

Integration Guide

Capture Security Center and ConnectWise Manage

June 2020

This document describes how Capture Security Center helps integrate product and services consoles with ConnectWise Manage (CWM) through MySonicWall. This integration helps automate the invoicing and billing of security services for MSPs via ConnectWise Manage. In addition, the integration automates the creation and processing of service tickets within ConnectWise Manage, including the automatic closure of tickets when alerts are closed in the product consoles.

The following are the acronyms used throughout this document:

MSW	MySonicWall
CWM	ConnectWise Manage platform

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About ConnectWise Manage

ConnectWise Manage is a professional services automation platform dedicated in automating business processes. The Managed Services Provider (MSP) would like to manage the professional services for SonicWall products via standard PSA platforms like ConnectWise Manage. This solution allows the MSP to synchronize the SonicWall products information to ConnectWise Manage, allowing them to manage the customers via the PSA platform. This document describes the steps to configure the integration successfully.

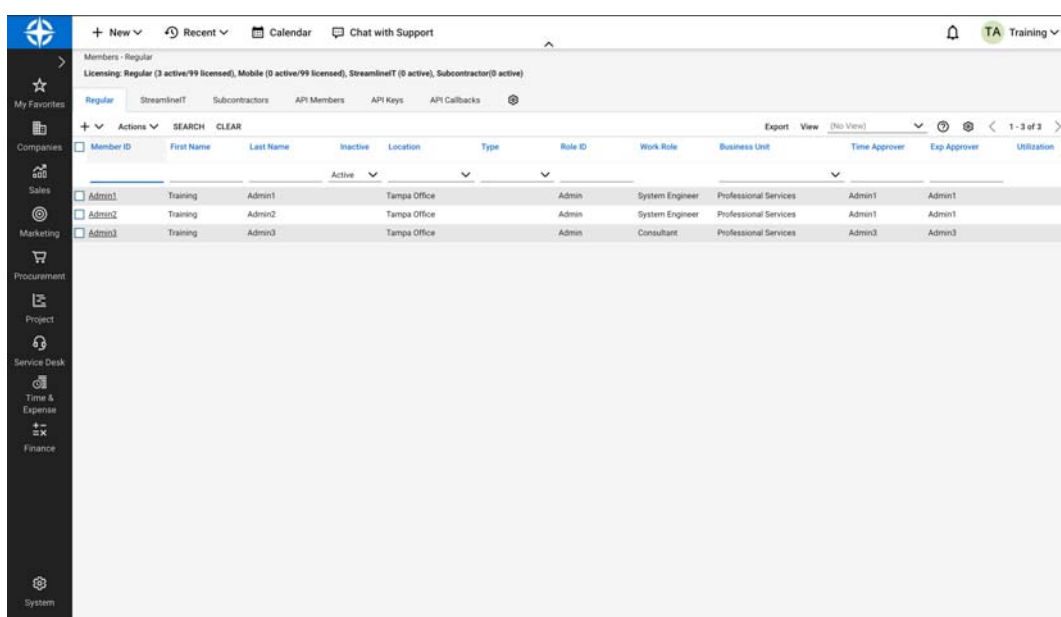
Requirements

Before starting with the configuration, there are some **prerequisites** to be taken care of:

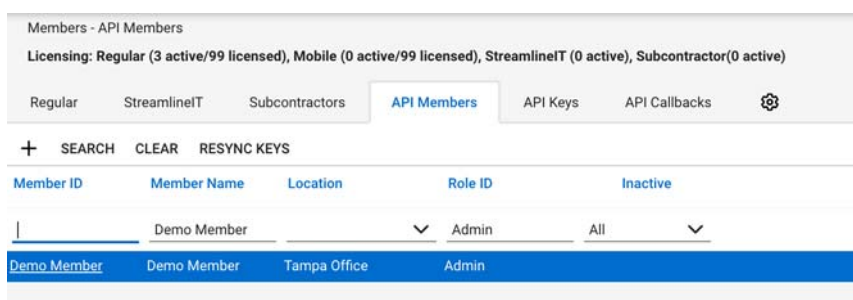
- 1 Make sure that the CWM instance is accessible via the internet over HTTPS (port 443).
- 2 Create an API member in CWM with the **admin** role and an API key pair.
- 3 Create an MSW account, part of a SonicWall SecureFirst Partner organization, to configure and manage the integration.

Configuring ConnectWise Manage

- 1 Login to CWM Portal using the admin credentials.
- 2 Navigate to **System > Members**.



- 3 Navigate to the **API Members** tab and create a new **admin** role.



- Click on the API member you created.

