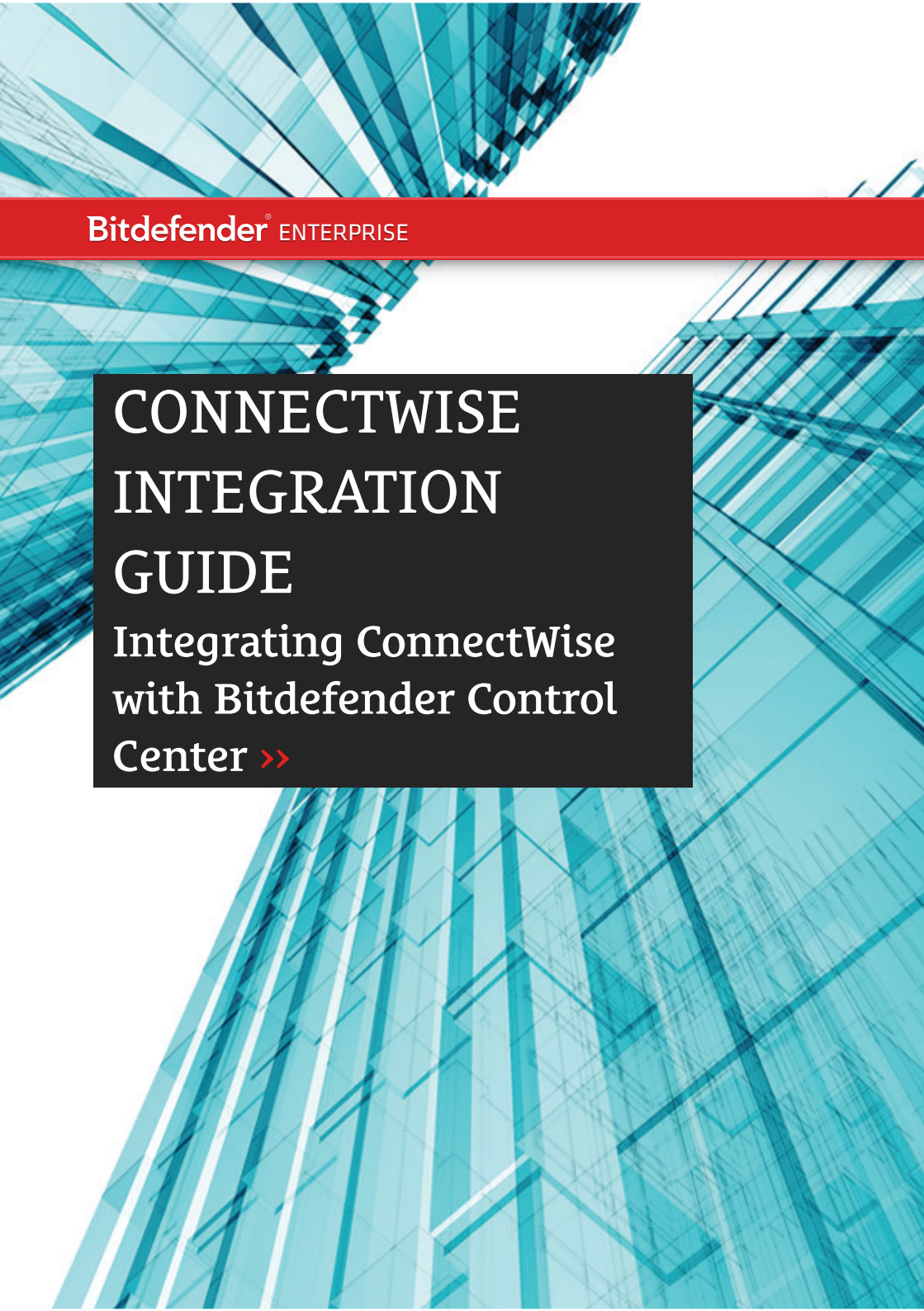
Bitdefender ENTERPRISE
CONNECTWISE INTEGRATION GUIDE
Integrating ConnectWise with Bitdefender Control Center ››

# ConnectWise Integration Guide
# Integrating ConnectWise with Bitdefender Control Center

Publication date 2014.10.16


Bitdefender

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# 1. Introduction

## 1.1. Scope of This Document

This document aims to explain how to configure ConnectWise and the Bitdefender cloud console for the automatic ticketing and billing services between the two platforms to work.

This document is intended for Managed Service Providers with partner accounts in the Bitdefender cloud console.

## 1.2. Bitdefender and ConnectWise

Bitdefender's cloud-based malware protection service is developed for computers running Microsoft Windows and Mac operating systems. It uses a centralized Software-as-a-Service multiple deployment model suitable for SMB and enterprise customers, while leveraging field-proven malware protection technologies developed by Bitdefender for the consumer market. Subscribers have access to a Web-based management interface called Control Center. From this interface, administrators can remotely install and manage malware protection on all their Windows and Mac computers. A local application called Endpoint Security is installed on each protected computer.

The integration module available within Bitdefender Control Center enables MSPs to automatically create tickets and billing procedures for their customer companies, based on delivered Bitdefender security services.

The ConnectWise integration module 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, username and password).
2. Setup the ticketing service. Once enabled within the Bitdefender integration wizard, tickets are automatically created in the ConnectWise platform for the following types of events:
   - **Malware Outbreak.** This ticket is triggered each time a defined percent of protected computers is infected with the same malware.
   - **Blocked URLs.** This ticket is triggered when a protected computer is trying to access a web address which is blocked by the security policy. A blocked website ticket is created only once for the same domain.

- **Outdated clients.** This ticket is triggered when the percentage of outdated clients within the managed network has exceeded the defined threshold.

3. Setup the billing service. This functionality is reporting to ConnectWise the count of active protected endpoints for each managed company with monthly subscription. Based on this count, ConnectWise can calculate a price and issue an invoice for each managed company at the end of each 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.
- ConnectWise Integrator Account, required for setting up the ConnectWise integration within Bitdefender Control Center. The following APIs should be enabled for this account: Service Ticket API, Managed Services API and Company API.
- ConnectWise companies must be successfully imported to Bitdefender Control Center.

