
Integrating ConnectWise Service Desk Ticketing with the Cisco OnPlus Portal

This Application Note explains how to configure ConnectWise PSA (Professional Service Automation) application settings and Cisco OnPlus Portal settings so that ConnectWise service tickets can be created automatically, based on events that are monitored through the Cisco OnPlus Portal. It also provides instructions for configuring ConnectWise API settings so that configuration information for OnPlus-discovered devices can be viewed in ConnectWise.

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ConnectWise Version Compatibility

ConnectWise version 2011.2 (10667) has been tested with the Cisco OnPlus Portal. For more information, see www.connectwise.com.

IMPORTANT When setting up ConnectWise integration, if you are using a self-hosted server, your ConnectWise server must have SSL enabled using a signed certificate.

Configuring Settings in ConnectWise

Follow the procedures in this section to configure settings within the ConnectWise application to enable integration with the Cisco OnPlus Portal for service ticketing and viewing information for OnPlus discovered devices within ConnectWise.

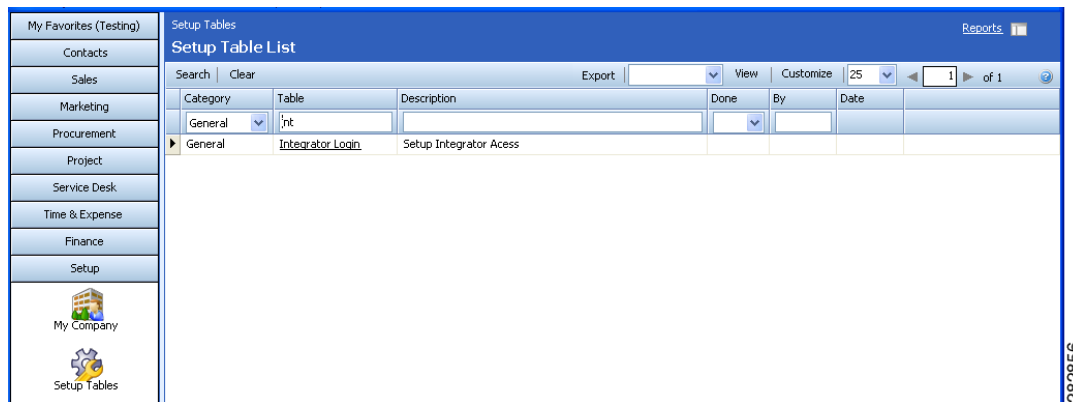
- [Setting up the Integrator Login in ConnectWise, page 2](#)
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Setting up the Integrator Login in ConnectWise

ConnectWise PSA administrators can assign permission to integrators. The PSA administrator must set up a master username and password and enable access to the APIs by an integrator.

Integrators can be allowed access to all objects or just to the objects that they have created themselves.

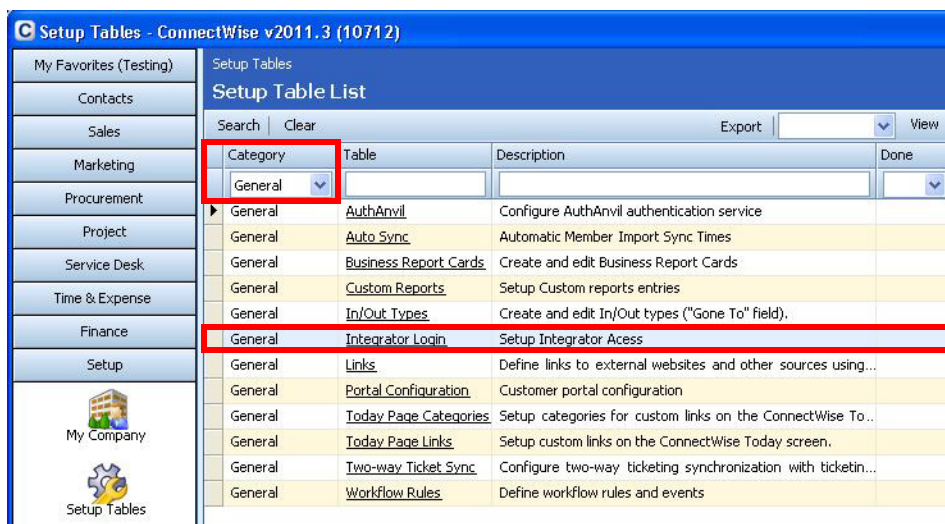
For ConnectWise, these permissions are set from the Integrator Login setup page in the Setup Tables area (**Setup > Setup Tables**), as shown below.