Members - API Members > Detail
Demo Member (Demo Member)

Details | API Keys | API Logs

Profile

Member ID* Demo Member | Time Zone* US Pacific

Member Name* Demo Member | Email

Notes

System

Role ID* Admin | Location* Tampa Office

Level* Corporate (Level 1) | Business Unit* Admin

Name* Corporate | Default Territory* Corporate

Service Defaults

Service Board

Default Board

Restrict Board Access

- Navigate to the **API Keys** tab available on the top panel.

Members - API Members > Public API Keys > API Keys
Demo Member (Demo Member)

Details | API Keys | API Logs

Public API Key

Description: Demo API Key

Public Key:

Private Key:

Note: The private key is only available at the time the key is created. Please make a note of it.

- Generate a new API Key by clicking on the + sign.
- Click on **Save** to generate the API credentials and save the Public Key and Private Key somewhere.

NOTE: The Private Key cannot be retrieved once you navigate away from this screen.

- Navigate to **System > Setup Tables**.
- Search for the **Table > Configuration Status**.

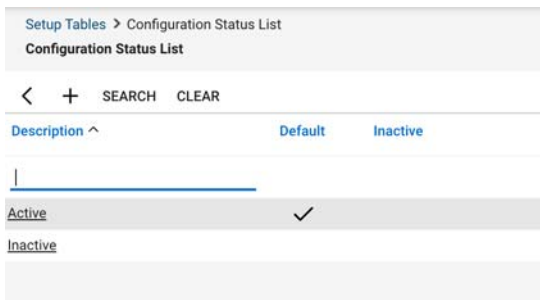
Setup Tables

Setup Tables

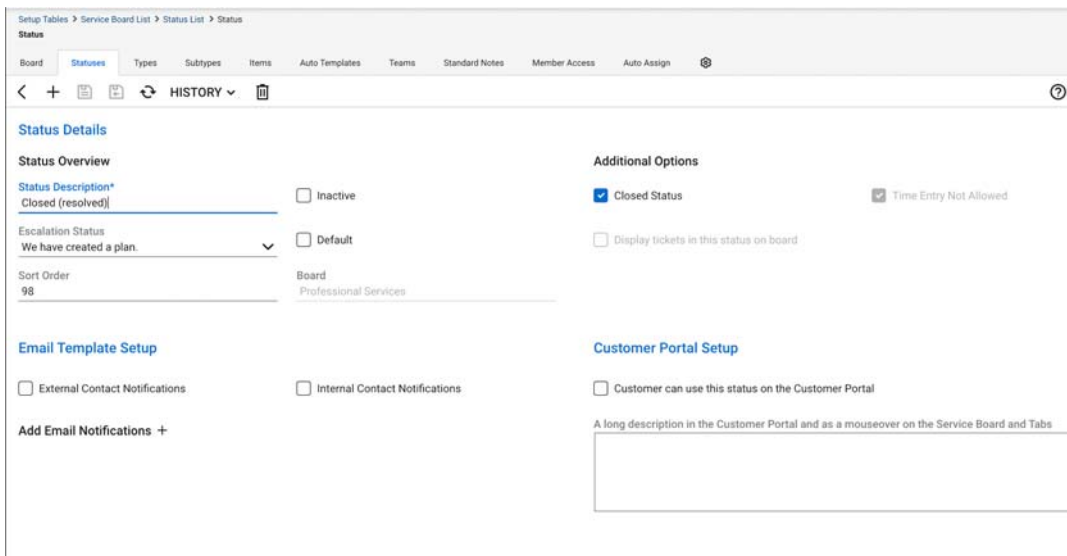
SEARCH CLEAR

Category	Table ^	Description	Done	By	Date
	Configuration Status				
Company	Configuration Status	Defines valid statuses to be used on the configuration screen.			

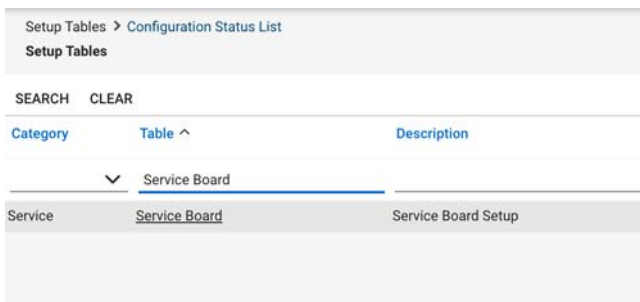
10 Verify that Configuration Status List is set up with one item selected as the default value.



