



GUIDE TO INTEGRATION IMPLEMENTATION

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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.

About Dropsuite Email Backup and Archive

Dropsuite is a market-leading cloud backup platform that helps businesses securely backup, manage, recover and protect their business information. Dropsuite Email Backup and Archiving for Office 365 has been built for small and mid-sized businesses(SMBs) to simplify their email backup, recovery and compliance experience. It works with Office 365, Hosted Exchange, Gmail, SharePoint, OneDrive and other IMAP email servers also.

There are 3 solutions for Dropsuite Email Backup and Archiving:

Dropsuite Business Archiver (with Backup)

The perfect agent-less archiving solution for SMBs who need to comply with regulatory requirements. Emails are archived using Envelope Journaling and this ensures all emails are archived without fail. Features include advanced eDiscovery (with option to filter using 16 attributes), legal hold, customizable retention periods, audit trail, audit review capabilities, tags in addition to granular user access control, file/attachment manager and advanced reporting via insights.

Business organizations need to be able to retrieve relevant any email message in the event of legal discovery, audits, and business or personnel investigations. Our archiving solution assures that evidentiary-quality records are systematically stored in a central repository with security in place to guard against any form of tampering.

Dropsuite Business Backup

This is the most preferred solution for small and medium business users. Pricing is based on number of mailboxes and the package include unlimited storage and retention. Features include user access control management, file/attachment manager, advance search and advanced reporting via insights. Insights and relationships give a summary report of all emails in and out of an organization. Restore, download or migrate the entire mailbox or just one email with the click of a button. Use 16 attributes in our advance search to find the right email that your need and restore within a minute.

Dropsuite Basic Backup

The ideal solution for small businesses without a backup solution in place, Dropsuite Basic Backup is designed with simplicity in mind. Pricing is based on storage space and not on the number of email accounts. Daily incremental backups support IMAP / POP protocols. Features include file/attachment manager, advance search and advanced reporting via insights. Insights and relationships give a summary report of all emails in and out of an organization. Restore, download or migrate the entire mailbox or just one email with the click of a button. Use 16 attributes in our advance search to find the right email that your need and restore within a minute.



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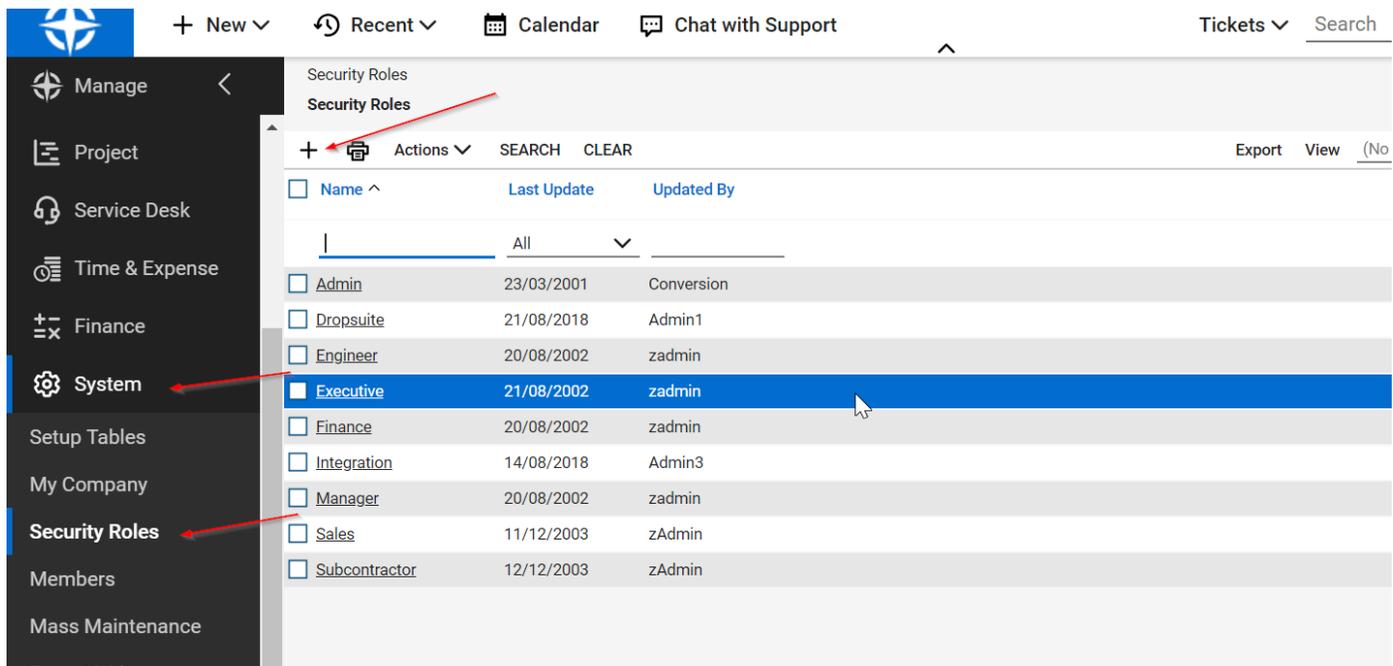
Setup on ConnectWise Manage™

