Contents

Overview 2
- Product / Plan Management 2
- User / Subscription Management 2
- Service Ticket Management 2

Setup on ConnectWise Manage™ 3
- Create Authentication Keys on ConnectWise Manage™ 3
  - Create Custom Security Role for Dropsuite (Optional) 3
  - Create Manage API Keys 4
  - Create New API Member 4
- Create Company Agreements for Dropsuite 5

Setup on Dropsuite Reseller Provisioning Portal 7
- Login 7
- Enter ConnectWise API Credentials and Required Mappings 7
- Create Dropsuite Plans 10

Subscription Creation and Management 12
- Create Dropsuite Subscription 12
- Upgrade/Downgrade and Terminate the Subscription 13
- Login as End User to setup backup 15

Service Tickets 16
- ConnectWise Service Ticket Creation 16

Troubleshooting 16

Overview

This is a guide for ConnectWise Manage integration with Dropsuite Email Backup solution. It highlights how to create plans, how to onboard the users, changing/terminating user subscriptions and logging in as end users.

Dropsuite will integration the below items on your ConnectWise Manage

Product / Plan Management

1. Procurement -> Product Catalogue: Dropsuite will create a product plan in your product catalogue in procurement.

User / Subscription Management

Dropsuite will create an addition to the selected Agreement for the company on your ConnectWise manage.

PLEASE NOTE that the effective date of this addition will be from the 1st of Next Month.

Finance -> Agreements: On ConnectWise "Agreements" facilitate managed service agreements (what's covered and what's not covered) for that product, that MSPs have with clients. this includes how the billing is done, how tickets are labelled and so on.

The MSP would have to create one or select a ConnectWise Manage agreement for each tenant on Dropsuite. Dropsuite will list all agreements for a particular company when adding the tenant to ConnectWise manage.

1. Finance -> Agreements -> agreement addition: this will show all the users who are using this product ID for a particular Agreement.

Service Ticket Management

We will automatically create service ticket at ConnectWise when there is an error with any one of the backups. These tickets will be managed / assigned to MSP based on agreements mentioned above. MSP support engineers will see these tickets, they can either try to fix the problem if its password related or raise a support ticket with us.

As soon as the ticket is fixed and backup is resumed, the service ticket is closed at ConnectWise.

For this few things to note here are:

1. Service Desk -> Service Board: MSP Decides which service board they want to put Dropsuite in. It can have priority service board, professional Services Service board and so on. This is a onetime activity which MSP does at the beginning.
2. Service Desk -> Configurations: (Automatically done by us) We create a configuration type named: Dropsuite_Mailbox_actions. All service tickets for Dropsuite are under this configuration type and can be searched from here