11 Verify that the **Closed** state has the **Closed Status** flag checked.



12 Search for **Service Board** on the **Setup Tables** page.



13 Select the Service Board where the tickets should be created for alerts.

The screenshot shows the 'Service Board' configuration page. The breadcrumb trail is 'Setup Tables > Service Board List > Service Board'. The page has several tabs: Board, Statuses, Types, Subtypes, Items, Auto Templates, Teams, Standard Notes, Member Access, and Auto Assign. The 'Board' tab is active.

Board Details

Service Overview

- Board Name*: Professional Services Inactive
- Location*: Tampa Office Mark first note as Issue
- Business Unit*: Professional Services
- Sign Off Template*: Default Signoff Template

Service Board Icon

Board Icon: service-network.gif **BROWSE**

Ticket Finance Defaults and Billing Override Options

Work Role: Work Type:

Bill Time: No Default Bill Expense: No Default

Bill Products: Billable

Billing Override Options

- Override Billing Set-up for Board Location
- Bill service tickets only after they have been closed

Time Entry and Closed Loop/Automatic Email Options

Closed Loop Options Time Entry Options

14 Navigate to the **Statuses** tab and verify the status:

- A status named **Closed** should be present.
- One state should be marked as **Default**.

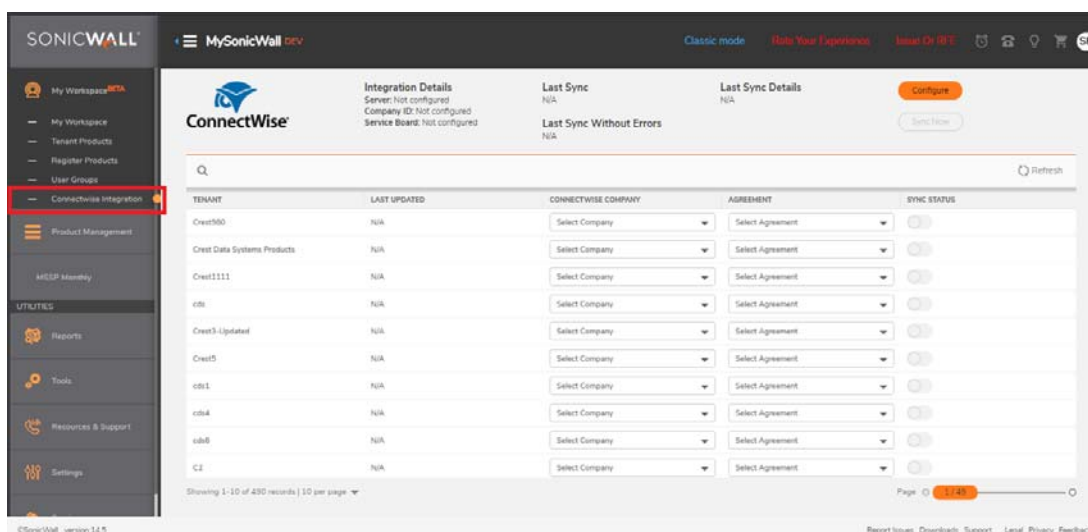
The screenshot shows the 'Status List' configuration page. The breadcrumb trail is 'Setup Tables > Service Board List > Status List'. The page has several tabs: Board, Statuses, Types, Subtypes, Items, Auto Templates, Teams, Standard Notes, Member Access, and Auto Assign. The 'Statuses' tab is active.

SEARCH CLEAR

Sort	Status	Default	Notification Steps	Display	No Time	Closed	Escalation Status	Portal	Survey
0	New (not responded)	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>			We have NOT respond...		
10	Assigned (responded)		0	<input checked="" type="checkbox"/>			We have NOT respond...		
20	In Progress (plan of action)		0	<input checked="" type="checkbox"/>			We have responded.		
98	Closed (resolved)		0		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	We have created a plan.		

