ConnectWise Guide

AppRiver services may be integrated with the ConnectWise® business management tool by following a few, simple steps. Once complete, AppRiver's billing system will work in tandem with ConnectWise agreements and additions. This capability will reduce the time that many of our partners spend manually entering billing adjustment information for customers into the ConnectWise interface based on usage changes initiated from the AppRiver portal.

Quick Links:

appriver
a zix company

Prerequisites

AppRiver Customer Portal – The ConnectWise feature must be enabled for your account. Login to the Customer Portal and verify the ConnectWise tab is visible in the Partner area. If not, please contact our Billing Department and request that ConnectWise be enabled for your account.

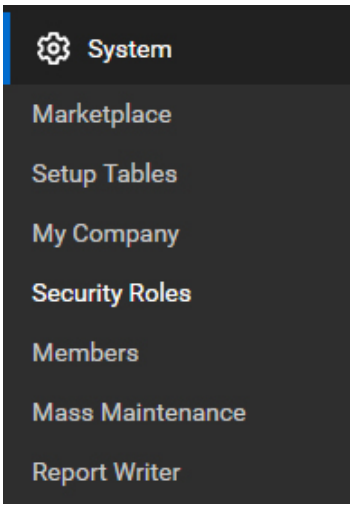
ConnectWise – You must have an active ConnectWise account. Version support valid for GA-1, GA, GA+1.

Overview

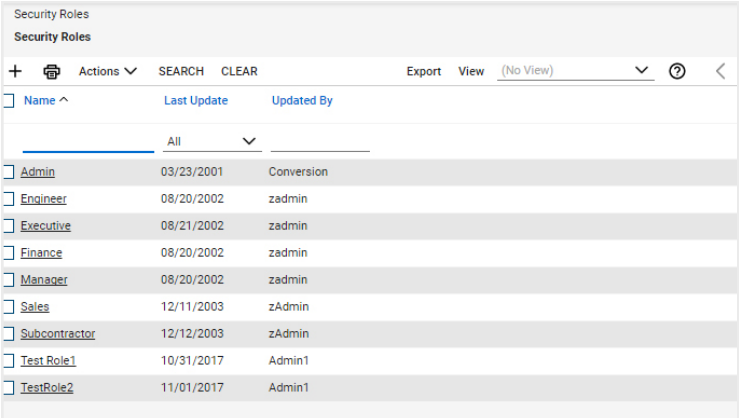
The ConnectWise and AppRiver interfaces need to be configured to work together. Once an API connection has been made between the two, charges and Customer accounts each need to be mapped between both systems. This guide provides a brief overview on connecting accounts and mapping both charges and customers. Additional guidance on AppRiver's interface may be obtained through AppRiver's Customer Portal or through your Channel Sales Advisor. Additional guidance for ConnectWise should be directed to ConnectWise.

Configure Initial Settings in ConnectWise Portal

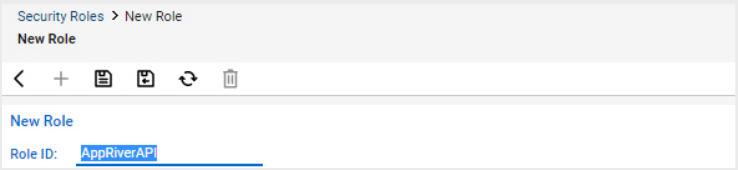
1. Visit connectwise.com/install. Download and install the ConnectWise Internet Client for Windows OS.
2. Login using your ConnectWise credentials.
3. On the left menu, **select System**, then **Security Roles**.