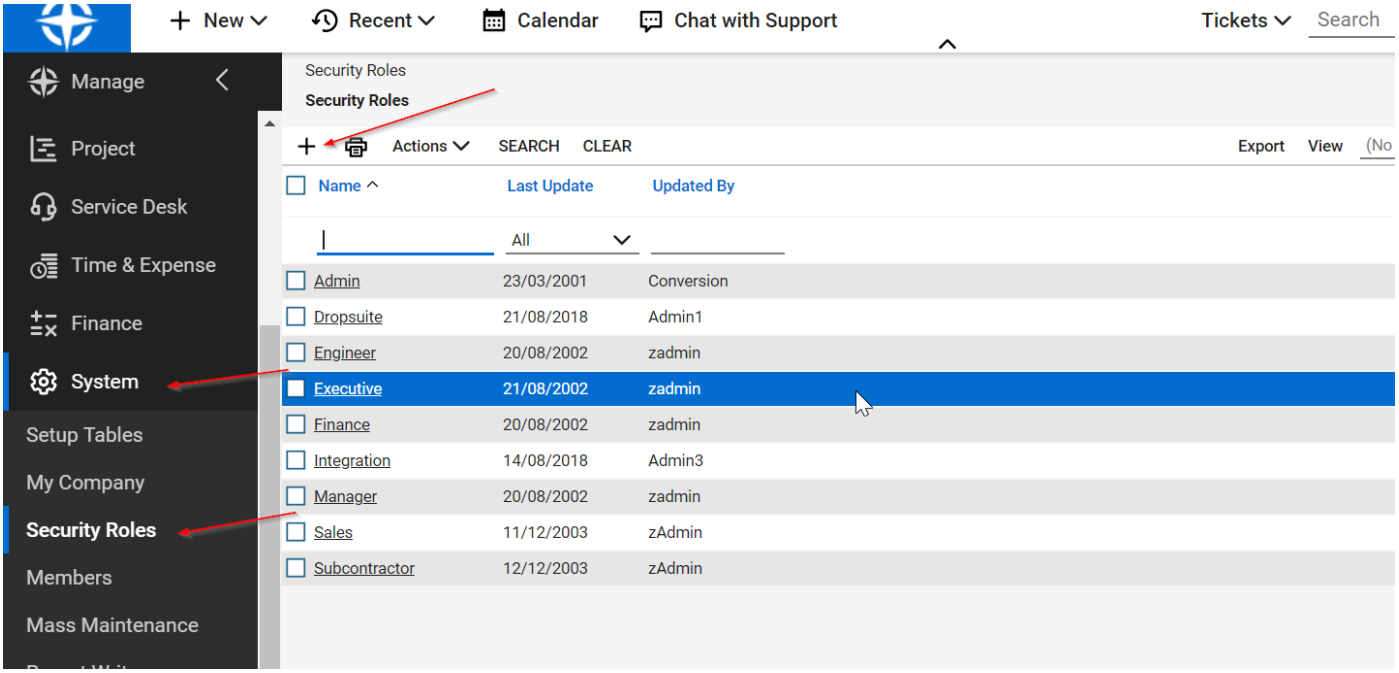
Setup on ConnectWise Manage™

Create Authentication Keys on ConnectWise Manage™

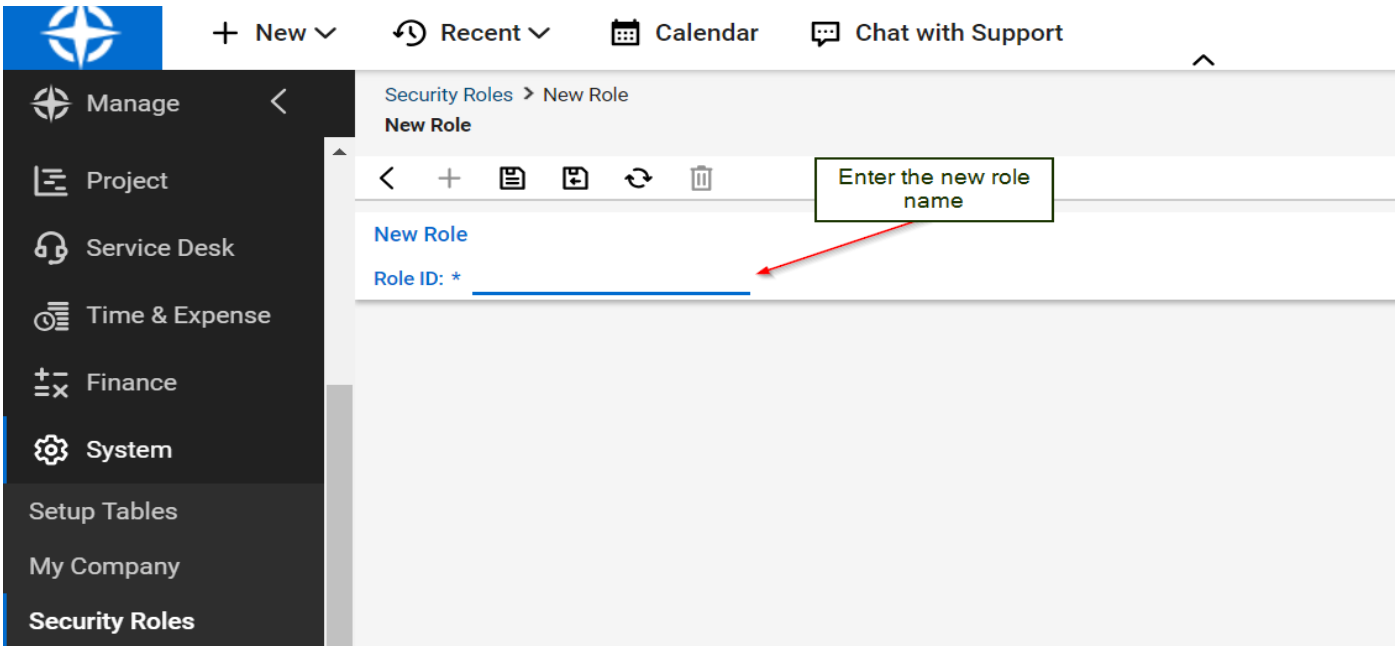
Create Custom Security Role for Dropsuite (Optional)

Before creating the API keys, you can either use the admin roles or create custom role for Dropsuite. If you decide to create a custom role please follow the below steps:

1. Click on System -> Security Roles -> Add new roles



2. Provide a name for the new role.



3. Select the specific roles and permissions as below and click save.

- Companies > Company Maintenance: Add, Inquire
- Companies > Configurations: Add, Edit, Inquire
- Finance > Agreements: Add, Edit, Delete, Inquire
- Procurement > Product Catalog: Add, Edit, Inquire
- Project > Project Tickets: Add, Edit, Inquire
- Project > Project Tickets - Dependencies: Add, Edit, Inquire
- Project > Close Project Tickets: Add, Edit, Inquire
- Service Desk > Service Tickets > Add, Edit, Inquire
- Service Desk > Service Tickets - Finance > Add, Edit, Inquire
- Service Desk > Service Tickets - Dependencies > Add, Edit, Inquire
- Service Desk > Close Service Tickets > Add, Edit, Inquire
- System > Table Setup > Add, Edit, Inquire
- System > Custom Menu Entry > Add, Edit, Delete, Inquire