Follow these steps to allow integrator permissions for Cisco OnPlus.

STEP 1 Log in to ConnectWise and go to **Setup > Setup Tables**.

STEP 2 Filter the list so that it shows the **General** category, then click **Integrator Login**.



STEP 3 Configure the following settings on the Integrator Login page:

- In the **Username and Password** fields, enter the username and password you use to log in to your ConnectWise site.
- Set the **Access Level** to "Records created by integrator."

STEP 4 Under **Enable Available APIs**, specify these settings:

Application Note

- Ensure that, at a minimum, the following APIs are enabled:
 - Service Ticket API
 - Managed Services API
 - Company API
 - Product API
 - Reporting API
 - Configuration API
- Under Service Ticket API, set **Service Board** to “Professional Services.”
- In the **Ticket Callback URL**, enter <https://www.cisco-onplus.com>.

STEP 5 Click **Save**.

Configuring Required API Information in ConnectWise for Viewing OnPlus Discovered Devices

To create the OnPlus Discovered Devices setting in ConnectWise, go to **Setup > Setup Tables > Search** and click the **Configuration** table.

STEP 1 From the Configuration Type page, click the New Item icon and enter the following text in the **Configuration Type** text box, exactly as it appears below:

OnPlus Discovered Device

STEP 2 Click the Save icon to save the configuration type and to open a page from which to add items to the configuration type.

NOTE Four items must be added to the OnPlus Discovered Device configuration type. The Question field for each of these items must be entered exactly as shown below:

- MAC Address
- Device Type
- Device PID
- Serial Number

- STEP 3** Click the New Item icon that is located to the left of the Search button and enter the following information for each of the four configuration items:
- Line Number: (This field is auto-generated)
 - Question: MAC Address
 - Type of field for answer: Text
 - Method of entry: Entry Field
 - Click the **Save** icon.
 - Repeat Step 3 until all four items have been entered in the Question field.
- STEP 4** Click the **Go Back** icon to view the list of items you have entered.

After you have configured settings on the portal, you will be able to view configuration information for the devices discovered via the OnPlus portal. See [Viewing OnPlus Discovered Devices in ConnectWise, page 14](#).

Creating Workflow Rules to Set Ticket Severity Level

In ConnectWise, you can set the ticket severity level by creating workflow rules using information provided in the Ticket Title or Description.

From the ConnectWise Home page click **Help**. From the ConnectWise University home page, enter Workflow Rules Setup Table in the Search window and click **Search**.

Setting Up a Company ID in ConnectWise for Each Customer

To be able to create ConnectWise ticket requests automatically from the OnPlus Portal, you must set up a Company ID in the ConnectWise client for each of your customers on the Cisco OnPlus Portal for which you want to enable this feature.

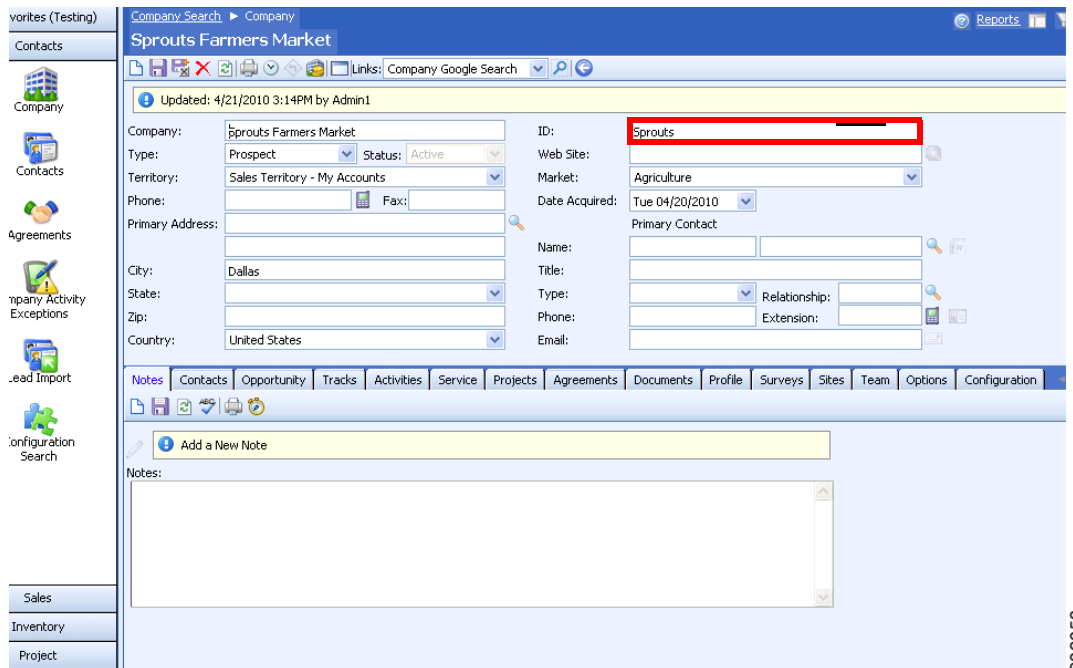
- STEP 1** To create a company in ConnectWise, go to **Contacts > Company** and click the **New Item** icon.
- STEP 2** To search for an existing customer, go to **Contacts > Company** and click the **Search** button.

