Bitdefender

GravityZone

CONNECTWISE MANAGE INTEGRATION GUIDE

Bitdefender GravityZone
ConnectWise Manage Integration Guide

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1. INTRODUCTION

1.1. Scope of This Document

This document aims to explain how to configure ConnectWise and Bitdefender Control Center, for the automatic ticketing and billing services to work.

This document is intended for Managed Services Providers with partner accounts in the Bitdefender Control Center.

1.2. Bitdefender and ConnectWise

Bitdefender GravityZone is an enterprise security solution that helps organizations to achieve the best protection and performance for their business needs. Control Center, a centralized security management console, allows administrators to remotely install and manage security for any endpoint, in any location and environment. A local application called Bitdefender Endpoint Security Tools is installed on each endpoint.

ConnectWise is a business management solution, assisting vendors and partners to bring together products, services and people.

The two solutions work together through API keys generation, available within ConnectWise. MSPs can automatically create tickets and billing procedures for their customer companies, based on security services delivered by Bitdefender.

The ConnectWise integration allows the following actions:

1. Connect Bitdefender Control Center to a ConnectWise account. Configure a new integration within Bitdefender Control Center and provide your ConnectWise account details (URL, company name, public and private keys).
2. Setup the ticketing service. Once enabled within the Bitdefender integration wizard, tickets are automatically created in ConnectWise for the following types of events:
   - **Malware Outbreak.** This type of ticket is triggered each time a specific percentage of protected endpoints is infected with the same malware.
   - **Blocked URLs.** This type of ticket is triggered when a protected endpoint is trying to access a web address blocked through a security policy.
   - **Outdated clients.** This type of ticket is triggered when the percentage of outdated clients within a managed company has exceeded the defined

threshold. The threshold represents a percentage of the total number of endpoints under a managed company.

3. Setup the billing service. This functionality is reporting to ConnectWise the number of active protected endpoints for each managed company with a monthly subscription. Based on these figures, ConnectWise can determine a price and issue an invoice for each managed company, at the end of the month. For this functionality to work, a pricing model has to be defined in ConnectWise for each managed company.
4. **Import ConnectWise companies to Bitdefender Control Center.** You can easily import your ConnectWise companies to Bitdefender Control Center:
   - During the initial integration setup (wizard-guided).
   - On demand, after setting up the ConnectWise integration, using the options available in the **Companies** page.

2. INTEGRATION PREREQUISITES

To connect your Bitdefender Control Center account to ConnectWise, you must meet the following requirements:

- Bitdefender Control Center partner account.
- Monthly Usage license key issued by Bitdefender.
- ConnectWise User Account.
- API Key generation, required for setting up the ConnectWise integration with Bitdefender Control Center.
- ConnectWise companies must be successfully imported to Bitdefender Control Center.

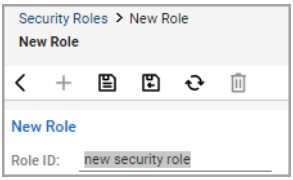
3. SETTING UP CONNECTWISE WITH API KEYS

Log in to ConnectWise to start the configuration. We recommend using the ConnectWise on premises client rather than the web client.

You need to generate API keys for authentication. These authentication parameters are unique to ConnectWise Members, granting them access to company resources.

To generate API keys:

1. Go to **System > Security Roles**.
2. Click + **New Item** to create a Security Role and type a name in the **Role ID** field.

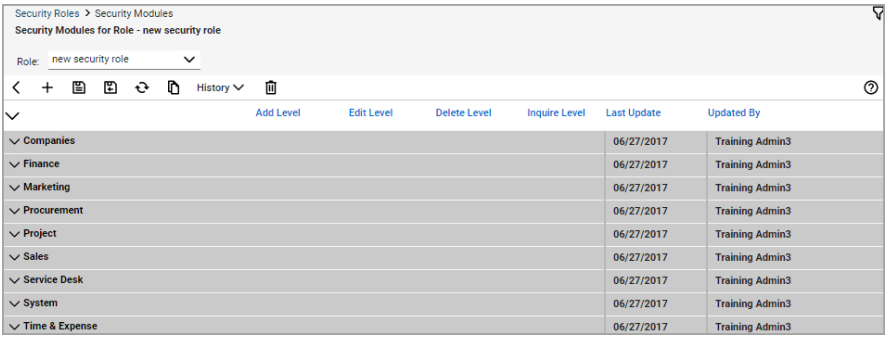


New Role

3. Click **Save**.
4. Edit the Security Role to add the following permissions:
   - **Companies > Company Maintenance**: Inquire level set to **All**
   - **Finance > Agreements**: Add Level, Edit Level and Inquire level set to **All**

     Important
     This feature is unavailable for Basic Plan accounts.