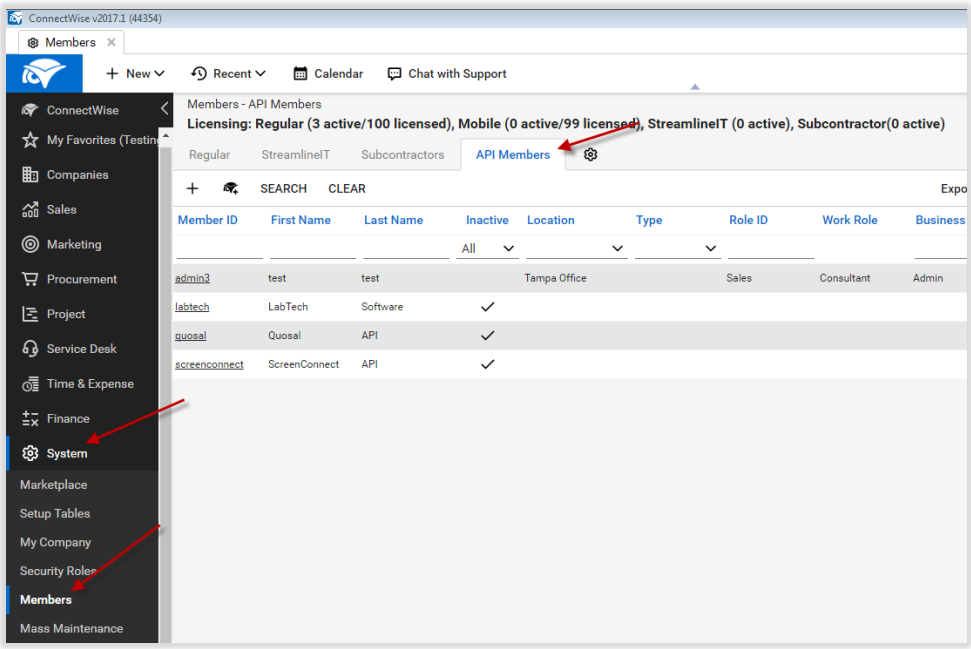
Create Manage API Keys

Before integration with Manage, create a pair of API keys for Dropsuite to enable the integration

To create these keys, setup a new member called an API Member

Note: *This API Member does not use a Manage User License*

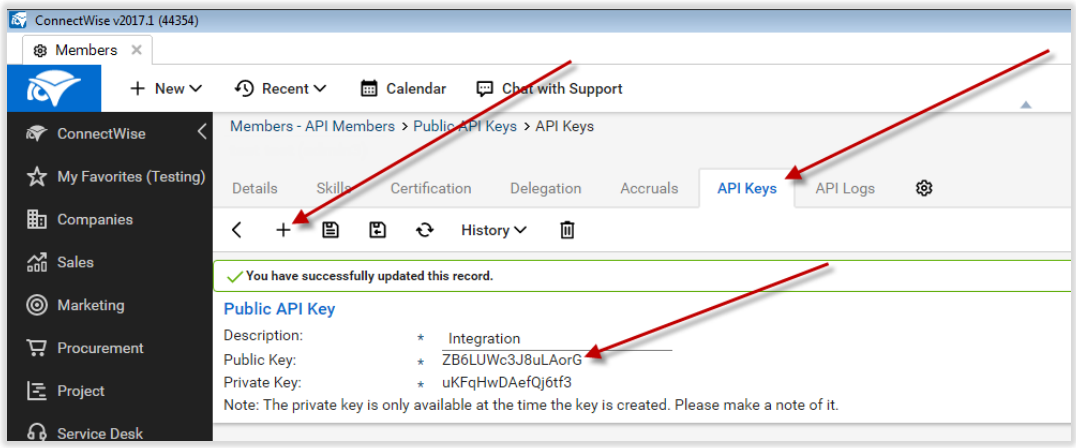
Create New API Member



1. Navigate to System > Members > API Members
2. Select the **New** Icon
3. Fill out required information and set the Member to Admin

Note: *You will need to fill out all of the required fields although many do not affect the integration. Please ensure that the Role ID is set to Admin / custom role selected in the above step.*

4. Save the API Member
5. Navigate to the **API Keys** tab.
6. Create a New API Key and name it something that identifies the integration