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:

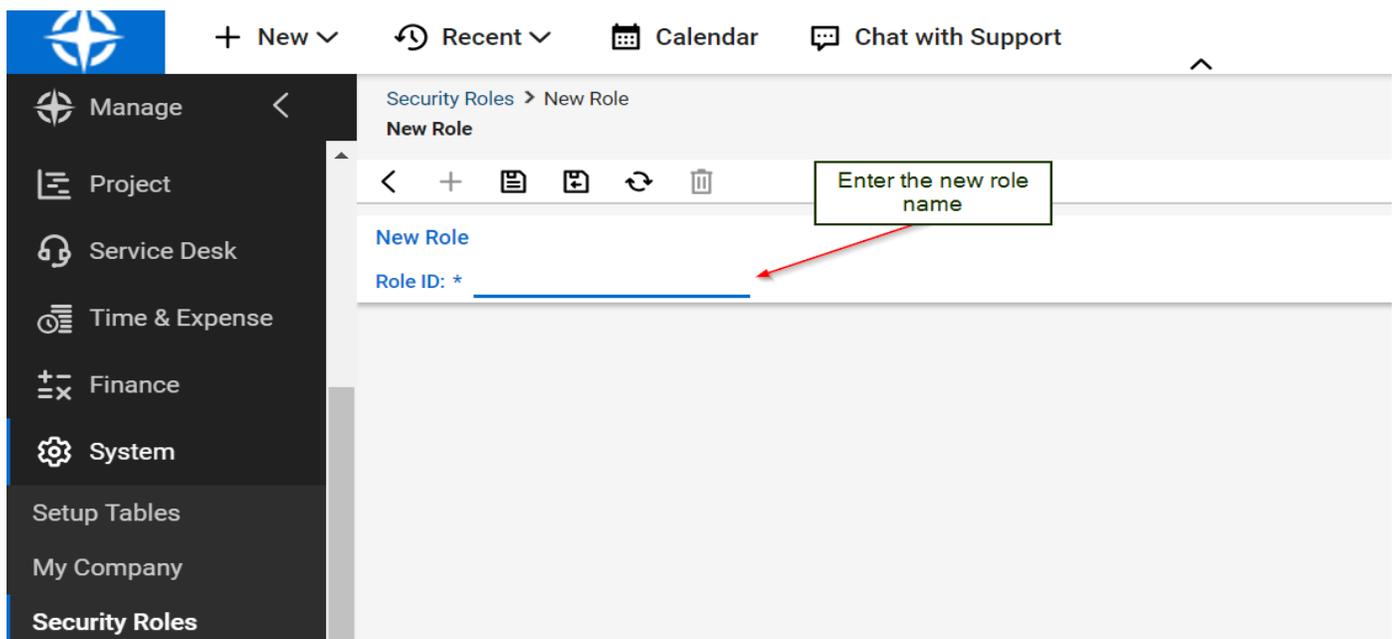
1. Click on System -> Security Roles -> Add new roles



The screenshot shows the 'Security Roles' page in ConnectWise Manage. The left sidebar has 'System' and 'Security Roles' highlighted with red arrows. The main content area shows a table of existing roles. The 'Executive' role is selected and highlighted in blue.

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.



The screenshot shows the 'New Role' form in ConnectWise Manage. The left sidebar has 'System' and 'Security Roles' highlighted with red arrows. The main content area shows a form with a text input field for the role name. A red arrow points to the input field with a box containing the text 'Enter the new role name'.