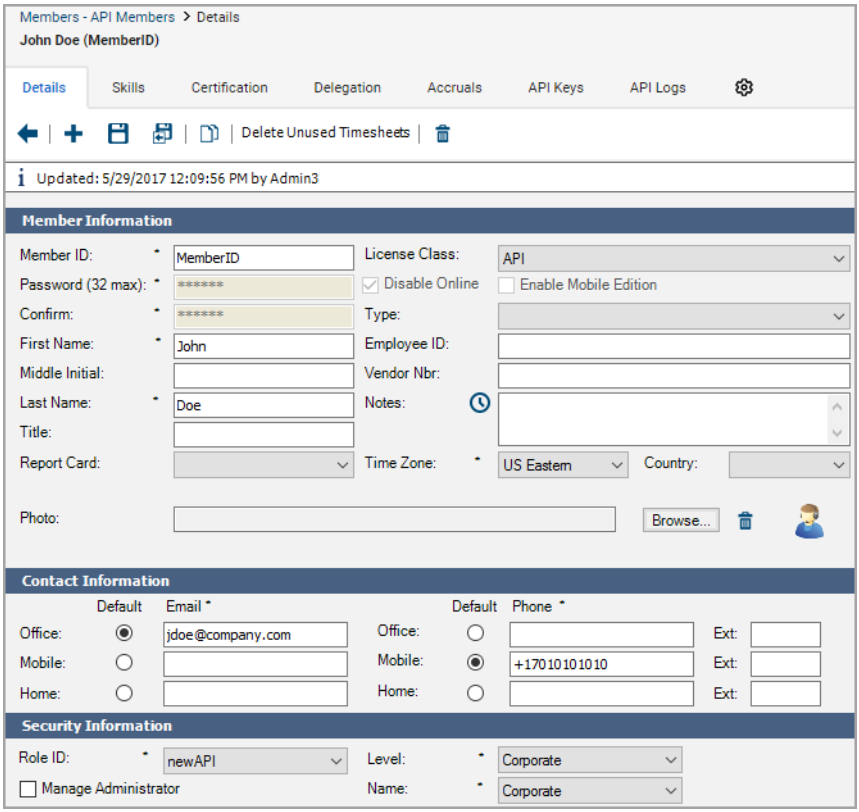
   - **Procurement > Products**: Inquire level set to **All**
   - **Procurement > Product Catalog**: Inquire level set to **All**
   - **Project > Project Ticket Tasks**: Inquire level set to **All**
   - **Project > Project Tickets**: Inquire level set to **All**
   - **Service Desk > Service Tickets**: Add Level and Inquire level set to **All**



Security Modules

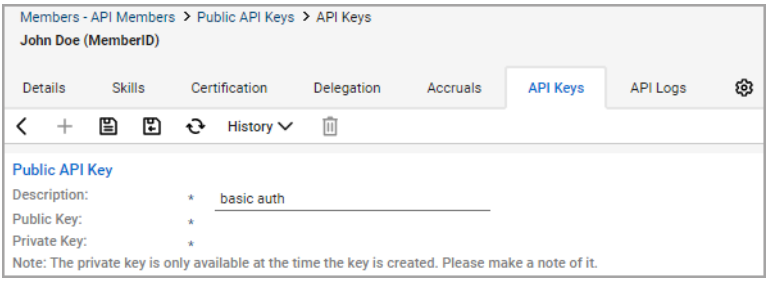
Important
Product Catalog is displayed as **Product Entry** in all versions prior to 2017.5.

5. Create an API Member as follows:
   a. Go to **System > Members**.
   b. Go to the **API Members** tab.
   c. Click + **New Item** to add a new entry.
   d. Fill in the mandatory fields and assign the previously created Security Role.
   e. Click **Save** to apply changes.