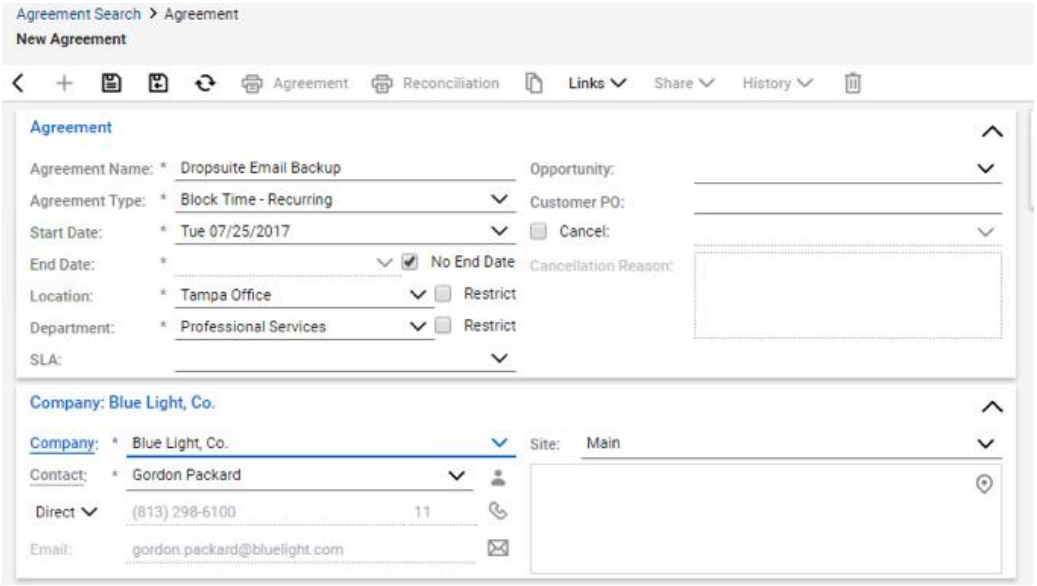


7. Copy the Public and Private Keys for future reference.

Note: *The Public key will no longer be available once you leave this screen*

Create Company Agreements for Dropsuite

- MSPs needs to create agreements for each company before the integration
- Go to Finance > Agreements
- Click New Agreement button, provide required details, select the company and create the agreement.

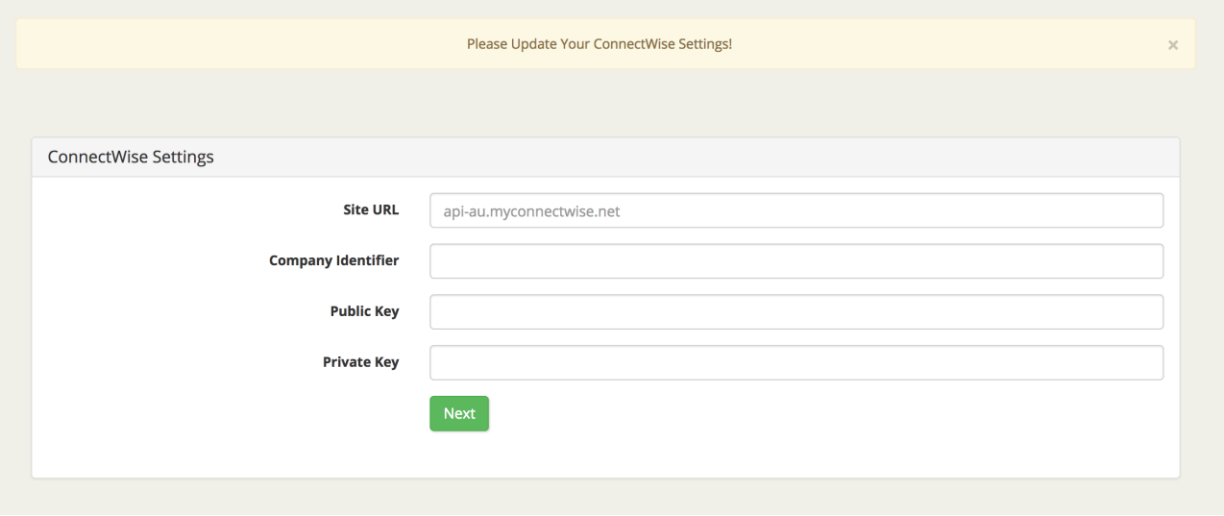


Setup on Dropsuite Reseller Provisioning Portal

Login

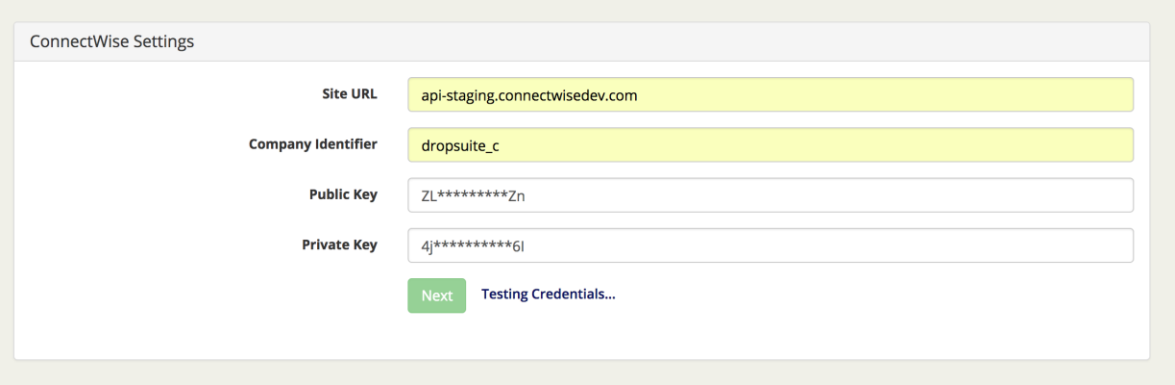
Once the ConnectWise MSP has signed a contract with Dropsuite, they will get access to Dropsuite MSP Reseller provisioning platform. The credentials will be shared to them via the sales team. **In case they have not received these credentials or wish to try our solution, please reach out to Dropsuite team at sales@dropsuite.com.**

MSPs / Resellers must login to the Reseller Provisioning Portal with the given credentials. If they are logging for the first time, they will be redirected to the ConnectWise settings page. This is a onetime setting that all ConnectWise MSPs must fill.