# 3. Setting up ConnectWise

Several settings have to be defined in ConnectWise for the automatic billing and ticketing services to work.

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

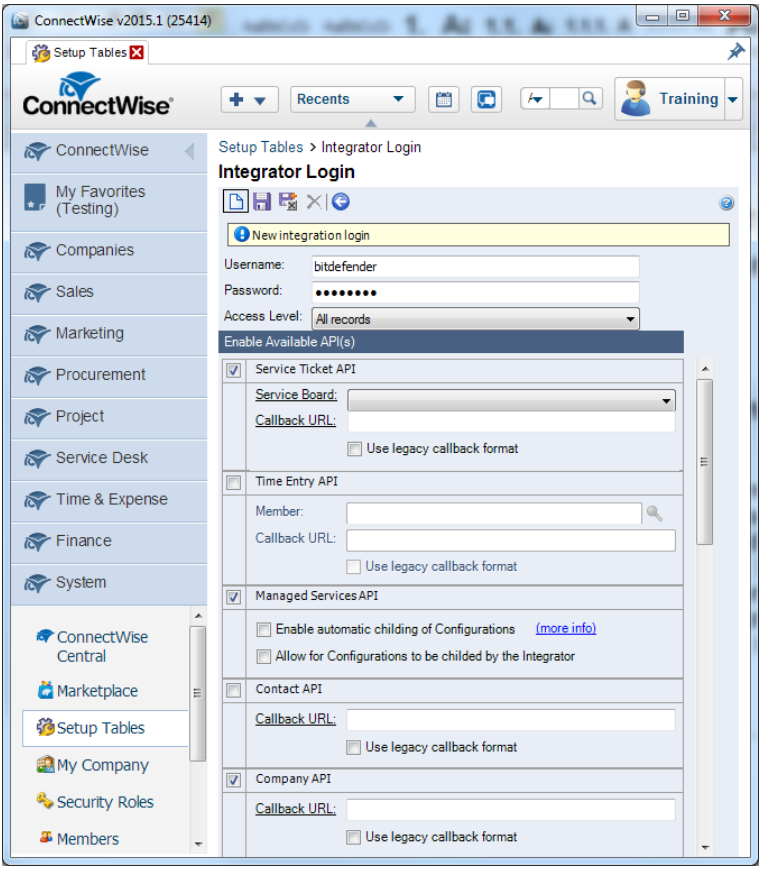
## 3.1. Create an Integrator Account

For the communication between Bitdefender Control Center and ConnectWise to work, you need to define an Integrator Account in ConnectWise and configure it to grant access to the required ConnectWise APIs.

To create an Integrator Account:

1. Go to **System > Setup Tables**.
2. Search for **Integrator Login** in the **Table** column.
3. Click **Integrator Login**.
4. Click the **New Item** icon to create a new entry.
5. Enter the username and password for the integrator account.
6. For the Access Level, select **All records**.
7. Enable the following APIs:
   - Service Ticket API.

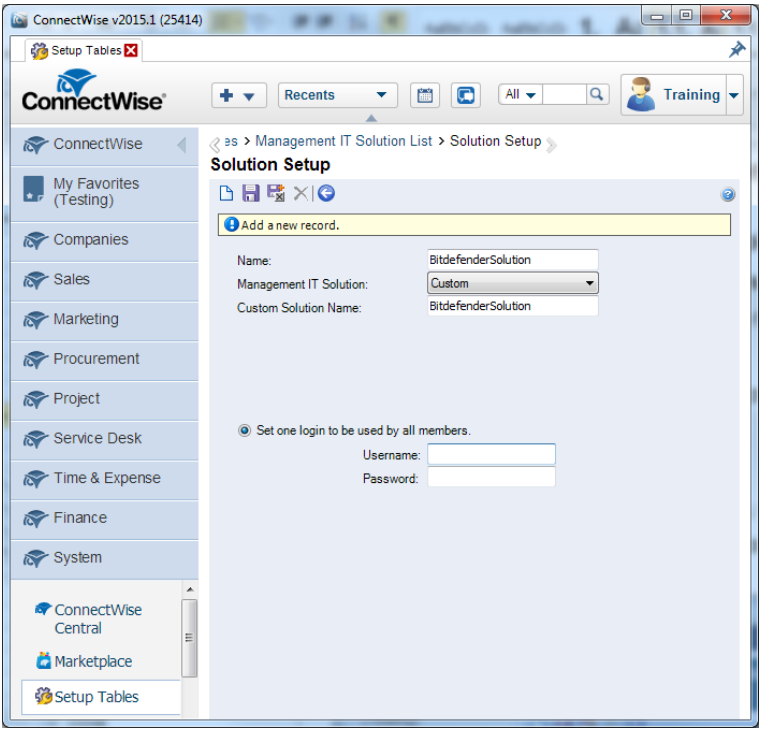
     You must also select **Professional Services** for the Service Board to be able to manually close the tickets. No callback URL is required.
   - Managed Services API.
   - Company API.
8. Click the **Save and Close** icon.