Application Note

Make sure that a **Company ID** is configured for each of your customers. Refer to the ConnectWise documentation for more information about this setting.

STEP 3 Record the **Company ID** for each customer, since you must enter it into the ConnectWise service on the Cisco OnPlus Portal.

A sample ConnectWise screen showing the location of the **Company ID** field is shown below.



The screenshot displays the 'Company Search' interface for 'Sprouts Farmers Market'. The 'Company ID' field is highlighted with a red box and contains the value 'Sprouts'. Other fields include 'Type: Prospect', 'Status: Active', 'Territory: Sales Territory - My Accounts', 'Market: Agriculture', 'Date Acquired: Tue 04/20/2010', 'City: Dallas', 'State: ', 'Zip: ', 'Country: United States', 'Web Site: ', 'Primary Contact: ', 'Name: ', 'Title: ', 'Type: ', 'Relationship: ', 'Phone: ', and 'Extension: '. The interface also shows a 'Notes' section with an 'Add a New Note' button and a 'Configuration Search' section.

Configuring Settings on the Cisco OnPlus Portal

Follow the procedures in this section to configure settings on the Cisco OnPlus Portal to enable integration with ConnectWise for service ticketing:

- [Creating a Delivery Contact for ConnectWise Ticketing, page 7](#)
- [Adding and Configuring the ConnectWise App on the Portal, page 7](#)
- [Creating Delivery Rules for ConnectWise Ticketing, page 10](#)

Creating a Delivery Contact for ConnectWise Ticketing

Before you add the ConnectWise application, you must create a global delivery contact to use for delivering notifications to ConnectWise.

- Although you can use an existing contact, we recommend that you create a contact to use specifically for ConnectWise ticketing. The ConnectWise contact is a global contact that is used for all of your customers that have the ConnectWise application installed.
- You should always create the global contact before you add the application and create notification delivery rules that use the contact.

To create a new global delivery contact, follow these steps.

STEP 1 Log in to the Cisco OnPlus Portal and choose **Notifications > Delivery Contacts**.

STEP 2 Complete the required fields and click **Save**.

IMPORTANT When creating a delivery contact for ConnectWise, make sure that the **Customer** field in the Add Delivery Contact dialog box is set to **None** to make it a global contact.

For a Customer Account, the Customer field does not appear on the screen.



The screenshot shows a light blue dialog box with four fields. The first field is 'Email Address' with a text input box. The second field is 'Alternate Email Address' with a text input box. The third field is 'Customer' with a dropdown menu showing 'None'. The fourth field is 'Preferred Language' with a dropdown menu showing 'English'.

STEP 3 Click **Save**.

Adding and Configuring the ConnectWise App on the Portal

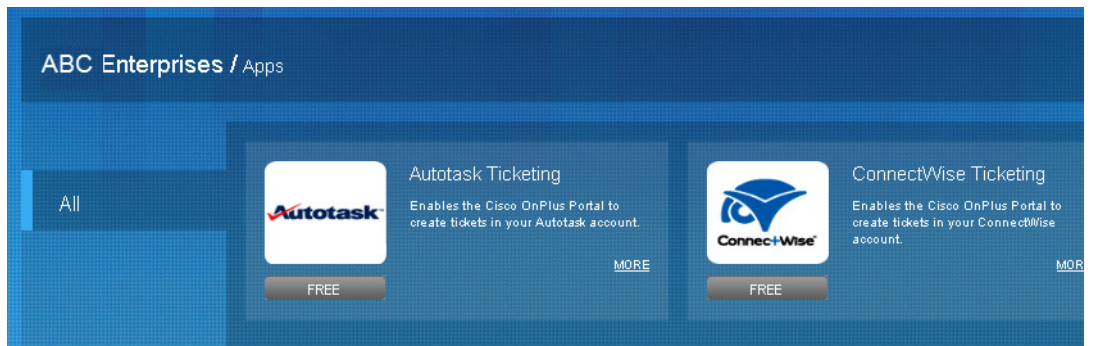
To add and configure ConnectWise integration for a customer, follow these steps.