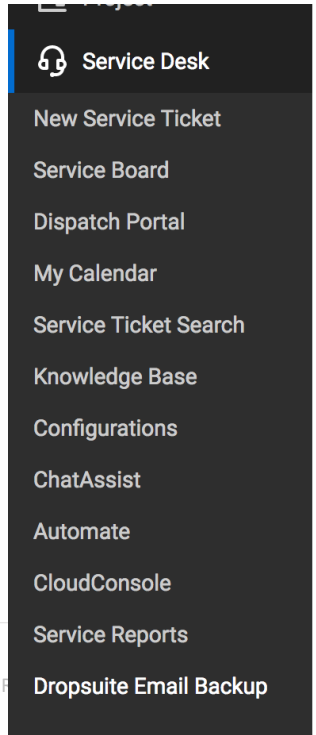


Enter ConnectWise API Credentials and Required Mappings

- Enter the following API credentials
  - **Site URL**: ConnectWise manage cloud URL. Please note that this URL should have the prefix '**api-**' E.g.: *api-na.myconnectwise.net*
  - **Company Identifier**: Identifier of the MSP's company
  - **Public Key**: Public key of API key copied above
  - **Private Key**: Private key of API key copied above
- Click **Next** and Dropsuite will validate the credentials



- Select the following ConnectWise mappings in next view and click **Submit**.
  - **Service Board**: Service board to be used to create service tickets
  - **New Service Ticket Status**: Status of newly created service ticket
  - **Closed Service Ticket Status**: Status of resolved service ticket
  - **Cancelled Service Ticket Status**: Status of cancelled service ticket



- **Important:** Values for the dropdowns are fetched from MSP's ConnectWise account. If they don't have corresponding values in the dropdown please create them from ConnectWise dashboard first.
- Once the settings are submitted Dropsuite will create a menu link called **Dropsuite Email Backup** in MSP's ConnectWise Manage dashboard under **Service Desk** and MSP can use that menu to log into Dropsuite reseller portal.

Create Dropsuite Plans

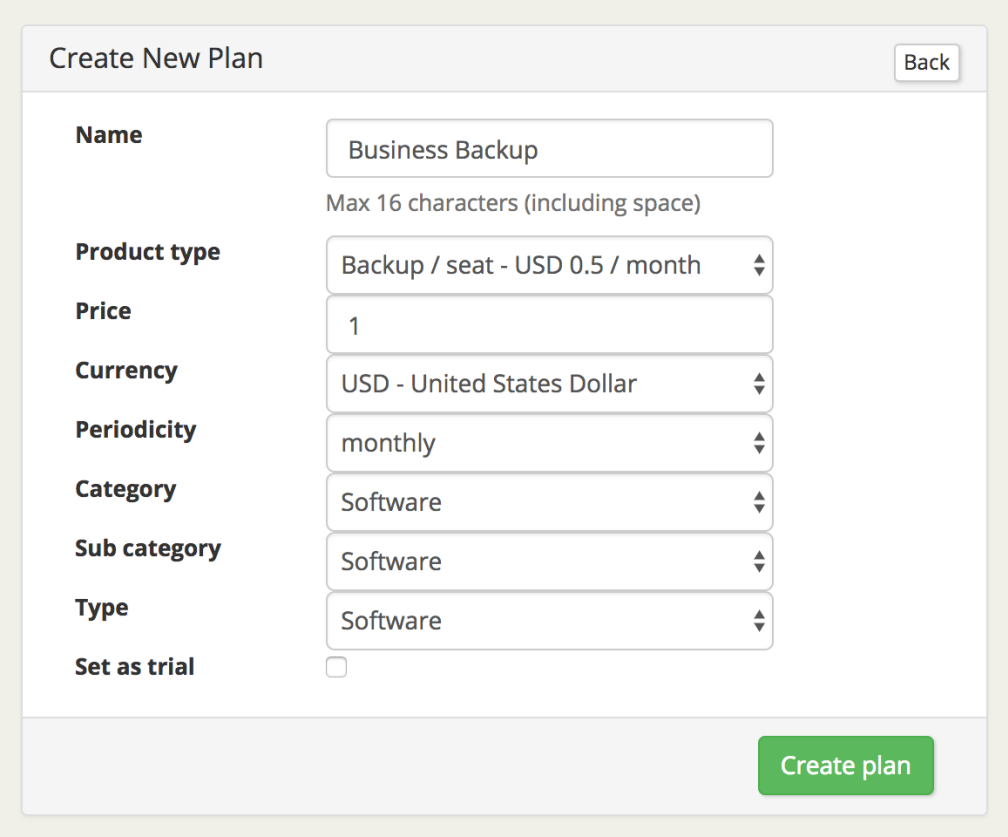
Plans at Dropsuite can be any one of the products that you wish to offer to your customer.

Examples of plans can be

- Business Backup
- Business Archiver
- Basic Backup 5 GB
- Basics backup 10 GB

In this section, you will learn how to create plan or Dropsuite products for your Product catalogue on ConnectWise. This is a one-time activity and must be done before provisioning a customer.