4. On the **Security Roles** page, click the **plus sign** (+) to create a security role.

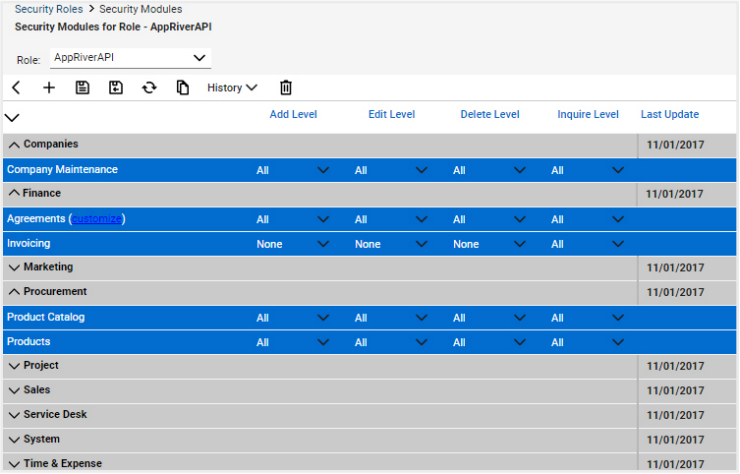


5. In the **Role ID field**, type **AppRiverAPI** and click the Save button.

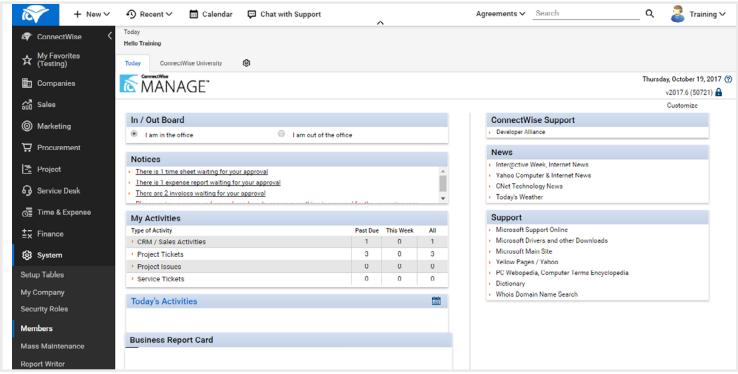


6. On the **Security Modules for Role page,** change the settings as shown below and then click the **Save** button.

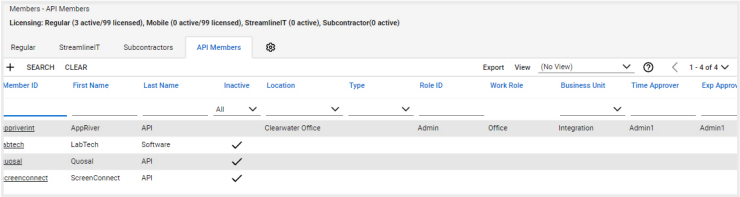
Security Role	Subcategory	Permission Level(s)	Setting
Companies	Company Maintenance	Add / Edit / Delete / Inquire	All
Finance	Agreements	Add / Edit / Delete / Inquire	All
Finance	Invoicing	Inquire	All
Procurement	Product Catalog	Add / Edit / Delete / Inquire	All
Procurement	Products	Add / Edit / Delete / Inquire	All



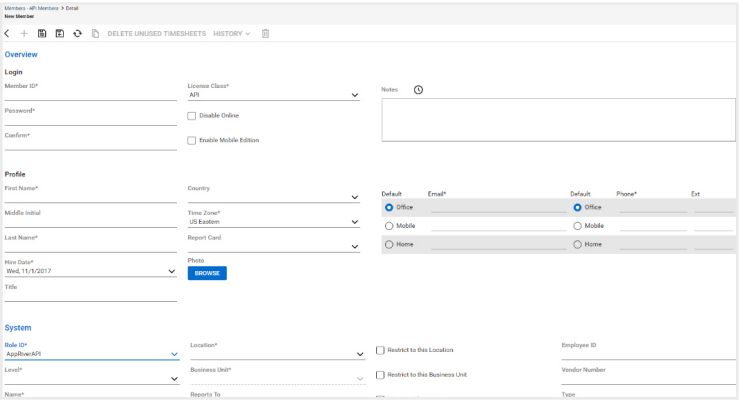
7. On the left menu, select **System**, then **Members**.



8. On the **Members** page, click the **API Members** tab and then click the **plus sign (+)** to create a new API Member.

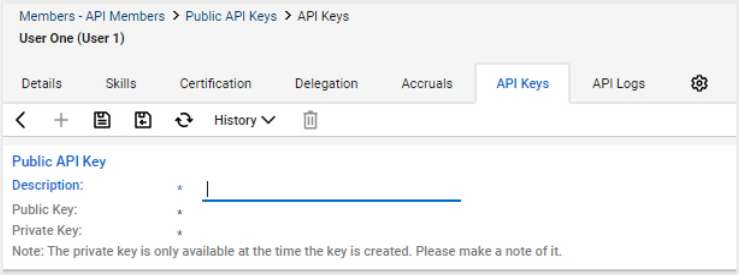


9. Create the new member profile by providing all required information. Ensure **Role ID** is set to **AppRiverAPI** as created previously.

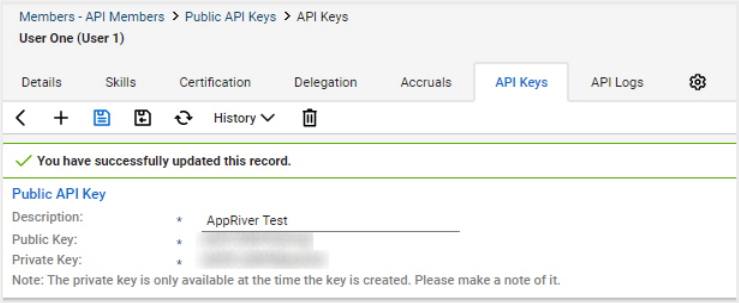


10. Once complete, click the **Save** button.

11. Click the **API Keys** tab, provide a description and click the **Save** button.



12. Both **Public** and **Private** keys will be shown – **copy** both for use later.



Note *– The Public key may be accessed at any time through the* ***API Keys*** *tab, but the Private key is only shown during initial key creation. Ensure keys are copied for use before proceeding.*