ConnectWise v2015.1 (25414)
Setup Tables
ConnectWise
Recents
Training
ConnectWise
My Favorites (Testing)
Companies
Sales
Marketing
Procurement
Project
Service Desk
Time & Expense
Finance
System
ConnectWise Central
Marketplace
Setup Tables
My Company
Security Roles
Members
Setup Tables > Integrator Login
Integrator Login
New integration login
Username: bitdefender
Password: ••••••••
Access Level: All records
Enable Available API(s)
Service Ticket API
Service Board:
Callback URL:
Use legacy callback format
Time Entry API
Member:
Callback URL:
Use legacy callback format
Managed Services API
Enable automatic childing of Configurations (more info)
Allow for Configurations to be childed by the Integrator
Contact API
Callback URL:
Use legacy callback format
Company API
Callback URL:
Use legacy callback format

# 3.2. Define the ConnectWise Billing Settings

## 3.2.1. Create a Management IT Solution

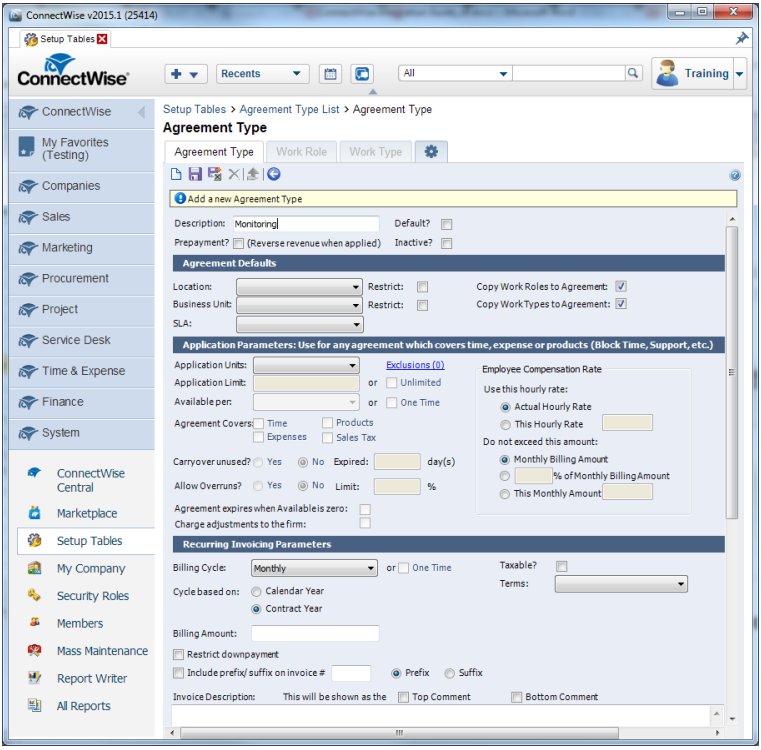
1. Go to **System > Setup Tables**.
2. Search for **Management IT** in the **Table** column.
3. Click **Management IT**.
4. Click the **New Item** icon to create a new management solution.
5. Enter the solution name.
6. Select the **Custom** type.
7. For the custom solution name, enter the same solution name.
8. Click the **Save and Close** icon.



## 3.2.2. Create an Agreement Type

A unique agreement type is needed for updating the appropriate agreements with customer billing information.

1. Go to **System > Setup Tables**.
2. Search for **Agreement Type** in the **Table** column.
3. Click **Agreement Type**.
4. Click the **New Item** icon to create a new agreement type.
5. Fill in the **Description** field. For simplicity reasons, you can use the same name as for the Management Solution.
6. Optionally, you can configure the rest of the agreement type options as you want.
7. Click the **Save and Close** icon.

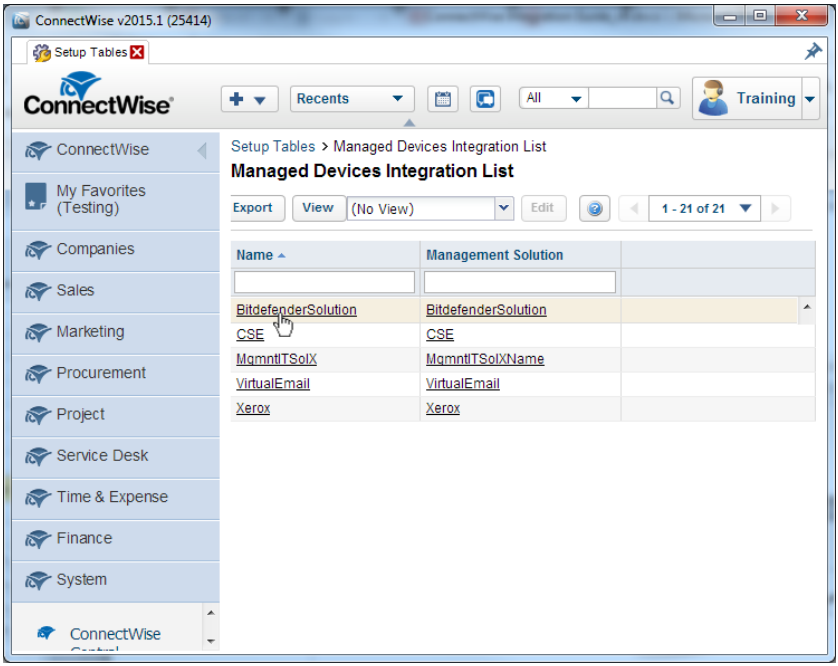


## 3.2.3. Create Cross-References for the Management Solution

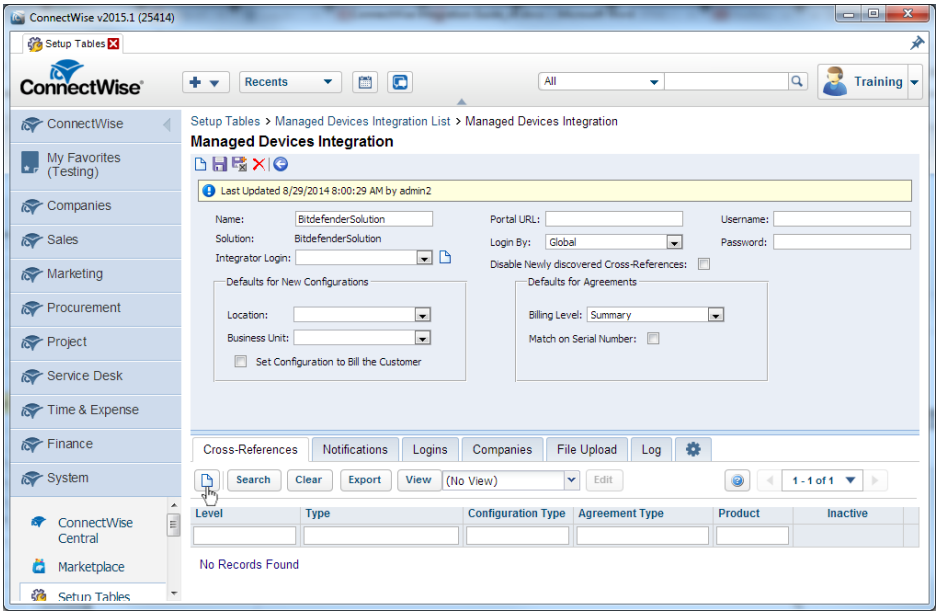
To be able to automatically send billing information to ConnectWise, you need to define the type and level for your management solution and to create cross-references between types, levels, agreement types and products.