- Login to Dropsuite reseller portal
- Navigate to **Plans**
- Click on **Create New Plan.**
- Enter the following fields and click **Create Plan**.
    - **Name:** Name of the plan
    - **Product Type:** Type of the product (Backup/Archive/Personal)
    - **Price:** End user price
    - **Currency**: End user currency
    - **Periodicity:** Periodicity
    - **Category:** ConnectWise product category
    - **Sub Category:** ConnectWise product subcategory
    - **Type:** ConnectWise product type



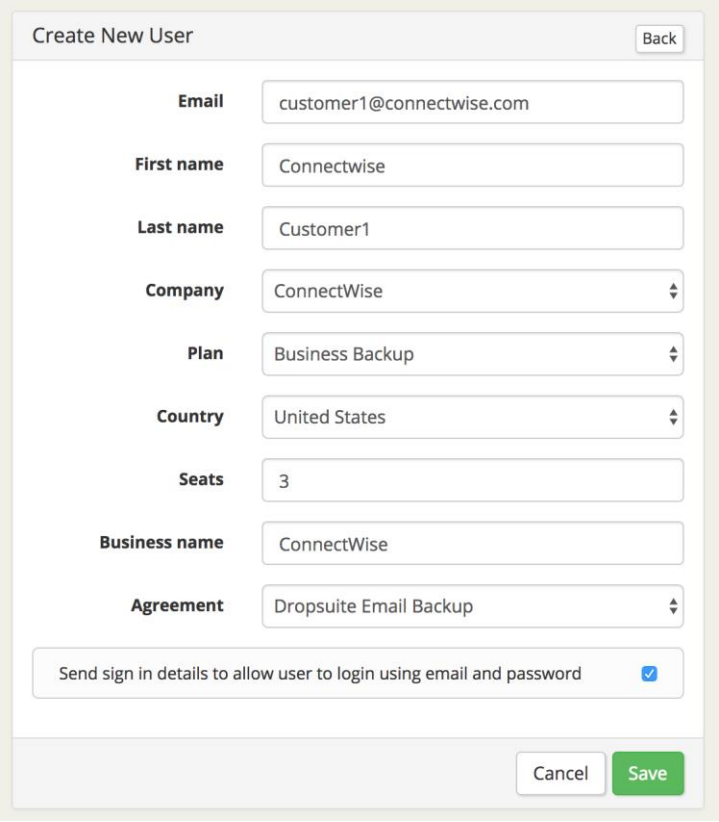
- Once you click Create plan Dropsuite will create a product in product catalog in ConnectWise.
- Catalog item id will be in **{region}.{Dropsuite_plan_id}**
- Repeat the above steps to create all the plans for the products that the MSP is offering.

Subscription Creation and Management

Create Dropsuite Subscription

This section describes how to create a Dropsuite tenant subscription for your customer. At Dropsuite one subscription is created for one company at ConnectWise.

- Login to Dropsuite reseller portal
- Navigate to **Users**
- Click on **Create New User**
- Enter the following fields and click on **Save**.
    - **Email:** Admin contact email of the company
    - **First Name:** First name
    - **Last Name:** Last name
    - **Company:** ConnectWise company
    - **Plan:** Dropsuite plan
    - **Country:** Country
    - **Seats:** Number of seats (Not applicable for Basic Backup plans)
    - **Business Name:** Company name (Not applicable for Basic Backup plans)
    - **Agreement:** ConnectWise company agreement
    - Checkbox (Send sign in details to allow user to login using email and password) Select this option if you want your end users to be able to login to their backups and manage their accounts. Once selected the end user will get the username and password in an email.



- Once the user and the subscription are created, Dropsuite will create an agreement addition in ConnectWise.

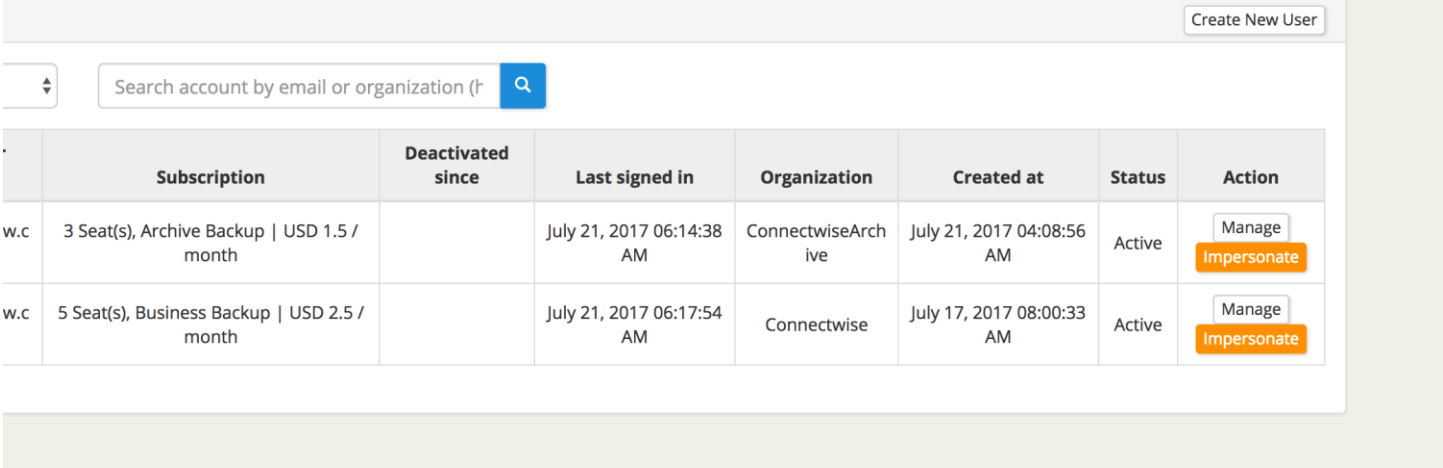
Upgrade/Downgrade and Terminate the Subscription