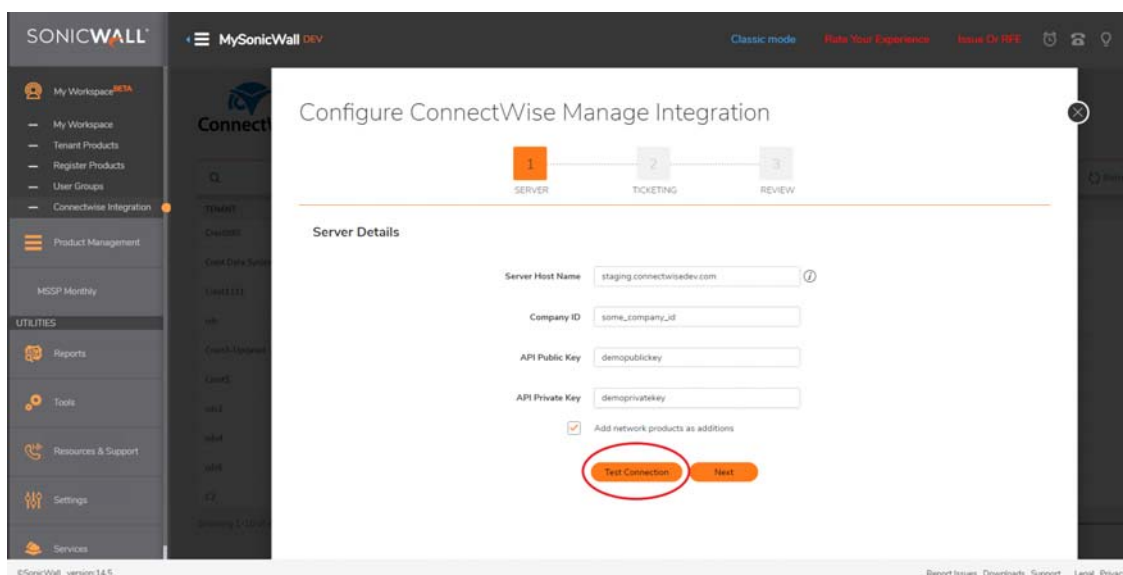
Configure ConnectWise Integration on MySonicWall

- 1 Login to MySonicWall using your account credentials.
- 2 Navigate to **My Workspace > Connectwise integration**. The tenants having access to this account are listed.



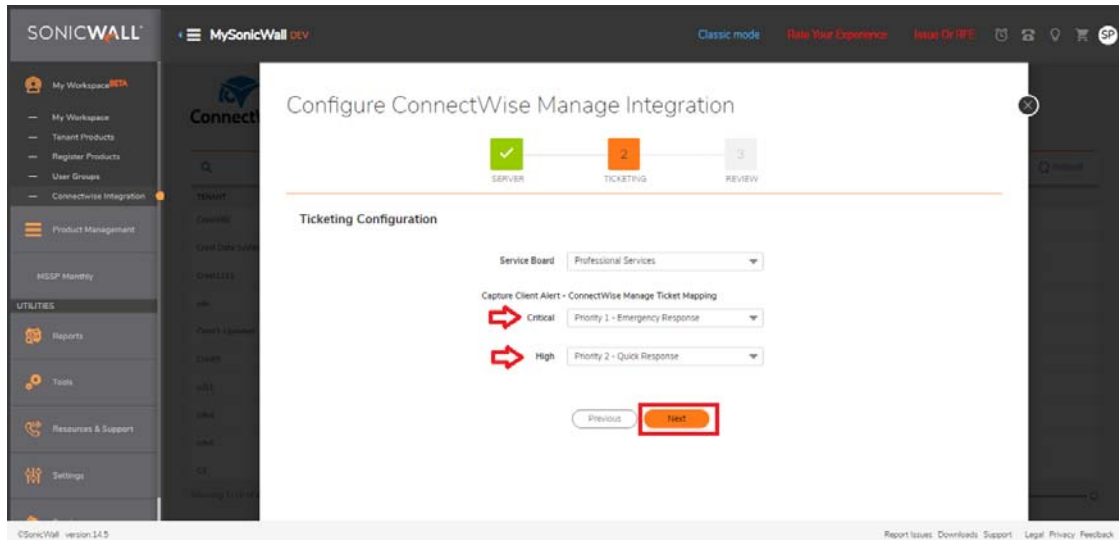
- 3 Click on **Configure** button and the configuration wizard should be displayed.

NOTE: You can also edit a configuration by clicking on the **Configure** button.



- 4 Add the CWM server details to the appropriate fields:
 - Server Host Name
 - Company ID
 - API Public Key
 - API Private Key

- 5 Select **Add network products as additions** if you want network products from SonicWall to be added as additions in CWM agreements along with CWM configurations. By default, such products are added as **Configurations**.
- 6 Click on **Test Connection** to verify the server details.
- 7 Click **Next**.



- 8 From the drop-down list, select the **Service Board** in which the Capture Client alerts are created as tickets.
 - ⓘ **NOTE:** Alerts only generate for companies having an **Active** status. If the admin maps any company having status other than **Active**, appropriate error messages appear in the logs.
- 9 Select an option from the drop-down lists to map the ticket priorities for **Critical** and **High** severity for the Capture Client alerts.
- 10 Click on **Next** to review the configuration details.
- 11 Click **Submit** to save your settings.