Member ID

6. Go to the **API Keys** tab.
7. Click + **New Item** to add a new entry.
8. Write down the name in the **Description** field.
9. Click **Save** to generate Public and Private API Keys.



API Keys

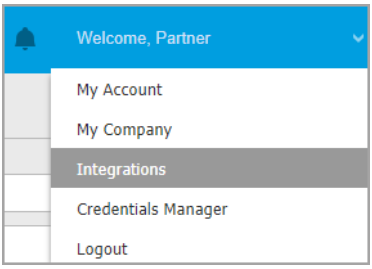
Important

The Private Key is only available the first time you create it. Please make a note of it to be later used in the Configure ConnectWise Integration screen.

4. MANAGING THE CONNECTWISE INTEGRATION WITHIN BITDEFENDER CONTROL CENTER

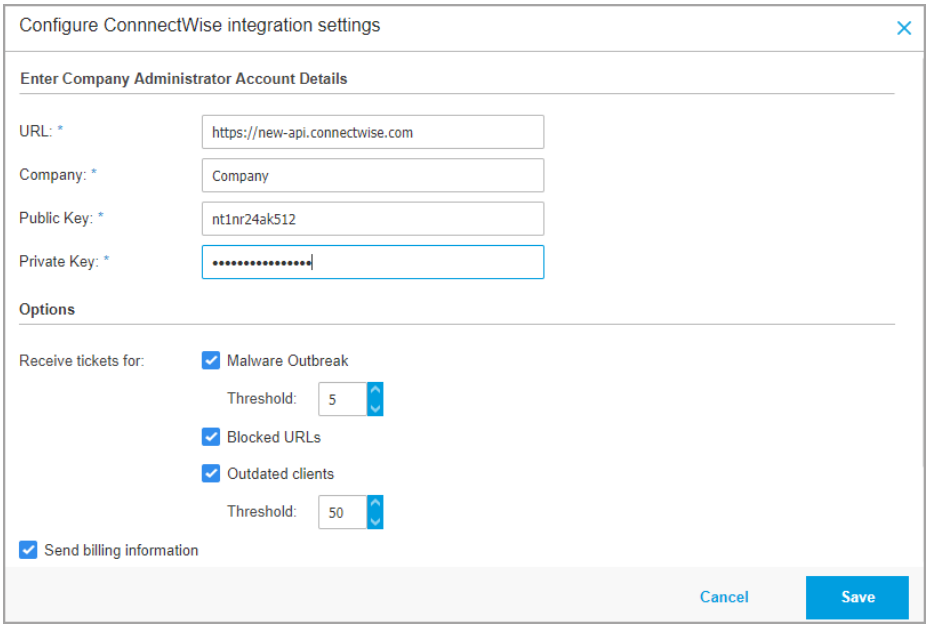
4.1. Configure the ConnectWise Integration

1. Log in to Bitdefender Control Center using your partner credentials.
2. Point to your username in the upper-right corner of the console and choose **Integrations**. The **Integrations** page will show up.



Cloud Console Integration

3. Click the ⊕ **Add** button at the left side of the table.
4. Click **Add ConnectWise Integration** link. The integration wizard will appear.



Integration Settings

5. Under the **Company Administrator Account Details** section, enter the required ConnectWise credentials:
   - **URL**: the ConnectWise server address.
   - **Company**: your ConnectWise Company ID.
   - **Public Key** and **Private Key** : generated after you created an API Member in ConnectWise.
6. Under **Options**, define the services you want to use with the ConnectWise platform:
   - Select the type of tickets you want to automatically create from Bitdefender Control Center:
     - **Malware Outbreak**. This type of ticket is triggered each time a specific percentage of protected endpoints is infected with the same malware.