This section tells you how to upgrade or downgrade a subscription. Using this you can add or remove seats or storage to an existing Dropsuite subscription. You can also Terminate or suspend the subscription.

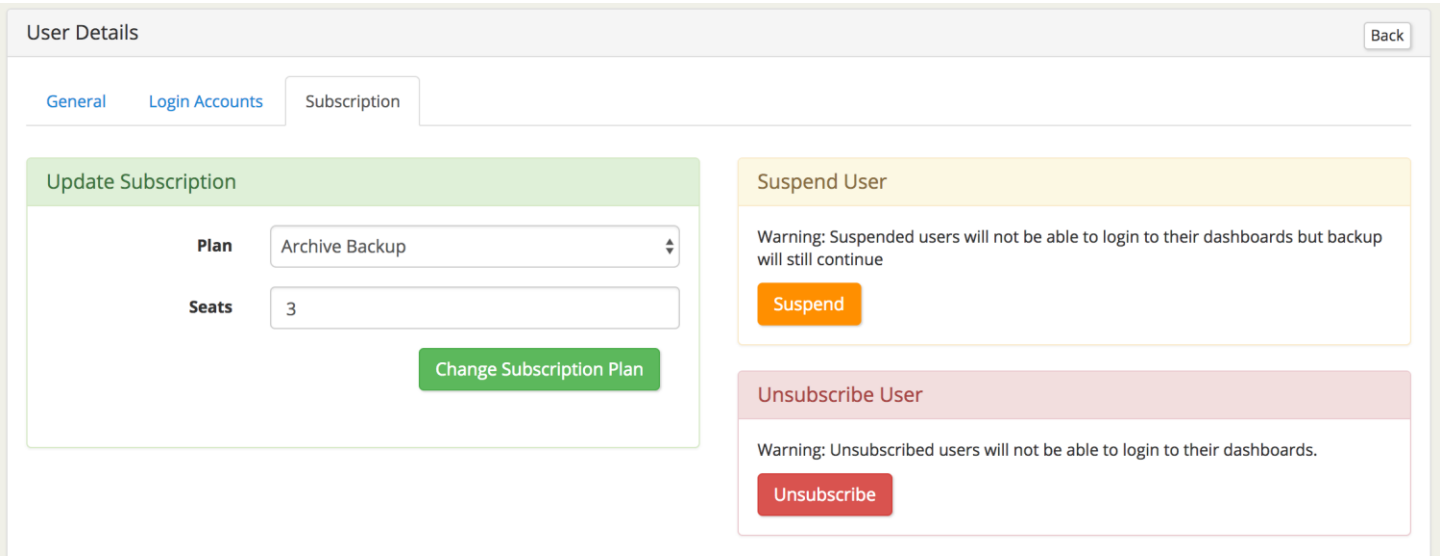
Termination will delete the subscription permanently

Suspension will disable the login to the subscription while keeping it active for billing.

- Login to Dropsuite reseller portal
- Navigate to **Users**
- Click on **Manage** for a particular user to upgrade/downgrade or terminate the subscription**.**



- Click on the **Subscription** tab



- MSP can suspend or unsubscribe the subscription here
- MSP can change the number of seats for a Business archiver or Business backup subscription
- MSP can change the storage plan if it is a Basic backup subscription
- Once the subscription is updated, Dropsuite will update the ConnectWise agreement addition
- If user is unsubscribed, Dropsuite will cancel the agreement addition