After submitting your settings, the backend service stores the configurations and performs some additional configuration on ConnectWise Manage.

ⓘ **NOTE:** Currently, ConnectWise Integration configurations are not shared across MySonicWall account. You should not use more than one MySonicWall account for ConnectWise Integration.

Additionally, as part of this step, the following ConnectWise Manage product types, categories and subcategories are automatically created, if they don't exist:

Product Types	SonicWall Miscellaneous
Categories	Cloud Hardware/Virtual Miscellaneous
Subcategories	Cloud Services, Software Network Device Miscellaneous

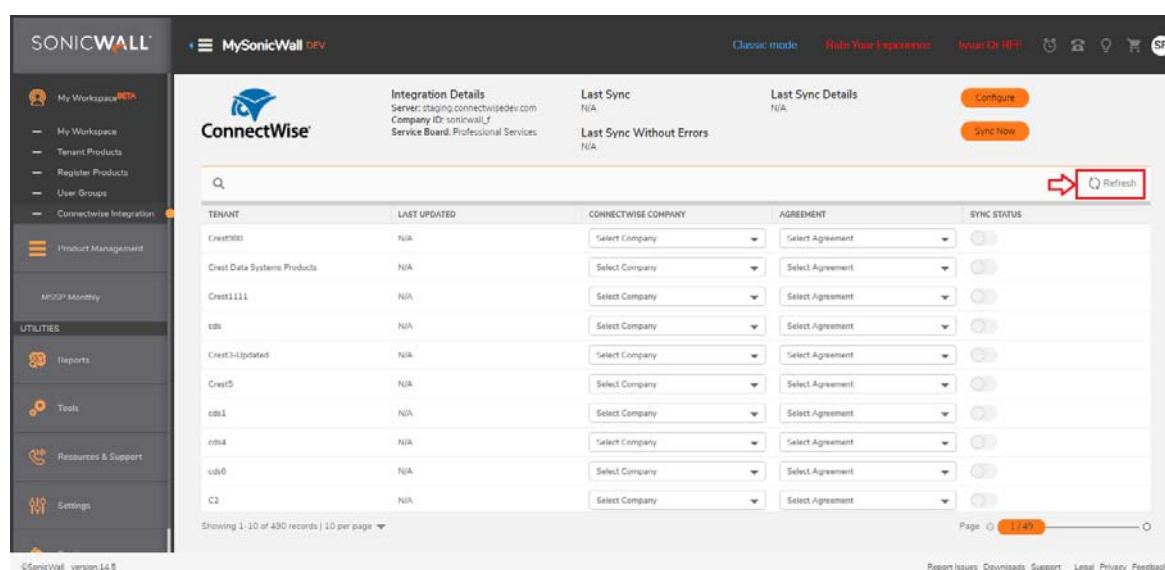
Configure Tenants and Product Mapping

When the configuration is done and submitted, the integration fetches all available companies with their agreements from ConnectWise Manage.

NOTE: Companies with no agreements are not populated.

NOTE: Use the **Refresh** button to refresh the page until the **Sync Status** is populated.

When the synchronization is complete, the companies with their respective agreements populate the ConnectWise company drop-down list. The **Integration Details** page displays all available MSW tenants in the table with **ConnectWise Company** and **Agreement** selections.



For the **Tenant**, select a company and corresponding agreement and enable the **Sync Status** switch. This switch can be enabled only if the **ConnectWise Company** and **Agreement** both are selected for the tenant.

NOTE: If a tenant name has unicode characters, synchronization fails for that tenant.

Synchronizing Tenant and Products

By default, all tenants and product are automatically synchronized at 01:00 local time. *Local time* is based on the configured time zone for the MySonicWall account. Administrators can perform manual synchronizations using the **Sync Now** button.

All the billable products fetched from the enabled tenants are synchronized with CWM's product catalog. If a product already exists, the entry is updated. All products are set with the type **SonicWall**. Categories and Sub-Categories are set per product type as follows:

Products	Category	Sub-Categories
Firewall	Hardware/Virtual	Network Device
SMA 1000 Series	Hardware/Virtual	Network Device
SMA 100 Series	Hardware/Virtual	Network Device
Access Points	Hardware/Virtual	Network Device
Email Security	Hardware/Virtual	Network Device
Capture Client	Cloud	Software

Products	Category	Sub-Categories
Cloud App Security	Cloud	Cloud Services
GMS Software	Software	Software
Analyzer Software	Software	Software
CMS	Software	Software
Hosted Email	Cloud	Cloud Services

To validate that the tenants are synchronized with the Product Catalog:

- 1 Login into the CWM portal and navigate to **Procurement > Product Catalog**.