To create a cross reference:

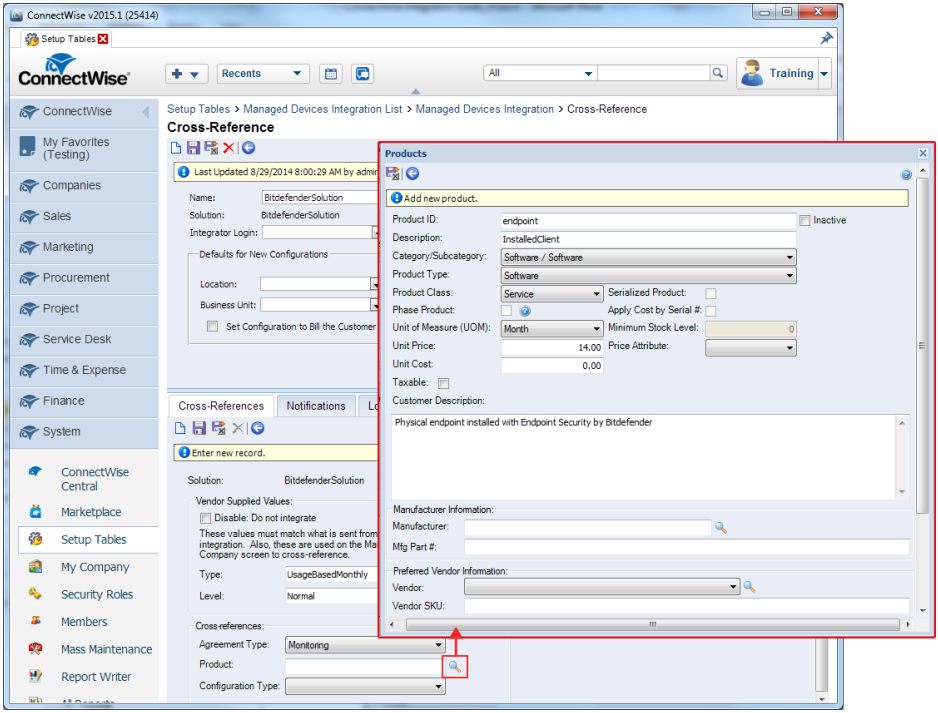
1. Go to **System > Setup Tables**.
2. Search for **Managed Devices** in the **Table** column.
3. Click **Managed Devices Integration**.
4. Click the previously created management solution.



5. In the **Cross-References** tab, click the **New Item** icon to create a cross-reference.




6. Fill in the following mandatory fields:
   - **Type and Level**, according to your billing plan.
   - **Agreement Type**. Select the previously created agreement type.
   - **Product**. Select one of the previously created products. If no product has been defined, proceed as follows:
     a. Click the **Search** icon next to the **Product** field.
     b. Click the **New Item** icon to create a new product.
     c. Define the following mandatory settings:
        – Product ID
        – Description
        – Unit Price
        – Customer Description
     d. Click the **Save and Close** icon.



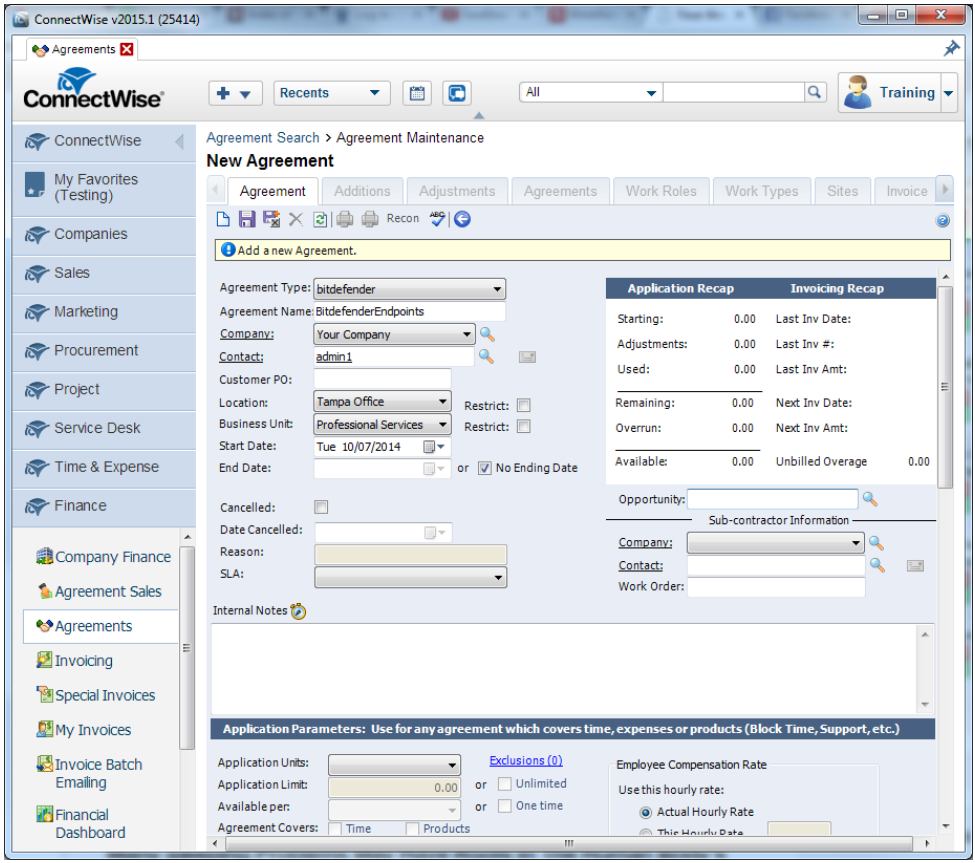

7. Click the **Save and Close** icon.

## 3.2.4. Create Agreements for Each Company

To ensure that the billing information is correctly sent to ConnectWise companies from your Bitdefender partner account, you have to create an agreement for each company.

