 'Partner Profile' (highlighted with a red box and a blue '2'), and 'Getting Started'. The main content area is titled 'Partner Profile' and includes tabs for 'Configure', 'Information', 'Billing Report', and 'Payment Information'. A 'Your Progress' section shows a 47% completion bar. Below this is a list of configuration items: 'Branding' (2/2), 'Partner Notifications' (2/3), 'Global Welcome Message' (2/2), 'Ticket Management System' (1/1, highlighted with a blue box and a blue '3'), 'Global Push/Client Notifications' (0/5), 'Tax Exemption' (0/1), 'Integrations' (0/2), and 'Training Configuration' (1/1). On the right, a 'Ticket Management System' card features a 'Watch' button and a 'Setup' button (highlighted with a blue box and a blue '3'). Below the card, a 'Subtasks' section shows 'TMS Configuration' as completed.

1. Login as a Partner Administrator to the PII-Protect portal [here](#).
2. Select “**Partner Profile**” application on the left,
3. Click the “**Ticket Management System**” option then the “**Setup**” button to navigate to the Autotask PSA settings

# Configuring ConnectWise Within the PII Protect Portal

## Configure Notification Settings

**TMS Configurations**

Enable TMS System

4   
connectwise

---

**connectwise configuration**

5

6

7  Check if using Connectwise On Premise

8

4. Click the “**Choose TMS system for Integration**” dropdown and select “ConnectWise”
5. Fill in your **Company ID** from your ConnectWise System
6. Enter the **Public API Key** and **Private API Key** noted on [page 8](#).
7. **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
8. 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

9	Enable	Service Name	10	Email
	<input type="checkbox"/>	Directory Sync - Digest		<input checked="" type="checkbox"/>
	<input type="checkbox"/>	Auto Phish - Campaign Ending		<input checked="" type="checkbox"/>
	<input type="checkbox"/>	Auto Phish - Campaign Notification		<input checked="" type="checkbox"/>
	<input type="checkbox"/>	Purchase - Notification		<input checked="" type="checkbox"/>
	<input type="checkbox"/>	Email - Bounced Report		<input checked="" type="checkbox"/>
	<input type="checkbox"/>	Email - Not Delivered Report		<input checked="" type="checkbox"/>
	<input type="checkbox"/>	Email - Unsubscribed Report		<input checked="" type="checkbox"/>

### 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.

9. **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](#)
10. 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

Enable	Service Name	Email
<input type="checkbox"/>	Directory Sync - Digest	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Auto Phish - Campaign Ending	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Auto Phish - Campaign Notification	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Purchase - Notification	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Email - Bounced Report	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Email - Not Delivered Report	<input checked="" type="checkbox"/>

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

**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.

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

**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.

Details & descriptions continued on next page.

# Configuring ConnectWise Within the PII Protect Portal

## Configure Notification Settings – Notification Details & Descriptions

<input type="checkbox"/>	Email - Unsubscribed Report	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Email - Spam Report	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Dark Web Monitoring - Breach Report	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Dark Web Monitoring - Large Breach Notice	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Catch Phish Phishing Reported	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Dark Web Breach Report	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Dark Web Monthly Report	<input checked="" type="checkbox"/>

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

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

**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.

**Note:** Email Unsubscribes can be turned back on in the portal.

1. In the “Manage Clients” view select the Client account the user is associated with.
2. Select the **User** tab
3. Click on the unsubscribed user, de-select the “**Don't send Micro-Training/Monthly Newsletter**” and click **Save** to re-subscribe them.

# ConnectWise Client Configuration

## Setup ConnectWise Notifications for a Client

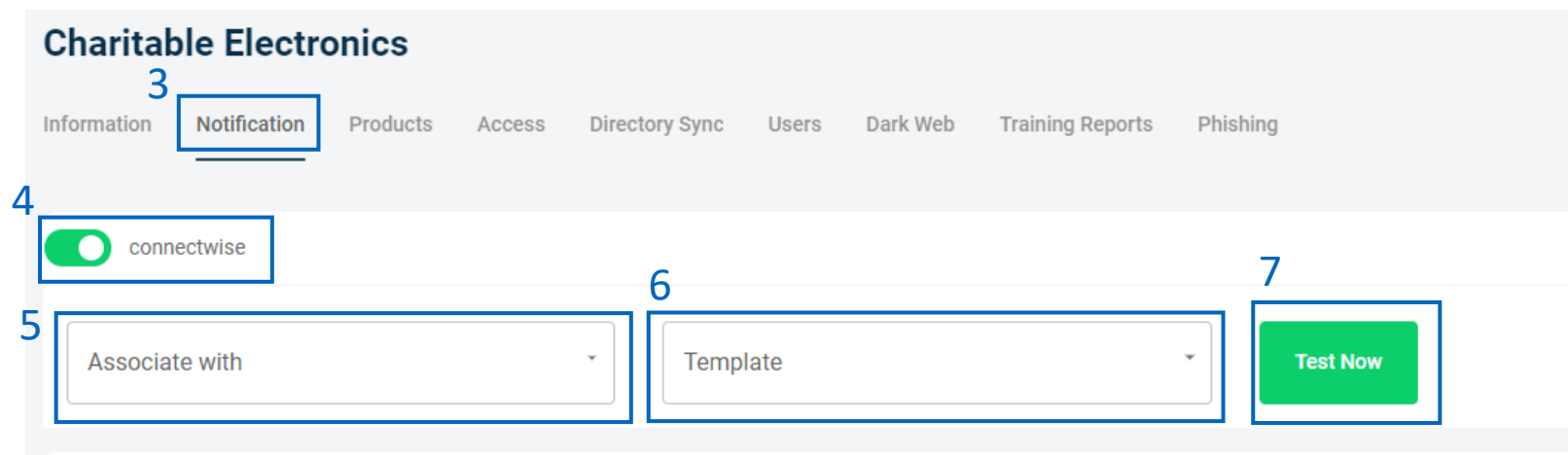
The screenshot shows the ConnectWise Client Configuration interface. On the left, a sidebar contains navigation options: 'My Dashboard', 'My Company', 'Manage Clients' (highlighted with a green box and a green '1'), and 'Partner Profile'. The main content area features a search bar, 'Add Filter', and 'Create' buttons. Below these is a table of clients with the following data:

Name ↑	Branding	Consulting	Insurance	RA	Users	Breaches	ESS	Active	New UI
ABC Worldwide Product: Unlimited Cybersecurity Training					0			✓	✗
Charitable Electronics Product: Unlimited Cybersecurity Training					0			✓	✗
Dunder Mifflin Infinity Product: Unlimited Cybersecurity Training					0			✓	✗
Hermey's Dentistry Product: Unlimited Cybersecurity Training					0			✓	✗

1. Login as a Partner Administrator to the PII-Protect portal [here](#). Click on the “Manage Clients” application on the left to view your client list (above).
2. Select the client you’d like to configure ConnectWise notifications for.

# ConnectWise Client Configuration

## Setup ConnectWise Notifications for a Client



3. Select the “**Notification**” tab then expand the “**TMS**” section
4. Click the “**ConnectWise**” slider to configure and test the notification settings for this client.
5. Click the “**Associate with**” 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 Autotask console.
6. Click the “**Select Template**” dropdown to choose the notification type you would like to test.
7. Click “**Test**” to send a test notification to your Autotask PSA system!

**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.





## 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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