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?

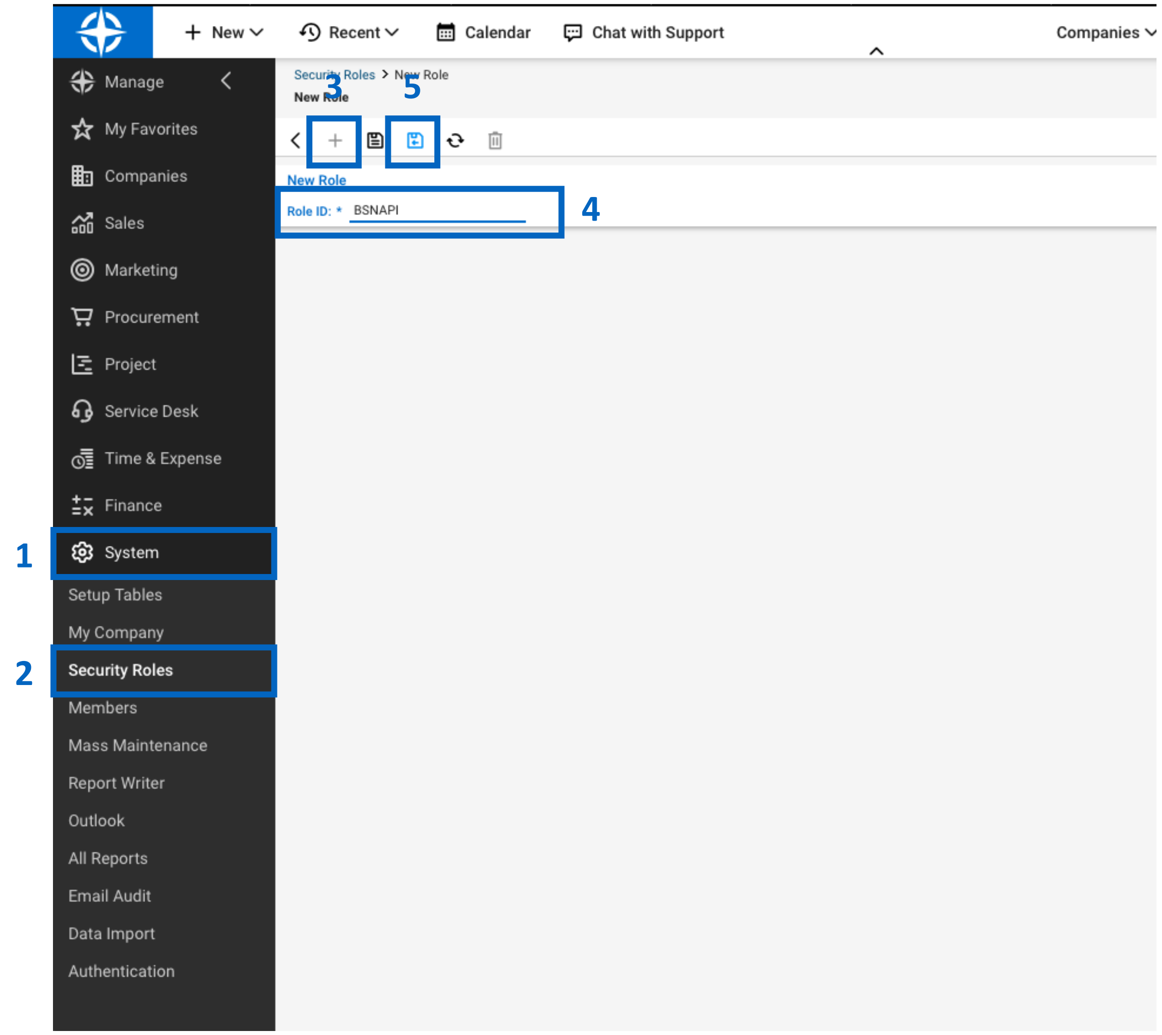
Email: Operations@breachsecurenow.com
Phone: (877) 275 – 4545