13. Configure your initial settings in the AppRiver Customer Portal.

Configure Initial Settings in AppRiver Customer Portal

1. Login to the AppRiver Customer Portal **Partner area**.
2. Select the **ConnectWise** tab.

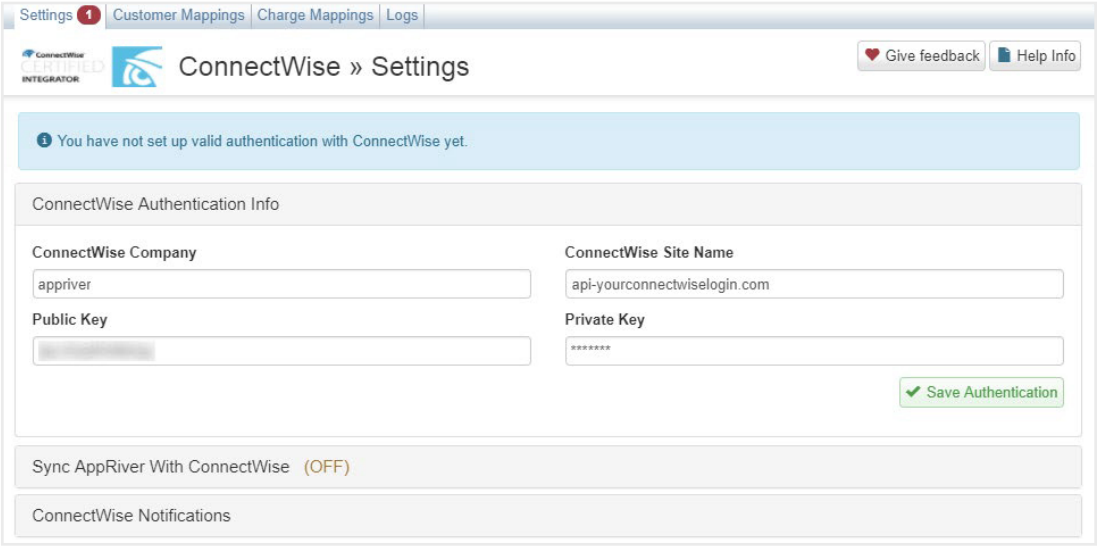
3. Under the **Settings** tab, select the **ConnectWise Authentication Info** accordion and provide the following information:

   Company – used to login to ConnectWise

   Site Name – URL for ConnectWise login

   Public Key – provided in ConnectWise initial configuration

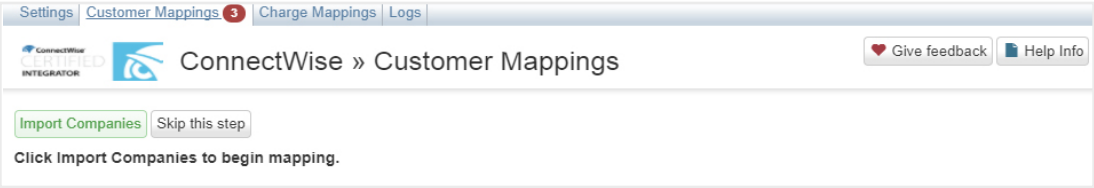
   Private Key – provided in ConnectWise initial configuration



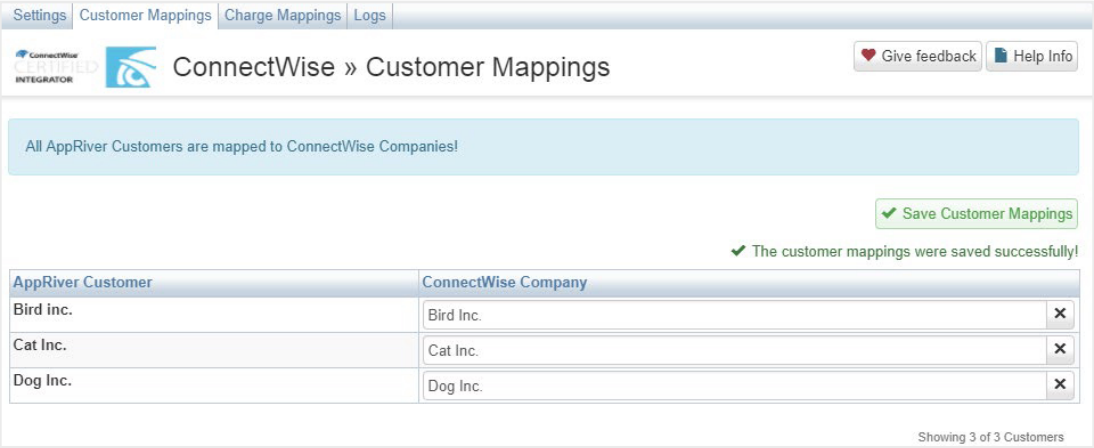
4. Click the **Save Authentication** button.
5. Proceed to map customers for your account.