To create an agreement:

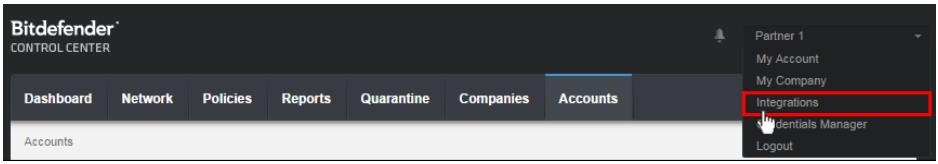
1. Go to **Finance > Agreements**.
2. Click the **New Item** icon to create a new agreement.
3. Make the following mandatory settings:
   - Select the agreement type you have previously created.
   - Enter the agreement's name.
   - Select the target company.
   - Choose or define a contact within the selected company.
   - Define the agreement's ending date.
4. Click the **Save and Close** icon.


ConnectWise v2015.1 (25414)
Agreements
ConnectWise
Recents
All
Training
ConnectWise
My Favorites (Testing)
Companies
Sales
Marketing
Procurement
Project
Service Desk
Time & Expense
Finance
Company Finance
Agreement Sales
Agreements
Invoicing
Special Invoices
My Invoices
Invoice Batch Emailing
Financial Dashboard
Agreement Search > Agreement Maintenance
New Agreement
Agreement
Additions
Adjustments
Agreements
Work Roles
Work Types
Sites
Invoice
Recon
Add a new Agreement.
Agreement Type: bitdefender
Agreement Name: BitdefenderEndpoints
Company: Your Company
Contact: admin1
Customer PO:
Location: Tampa Office
Business Unit: Professional Services
Start Date: Tue 10/07/2014
End Date:
Restrict:
Restrict:
or No Ending Date
Cancelled:
Date Cancelled:
Reason:
SLA:
Application Recap
Invoicing Recap
Starting: 0.00
Last Inv Date:
Adjustments: 0.00
Last Inv #:
Used: 0.00
Last Inv Amt:
Remaining: 0.00
Next Inv Date:
Overrun: 0.00
Next Inv Amt:
Available: 0.00
Unbilled Overage 0.00
Opportunity:
Sub-contractor Information
Company:
Contact:
Work Order:
Internal Notes
Application Parameters: Use for any agreement which covers time, expenses or products (Block Time, Support, etc.)
Application Units:
Application Limit: 0.00
Available per:
Agreement Covers: Time Products
Exclusions (0)
or Unlimited
or One time
Employee Compensation Rate
Use this hourly rate:
Actual Hourly Rate

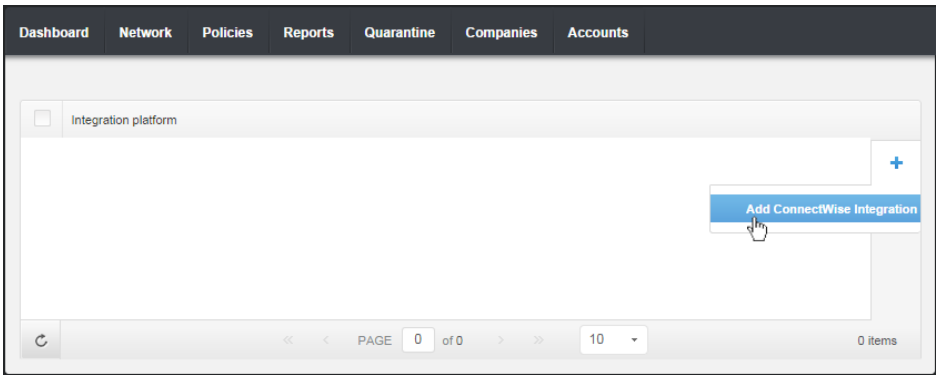
# 4. Managing the ConnectWise Integration within Bitdefender Control Center

## 4.1. Configure the ConnectWise Integration

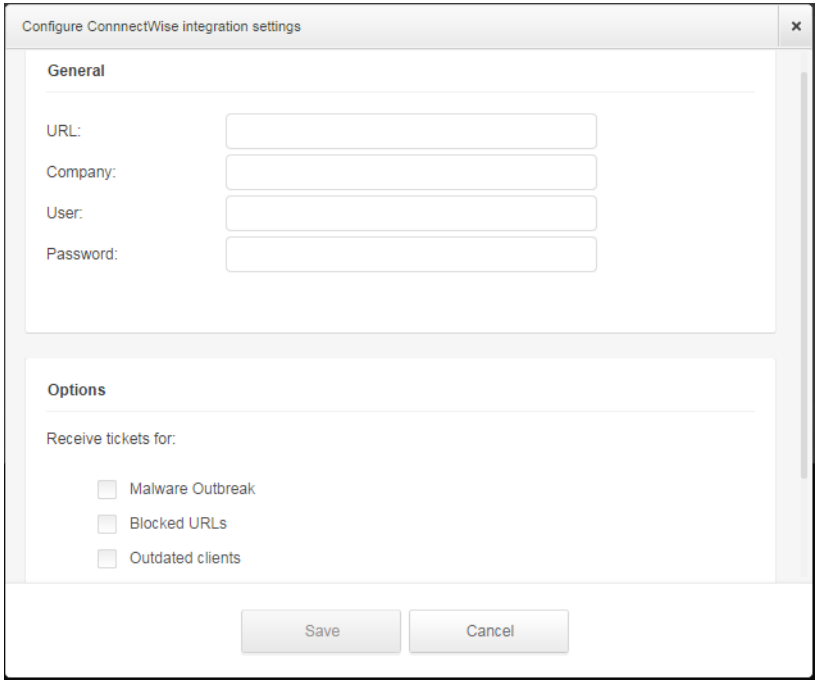
1. Log on to Bitdefender Control Center using your partner credentials.
2. Point to your username in the upper-right corner of the console and choose **Integrations**. The integrations page will show up.