STEP 1 For a Customer Account, from the Dashboard page on the portal, choose Apps.

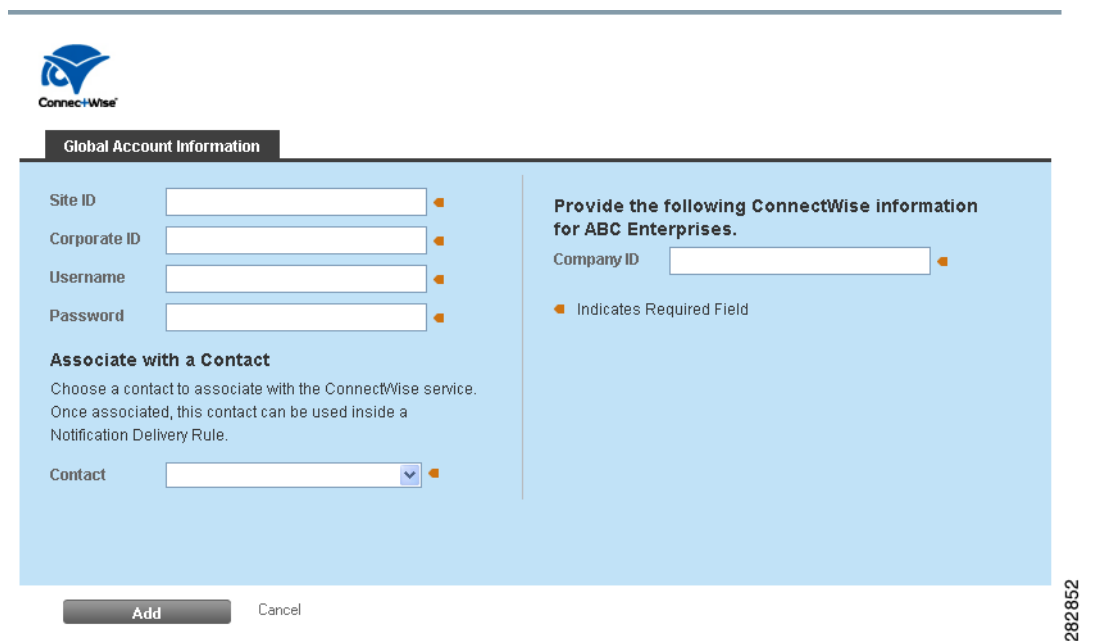
Application Note

For a Partner Account, from the Overview page on the portal, choose a customer for which you want to configure the ConnectWise application, and choose **Apps**.

- STEP 2** Click **All** to display the available applications, locate the **ConnectWise** application, and click **Free**.



The **Add App** dialog box window appears.

A screenshot of a "Global Account Information" dialog box. The dialog has a light blue background and a dark blue header with the ConnectWise logo. The "Global Account Information" section contains several input fields: "Site ID", "Corporate ID", "Username", and "Password", each with a small orange square icon to its right. Below these is a section titled "Associate with a Contact" with a dropdown menu for "Contact". To the right, there is a section titled "Provide the following ConnectWise information for ABC Enterprises." with a "Company ID" input field and a legend indicating that the orange square icon means "Indicates Required Field". At the bottom of the dialog are "Add" and "Cancel" buttons. A vertical text "282852" is visible on the right side of the dialog.

- STEP 3** In the **Global Account Information** section, enter the following information:

NOTE If you have added the ConnectWise application previously, check the **Make Changes** option to make the fields editable.

- **Site ID:** ConnectWise Site ID (for example, test.connectwise.com). This URL is provided by ConnectWise.

- **Corporate ID:** ConnectWise account login (the value that you enter in the Company ID field when you log in to ConnectWise).
- **Username, Password:** ConnectWise username and password.
This is the same username and password you configured for the Integrator Login within ConnectWise. These are the credentials you use when logging in to your ConnectWise site.
- In the **Associate with a Contact** area, choose a contact to associate with the ConnectWise application on the portal.

Once you have set the **Global Account Information** for one customer, it is used for all customers that have the ConnectWise application enabled.