ConnectWise PSA Integration Setup

Table of Contents

Configuring Settings in the ConnectWise Console

Create New Security Role

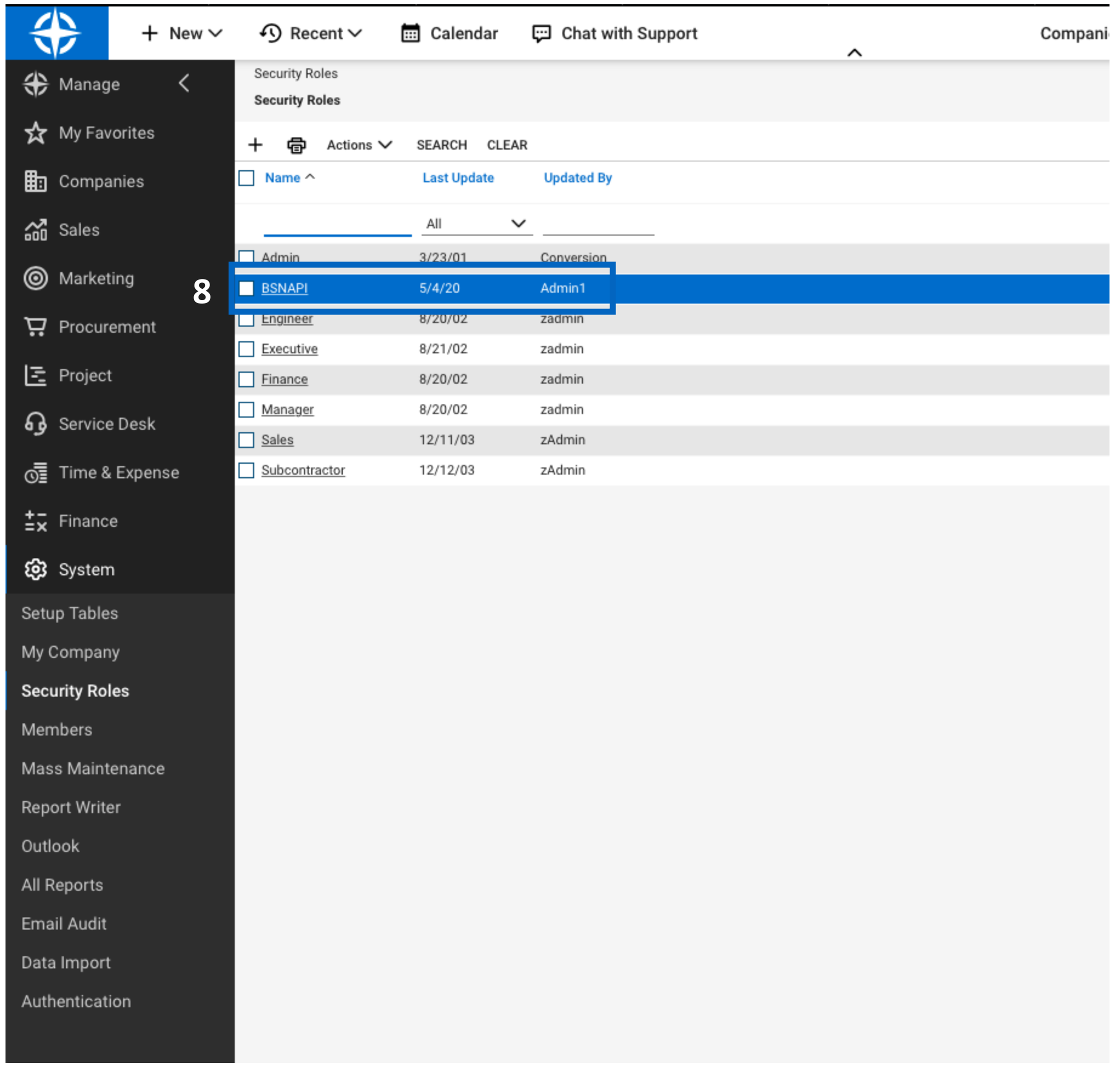


Log into the ConnectWise console and create a new Security Role

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

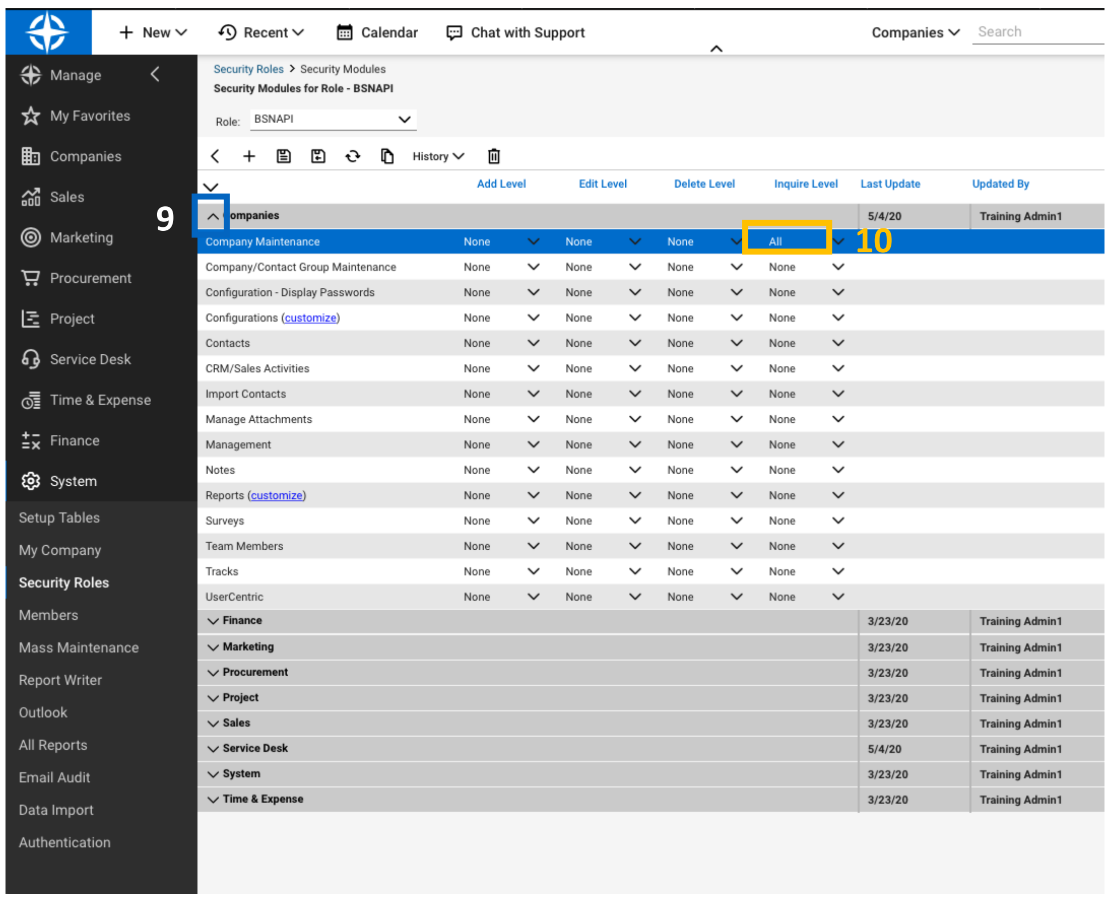