Product ID	Description	Price	Cost	Ta...	S...	S...	Type	Category	Subcategory	Class
SONICWALL	SONICWALL	0.00	0.00				Hardware	Hardware-U	Network Device-1234	Non-Invento
SONICWALL_BRJUMNHSO_BASIC	SONICWALL Nsv 200 Trial	0.00	0.00				SonicWall	Hardware/Virtual	Network Device-123	Non-Invento
SONICWALL_CAPTURE_CLIENT_TENANT_ADVANCED	Capture Client Tenant	0.00	0.00				SonicWall	Cloud	Software	Non-Invento
SONICWALL_CAPTURE_CLIENT_TENANT_BASIC	Capture Client Tenant	0.00	0.00				SonicWall	Cloud	Software	Non-Invento
SONICWALL_CGTNUWFOSE_BASIC	SONICWALL Nsv 200 Trial	0.00	0.00				SonicWall	Hardware/Virtual	Network Device-123	Non-Invento
SONICWALL_CLIENT_LICENSE_PRODUCT	SonicWall CLIENT LICENSE PRODUCT	0.00	0.00				Hardware	Hardware-U	Network Device-1234	Non-Invento
SONICWALL_CLIENT_LICENSE_PRODUCT	SonicWall CLIENT LICENSE PRODUCT	0.00	0.00				Software	Software	Software-New	Non-Invento
SONICWALL_CLOUD_APP_SECURITY_ADVANCED	Cloud App Security	0.00	0.00				Software	Software updated	Software-1234	Non-Invento
SONICWALL_CLOUD_APP_SECURITY_BASIC	Cloud App Security	0.00	0.00				SonicWall	Cloud	Cloud Service	Non-Invento
SONICWALL_CLOUD_EDGE	SonicWall Cloud Edge	0.00	0.00				Software	Software-U	Software-1234	Non-Invento
SONICWALL_CLOUD_EDGE_ADVANCED	SonicWall Cloud Edge	0.00	0.00				Software	Software updated	Software-1234	Non-Invento
SONICWALL_CMS_FOR_SMA_WITH_BASE_APPLIANCE_LICENSE	CMS for SMA with Base Appliance License	0.00	0.00				SonicWall	Software	Software	Non-Invento
SONICWALL_EMAIL_SECURITY_7050	SONICWALL EMAIL SECURITY 7050	0.00	0.00				Hardware	Hardware-U	Network Device-1234	Non-Invento
SONICWALL_EMAIL_SECURITY_FREE_TRIAL_SOFTWARE_10000	SONICWALL EMAIL SECURITY FREE TRIAL SOFTWARE (10000 USE...	0.00	0.00				Hardware	Hardware-U	Network Device-1234	Non-Invento
SONICWALL_GMS_SOFTWARE_DEMO_LICENSE	GMS Software Demo License	0.00	0.00				Software	Software updated	Software-1234	Non-Invento
SONICWALL_HBEGRHANUJ_BASIC	SONICWALL Nsv 200 Trial	0.00	0.00				SonicWall	Hardware/Virtual	Network Device-123	Non-Invento
SONICWALL_HHOORTZBFH_BASIC	SONICWALL Nsv 200 Trial	0.00	0.00				SonicWall	Hardware/Virtual	Network Device-123	Non-Invento
SONICWALL_HOSTED_EMAIL_SECURITY	Hosted Email Security	0.00	0.00				SonicWall	Cloud	Cloud Service	Non-Invento
SONICWALL_HTTPJTANVUJ_BASIC	SONICWALL Nsv 200 Trial	0.00	0.00				SonicWall	Hardware/Virtual	Network Device-123	Non-Invento
SONICWALL_IBDSBIBHJ_BASIC	SONICWALL Nsv 200 Trial	0.00	0.00				SonicWall	Hardware/Virtual	Network Device-123	Non-Invento
SONICWALL_MANSRIKUHE_BASIC	SONICWALL Nsv 200 Trial	0.00	0.00				SonicWall	Hardware/Virtual	Network Device-123	Non-Invento
SONICWALL_MCVLWUZE_BASIC	SONICWALL Nsv 200 Trial	0.00	0.00				SonicWall	Hardware/Virtual	Network Device-123	Non-Invento
SONICWALL_MVBXAMVUJ_BASIC	SONICWALL Nsv 200 Trial	0.00	0.00				SonicWall	Hardware/Virtual	Network Device-123	Non-Invento
SONICWALL_NS-span style="vertical-align: sub;font-style: ita	SONICWALL NS-span style="vertical-align: sub;font-style: ita	0.00	0.00				Hardware	Hardware-U	Network Device-1234	Non-Invento
SONICWALL_NS_BASIC	SONICWALL NS, 200 Trial	0.00	0.00				SonicWall	Hardware/Virtual	Network Device-testprod	Non-Invento

- 2 Search for products with a product ID starting with **SonicWall**.