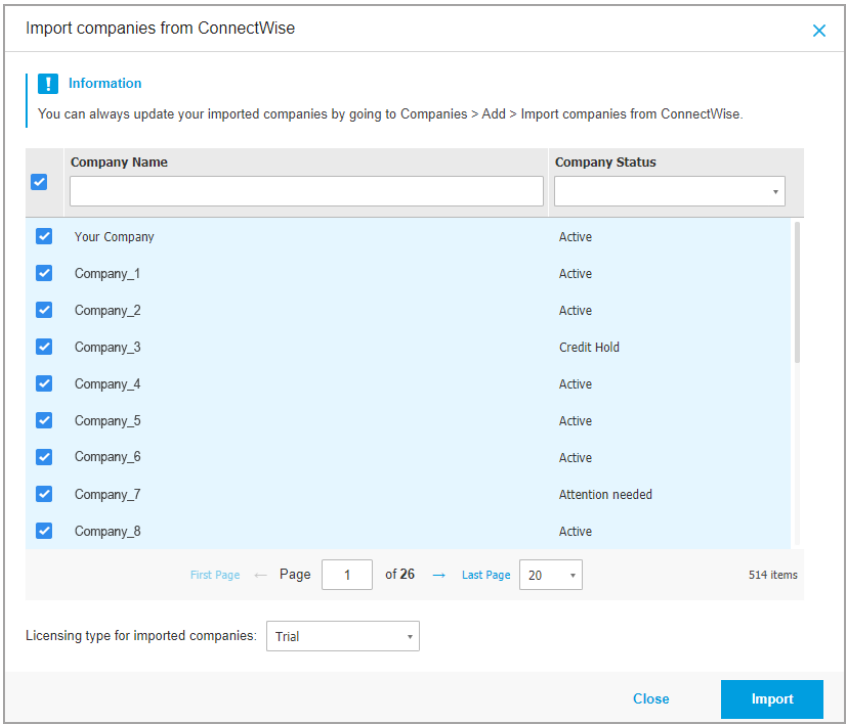
- **Blocked URLs**. This type of ticket is triggered when a protected endpoint is trying to access a web address blocked through a security policy.
- **Outdated clients**. This type of ticket is triggered when the percentage of outdated clients within a managed company has exceeded the defined threshold. The threshold represents a percentage of the total number of endpoints under a managed company.

For more details regarding the tickets workflow, refer to the Ticketing Setup chapter.

- **Send billing information** enables Bitdefender to report the number of active protected endpoints for each managed company. For the billing service to work, you need to provide the following information:
  - **Agreement Type**: enter the name of the previously created Agreement Type.
  - **Product**: enter the relevant Product for your managed company.

  For more details regarding the billing workflow, refer to the Billing Setup chapter.

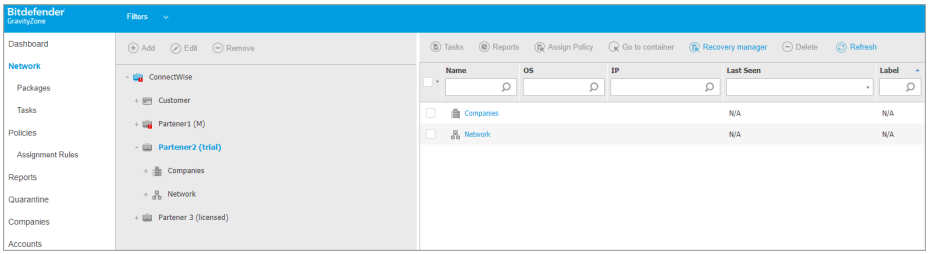
7. Click **Save**. Wait until Bitdefender Control Center connects to ConnectWise with the provided credentials.
8. After the connection with ConnectWise has been established, the wizard will load all your managed companies. Import to Bitdefender Control Center the list of desired companies, as follows:
   a. Select the companies ready to be imported. Use the search box under **Company Name** or the filter under **Company Status** to easily find a specific company.
   b. Choose the **Licensing type** for the imported companies. Each company under Bitdefender Control Center must have the licensing option filled in. You can opt between the following license types:
      - **Trial**. A 30 days trial license key is automatically assigned to each imported company.
      - **Monthly Subscription**. Each imported company will share the seats available on your Bitdefender monthly usage license key.



Import Companies from ConnectWise

Warning
For the billing integration to work, managed companies must have a monthly subscription.

9. Click **Import**. Wait until your ConnectWise companies are imported to Bitdefender Control Center. Imported companies will appear in the **Network** group, under your Network inventory. You can also edit each company using the options available in the **Companies** page.



Network Inventory

Once configured, the ConnectWise integration will be visible in the **Integrations** page.

4.2. Edit the Settings for ConnectWise Integration

To edit the settings of your ConnectWise integration, all you need to do is to click **ConnectWise** in the **Integrations** page. You will be able to change the integration's credentials and modify the selected features.