STEP 4 In the **Company ID** field, enter the ConnectWise company ID that you configured in ConnectWise (**Contacts > Company**), as shown below.

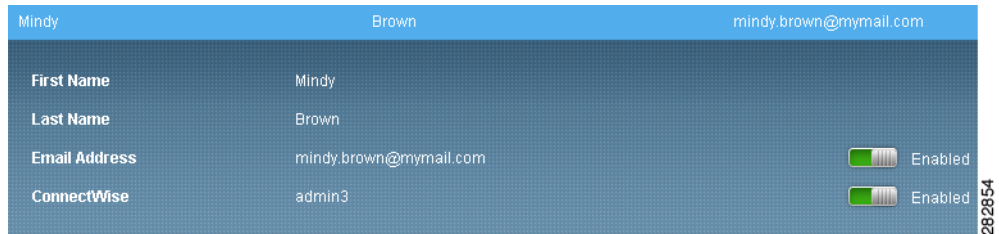
The screenshot displays the 'Company Search' interface for 'ABC's Store'. The 'ID' field is highlighted with a red box and contains the value 'abc123'. A red arrow points from this field to the 'Update App' dialog box. In the dialog, the 'Global Account Information' section is expanded, and the 'Company ID' field is highlighted with a red box and contains the value 'abc123'. A message above the field says 'Provide the following ConnectWise information for ABC's Store.' Below the field, it says 'Indicates Required Field'. Other fields in the dialog include Site ID, Corporate ID, Username, Password, and Associate with a Contact.

STEP 5 Click **Add**.

If the application is added successfully, the ConnectWise app appears on the list of **Installed** applications.

Application Note

The ConnectWise user credentials are linked to the contact you specified in the Add App dialog box. A ConnectWise delivery method is added to the contact's information so that you can enable or disable service ticket generation. When you first associate the contact and add the application, it is enabled.



The screenshot shows a contact configuration page for 'Mindy Brown' with email 'mindy.brown@mymail.com'. The 'ConnectWise' field is set to 'admin3' and is enabled, indicated by a green toggle switch and the word 'Enabled'.

Mindy Brown		mindy.brown@mymail.com	
First Name	Mindy		
Last Name	Brown		
Email Address	mindy.brown@mymail.com	<input checked="" type="checkbox"/>	Enabled
ConnectWise	admin3	<input checked="" type="checkbox"/>	Enabled

Creating Delivery Rules for ConnectWise Ticketing

To begin creating Service Tickets remotely, you must create a notification delivery rule to specify events that will generate a ConnectWise service ticket and choose the configured ConnectWise contact as the target for the delivery rule.

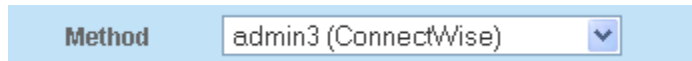
Make sure that you have set up device monitors so that events are generated for the type of conditions that you want to use to create service tickets. By default, only the Cisco OnPlus Network Agent is monitored. For example, you may want to monitor and create tickets for Device Offline events or events of a specific severity level.

Follow these steps when creating notification rules for creating ConnectWise service tickets.

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- STEP 1** Log in to the Cisco OnPlus Portal, and choose **Notifications > Delivery Rules**.
 - STEP 2** Click the **+ Add Delivery Rule** button.
 - STEP 3** For a Partner Account, choose a customer from the drop-down list.
Note: There is no Customer drop-down list for a Customer Account.
 - STEP 4** You can choose a severity level or specify the type of event that will trigger the creation of an ConnectWise service ticket.
 - STEP 5** In the **Contact** field, choose the contact that is associated with the ConnectWise application. If you need to look up the Contact that is used for ConnectWise, you can open the ConnectWise configuration details from the Apps page on the portal.

- STEP 6** Once you choose the Contact, select the ConnectWise user from the **Method** drop-down menu. The ConnectWise user is identified by the format “<username> (ConnectWise)” in the list.

The following example shows the ConnectWise user being selected as the Method when creating a delivery rule.

A screenshot of a web interface showing a dropdown menu. The label 'Method' is on the left. The dropdown box contains the text 'admin3 (ConnectWise)' and a small downward-pointing arrow on the right side.

If none of the Methods in the list display this information, it means that you selected a contact that is not associated with the ConnectWise user.

- STEP 7** Click **Save**.

Generating a Test Event, Notification, and Service Ticket

Follow these steps to:

- Create an example delivery rule.
- Associate that rule with your ConnectWise delivery contact and method.
- Use the Test Monitor feature to generate an event that matches the criteria for event notifications specified in the delivery rule.
- Verify that the event notification was sent to ConnectWise.