Products with a sub-category of **Cloud Services** and **Software** are synchronized as additions within the CWM company agreement. If the option was selected during configuration in MySonicWall, then Network Device products are also listed as additions.

To validate that the Network Devices are added:

- 1 Navigate to the company you want to validate.
- 2 Review the agreement has been selected for tenant synchronization.
- 3 Navigate to the Additions tabs and review the products added within the agreement.

Sequence	Effective	Cancelled	Product ID	Description	Quantity	Price	Ext Price	Bill	Tax
1.00	5/4/20	5/13/20	SONICWALL_CLOUD_APP_SECURITY_ADVANCED	SONICWALL_CLOUD_APP_SECURITY_ADVANCED	25.00	\$0.00	\$0.00	✓	
2.00	5/4/20	5/13/20	SONICWALL_CAPTURE_CLIENT_TENANT_ADVANCED	SONICWALL_CAPTURE_CLIENT_TENANT ADVA...	10.00	\$0.00	\$0.00	✓	

For every addition, the following properties are set/updated. The **Bill Customer** field and **Description** field are not modified if they have been updated manually by user.

Property	Value
Product ID	The product name as reported by MySonicWall.
Bill Customer	Billable.
Effective Date	Product registration date: <ul style="list-style-type: none"> • If earlier than the Agreement billing start date, the Agreement billing start date is used. • If it is a Monthly Recurring Agreement, the next invoice date is used.
Canceled Dates	Product expiry date. All the services' expiry dates are considered. The latest expiry date is considered the product's expiry date.
Serial Number	Serial number of the product.
Total Quantity	The highest quantity from the list of sub-services.
Product Invoice Description	The product name as reported by MySonicWall.

NOTE: If the Agreement is set to a recurring type, then only Recurring - Monthly Billing types are supported.

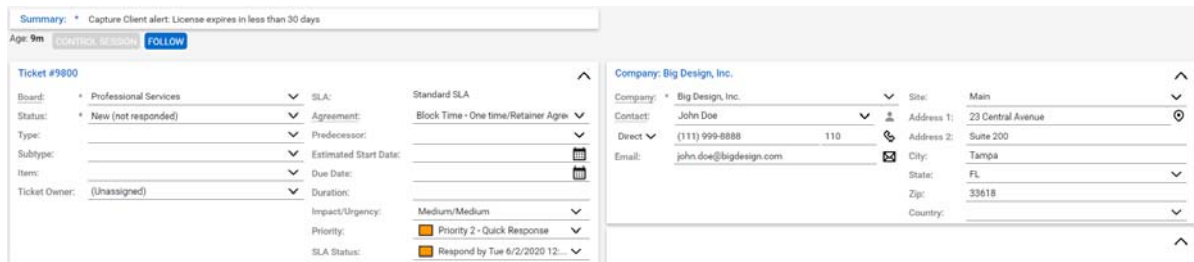
Products with a sub-category of **Network Devices** are reported as configurations attached to the Agreement. The Configuration properties that are defined as follows:

Property	Value
Type	Configuration type matching the product type. If the type is unavailable, a new type is automatically created.
Configuration Name	Network device name.
Install Date	Product registration date.
Expiration Date	Product expiry date. All the services' expiry dates are considered. The latest expiry date is considered the product's expiry date.
Serial Number	Serial number of the product.
Status	Active.
Configuration Questions	The services and sub-services associated with the network device are reported as questions. The answer to each question (Service/Sub-Service) is the expiry date of the corresponding Service/Sub-Service.

Creating Tickets from Alerts

This integration of MySonicWall and ConnectWise Manage allows you to create tickets for alerts from the products managed via Capture Security Center. Tickets are created in the Service Board selected during configuration in MSW. If the alert is deleted or closed in the product console, the ticket is also closed in CWM.

Every ticket summary includes the alert message, priority (based on the configuration in MySonicWall) and the company and agreement mapped with MySonicWall tenant. The ticket also contains an attachment with the relevant URL for the Service Board operator to pivot to the product console for investigation.



NOTE: The following notes apply:

- As part of this version of the integration, tickets are automatically created and closed only for Critical and High alerts from SonicWall Capture Client.
- The integration checks for up to 100 new alerts every 10 minutes and creates and closes tickets.
- As part of the synchronization operation, all the tenants that are configured and enabled for synchronization are considered.