When done, click **Save** to apply changes.

Important
Importing new companies from ConnectWise is not available while editing the integration's settings. After the first ConnectWise integration setup, you can import new ConnectWise companies only by using the options available in the **Companies** page. For more information, refer to the Managing ConnectWise Companies in Bitdefender Control Center chapter.

4.3. Disable the ConnectWise Integration

To disable the ConnectWise integration, go to the **Integrations** page. Select its checkbox and click the ⊖ **Delete** button, at the left side of the table. The integration is removed once you have confirmed the action.

5. TICKETING SETUP

Bitdefender Control Center can be configured to automatically create tickets in ConnectWise for the following type of events: malware outbreak, blocked URLs and outdated clients.

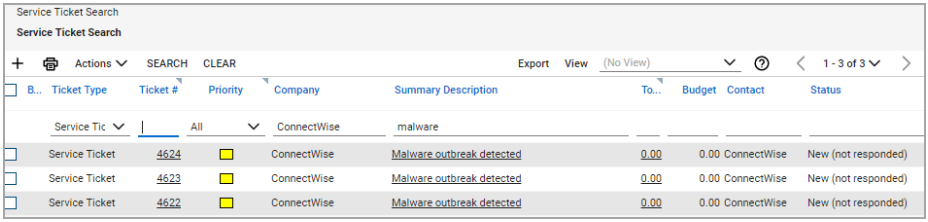
For the ticketing service to work, the following conditions must be fulfilled:

1. At least one ticket type is enabled and configured as required in the ConnectWise integration wizard.
2. Bitdefender Endpoint Security Tools (the client security software) is installed on endpoints belonging to your managed companies.

When a ticket is created, Bitdefender sends a ticket summary and a detailed description of the issue to ConnectWise.

Once you have evaluated and eventually solved the ticket, you can close it. To view tickets in ConnectWise:

1. Go to **Service Desk > Service Ticket Search**.
2. In the **Company** column, search for the company you are interested in. ConnectWise will display all the tickets created for that company.



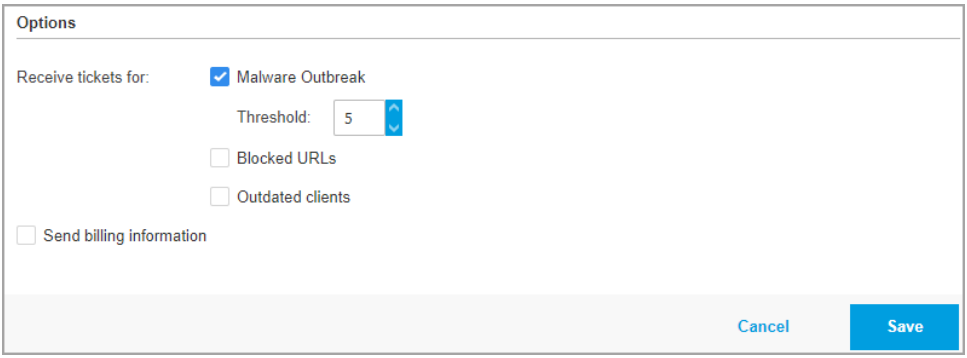
Service Ticket Search

5.1. Malware Outbreak Tickets

A malware outbreak ticket is created in ConnectWise each time a specific percentage of protected endpoints is infected with the same malware.

You can configure the malware outbreak ticket threshold in the ConnectWise integration wizard.

For example, when the threshold is set to 5 for a company, and a virus is detected on 5 out of 100 endpoints, a malware outbreak ticket will automatically be created for that company, in ConnectWise.



Malware Outbreak

Note
Another malware outbreak ticket can be generated if the same infection is still detected in the network, twenty four hours after the initial ticket was raised.