Create New Security Role



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

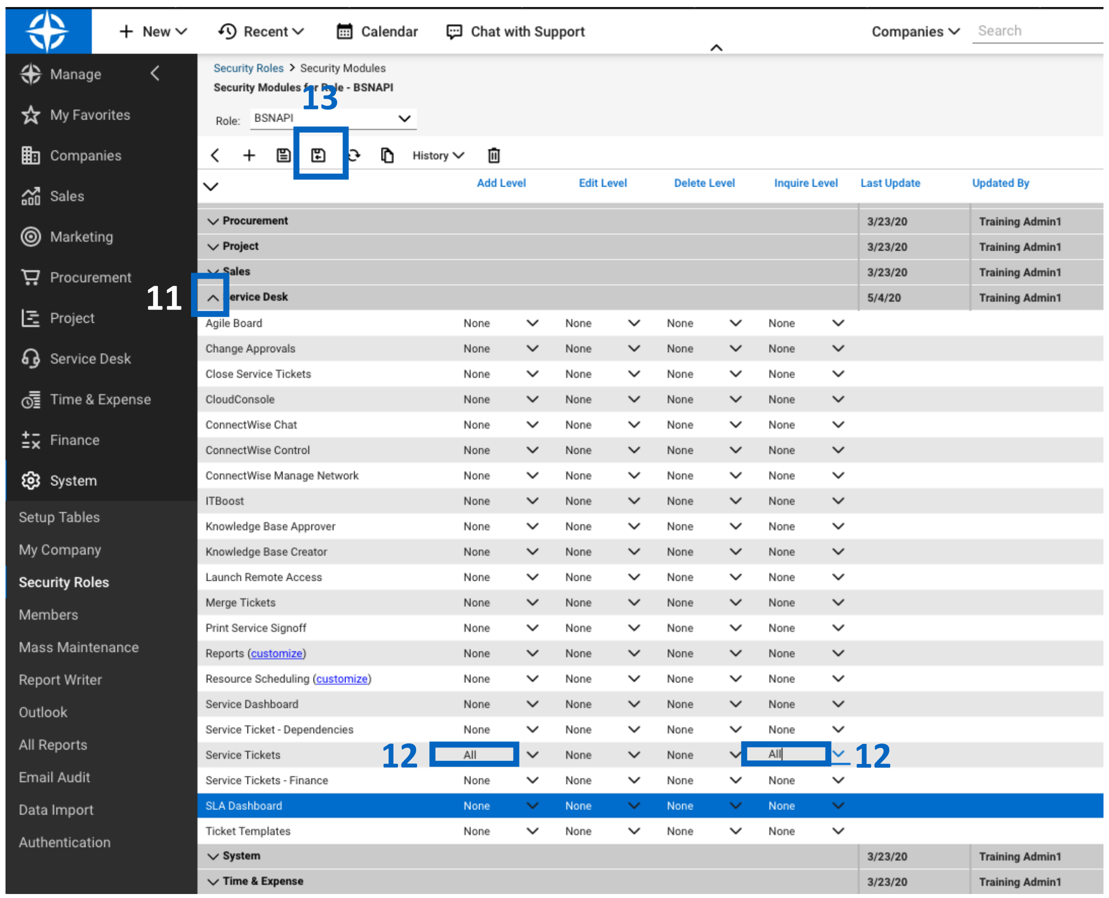


Change Security Permissions

9. Expand the **Companies Role**
10. Change **Company Maintenance** “Inquire Level” to “All”

Configuring Settings in the ConnectWise Console