Security Roles > New Role

New Role

Role ID: *



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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

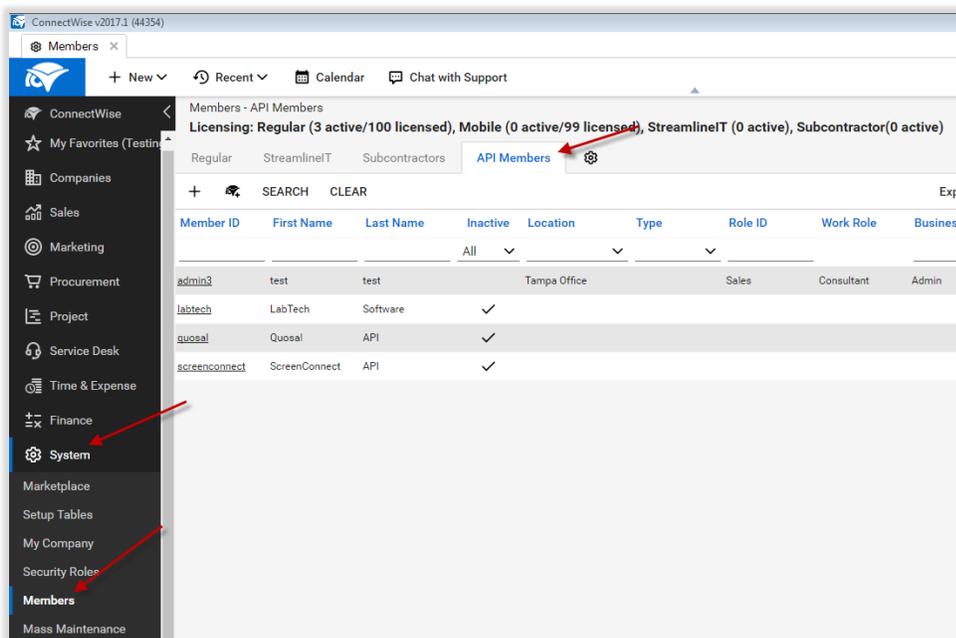
Create Manage API Keys

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



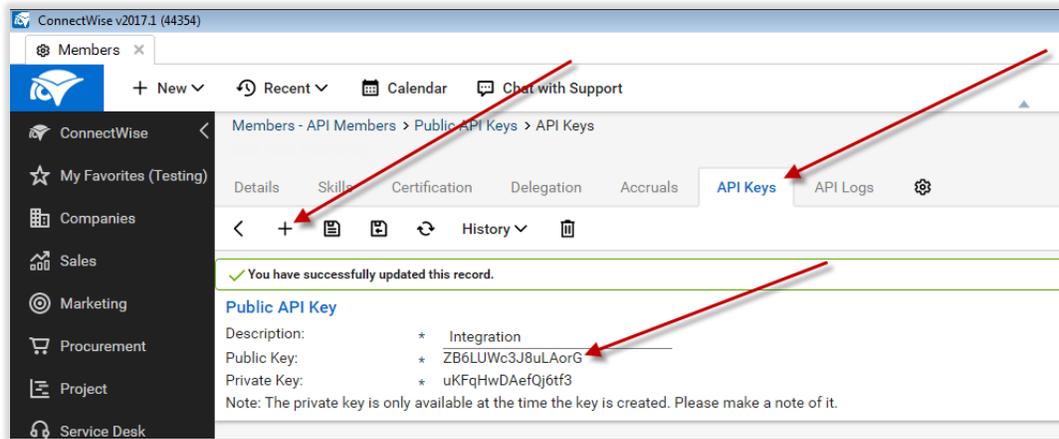
1. Navigate to System > Members > API Members
2. Select the **New** Icon
3. Fill out required information and set the Member to Admin



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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