5.2. Blocked URLs Tickets

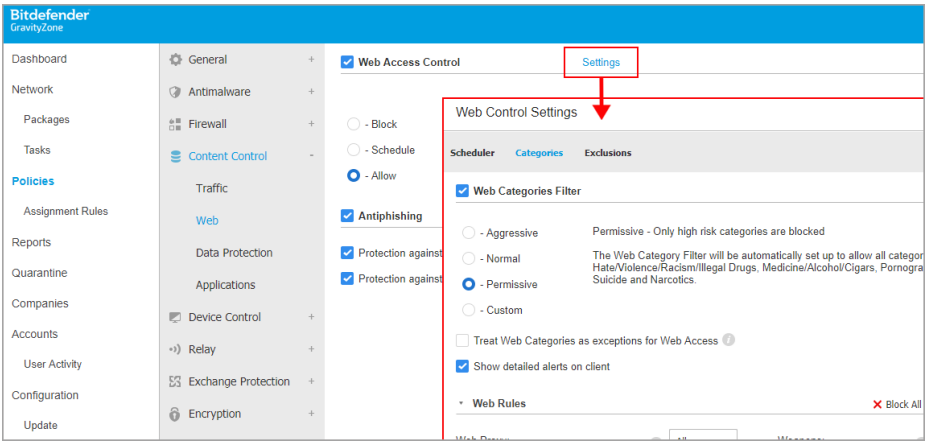
Blocked URLs tickets are automatically created when a protected endpoint is trying to access a web address that is blocked through a security policy.

Important
Bitdefender Control Center creates only one Blocked URLs ticket for the same web domain. For example, Bitdefender Control Center will not generate a new ticket when another URL path or sub-domain is getting blocked within the same company. This can happen regardless of a ticket's closed status.
New Blocked URLs tickets can be generated only for other domains that are blocked through the security policy.

In the Bitdefender Control Center, you can configure the security policies to block web traffic by categories, and also by specific URLs:

- **Blocking website categories**. To view the policy web control settings, open the **Policies** section and go to **Content Control > Web > Web Control Settings >**

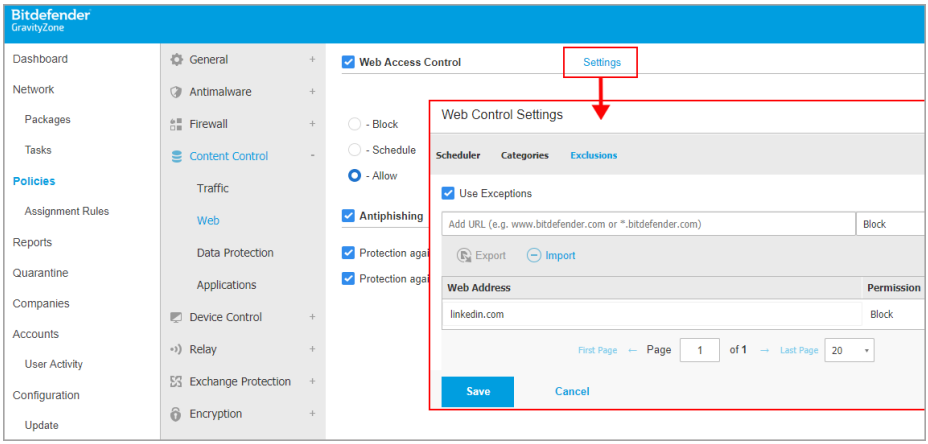
Categories. In this section, you can enable the web categories filter and define web rules (allow or block) for each web category.



Web Control Settings: Categories

For example, if you assign a policy to block social network websites, and one endpoint is trying to access `www.linkedin.com`, a ticket will be created in ConnectWise for the parent company. The ticket description will specify that an URL has been blocked for the `www.linkedin.com` domain.

- **Blocking specific URLs**. You can also configure security policies to block specific URLs, by enabling web exceptions and adding the specific URLs that you want to block. To accomplish that, open the **Policies** section, go to **Content Control > Web > Web Control Settings > Exclusions** and define the settings accordingly.



Web Control Settings: Exclusions

5.3. Outdated Clients Tickets

Outdated Clients tickets are created when the percentage of outdated clients within a managed company has exceeded the defined threshold. The threshold represents a percentage of the total number of endpoints under a managed company

Bitdefender Control Center reports that the Bitdefender Endpoint Security Tools client is outdated if either the product, or the virus signatures have not been updated in the first twenty four hours following an update release.

You can configure the threshold for the Outdated Clients ticket in the ConnectWise integration wizard.

For example, for a threshold of 50, when the number of outdated clients of a company reaches 50 out of 100 endpoints, an Outdated Clients ticket will automatically be generated for that company in ConnectWise.