Change BSNAPI Security Permissions

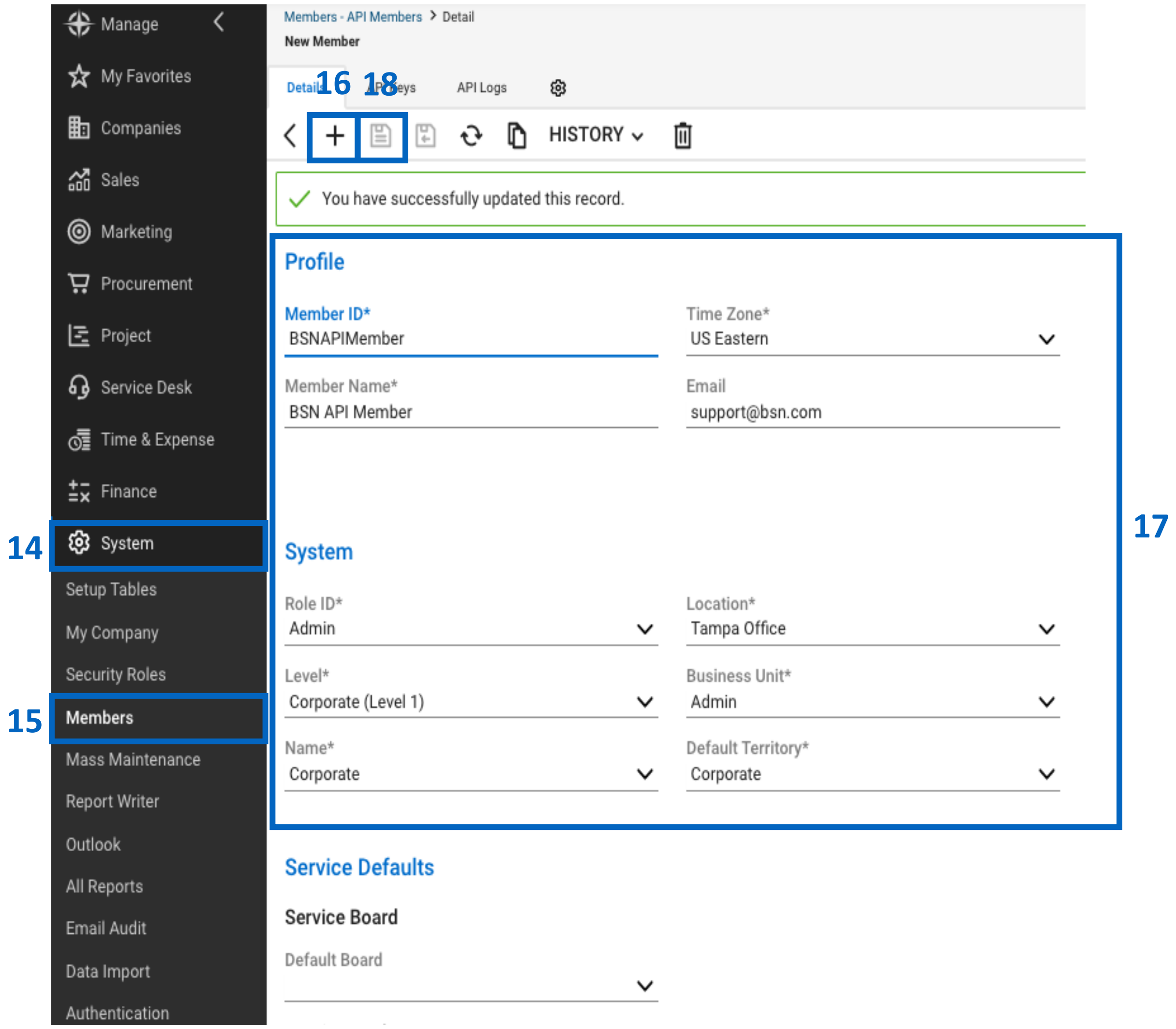


Change Security Permissions

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



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

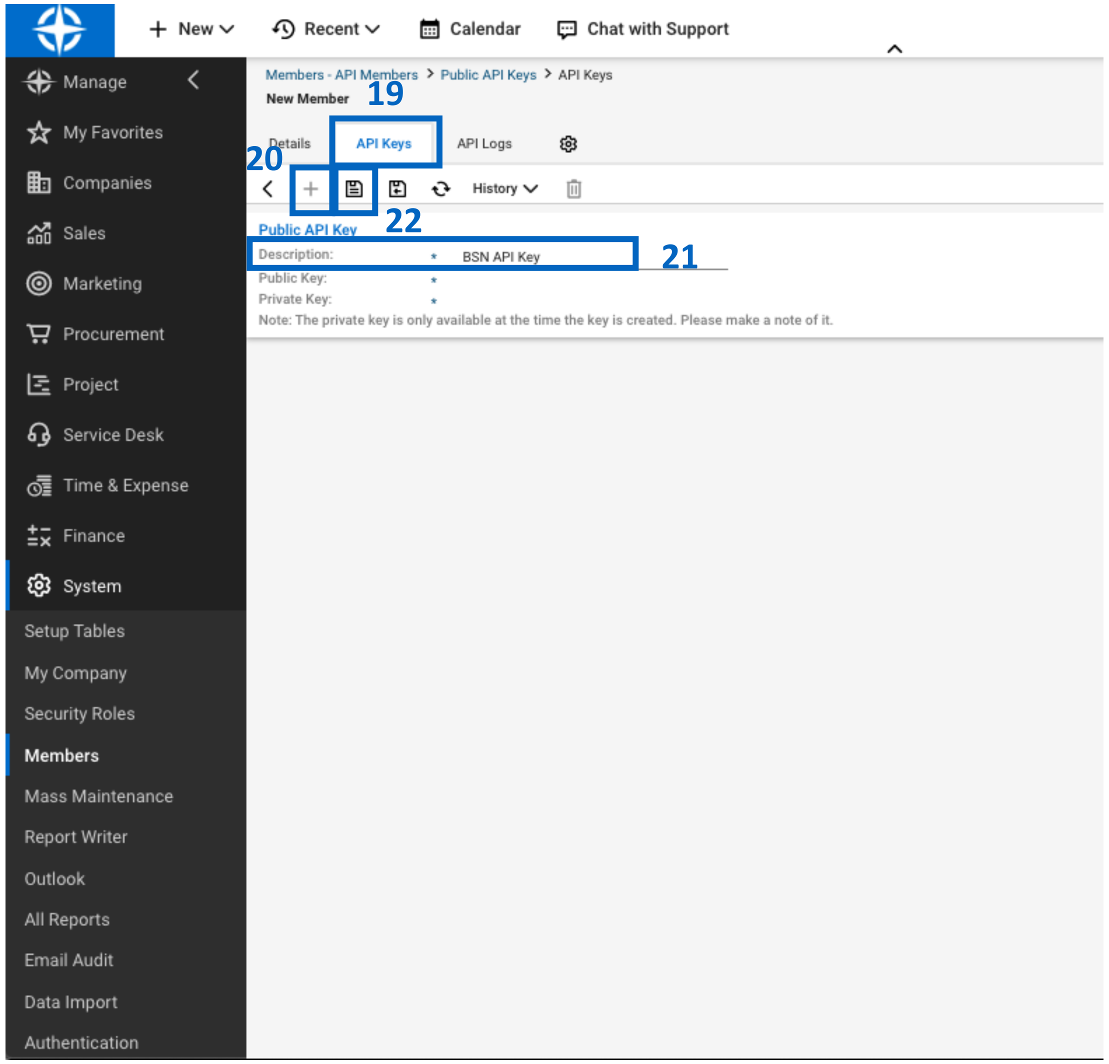
    System:

    - Role ID: BSNAPI

    Fill in all other mandatory fields
