



GUIDE TO INTEGRATION IMPLEMENTATION

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



GUIDE TO INTEGRATION IMPLEMENTATION

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 integrate 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



GUIDE TO INTEGRATION IMPLEMENTATION

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

Name	Last Update	Updated By
Admin	23/03/2001	Conversion
Dropsuite	21/08/2018	Admin1
Engineer	20/08/2002	zadmin
Executive	21/08/2002	zadmin
Finance	20/08/2002	zadmin
Integration	14/08/2018	Admin3
Manager	20/08/2002	zadmin
Sales	11/12/2003	zAdmin
Subcontractor	12/12/2003	zAdmin

2. Provide a name for the new role.

Security Roles > New Role

New Role

Role ID: *



GUIDE TO INTEGRATION IMPLEMENTATION

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

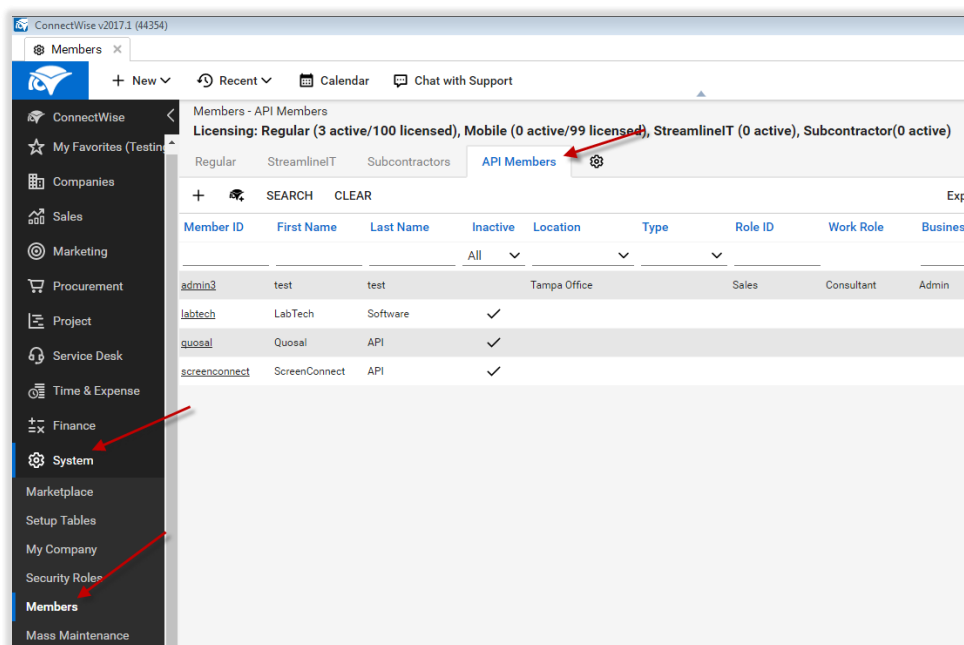
Create Manage API Keys

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



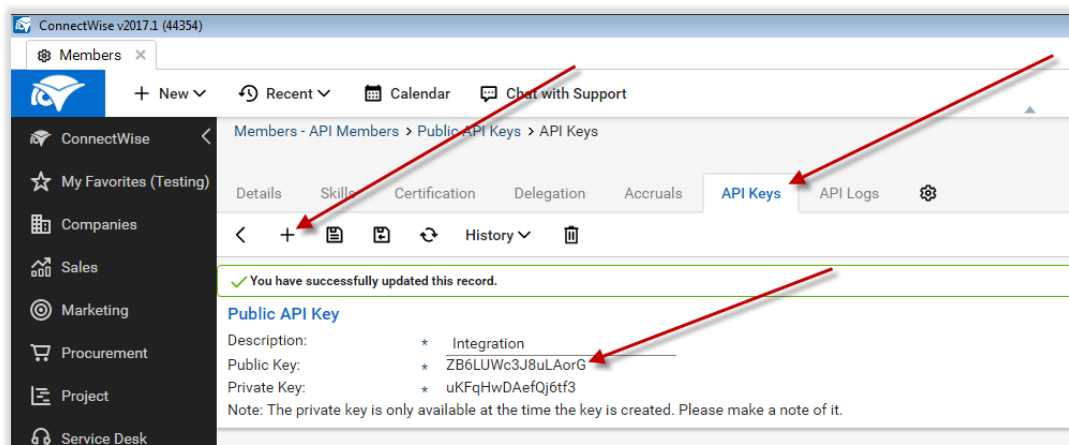
1. Navigate to System > Members > API Members
2. Select the **New** Icon
3. Fill out required information and set the Member to Admin



GUIDE TO INTEGRATION IMPLEMENTATION

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.