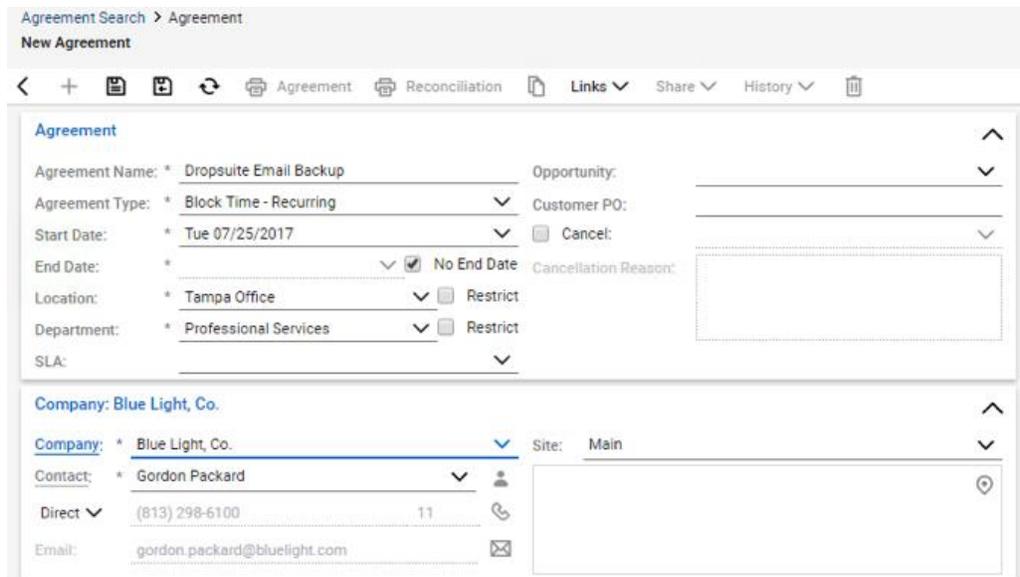


7. Copy the Public and Private Keys for future reference.

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.





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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



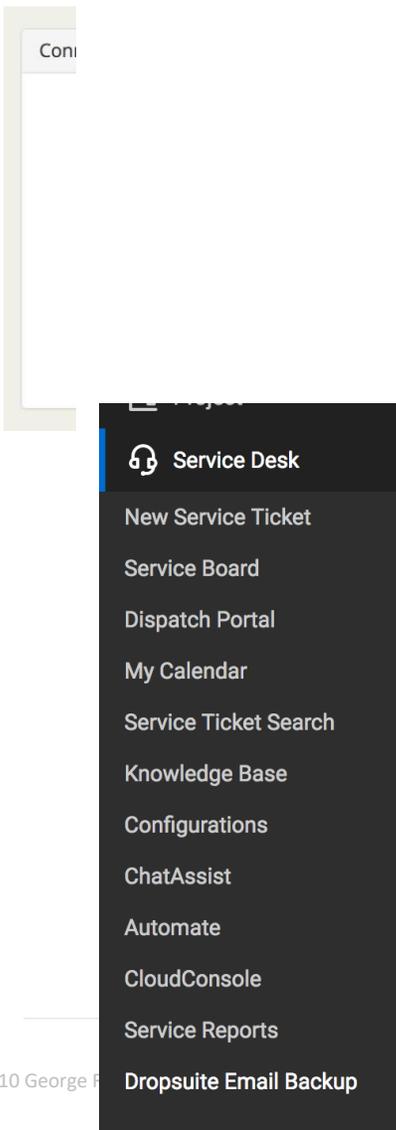
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ConnectWise Settings

Site URL	<input type="text" value="api-staging.connectwise.dev.com"/>
Company Identifier	<input type="text" value="dropsuite_c"/>
Public Key	<input type="text" value="ZL*****Zn"/>
Private Key	<input type="text" value="4j*****6i"/>

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



- **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.



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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



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Create New Plan Back

Name	<input type="text" value="Business Backup"/> <small>Max 16 characters (including space)</small>
Product type	<input type="text" value="Backup / seat - USD 0.5 / month"/>
Price	<input type="text" value="1"/>
Currency	<input type="text" value="USD - United States Dollar"/>
Periodicity	<input type="text" value="monthly"/>
Category	<input type="text" value="Software"/>
Sub category	<input type="text" value="Software"/>
Type	<input type="text" value="Software"/>
Set as trial	<input type="checkbox"/>

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.



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

First name

Last name

Company

Plan

Country

Seats

Business name

Agreement

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

Cancel
Save



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- 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](#)

	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	ConnectwiseArchive	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

Seats

[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](#)



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- 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



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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](#)

	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	ConnectwiseArchive	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

[Edit](#) [De-Activate](#)

Email Account	Number of Emails	Space Used	Last System Backup
connectwise004@mailerdropsmyemail.com	0	0 Bytes	2017-07-21 14:13:43 UTC

[Add Email](#)



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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.