



## 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.

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## 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.

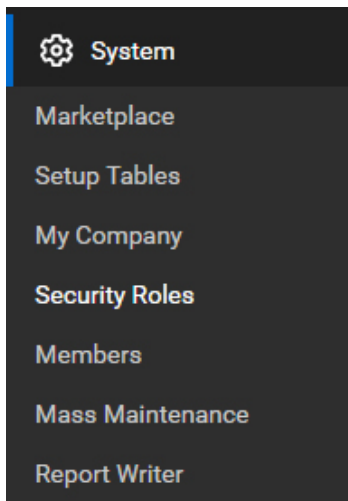
**ConnectWise** – You must have an active ConnectWise account. Version support valid for GA-1, GA, GA+1.

## 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](https://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.

Security Roles		
Security Roles		
	Actions	SEARCH CLEAR
	Export	View (No View)
Name ^	Last Update	Updated By
<input type="checkbox"/> All	All	
<input type="checkbox"/> Admin	03/23/2001	Conversion
<input type="checkbox"/> Engineer	08/20/2002	zadmin
<input type="checkbox"/> Executive	08/21/2002	zadmin
<input type="checkbox"/> Finance	08/20/2002	zadmin
<input type="checkbox"/> Manager	08/20/2002	zadmin
<input type="checkbox"/> Sales	12/11/2003	zAdmin
<input type="checkbox"/> Subcontractor	12/12/2003	zAdmin
<input type="checkbox"/> Test Role1	10/31/2017	Admin1
<input type="checkbox"/> TestRole2	11/01/2017	Admin1

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

Security Roles > New Role

New Role

New Role

Role ID: AppRiverAPI

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

Security Roles > Security Modules

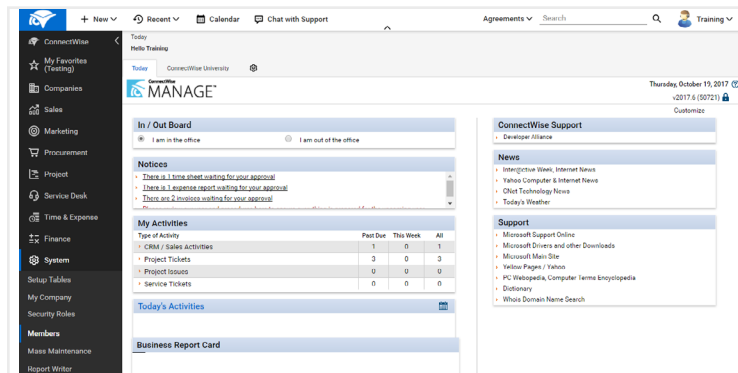
Security Modules for Role - AppRiverAPI

Role: AppRiverAPI

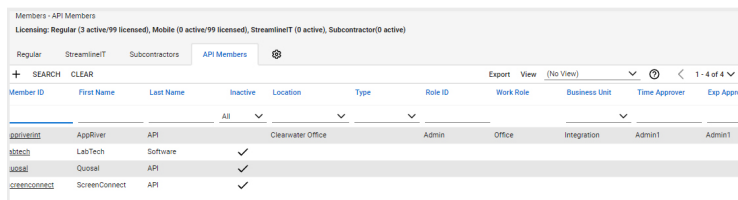
History

	Add Level	Edit Level	Delete Level	Inquire Level	Last Update
^ Companies					11/01/2017
Company Maintenance	All	All	All	All	
^ Finance					11/01/2017
Agreements (Agreements)	All	All	All	All	
Invoicing	None	None	None	All	
^ Marketing					11/01/2017
^ Procurement					11/01/2017
Product Catalog	All	All	All	All	
Products	All	All	All	All	
^ Project					11/01/2017
^ Sales					11/01/2017
^ Service Desk					11/01/2017
^ System					11/01/2017
^ Time & Expense					11/01/2017

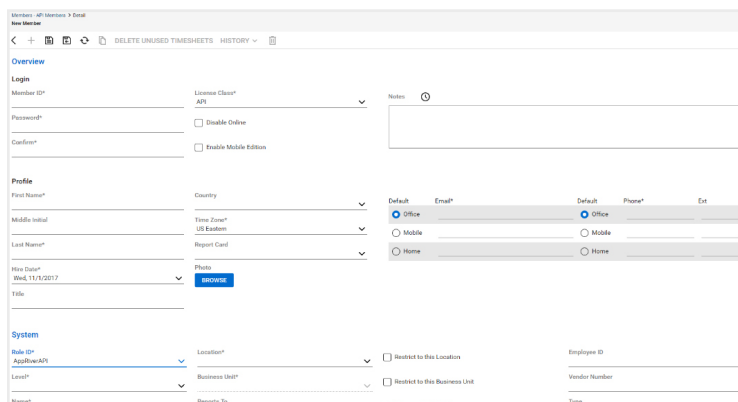
7. On the left menu, select **System**, then **Members**.