18. Click the **Save** button

Configuring Settings in the ConnectWise Console

Create New API Member



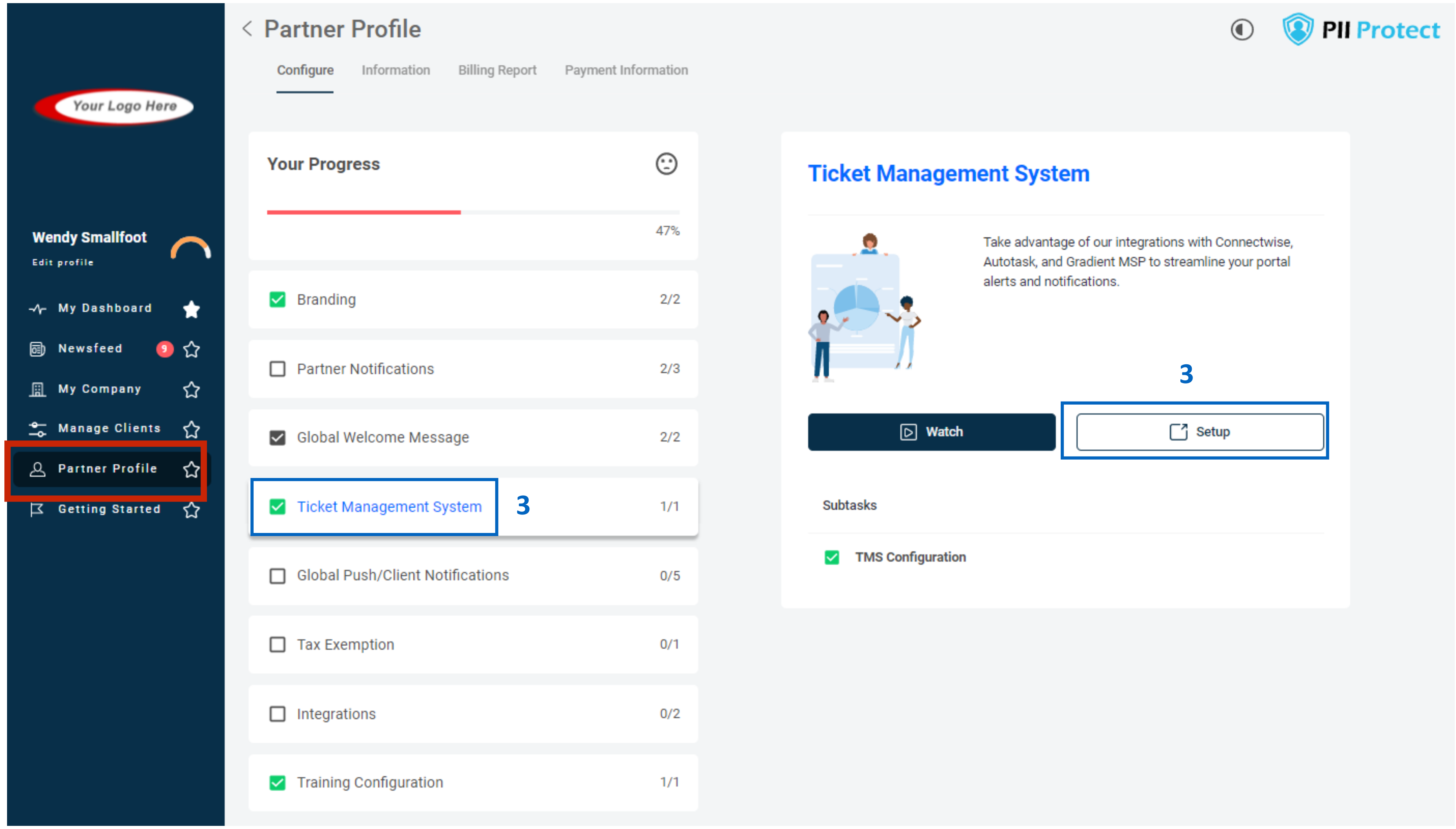
19. Navigate to the **API Keys** tab
20. Click the **+** symbol
21. Enter "**BSN API Key**" for the description
22. Click the **Save** button and record the Public and Private key