Mapping Customers

1. In the AppRiver Customer Portal **Partner** area, select the **ConnectWise** tab.
2. Select the **Customer Mappings** section and click the **Import Companies** button to begin.



3. Corresponding companies from each system are automatically mapped and displayed. Any AppRiver customers that cannot be mapped will be displayed at the top of the table. Review the matches to ensure accuracy. If all customers have been properly mapped, click the **Save Customer Mapping** button and proceed to Step 5. To modify mappings, proceed to the next step.

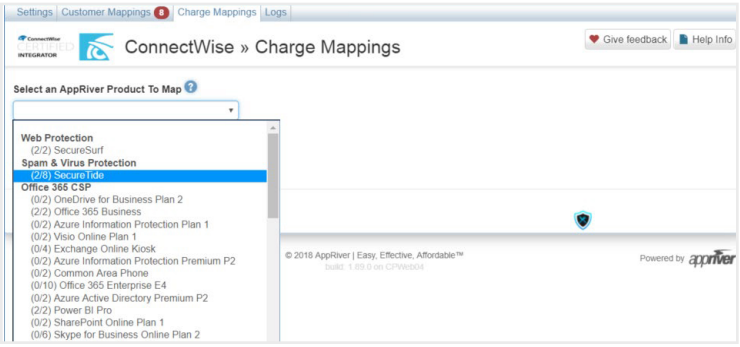


4. If a customer has been improperly mapped, or no mapping was found, click the ConnectWise Company field to select the corresponding **ConnectWise Company**. If no ConnectWise Company can be found, you will need to add it in ConnectWise. Click the **Save Customer Mappings** button when finished.
5. Proceed to map charges for your account.

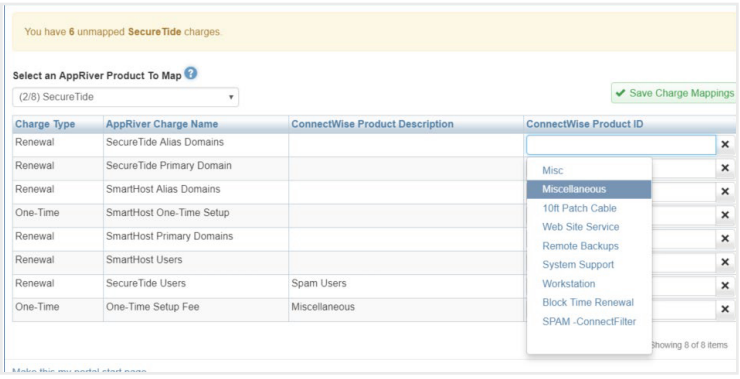
Mapping Charges

In order for AppRiver to accurately update charges to ConnectWise, a one-to-one mapping needs to be established between AppRiver service charges and products in your ConnectWise system. Complete the steps below for all AppRiver products you intend to sell. This process will only need to be performed once.

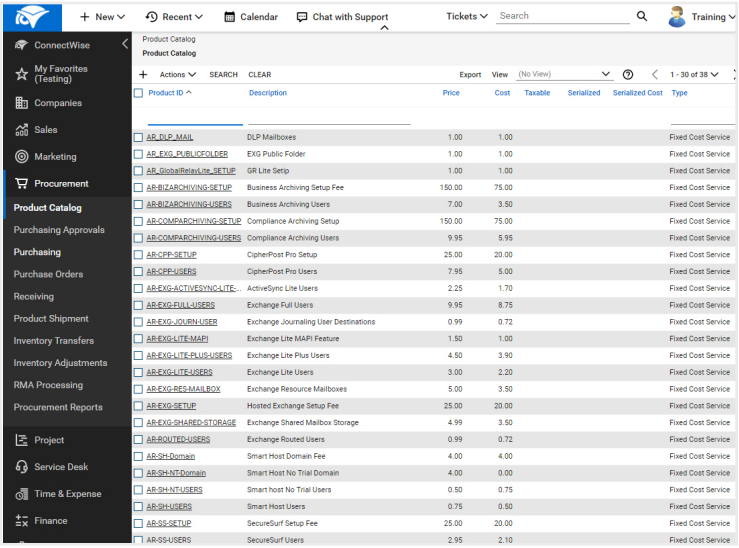
1. In the AppRiver Customer Portal **Partner** area, select the **ConnectWise** tab.
2. Select the **Charge Mappings** tab and select the applicable product from the dropdown menu.