Note
Another Outdated Clients ticket for the same company can be generated only if the current ticket had been manually closed in ConnectWise.

6. BILLING SETUP

The billing integration allows you to receive Bitdefender Control Center usage reports for each managed company in ConnectWise.

Important
This feature is unavailable for Basic Plan accounts.

Once the billing integration has been enabled, Bitdefender Control Center sends out the number of active computers protected with Bitdefender Endpoint Security Tools to the configured ConnectWise server.

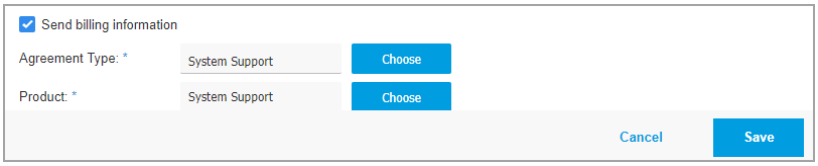
A Bitdefender Endpoint Security Tools client is considered active only if a connection to the the Bitdefender Control Center is established, at least once in a given month.

For the billing service to work, the following conditions must be fulfilled:

1. A pricing model is defined in ConnectWise for each managed company.
2. The billing service is enabled and configured as required in the ConnectWise integration wizard.

   Important
   For the billing service to work, make sure to correctly input the required information in the ConnectWise integration settings. All entries are case sensitive:

   - **Agreement Type**: enter the name of the previously created Agreement Type name.
   - **Product**: enter the relevant Product for your managed company.



Send Billing Information

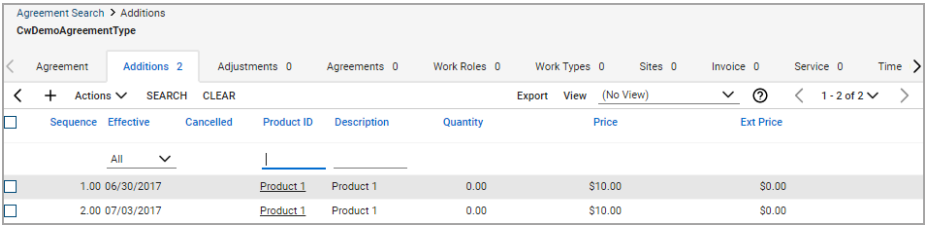
3. Managed companies are licensed with a monthly subscription.

At the beginning of each month, Bitdefender Control Center creates a usage record for each managed company in ConnectWise. The usage record remains open during

the entire month. When a new client is installed in the same company, the usage record is automatically updated with the new count. New additions will be visible after a time period of four hours.

To view the usage records of a company in ConnectWise:

1. Go to **Finance > Agreements**.
2. Search for the previously created **Agreement Type**.
3. Go to the **Additions** tab.



Additions

An **Addition** will be created at the start of the month and updated incrementally. Each **Addition** will be counted as a new value by the Update Request Processor, allowing the user to know exactly how many endpoints are active in a given month.

Important
New **Additions** cannot be added to an upcoming **Billing Start Date**. This can only be done after the service period start date.

7. MANAGING CONNECTWISE COMPANIES IN BITDEFENDER CONTROL CENTER

Importing your managed companies from ConnectWise to Bitdefender Control Center can be done in two stages:

1. At the final step of the initial ConnectWise Integration Setup. During further edits, the companies import options are no longer available from the ConnectWise integration.
2. At any time, in the **Companies** page from Bitdefender Control Center:
   a. Log in to Bitdefender Control Center using your partner credentials.
   b. Go to the **Companies** page.
   c. Click the ⊕ **Add** button from the upper left side of the table.

Import Companies from ConnectWise

   d. Click **Import companies from ConnectWise**. Wait until Bitdefender Control Center retrieves the information from ConnectWise.
   e. Select the companies that you want to import and specify their licensing type using the options available at the lower side of the window. You can opt between the following license types:
      - **Trial**. A 30 days trial license key is automatically assigned to each imported company.
      - **Monthly Subscription**. Each imported company will share the seats available on your Bitdefender monthly usage license key.

Warning
For the billing integration to work, managed companies must have a monthly subscription.

   f. Click **Import**. Wait until ConnectWise companies are imported to Bitdefender Control Center.