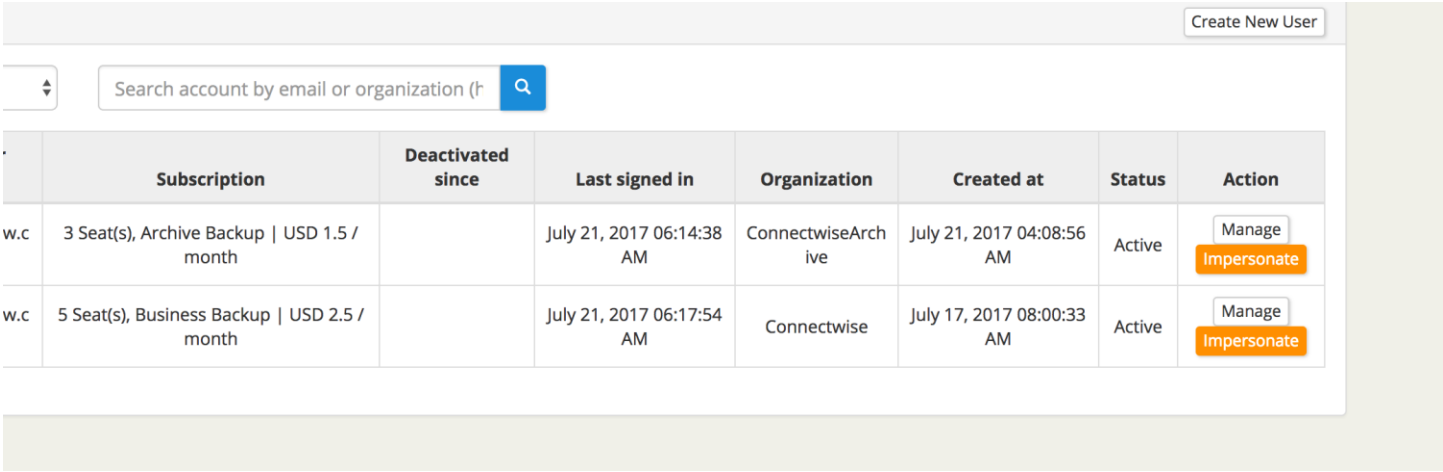
Login as End User to setup backup

This section allows you to login as an end user to the end user dashboard so that you can

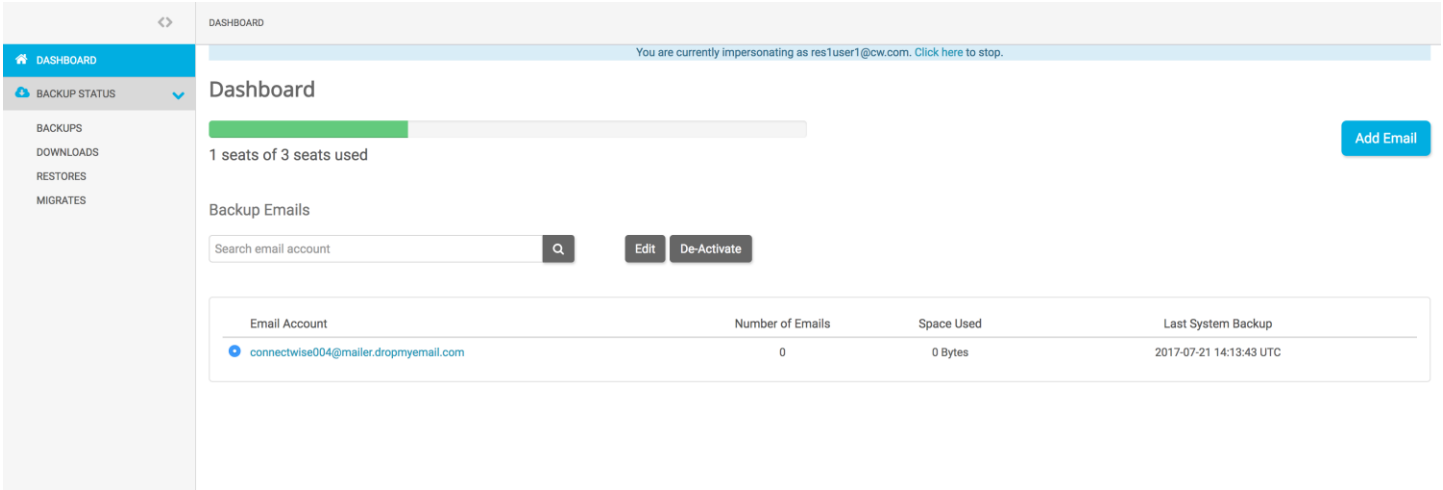
1. Set up their backups
2. Restore from their backup
3. Allow end user access to their emails

Please note that you will not be allowed to view individual emails of the end users, but only the meta data.

- Login to Dropsuite reseller portal
- Navigate to **Users**
- Click on **Impersonate** for a particular user to login to the end user's dashboard**.**



- In the end user dashboard, MSP can perform pre-configured end user actions.
- MSP can add/remove mailboxes from the backup and restore emails.



Service Tickets

Dropsuite will create a configuration type named 'dropsuite_mailbox_actions' which will be used to create Dropsuite related configurations.

Configurations will be created on ConnectWise per each action performed on the mailbox by Dropsuite or the MSP which includes backup, archive, restore, migrate and download.

Configuration name will be in format **{region}.{action}.{action_id}** format. *E.g.: uswest.backup.10. This means that this is for uswest region, for backup action with backup id 10.*

ConnectWise Service Ticket Creation

- In case of any errors during Backup, Archive Restore or Download, Dropsuite will create service tickets on ConnectWise attaching the corresponding configuration record
- The status of the ticket will be **New**.
- MSP can filter the Dropsuite related service tickets using the above configuration type 'dropsuite_mailbox_actions'.
- When the error is fixed, and the action is completed Dropsuite will close the ticket automatically.
- If the error is not fixed and the maximum retry attempts are exceeded Dropsuite will cancel the ticket.

Troubleshooting

Please contact support@dropsuite.com if you have any issues with the integration.