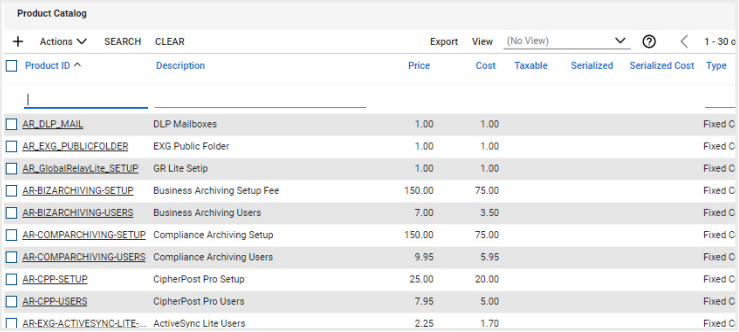
3. Select the correlating ConnectWise product description for each unmapped charge and click the **Save Charge Mappings** button when complete.



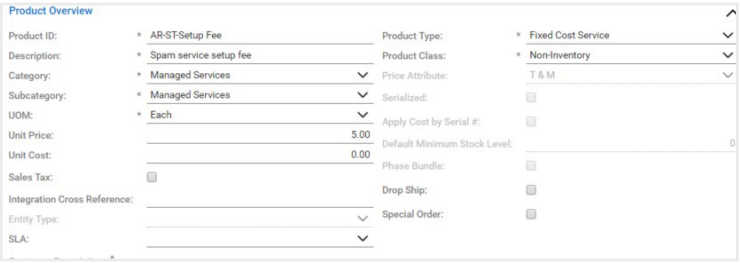
4. If a correlating ConnectWise product description cannot be found, you may need to add the product in the ConnectWise system.
5. In the ConnectWise portal on the left menu, select **Procurement**, then **Product Catalog**.



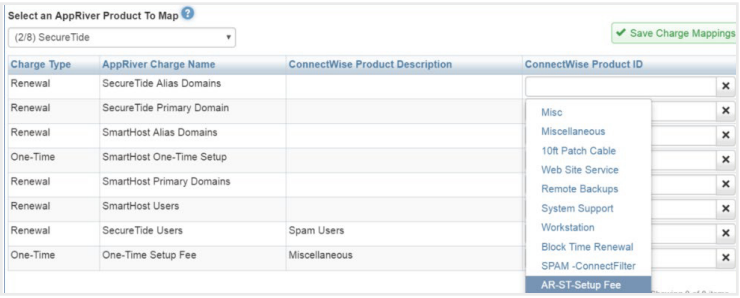
6. All ConnectWise products are listed. To add a new service charge, click the **plus sign** (+).



7. Provide all required information for the product service charge and click the **Save** button.



8. Return to the ConnectWise **Charge Mappings** tab in the AppRiver Customer Portal to map the added charge.



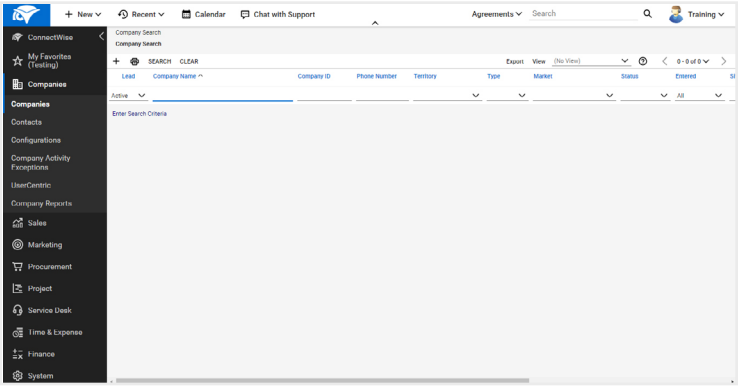
9. Click the **Save Charge Mappings** button to complete mapping.

10. Verify any associated Agreement Additions in ConnectWise.

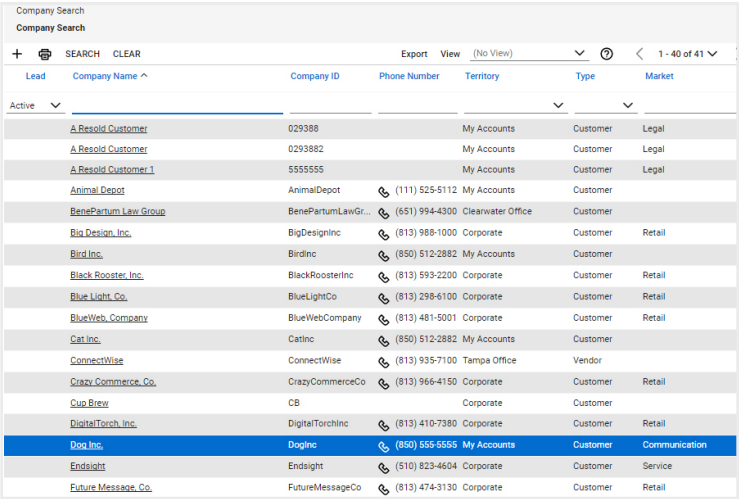
Verifying Agreement Additions in ConnectWise

Before you begin syncing charges from AppRiver to your ConnectWise system, it is important you verify that each company with existing AppRiver services has the appropriate Additions in their Agreement for the AppRiver services they are using. Complete the following steps for all companies with AppRiver services.