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

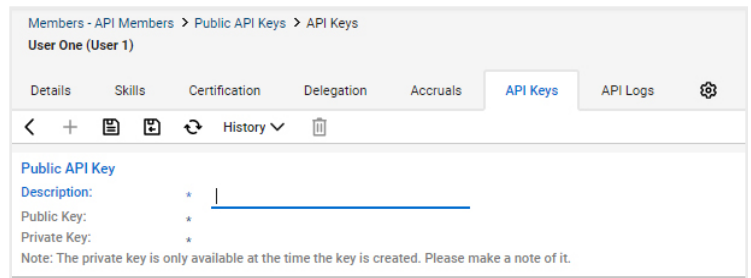


9. Create the new member profile by providing all required information. Ensure **Role ID** is set to **AppRiverAPI** as created previously.

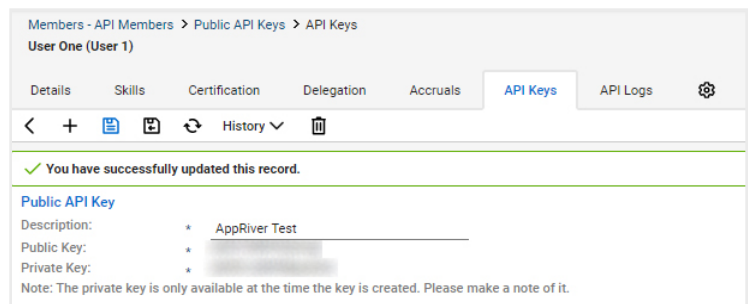


10. Once complete, click the **Save** button.

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.



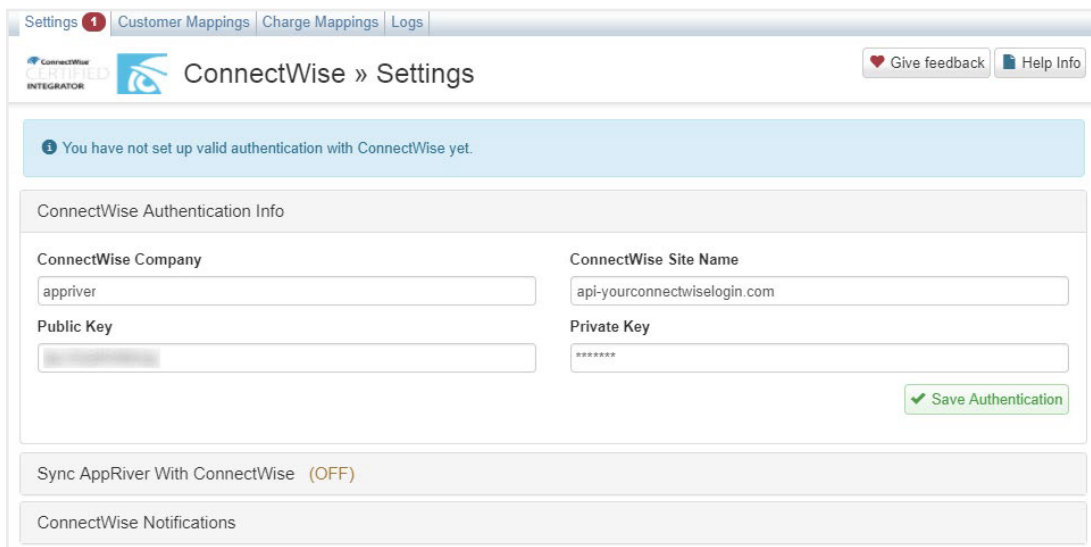
3. Under the **Settings** tab, select the **ConnectWise Authentication Info** accordion and provide the following information:

**Company** – used to login to ConnectWise

**Site Name** – URL for ConnectWise login

**Public Key** – provided in ConnectWise initial configuration

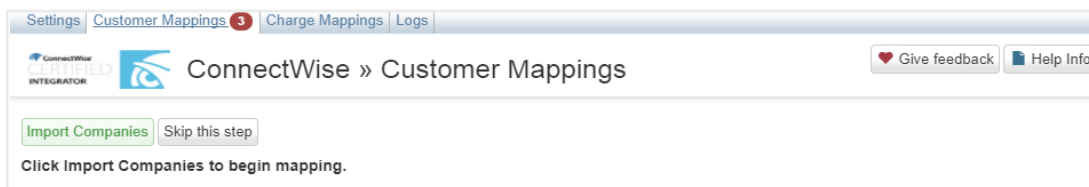
**Private Key** – provided in ConnectWise initial configuration



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.



Settings | Customer Mappings **3** | Charge Mappings | Logs

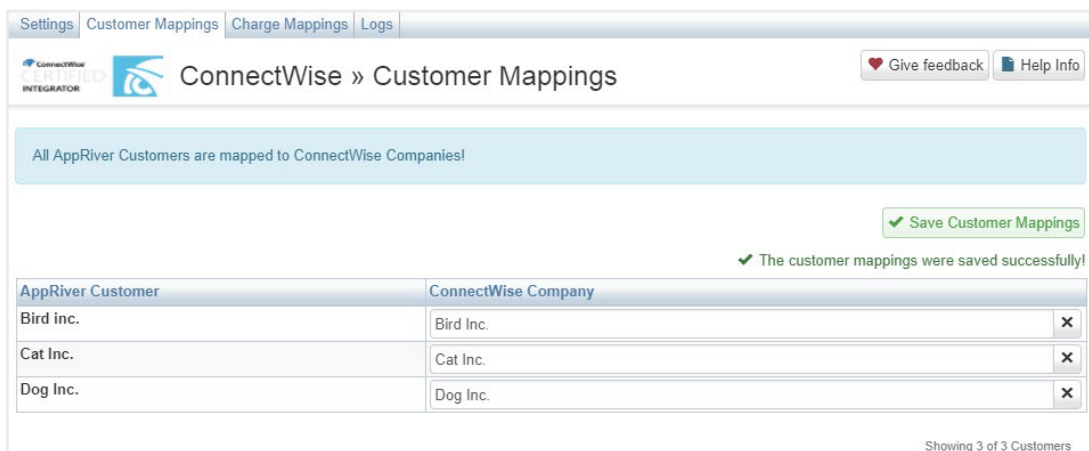
ConnectWise » Customer Mappings

[Give feedback](#) [Help Info](#)

[Import Companies](#) [Skip this step](#)

Click **Import Companies** to begin mapping.

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.



Settings | Customer Mappings | Charge Mappings | Logs

ConnectWise » Customer Mappings

[Give feedback](#) [Help Info](#)

All AppRiver Customers are mapped to ConnectWise Companies!

[Save Customer Mappings](#)

✓ The customer mappings were saved successfully!

AppRiver Customer	ConnectWise Company	
Bird Inc.	Bird Inc.	✕
Cat Inc.	Cat Inc.	✕
Dog Inc.	Dog Inc.	✕

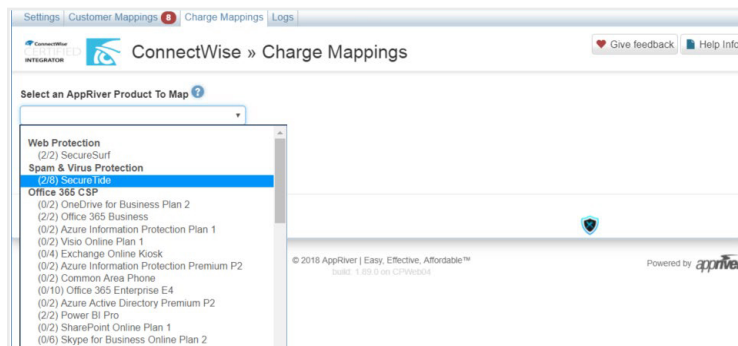
Showing 3 of 3 Customers

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.