3. Click the + **Add** button at the right side of the table.




4. Click the **Add ConnectWise Integration** link. The integration wizard will appear.




5. Under **General** section, enter the required ConnectWise credentials:
   - **URL**: the ConnectWise server address.
   - **Company**: your ConnectWise Company ID.
   - **User** and **Password** of your ConnectWise Integrator Account.
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 created in ConnectWise each time the percent of computers inside a managed company on which the same malware has been detected exceeds the defined threshold. The threshold represents a percentage of total number of endpoints under a managed company.
     - **Blocked URLs**. This type of ticket is created in ConnectWise when a protected computer is trying to access a web address specifically blocked by the security policy.
     - **Outdated clients**. This type of ticket is created when the percentage of outdated clients within a managed company has exceeded the defined threshold. The

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

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

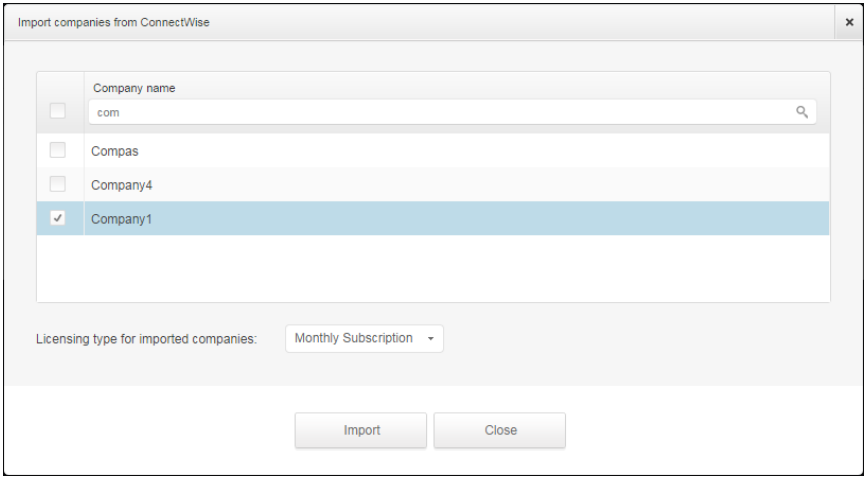
**Important**
For the ticketing service to work, you have to enable the Service Ticket API in your ConnectWise Integrator Account.

- **Send billing information** option enables Bitdefender to report the number of active protected endpoints for each managed company. For the billing service to work, you have to provide the following data:
  - **Solution name**: enter the name of the previously defined Management IT Solution.
  - **Level and Type**: enter the Level and Type IDs specified with the previously defined Cross-Reference.

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

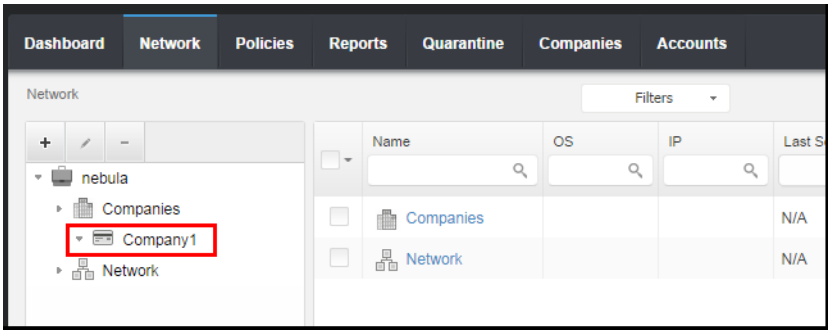
**Important**
For the billing service to work, you have to enable the Managed Services API in your ConnectWise Integrator Account.

7. Click **Save**. Wait until Bitdefender Control Center connects to ConnectWise with the provided credentials.
8. As soon as the connection with ConnectWise has been established, the wizard will load all your managed companies. Import to Bitdefender Control Center the list of companies that you want as follows:
   a. Select the companies that you want to import. Use the search box to easily find the company that you want.
   b. Choose the **Licensing type** for imported companies. Each company under Bitdefender Control Center must have the licensing option filled in. You can opt between the following license types:
      - **Trial**. In this case, a 30 days trial license key is automatically assigned to each imported company.
      - **Monthly Subscription**. In this case, 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.

9. Click **Import**. Wait until 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.




**Important**
To successfully map your managed companies between Bitdefender Control Center and ConnectWise, the Companies API must be enabled in your ConnectWise Integrator Account.

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 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 when 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, select its checkbox and click the − **Delete** button at the right 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:

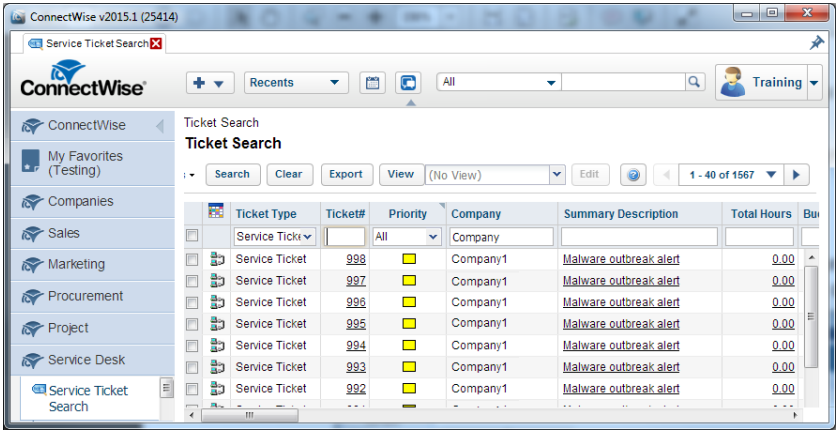
1. The Service Ticket API has been enabled in your ConnectWise Integrator Account.
2. At least one ticket type has been enabled and configured as required in the ConnectWise integration wizard.
3. Endpoint Security (the client security software) has been installed on your managed companies endpoints.