-
- STEP 1** Log in to the Cisco OnPlus Portal, and choose **Notifications > Delivery Rules**.

- STEP 2** Click the + **Add Delivery Rule** button.

- STEP 3** From the **Customer** drop-down menu, choose **All** from the drop-down list.

Note: There is no Customer drop-down list for a Customer Account.

- STEP 4** For the **Severity** level, choose **Warning**.

- STEP 5** For the **Contact**, choose the ConnectWise delivery contact.

- STEP 6** For the **Method**, choose the delivery method you defined for the ConnectWise delivery contact.

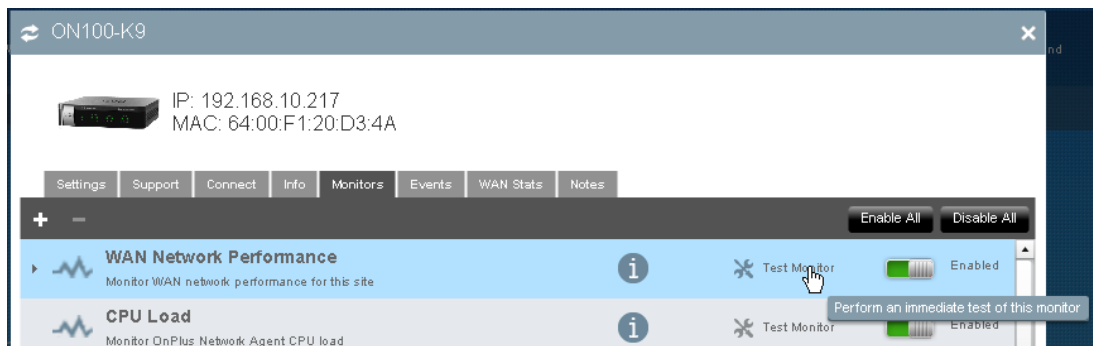
- STEP 7** Click **Save**.

Application Note

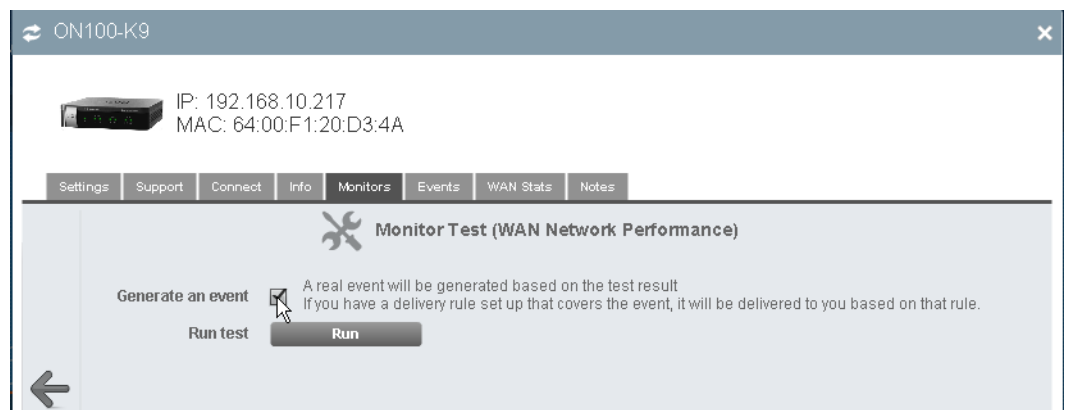
- STEP 8** From the Overview menu, click on one of your Activated, Online customers with the ConnectWise application installed.
- STEP 9** In the Topology view, locate the customer's OnPlus Network Agent, and open the Device Information window.
- STEP 10** In the Device Information window for the OnPlus Network Agent, click the Monitors tab.

The first monitor in the list is the WAN Network Performance monitor.

- STEP 11** Click the **Test Monitor** icon to the right of the WAN Network Performance monitor.