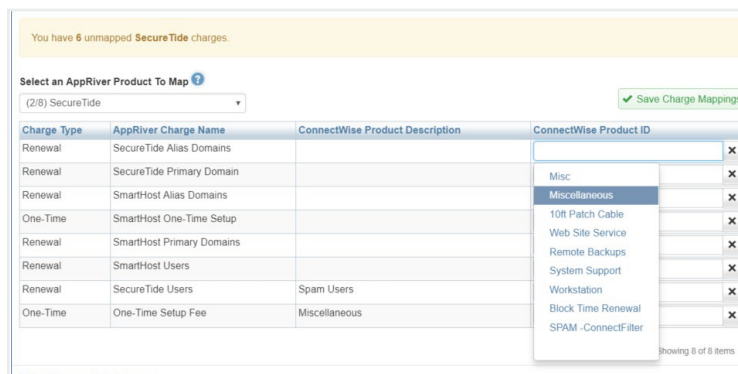
## Mapping Charges

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.

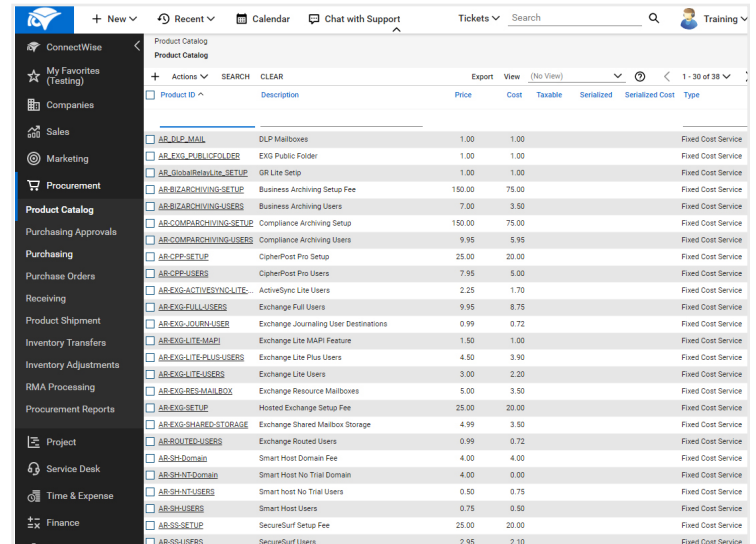
1. In the AppRiver Customer Portal **Partner** area, select the **ConnectWise** tab.
2. Select the **Charge Mappings** tab and select the applicable product from the dropdown menu.



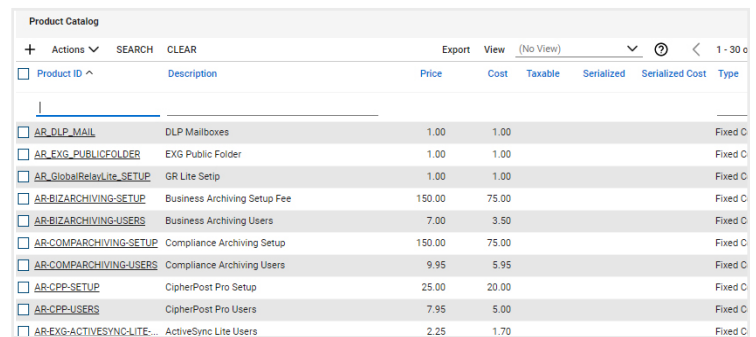
3. Select the correlating ConnectWise product description for each unmapped charge and click the **Save Charge Mappings** button when complete.



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 (+)**.



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

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

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

- 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.

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

- Select the customer to verify their specific Agreement Additions.