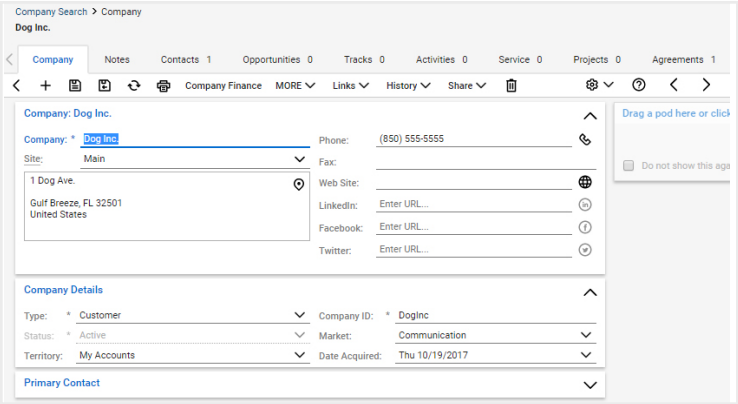
1. In the ConnectWise portal on the left menu, select **Companies**, then Companies and then click **SEARCH** to see a list of companies.



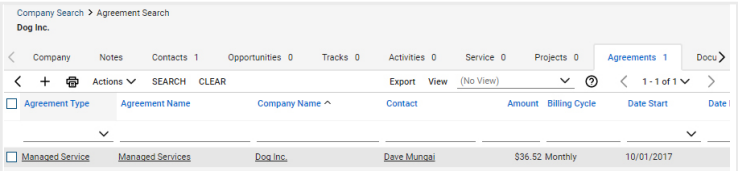
2. Select the customer to verify their specific Agreement Additions.



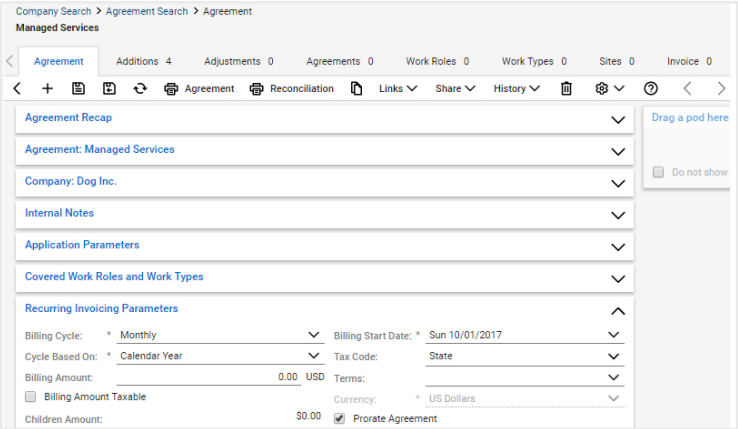
3. On the company page, select the **Agreements** tab.



4. On the **Agreements** tab, select the agreement.



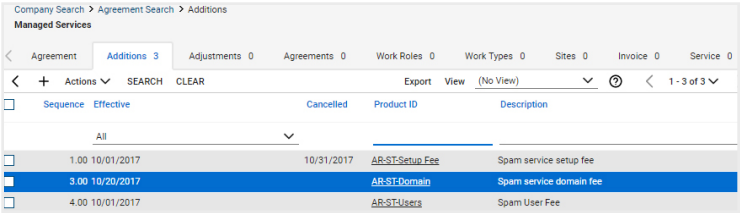
5. On the **Agreement** tab, scroll down to the **Recurring Invoicing Parameters** section and ensure Prorate Agreement is selected. Then click the **Additions** tab.



6. On the **Additions** tab, verify that the appropriate additions are listed for:

   One Time Charges – One time charges such as setup fees should be entered with an effective date of the 1st of the month and a canceled date of the last day of the month (for the month the charge is to bill). This will ensure that the full amount of the charge is billed to the customer (not prorated).

   Recurring Charges – Recurring charges such as user counts and domain fees should be entered with an effective date of when billing should begin but the canceled date should be left blank. These are the Additions that will be updated automatically as usage values are modified from the AppRiver portal.