Agreement Search > Agreement

New Agreement

Agreement

Agreement Name: * Dropsuite Email Backup Opportunity:
 Agreement Type: * Block Time - Recurring Customer PO:
 Start Date: * Tue 07/25/2017 Cancel:
 End Date: * No End Date Cancellation Reason:
 Location: * Tampa Office Restrict
 Department: * Professional Services Restrict
 SLA:
 Company: Blue Light, Co.
 Company: * Blue Light, Co. Site: Main
 Contact: * Gordon Packard
 Direct (813) 298-6100 11
 Email: gordon.packard@bluelight.com



GUIDE TO INTEGRATION IMPLEMENTATION



GUIDE TO INTEGRATION IMPLEMENTATION

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.

Please Update Your ConnectWise Settings!

ConnectWise Settings

Site URL

Company Identifier

Public Key

Private Key

Next

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



GUIDE TO INTEGRATION IMPLEMENTATION

ConnectWise Settings

Site URL

api-staging.connectwisedev.com

Company Identifier

dropsuite_c

Public Key

ZL*****Zn

Private Key

4j*****6l

Next

Testing 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

Coni

Service Desk

- New Service Ticket
- Service Board
- Dispatch Portal
- My Calendar
- Service Ticket Search
- Knowledge Base
- Configurations
- ChatAssist
- Automate
- CloudConsole
- Service Reports
- Dropsuite Email Backup

- **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.



GUIDE TO INTEGRATION IMPLEMENTATION



GUIDE TO INTEGRATION IMPLEMENTATION

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



GUIDE TO INTEGRATION IMPLEMENTATION

Create New Plan

Back

Name

Business Backup

Max 16 characters (including space)

Product type

Backup / seat - USD 0.5 / month

Price

1

Currency

USD - United States Dollar

Periodicity

monthly

Category

Software

Sub category

Software

Type

Software

Set as trial

☐

Create plan

- 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.



GUIDE TO INTEGRATION IMPLEMENTATION

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.

Create New User

Back

Email

customer1@connectwise.com

First name

Connectwise

Last name

Customer1

Company

ConnectWise

Plan

Business Backup

Country

United States

Seats

3

Business name

ConnectWise

Agreement

Dropsuite Email Backup

Send sign in details to allow user to login using email and password

☒

Cancel

Save



GUIDE TO INTEGRATION IMPLEMENTATION

- 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.

[Create New User](#)

▼

Q

	Subscription	Deactivated since	Last signed in	Organization	Created at	Status	Action
w.c	3 Seat(s), Archive Backup USD 1.5 / month		July 21, 2017 06:14:38 AM	ConnectwiseArch iver	July 21, 2017 04:08:56 AM	Active	Manage Impersonate
w.c	5 Seat(s), Business Backup USD 2.5 / month		July 21, 2017 06:17:54 AM	Connectwise	July 17, 2017 08:00:33 AM	Active	Manage Impersonate

- Click on the **Subscription** tab

User Details
[Back](#)

General
Login Accounts
Subscription

Update Subscription

Plan

Archive Backup ▼

Seats

3

[Change Subscription Plan](#)

Suspend User

Warning: Suspended users will not be able to login to their dashboards but backup will still continue

[Suspend](#)

Unsubscribe User

Warning: Unsubscribed users will not be able to login to their dashboards.

[Unsubscribe](#)

4110 George Road, Tampa, FL 33634 | 813-463-4740 | Platform@ConnectWise.com

ConnectWise®

ConnectWise
invent
Application Partner Program

13



GUIDE TO INTEGRATION IMPLEMENTATION

- 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



GUIDE TO INTEGRATION IMPLEMENTATION

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.

Create New User							
Search account by email or organization (f)							
	Subscription	Deactivated since	Last signed in	Organization	Created at	Status	Action
w.c	3 Seat(s), Archive Backup USD 1.5 / month		July 21, 2017 06:14:38 AM	ConnectwiseArch ive	July 21, 2017 04:08:56 AM	Active	Manage Impersonate
w.c	5 Seat(s), Business Backup USD 2.5 / month		July 21, 2017 06:17:54 AM	Connectwise	July 17, 2017 08:00:33 AM	Active	Manage Impersonate

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

DASHBOARD			
You are currently impersonating as res1user1@cw.com. Click here to stop.			
Dashboard			
1 seats of 3 seats used			
Backup Emails			
Search email account			
Edit De-Activate			
Email Account	Number of Emails	Space Used	Last System Backup
connectwise004@mailier.dropmyemail.com	0	0 Bytes	2017-07-21 14:13:43 UTC



GUIDE TO INTEGRATION IMPLEMENTATION

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.