**Important**
For the Service Ticket API you must also set the Service Board to **Professional Services** to be able to manually close the tickets.

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

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.

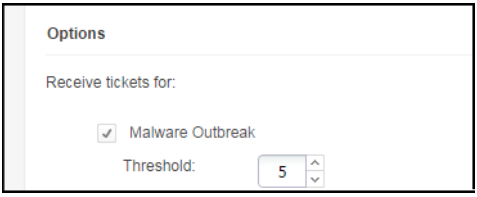


## 5.1. Malware Outbreak Tickets

A malware outbreak ticket is created in ConnectWise for a managed company when the percentage of endpoints on which the same malware has been detected exceeds the defined threshold.

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

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




**Note**
Another malware outbreak ticket for the same virus can be generated if that virus is still detected in the same network after 24 hours since the first ticket was raised.

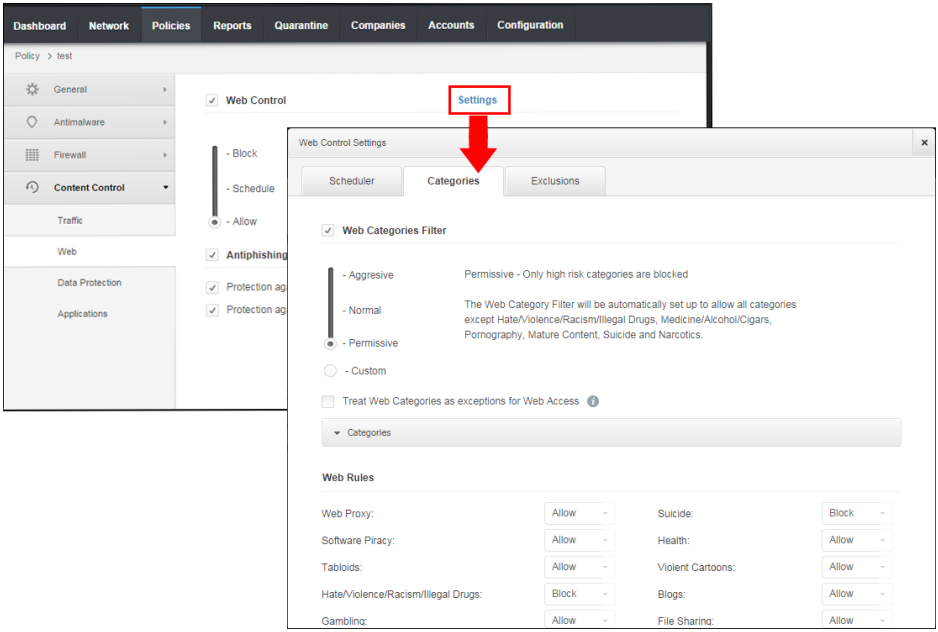
## 5.2. Blocked URLs Tickets

Blocked URLs tickets are automatically created when a protected computer inside a managed company is trying to access a web address which is blocked by the security policy. A blocked website ticket is created only once for the same domain.

**Important**
Bitdefender Control Center creates only one Blocked URLs ticket for the same web domain. When another URL path or sub-domain of the same domain is blocked again for a computer located in the same company, Bitdefender Control Center will not create a new ticket, even if the previous ticket had been closed.
New Blocked URLs tickets can be created only for other domains blocked by the computer policy.

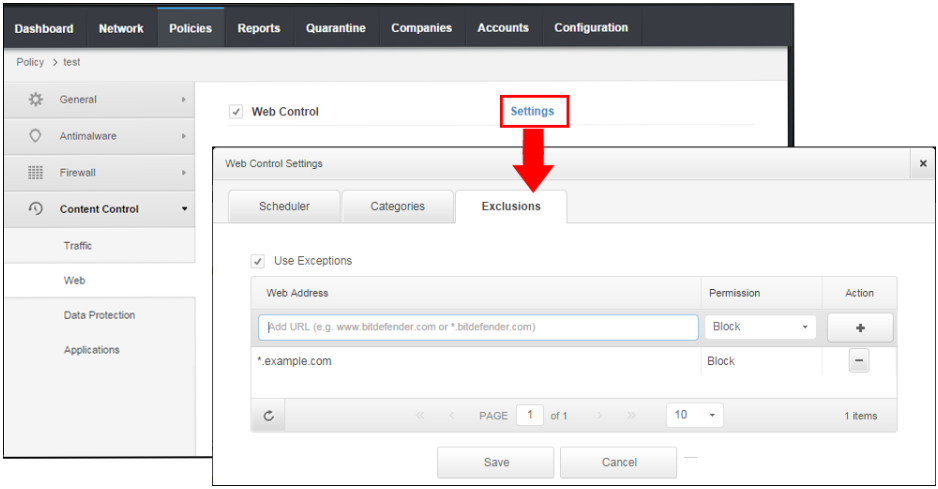
From Bitdefender Control Center, you can configure computer policies to block web traffic by categories and also by specific URLs.

- **Blocking website categories**. To view the policy web control settings open a computer policy template 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.




For example, if you assign the protected endpoints with a policy which is blocking social network websites, and one computer is trying to access `linkedin.com`, a ticket will be created in ConnectWise for the company where this computer is located. The ticket description will specify that a URL as been blocked for `linkedin.com` domain.

- **Blocking specific URLs**. You can also configure computer policies to block specific URLs, by enabling web exceptions and adding the specific URLs that you want to block. To do that, open the computer policies, go to **Content Control > Web > Web Control Settings > Exclusions** and make the necessary settings.