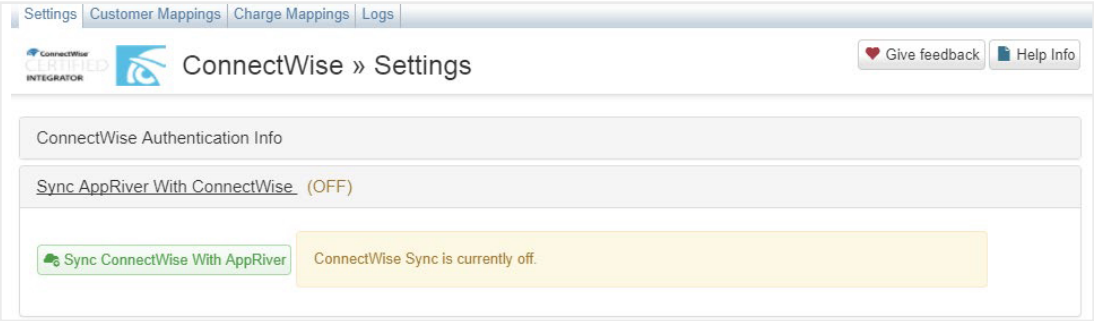


7. Once all Agreement Additions have been verified, proceed to the AppRiver Customer Portal to establish Adjustment Sync between the two services.

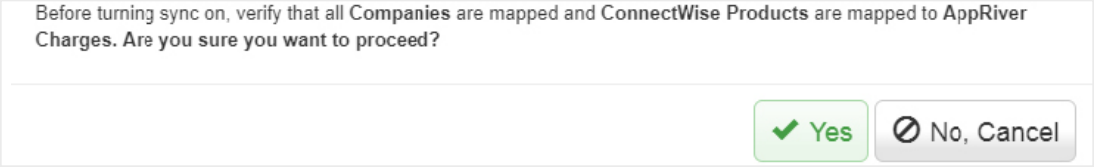
Establishing Adjustment Sync between AppRiver and ConnectWise

Once all account setups, customer mapping, charge mapping and agreement additions have been completed/verified, you can enable sync between AppRiver and ConnectWise. Once sync is enabled, all adjustment charges will be pushed to ConnectWise from that point forward.

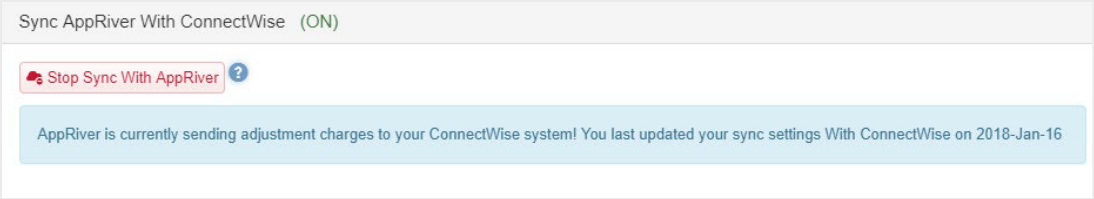
1. In the AppRiver Customer Portal **Partner** area, select the **ConnectWise** tab.
2. On the **Settings** tab, select the Sync AppRiver with ConnectWise accordion and click the **Sync ConnectWise With AppRiver** button.



3. Click the **Yes** button to proceed.



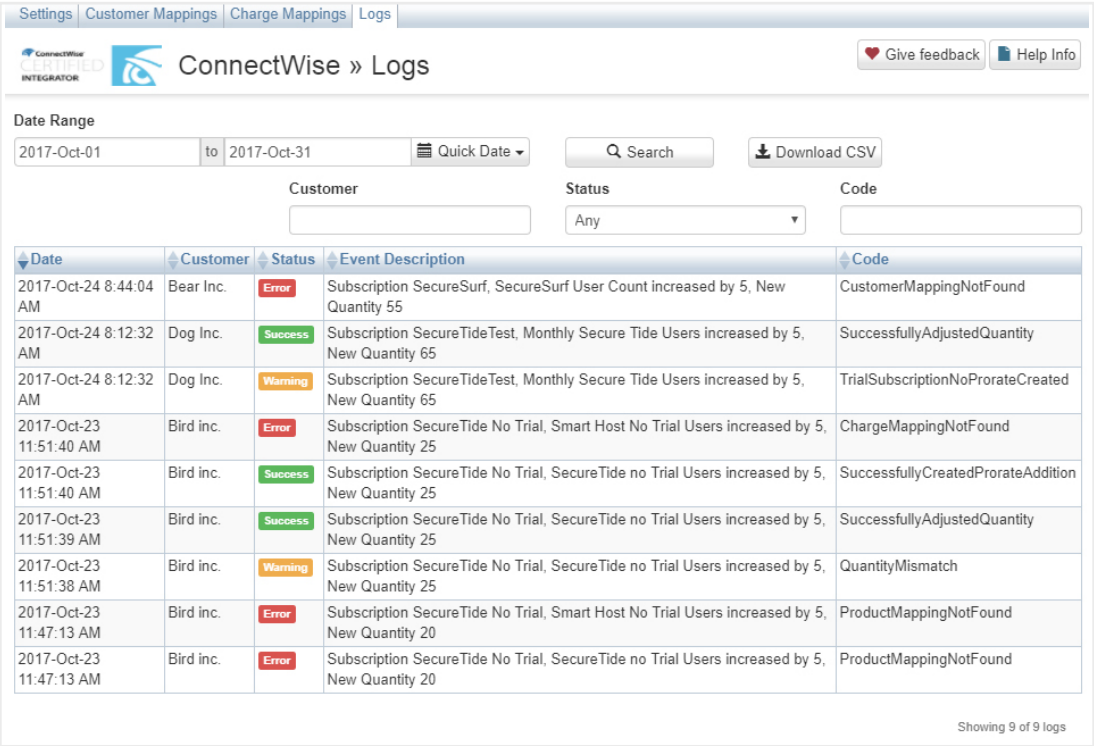
4. Once complete, AppRiver's adjustment charges will be synched with the ConnectWise system from that point forward. To stop sync between both systems, click the **Stop Sync With AppRiver** button.