Company Search						
Company Search						
+ SEARCH CLEAR						
Lead	Company Name	Company ID	Phone Number	Territory	Type	Market
Active						
	A Resold Customer	029388		My Accounts	Customer	Legal
	A Resold Customer	0293882		My Accounts	Customer	Legal
	A Resold Customer 1	5555555		My Accounts	Customer	Legal
	Animal Depot		(111) 525-5112	My Accounts	Customer	
	BenePartum Law Group	BenePartumLawGr	(651) 994-4300	Clearwater Office	Customer	
	Big Design, Inc.	BigDesignInc	(813) 988-1000	Corporate	Customer	Retail
	Bird Inc.		(850) 512-2882	My Accounts	Customer	
	Black Rooster, Inc.	BlackRoosterInc	(813) 593-2200	Corporate	Customer	Retail
	Blue Light Co.	BlueLightCo	(813) 298-6100	Corporate	Customer	Retail
	BlueWeb Company		(813) 481-5001	Corporate	Customer	Retail
	Cat Inc.	CatInc	(850) 512-2882	My Accounts	Customer	
	ConnectWise	ConnectWise	(813) 935-7100	Tampa Office	Vendor	
	Crazy Commerce Co.	CrazyCommerceCo	(813) 966-4150	Corporate	Customer	Retail
	Cup River	CB		Corporate	Customer	
	DigitalTorch, Inc.	DigitalTorchInc	(813) 410-7380	Corporate	Customer	Retail
	Dog Inc.	DogInc	(850) 555-5555	My Accounts	Customer	Communication
	Endsight	Endsight	(510) 823-4604	Corporate	Customer	Service
	Future Message Co.	FutureMessageCo	(813) 474-3130	Corporate	Customer	Retail



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

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

Agreement Type	Agreement Name	Company Name	Contact	Amount	Billing Cycle	Date Start	Date End
Managed Service	Managed Services	Dog Inc.	Dave Munoz	\$36.52 Monthly		10/01/2017	

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

- 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.

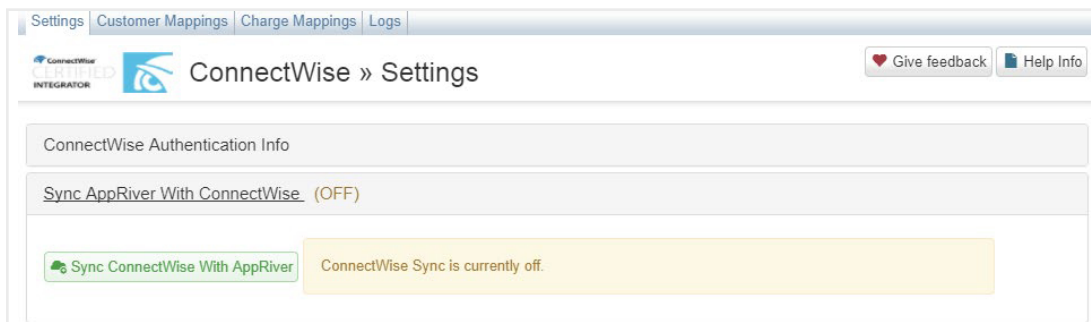
Sequence	Effective	Canceled	Product ID	Description
1.00	10/01/2017	10/31/2017	AR-ST-Setup Fee	Spam service setup fee
3.00	10/20/2017		AR-ST-Domain	Spam service domain fee
4.00	10/01/2017		AR-ST-Users	Spam User Fee

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

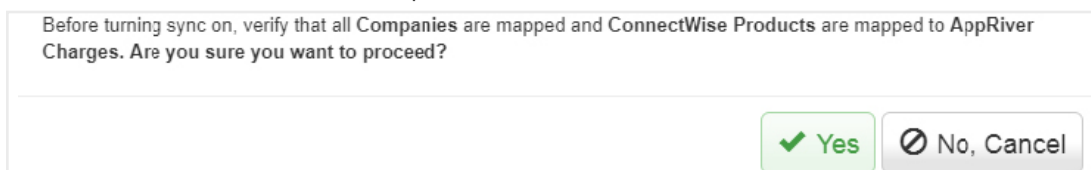
## Establishing Adjustment Sync between AppRiver and ConnectWise

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.

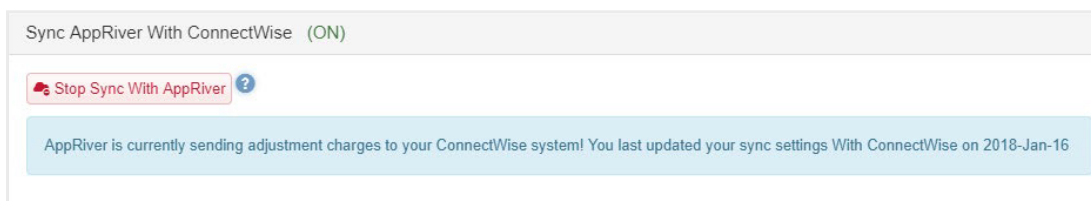
1. In the AppRiver Customer Portal **Partner** area, select the **ConnectWise** tab.
2. On the **Settings** tab, select the Sync AppRiver with ConnectWise accordion and click the **Sync ConnectWise With AppRiver** button.