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

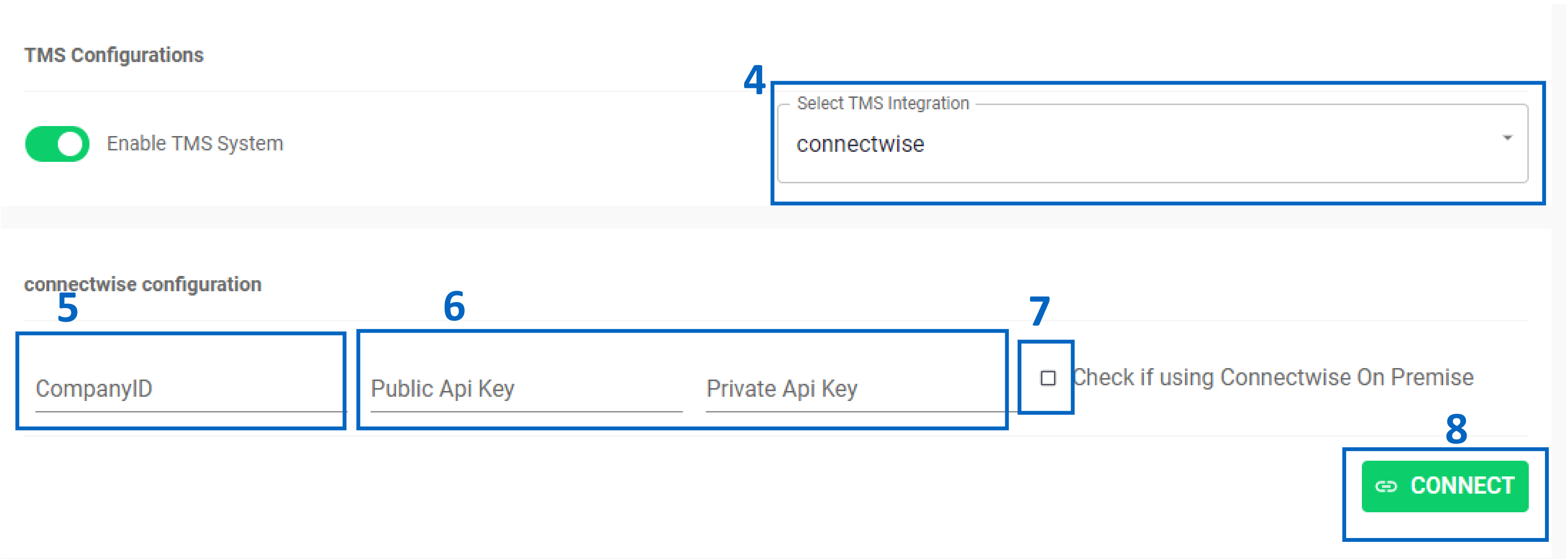
Navigating to the ConnectWise Integration Settings