## 5.3. Outdated Clients Tickets

Outdated Clients tickets are created when the percentage of outdated clients within the managed network has exceeded the defined threshold.

Bitdefender Control Center reports that the Endpoint Security client is outdated if either the product or the virus signatures have not been updated in the first 24 hours after the 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 be automatically created 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. Once the billing integration has been enabled, Bitdefender Control Center sends the number of active computers protected with Endpoint Security to the configured ConnectWise server. An Endpoint Security client is considered active only if it had connected to Bitdefender Control Center at least once in the current month.

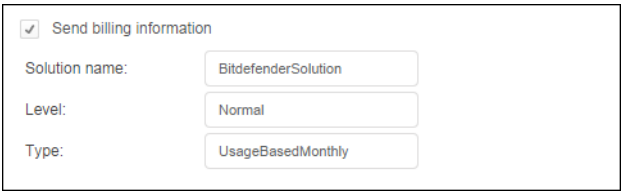
For the billing service to work, the following conditions must be fulfilled:

1. The Managed Services API has been enabled in your ConnectWise Integrator Account.
2. A pricing model has been defined in ConnectWise for each managed company. To learn more, refer to the Define ConnectWise Billing Settings chapter.
3. The billing service has been enabled and configured as required in the ConnectWise integration wizard.

**Important**

For the billing service to work, make sure to input correctly the required data in the ConnectWise integration settings. Please mind that the entries are case sensitive:

- **Solution Name**: the Management IT Solution name.
- **Level and Type**: the IDs of the Level and Type specified with the defined Cross-Reference.



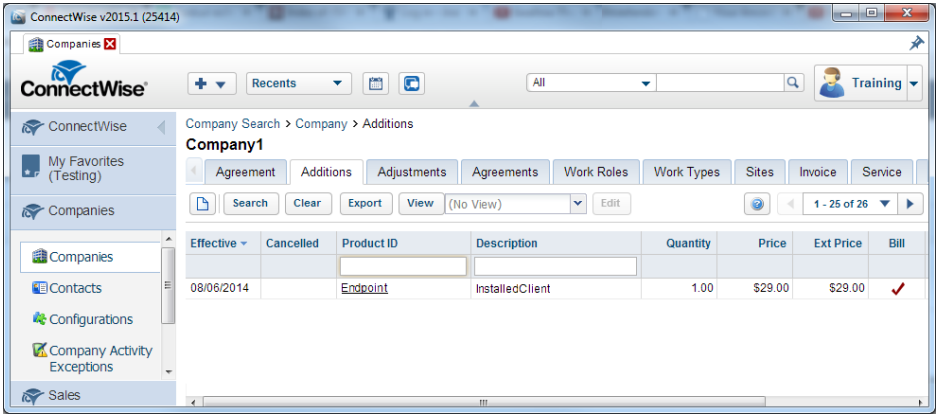

4. Managed companies are licensed with a monthly subscription.

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

To view the usage records of a company in ConnectWise:

1. Go to **Companies > Companies** and search for the company you are interested in.
2. Click the company's name.

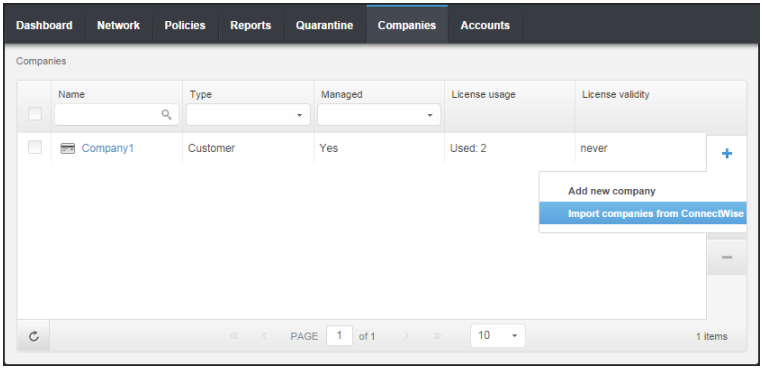
3. Go to the **Agreements** tab.
4. Click the previously created **Agreement Type**.
5. Go to the **Additions** tab.



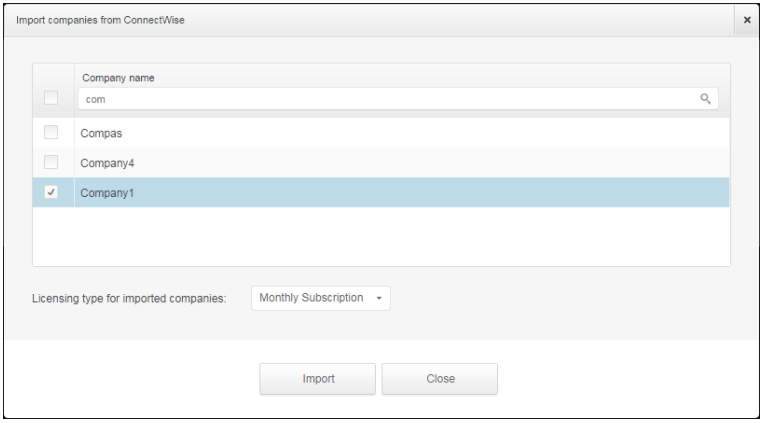
# 7. Managing ConnectWise Companies in Bitdefender Control Center

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

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. Any time you need, in the **Companies** page of the Bitdefender Control Center:
   a. Log on to Bitdefender Control Center using your partner credentials.
   b. Go to the **Companies** page.
   c. Click the + **Add** button at the right side of the table.




   d. Click **Import companies from ConnectWise**. Wait until Bitdefender Control Center retrieves information from ConnectWise.
   e. A new window will open, displaying all your managed companies from ConnectWise. 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**. In this case, a 30 days trial license key is automatically assigned to each imported company.
      - **Monthly Subscription**. In this case, 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.