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



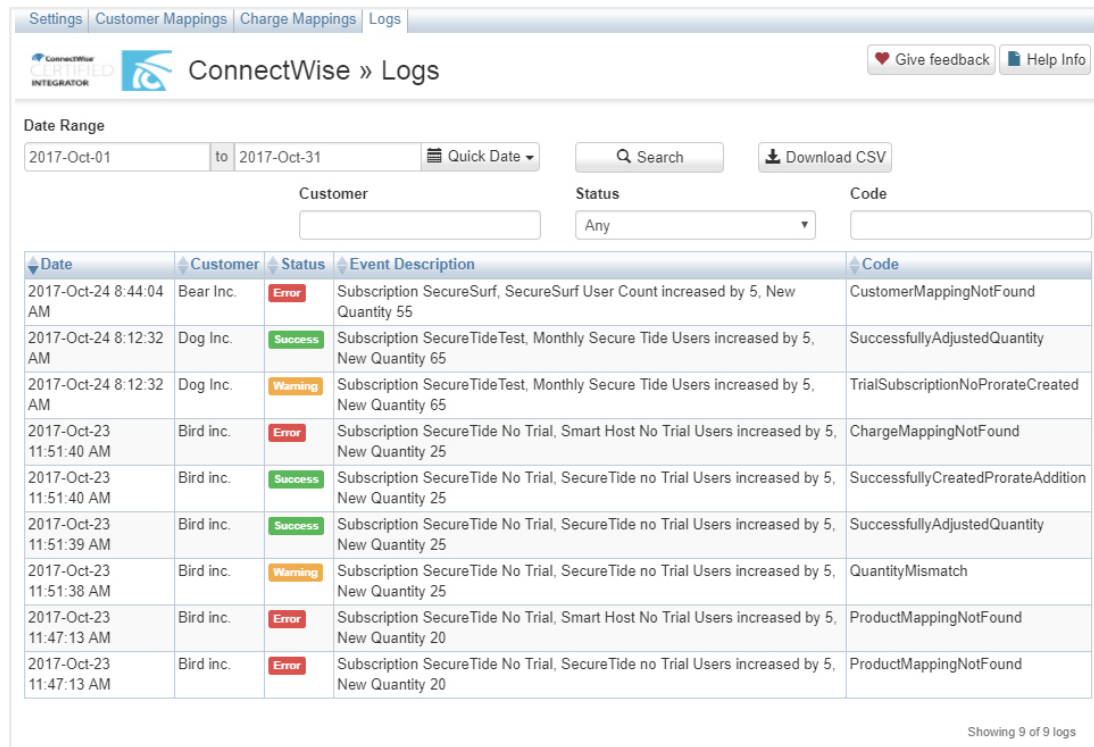
4. Once complete, AppRiver's adjustment charges will be synched with the ConnectWise system from that point forward. To stop sync between both systems, click the **Stop Sync With AppRiver** button.



5. 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.