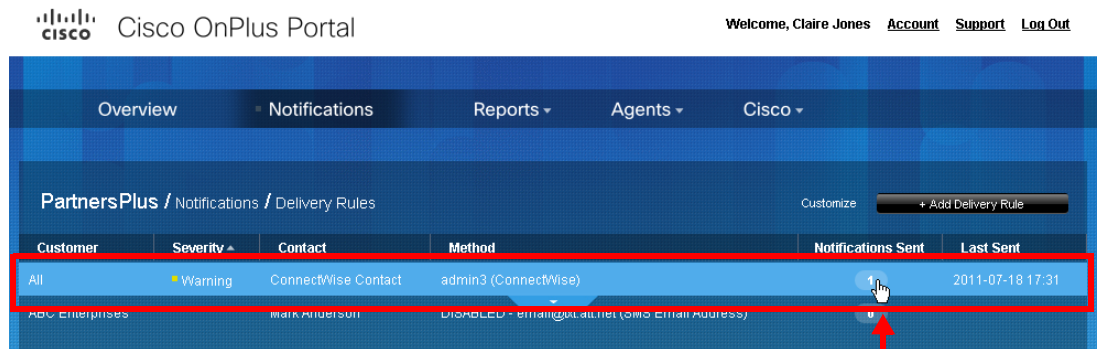


- STEP 12** Enable the **Generate an event** option.



- STEP 13** Click **Run**. The test event will generate a notification because a Warning event is generated by the test (the default severity level of the WAN Network Monitor event is Warning).
- STEP 14** After a few minutes, then go back to the Overview page and choose **Notifications > Delivery Rules**.

STEP 15 Locate the delivery rule you created for the ConnectWise test.



The screenshot shows the Cisco OnPlus Portal interface. The top navigation bar includes 'Overview', 'Notifications', 'Reports', 'Agents', and 'Cisco'. The main content area is titled 'PartnersPlus / Notifications / Delivery Rules'. Below this is a table with the following columns: Customer, Severity, Contact, Method, Notifications Sent, and Last Sent. The first row is highlighted with a red box and contains the following data: Customer: All, Severity: Warning, Contact: ConnectWise Contact, Method: admin3 (ConnectWise), Notifications Sent: 1, Last Sent: 2011-07-18 17:31. A red arrow points to the number '1' in the Notifications Sent column.

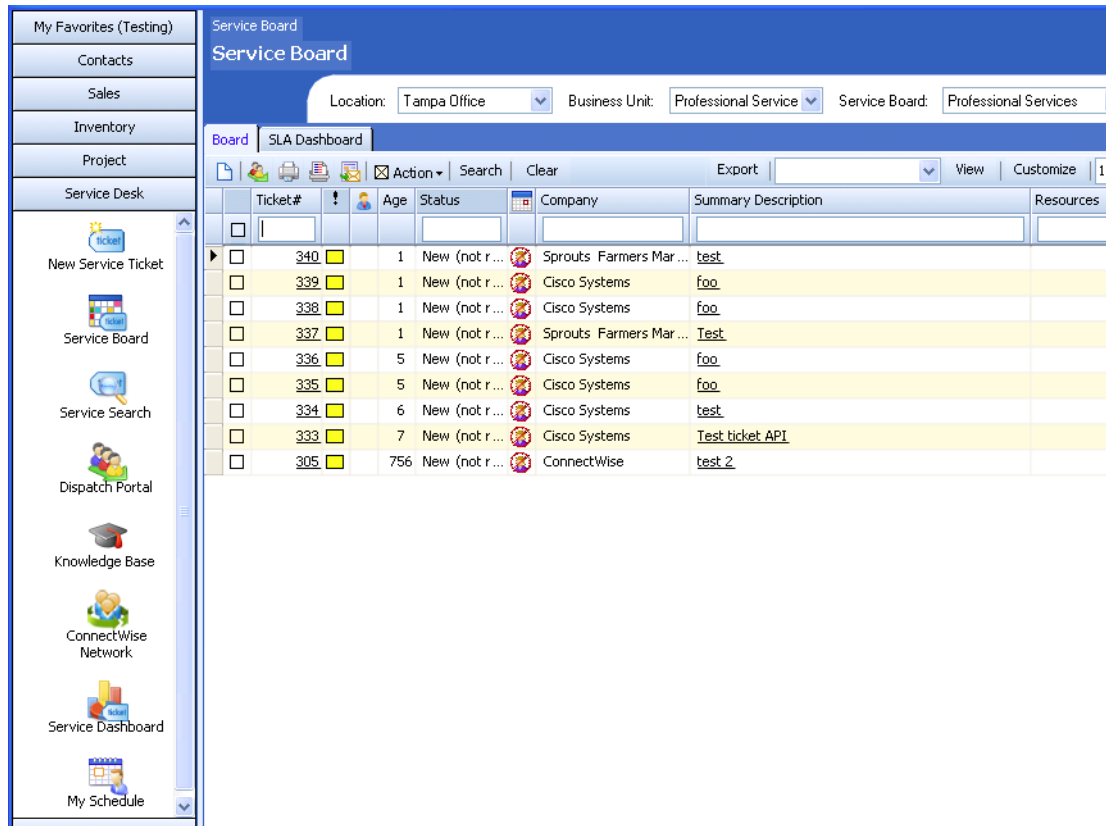
Customer	Severity	Contact	Method	Notifications Sent	Last Sent
All	Warning	ConnectWise Contact	admin3 (ConnectWise)	1	2011-07-18 17:31
ABC Enterprises		mark.anderson	DISABLED - email@outlook.com (only Email Address)		