5. 5. A full log of all sync events between both the AppRiver and ConnectWise systems is available under the **Logs** section.

Accessing Sync Logs

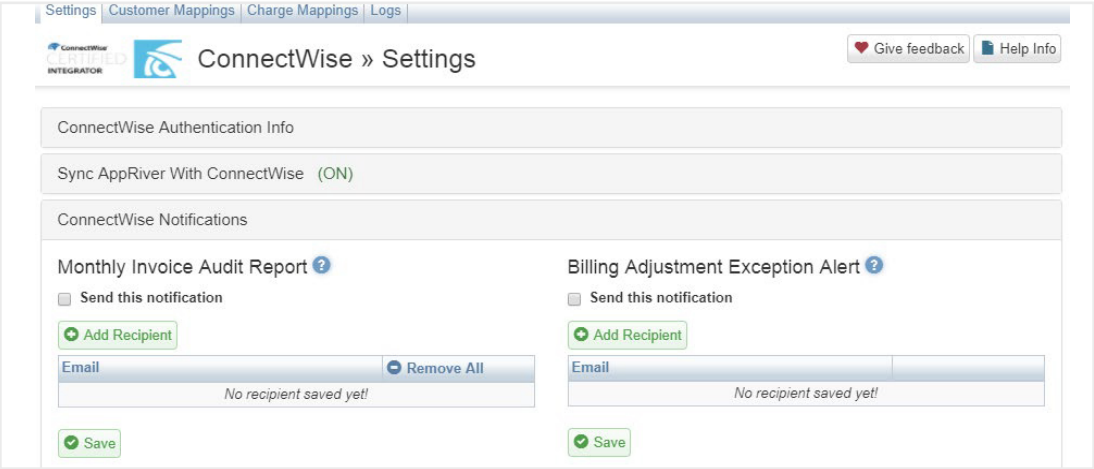
1. In the AppRiver Customer Portal **Partner** area, select the **Partner Management** tab, then ConnectWise.
2. Select the Logs section. **ConnectWise** systems is available under the **Logs** section.



3. 3. Sync events are shown based on the specified criteria. Additionally, you may also filter results by customer, status and code. Available status options include Any, Error, Warning and Success. Click the **Download CSV** button to download specified logs.

Configuring Notifications

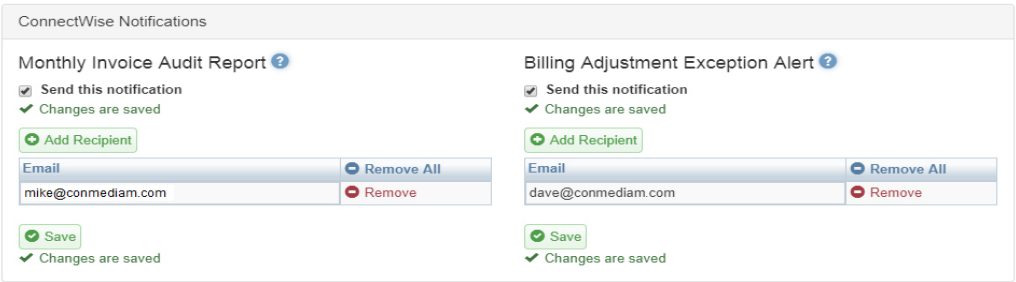
1. In the AppRiver Customer Portal **Partner** area, select the ConnectWise tab.
2. On the **Settings** tab, select the **ConnectWise** Notifications accordion.



The **Monthly Invoice Audit Report** is sent on the invoice date and provides a listing of customers with discrepancies between AppRiver and ConnectWise.

The **Billing Adjustment Exception Aler**t is an as-needed notification that is only sent if AppRiver billing adjustments are not updated in ConnectWise. It provides links to the logs which contain the billing errors.

3. To send a **Monthly Invoice Audit** and/or a Billing Adjustment Exception Alert, select the applicable Send this notification checkbox and click the **Add Recipient** button.



4. Select the desired recipient(s) and click the applicable **Save** button. Only recipients already listed within the system may be selected.
5. The recipient(s) will receive the selected notification(s) via email.

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