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

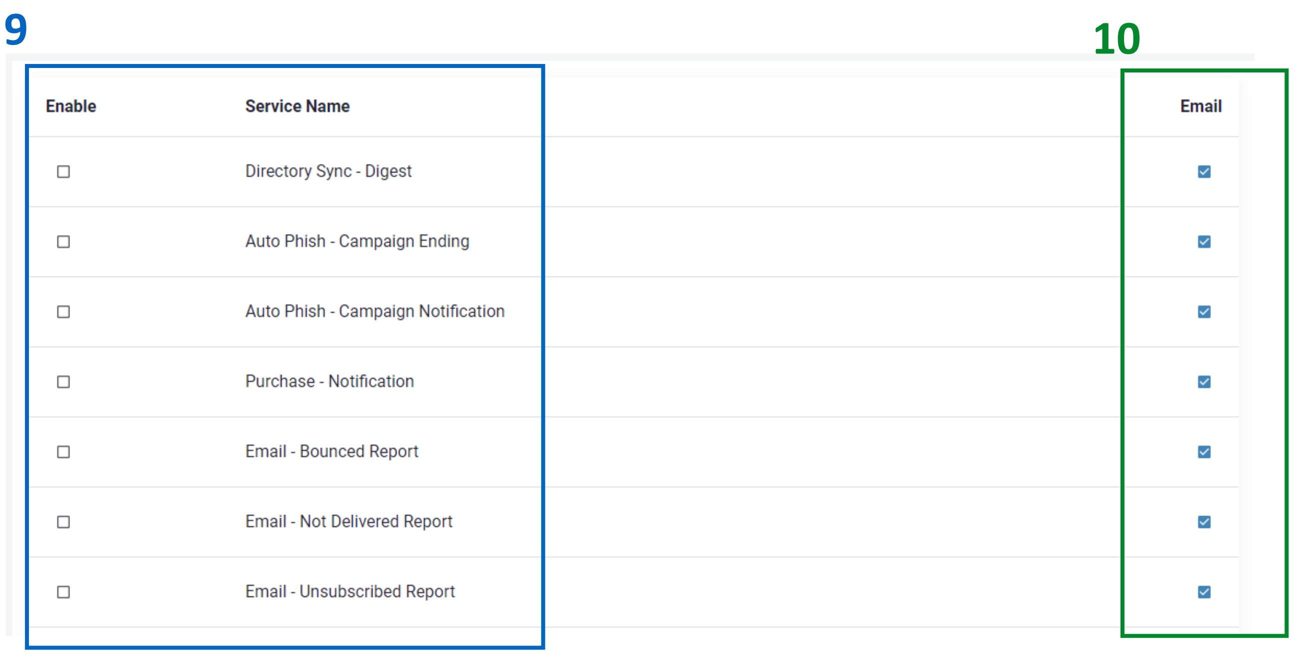


4. Click the "**Choose TMS system for Integration**" dropdown and select "ConnectWise"
5. Fill in your Company ID from your ConnectWise System
6. Enter the Public API Key and Private API Key noted on page 8.
7. On Premise ConnectWise only: If you are using the On Premise Version of ConnectWise, check 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



Enable	Service Name	Email
☐	Directory Sync - Digest	☑
☐	Auto Phish - Campaign Ending	☑
☐	Auto Phish - Campaign Notification	☑
☐	Purchase - Notification	☑
☐	Email - Bounced Report	☑
☐	Email - Not Delivered Report	☑
☐	Email - Unsubscribed Report	☑

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
☐	Directory Sync - Digest	☑
☐	Auto Phish - Campaign Ending	☑
☐	Auto Phish - Campaign Notification	☑
☐	Purchase - Notification	☑
☐	Email - Bounced Report	☑
☐	Email - Not Delivered Report	☑

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.

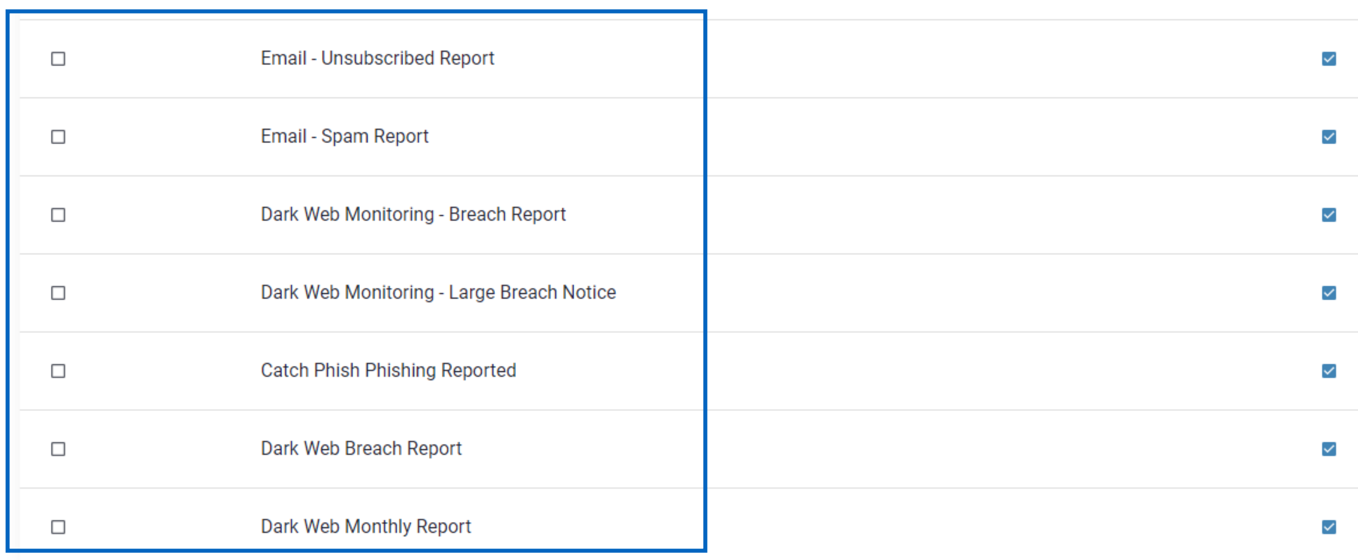
Email Bounced Report: Receive a notification each time an email bounces, contains user details.

