Integration Guide: GMS and ConnectWise

June 2019

This document describes how SonicWall® Global Management System (GMS) is integrated with ConnectWise Manage, a business software solution provided by ConnectWise, LLC. ConnectWise Manage is a comprehensive business management tool that can be used for account management, project management, billing, and other business management needs. All of the data and communications generated by these processes can greatly benefit from GMS’s rapidly deployed and centrally managed SonicWall firewall.

Topics:
- Configuration Features
- Configuring ConnectWise Settings
- Configuring ConnectWise Alerts
- Checking Configuration Status
- References

Configuration Features

The following procedures describe how GMS integrates with the ConnectWise Manage platform to provide you with the ability to synchronize basic firewall details into the ConnectWise platform. This integration includes the capability of managing security events and SonicWall assets, and the ability to create automated service tickets for alerts in the ConnectWise Manage platform. Features also include:

- **Asset Synchronization** - Firewalls managed by GMS can synchronize with ConnectWise Manage.
- **Automated Ticketing** - GMS automatically creates and deletes tickets in ConnectWise Manage when alerts have been generated in GMS.

Configuring ConnectWise Settings

*To set up integration between GMS and ConnectWise:*

1. In GMS, navigate to **CONSOLE | Management > Domains** and create a domain for managed companies. Domains in GMS map to managed companies in ConnectWise Manage. For more information, see Domains in the GMS Administration documentation available at: [https://www.sonicwall.com/support/technical-documentation](https://www.sonicwall.com/support/technical-documentation)
2. When you have a domain set up in GMS, log into ConnectWise Manage.
3 In ConnectWise Manage, navigate to System > Manage > Members.

4 On the API Members tab, click the + (plus) sign to create a new API member for the managed company administrator.
5. In the **System** section, add an **Admin profile** for the managed company.

6. Click the **Save** icon (upper left) to bring up the API Information screen.

7. Select the **API Keys** tab.
8 Generate a Public API Key and a Private API Key for the Administrator.

9 Log back into GMS using your newly created Domain (for the managed company).
10 Navigate to CONSOLE | ConnectWise > Settings.

11 Complete the screen by entering the Site URL, your Company Name, the Public Key and the Private key you created for ConnectWise.

12 When the information has been entered, click Test Connectivity to verify that the integration was successful.

13 If connectivity succeeded, click Close in the dialog box to bring up the next part of the screen. If not go back to try again.
14 If the connection was successful, additional fields appear on the screen. Click the first **Update** button to move to the next set of fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site URL</td>
<td>staging.connectwisedev.com</td>
</tr>
<tr>
<td>Company</td>
<td>Sonicwall</td>
</tr>
<tr>
<td>Public Key</td>
<td>******************</td>
</tr>
<tr>
<td>Private Key</td>
<td>******************</td>
</tr>
<tr>
<td>Service Board</td>
<td>Professional Services</td>
</tr>
<tr>
<td>Managed Company</td>
<td>Your Company</td>
</tr>
<tr>
<td>Agreement</td>
<td>No Agreement found</td>
</tr>
<tr>
<td>Configuration Type</td>
<td>SonicWall</td>
</tr>
<tr>
<td>Ticket Priority</td>
<td>Configure Ticket Priority</td>
</tr>
</tbody>
</table>

15 Complete the additional settings fields as follows:

- **Service Board** - Choose the service board you are managing.
- **Managed Company** - Enter the name of the company you want to map to the GMS domain you logged in to.
- **Agreement** - Select an agreement type from the drop-down menu.
- **Configuration Type** - By selecting **SonicWall** from the drop-down menu, SonicWall assets can be filtered on the ConnectWise Manage configuration dashboard.
16 Clicking **Configure Ticket Priority** before you update brings up the **Severity Priority** dialog box.

17 When you have assigned priorities, click **Update** in the dialog box.

18 Back on the lower portion of the **Settings updated successfully** screen, ensure that the **ConnectWise Manage Settings** check box for **Enable Asset Synchronization and Service Ticketing** is selected.

19 Clicking **Update** completes the integration setup.
Configuring ConnectWise Alerts

You can configure alerts in GMS, so that when GMS events are triggered, tickets are created in ConnectWise Manage. When alerts are deleted in GMS, the corresponding tickets in ConnectWise Manage are also deleted.

See the GMS Firewall Reports administration documentation at:
https://www.sonicwall.com/support/technical-documentation for additional details on configuring alert settings

To configure alerts in GMS:

1. There are two kinds of alerts that are supported, Reports Alerts and Manage Alerts. Navigate to FIREWALL | Reports | Events > Alert Settings, or FIREWALL | Manage | Events > Alert Settings, depending on which kind of alert you need to configure.
2 Configuring alerts can involve either editing an existing alert or adding a new alert. Click **Add Alert** to add an alert.

3 Click **Add Destination**, and select **ConnectWise** as the destination for the alert.

4 From the drop-down lists, select the appropriate status for opening and closing of the service tickets.

5 Click **Update** to update the settings.
To view Manage or Reports Alerts generated by GMS:

6 Navigate to FIREWALL | Manage (or Reports) | Events > Current Alerts (at the bottom of the Manage or Reports column).

7 Click the Alert # and a bubble appears giving more choices.

8 In Alert Listing, click the Details bubble next to the alert to see more information about the generated ticket.

9 A box appears giving Ticket Details. When you have consulted the details, click Close.
10 In ConnectWise Manage at **Service Board List > Service Ticket**, locate the same Ticket ID as in GMS to view the status, summary, priority, and description of the ticket, along with other related information.

11 Schedule solutions and make assignments, then click **Schedule Me** or **Assign Me**, as appropriate.
Checking Configuration Status

You can log back into ConnectWise to see that your assets (firewalls and so on) are synchronized with ConnectWise Manage.

References

- For more information about setting up this integration, refer to the latest GMS Console administration documentation available at: https://www.sonicwall.com/support/technical-documentation Select GMS in the Select A Product to view the available GMS documentation.
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⚠️ **IMPORTANT NOTE, NOTE, TIP, MOBILE, or VIDEO:** An information icon indicates supporting information.