Settings | Customer Mappings | Charge Mappings | Logs

ConnectWise » Logs

Give feedback | Help Info

Date Range: 2017-Oct-01 to 2017-Oct-31 Quick Date Search Download CSV

Customer Status Code

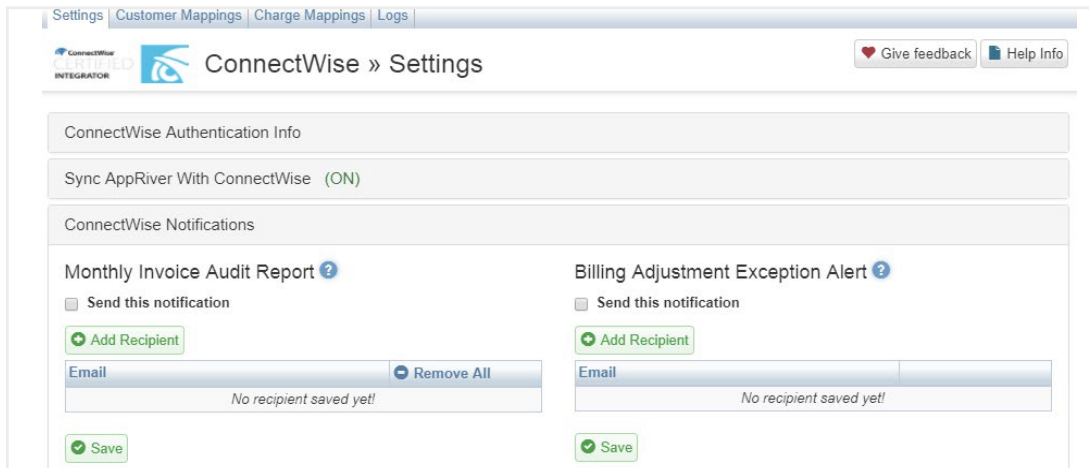
Date	Customer	Status	Event Description	Code
2017-Oct-24 8:44:04 AM	Bear Inc.	Error	Subscription SecureSurf, SecureSurf User Count increased by 5, New Quantity 55	CustomerMappingNotFound
2017-Oct-24 8:12:32 AM	Dog Inc.	Success	Subscription SecureTideTest, Monthly Secure Tide Users increased by 5, New Quantity 65	SuccessfullyAdjustedQuantity
2017-Oct-24 8:12:32 AM	Dog Inc.	Warning	Subscription SecureTideTest, Monthly Secure Tide Users increased by 5, New Quantity 65	TrialSubscriptionNoProrateCreated
2017-Oct-23 11:51:40 AM	Bird inc.	Error	Subscription SecureTide No Trial, Smart Host No Trial Users increased by 5, New Quantity 25	ChargeMappingNotFound
2017-Oct-23 11:51:40 AM	Bird inc.	Success	Subscription SecureTide No Trial, SecureTide no Trial Users increased by 5, New Quantity 25	SuccessfullyCreatedProrateAddition
2017-Oct-23 11:51:39 AM	Bird inc.	Success	Subscription SecureTide No Trial, SecureTide no Trial Users increased by 5, New Quantity 25	SuccessfullyAdjustedQuantity
2017-Oct-23 11:51:38 AM	Bird inc.	Warning	Subscription SecureTide No Trial, SecureTide no Trial Users increased by 5, New Quantity 25	QuantityMismatch
2017-Oct-23 11:47:13 AM	Bird inc.	Error	Subscription SecureTide No Trial, Smart Host No Trial Users increased by 5, New Quantity 20	ProductMappingNotFound
2017-Oct-23 11:47:13 AM	Bird inc.	Error	Subscription SecureTide No Trial, SecureTide no Trial Users increased by 5, New Quantity 20	ProductMappingNotFound

Showing 9 of 9 logs

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.



Settings | Customer Mappings | Charge Mappings | Logs

ConnectWise » Settings

Give feedback | Help Info

ConnectWise Authentication Info

Sync AppRiver With ConnectWise (ON)

ConnectWise Notifications

**Monthly Invoice Audit Report** ?

☐ Send this notification

+ Add Recipient

Email Remove All

No recipient saved yet!

Save

**Billing Adjustment Exception Alert** ?

☐ Send this notification

+ Add Recipient

Email Remove All

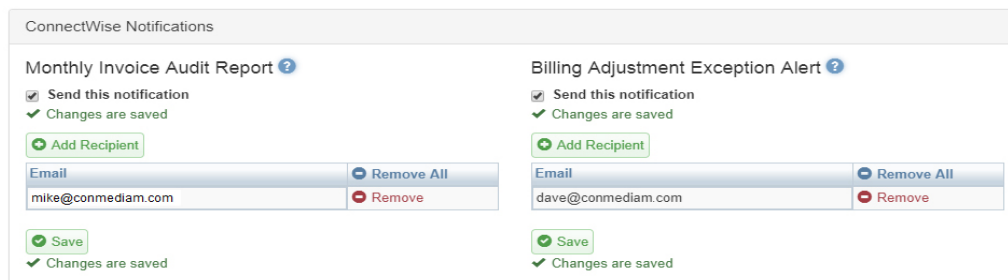
No recipient saved yet!

Save

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 Alert** 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.



ConnectWise Notifications

**Monthly Invoice Audit Report** ?

☒ Send this notification

Changes are saved

+ Add Recipient

Email Remove All

mike@conmediam.com Remove

Save

Changes are saved

**Billing Adjustment Exception Alert** ?

☒ Send this notification

Changes are saved

+ Add Recipient

Email Remove All

dave@conmediam.com Remove

Save

Changes are saved

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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