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



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.

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

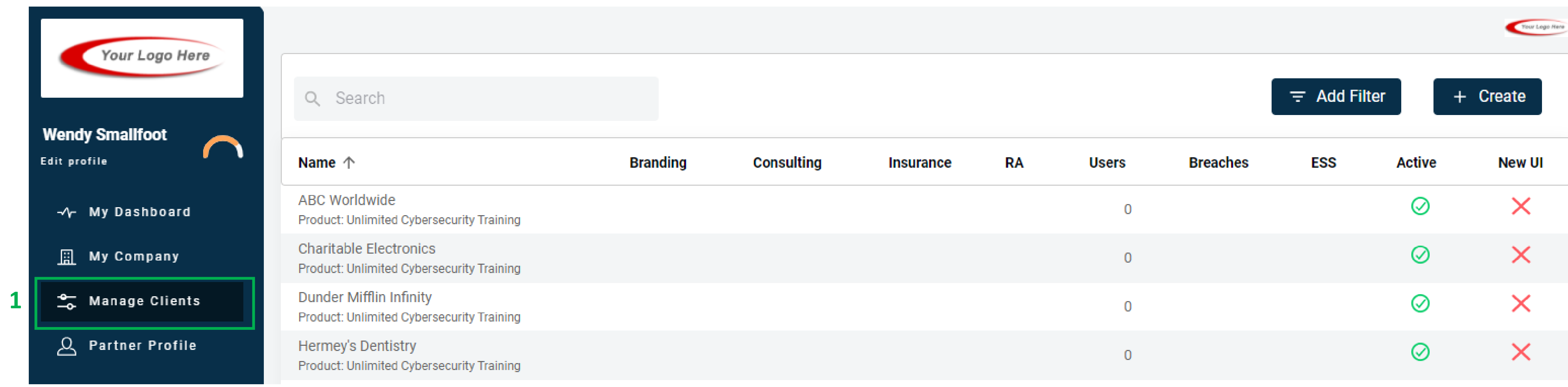
Email Spam Report: Receive a notification when a user marks an email as spam, contains user details.

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.

ConnectWise Client Configuration

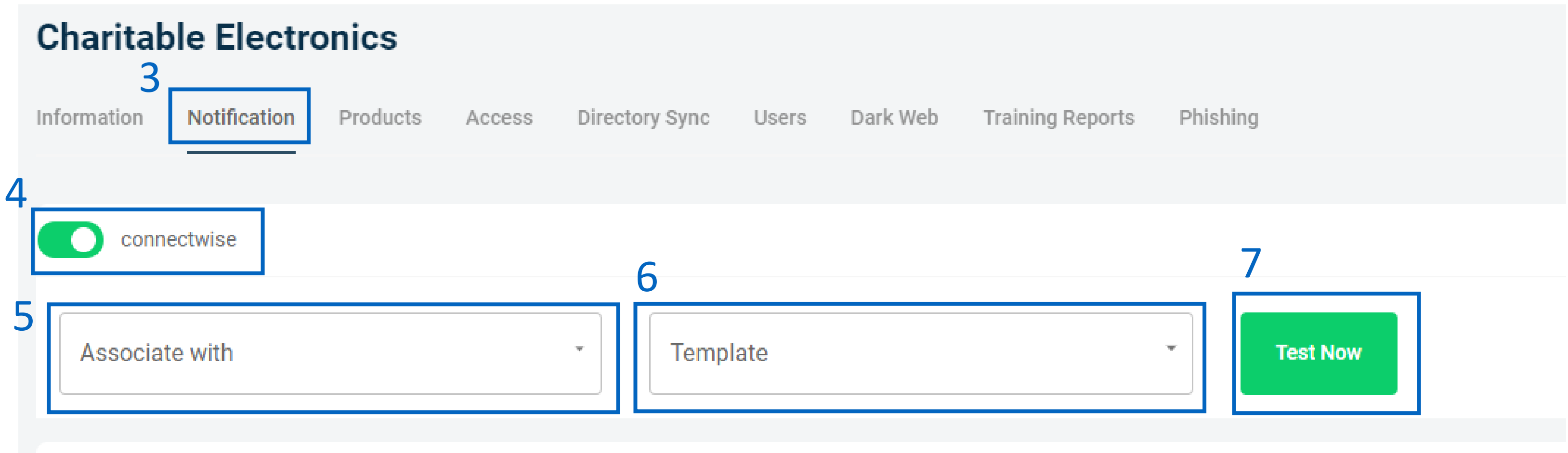
Setup ConnectWise Notifications for a Client



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



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. 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!

You’re All Set!

Your ConnectWise PSA Integration Setup is complete!

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

Email: Operations@breachsecurenow.com
Phone: (877) 275 – 4545