Troubleshooting

This section describes common problems with possible root causes, solutions or workarounds.

Problem 1: Status Not Correct

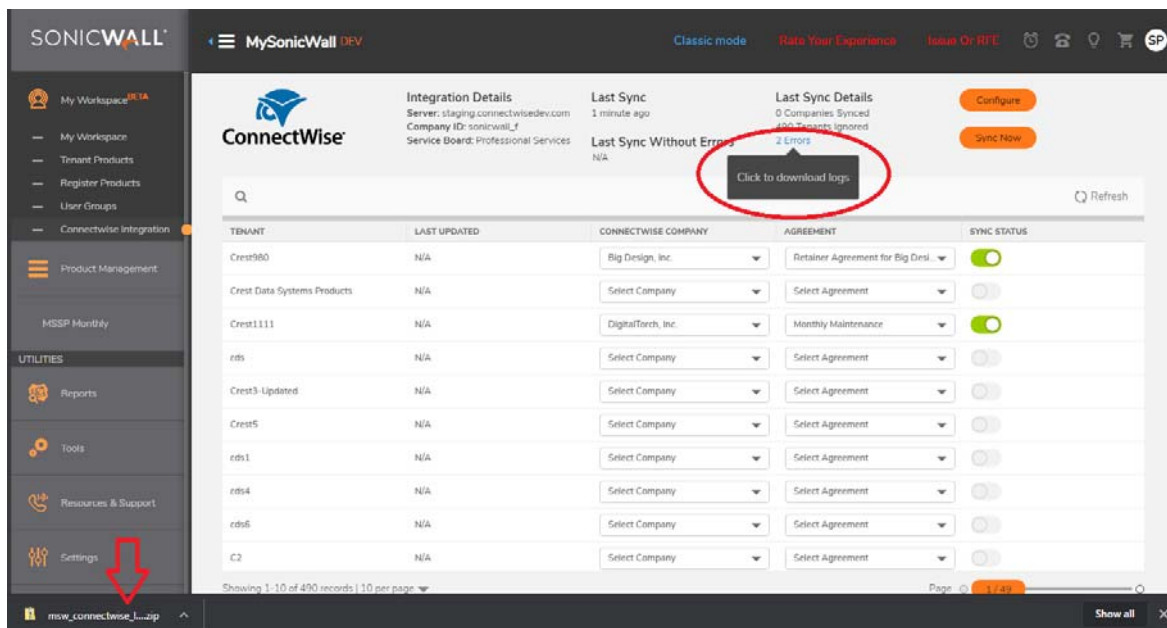
The tenant synchronization completed and the products are synchronized on ConnectWise Manage. However, the status is not reflected on the MySonicWall user interface.

To correct this issue, verify the latest status by refreshing the interface. The MySonicWall interface does not automatically refresh and relies on manual refresh action.

Problem 2: Tenant Sync Errors

While some tenants synchronize successfully, one or more other tenants have synchronization errors.

When a tenant synchronization fails, the failed tenants count is displayed in MySonicWall. Whenever the count is greater than zero, the count becomes an active hyperlink that can be used to download logs to determine the problem. Review the error logs to find the root cause for the error.



Some common situations which causes problems include:

- CWM API keys are invalidated.

Authentication errors appear in logs for the CWM API, for example: `GET company/companies company:sonicwall_f error:401 Auth Error.`

- An enabled tenant has a product with expiration date earlier than the billing start date of the associated CWM agreement.

The following is a sample error: `Error occurred while creating/updating an addition for product.`

SonicWall Support

Technical support is available to customers who have purchased SonicWall products with a valid maintenance contract.

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. To access the Support Portal, go to <https://www.sonicwall.com/support>.

The Support Portal enables you to:

- View knowledge base articles and technical documentation
- View and participate in the Community forum discussions at <https://community.sonicwall.com/technology-and-support>
- View video tutorials
- Access [MySonicWall](#)
- Learn about SonicWall professional services
- Review SonicWall Support services and warranty information
- Register for training and certification
- Request technical support or customer service

To contact SonicWall Support, visit <https://www.sonicwall.com/support/contact-support>.


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Legend

 **WARNING:** A WARNING icon indicates a potential for property damage, personal injury, or death.

 **CAUTION:** A CAUTION icon indicates potential damage to hardware or loss of data if instructions are not followed.

 **IMPORTANT NOTE, NOTE, TIP, MOBILE, or VIDEO:** An information icon indicates supporting information.