Click on the number in the **Notifications Sent** column to see if the test event was generated as expected.

- Check the **Notifications Sent** column to see if the count increased as expected.
- Click on the number in the **Notifications Sent** column to view event details.
- Verify that the test event appears in the event list. Since it was just generated, it should be near the top of the list. If it is, then the notification was sent to ConnectWise.

Verifying Service Ticket Creation in ConnectWise

If the delivery rule and ConnectWise information are configured correctly for the customer, when the event occurs and the ticket is successfully created, it appears on the ConnectWise application under **Service Desk > Service Board**.



Viewing OnPlus Discovered Devices in ConnectWise

To view configuration information for OnPlus-discovered devices in ConnectWise, follow these steps.

- STEP 1** Log in to ConnectWise and go to **Contacts > Company**.
- STEP 2** Click **Search**.
- STEP 3** From the list of companies, click the Company Name for which you want to view a configuration.

STEP 4 From the company page, click the **Configuration** tab to display the configuration.

NOTE OnPlus discovered devices may take up to three hours to display in the Configuration Items upon adding the ConnectWise App.

Automated Ticket Resolution (Device Monitor Events Only)

ConnectWise service desk tickets that are created through notification delivery rules that are based on device monitors are automatically resolved in ConnectWise when the device monitor generates a subsequent recovery event. This feature applies to all device monitors except IP Change and WAN Network Performance.

For example, if you have created a notification delivery rule that creates a service desk ticket when the device monitor detects that the monitored host is down, a notification is sent to ConnectWise and a service desk ticket is created. If the device subsequently comes back up, the ConnectWise service ticket associated with that event is automatically marked Complete, and the Resolution field displays the device recovery event information.

Suspending Service Ticket Generation for All Customers

To temporarily suspend generation of service tickets through the portal for all customers, follow these steps:

STEP 1 On the Partner Account Overview page, choose **Notifications > Delivery Contacts**.

STEP 2 Select the contact associated with ConnectWise notification delivery.

STEP 3 Click the **Enable** button associated with the ConnectWise contact to toggle the setting to **Disabled**.

Since the ConnectWise contact is a global contact for all customers with the application installed, this suspends ConnectWise ticketing for all customers with the application.

Updating Global Account Information

To update ConnectWise Global Account Information, follow these steps.

-
- STEP 1** From the Partner Account Overview page, select a customer that has the ConnectWise application enabled and choose **Apps**.
 - STEP 2** In the **Installed** applications list, locate the ConnectWise application and click the **Edit**.
 - STEP 3** To modify Global Account Information, click the **Make Changes** option to make the fields editable.
 - STEP 4** Make your changes.
 - STEP 5** Click **Update**. The changes are applied to all customers with the ConnectWise application installed.
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Removing the ConnectWise App for a Customer

To remove the ConnectWise application for a specific customer, follow these steps.

-
- STEP 1** From the Partner Account Overview page, select the customer and choose **Apps**.
 - STEP 2** In the **Installed** applications list, locate the ConnectWise app and click **Remove**.
 - STEP 3** Click **OK** to confirm.
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Where To Go From Here

Cisco provides a wide range of resources to help you and your customer obtain the full benefits of the Cisco OnPlus Portal.

Support	
Cisco Small Business Support Community	www.cisco.com/go/smallbizsupport
Cisco Small Business Support and Resources	www.cisco.com/go/smallbizhelp
Phone Support Contacts	www.cisco.com/go/sbsc
Cisco Small Business Firmware Downloads	www.cisco.com/go/software
Product Documentation	
Cisco ON100 Network Agent	www.cisco.com/go/onplus-docs
Cisco OnPlus Portal	www.cisco.com/go/onplus-docs
Cisco Small Business	
Cisco Partner Central for Small Business (Partner Login Required)	www.cisco.com/web/partners/sell/smb
Cisco Small Business Home	www.cisco.com/smb

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