

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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Configure Initial Settings in AppRiver Customer Portal

Mapping Customers

Mapping Charges

Verifying Agreement Additions in ConnectWise

Establishing Adjustment Sync between AppRiver and ConnectWise

Accessing Sync Logs

Configuring Notifications





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

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- 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**.

段 System
Marketplace
Setup Tables
My Company
Security Roles
Members
Mass Maintenance
Report Writer

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)	\sim	0	<
Name ^	Last Update	Updated By						
	All 🗸							
Admin	03/23/2001	Conversion						
Engineer	08/20/2002	zadmin						
Executive	08/21/2002	zadmin						
Finance	08/20/2002	zadmin						
Manager	08/20/2002	zadmin						
Sales	12/11/2003	zAdmin						
Subcontractor	12/12/2003	zAdmin						
Test Role1	10/31/2017	Admin1						
TestRole2	11/01/2017	Admin1						

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

Security Role	ies > New Ri	ole	
< +	E E	Ð	Ū
New Role Role ID:	ppRiverAPI		

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

Sec	urity R	oles >	Securit	ty Modu	lles										
Sec	urity N	Aodules	s for Ro	le - Ap	RiverA	PI									
Ro	e: A	ppRiver	API		``	/									
<	+		F	Ð	D	History N	/ 🔟								
\sim							Add L	evel	Edit L	evel	Delete	Level	Inquire	e Level	Last Update
^ C	ompar	ies													11/01/2017
Com	pany N	laintena	ance				All	\sim	All	\sim	All	\sim	All	\sim	
∧Fi	nance														11/01/2017
Agre	emente	s (<u>custo</u>	omize)				All	\sim	All	\sim	All	\sim	All	\sim	
Invoi	cing						None	\sim	None	\sim	None	\sim	All	\sim	
×N	larketi	ng													11/01/2017
^ P	rocure	ment													11/01/2017
Prod	uct Ca	talog					All	\sim	All	\sim	All	\sim	All	\sim	
Prod	ucts						All	\sim	All	\sim	All	\sim	All	\sim	
∨ P	roject														11/01/2017
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∨ s	ervice	Desk													11/01/2017
∨ s	ystem														11/01/2017
VT	ime &	Expens	e												11/01/2017



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

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+ New~	🚯 Recent 🗸 🛗 Calendar 🚦	Chat with Support	~		Agreements V Search	_ Q 🛛 💈 Training 🔪
ConnectWise	Today Mallo Training					
My Favorites (Testing)	Today ConnectWise University					
Companies						Thursday, October 19, 2017
	INANAGE					v2017.6 (50721) 🔒
Sales						Customize
	In / Out Board				ConnectWise Support	
Marketing	I am in the office	I am out of the office			Developer Alliance	
Procurement					Naus	
	Notices				Interfective Week Internet News	
Project	There is 1 time sheet waiting for your ap	proval		~	Yahoo Computer & Internet News	
Service Deals	 There is 1 expense report waiting for your 	r approval			CNet Technology News	
Jei lice Deak	There are 2 involces waiting for your app	roval		*	 Today's Weather 	
Time & Expense	My Activities				Support	
Finance	Type of Activity	Past 0	ue This Week	AI	Microsoft Support Online	
	CRM / Sales Activities	1	0	1	 Microsoft Drivers and other Downloads 	
System	 Project Tickets 	3	0	3	 Microsoft Main Site 	
	 Project Issues 	U	0	0	 Tellow Pages / Tahoo PC Webenadia Computer Terms Estudionadia 	
p Tables	 Service Tickets 	0	0	0	Dictionary	
				-	Whois Domain Name Search	
	Today's Activities					
nbers						
	Business Report Card					
nort Weiter						

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

Members - API	Members - API Members									
Licensing: Regular (3 active/99 licensed), Mobile (0 active/99 licensed), StreamlineIT (0 active), Subcontractor(0 active)										
Regular	StreamlineIT	Subcontractors	API Members	\$						
+ SEARCH	CLEAR						Export View	(No View)	<u>~</u> (0) <	1 - 4 of 4 🗸
Member ID	First Name	Last Name	Inactive	Location	Туре	Role ID	Work Role	Business Unit	Time Approver	Exp Approv
			All V		~	~			~	
opriverint	AppRiver	API		Clearwater Office		Admin	Office	Integration	Admin1	Admin1
abtech	LabTech	Software	~							
uosal	Quosal	API	~							
creenconnect	ScreenConnect	API	\checkmark							

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

Members - API Members -> Detail New Member			
(+ 🖺 🖬 🕹 🖒 DELETE	UNUSED TIMESHEETS HISTORY 🗸 🗒		
iverview			
ogin			
tember ID*	License Class* API	v Notes (S)	
*broweca	Disable Online		
onfirm*	Enable Mobile Edition		
rofile	Doubles		
		Default Email*	Default Phone* Ext
tiddle Initial	Time Zone*	O Othoe	O Ottoe
	US Eastern	O Mobile	O Mobile
ast Name*	Report Card	✓ ○ Home	O Home
ire Date*	Photo		
Ned, 11/1/2017	BROWSE		
itle			
ystem			
ole ID* spoRtverAPI	Location*	Restrict to this Location	Employee ID
zvel*	Business Unit*	Restrict to this Business Unit	Vendor Number
			Y

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

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

Members - API Members User One (User 1)	 Public API Keys 	> API Keys								
Details Skills	Certification	Delegation	Accruals	API Keys	API Logs	¢				
< + E E	€ History ∨	Ū								
Public API Key										
Description:	*									
Public Key:	*									
Private Key:	*									
Note: The private key is o	Note: The private key is only available at the time the key is created. Please make a note of it.									

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

Mem User	one (API M User 1	embers)	> Pu	blic API Keys	> API Keys				
Deta	ils	Sk	ills	Cert	tification	Delegation	Accruals	API Keys	API Logs	¢
<	+		Ð	Ð	History 🗸	Ū				
~ Y	ou hav	ve succ	essfull	y upda	ted this recor	rd.				
Publi	c API	Key								
Descr	iption			*	AppRiver Te	st				
Public	: Key:			*						
Privat	e Key:			*						
Note: The private key is only available at the time the key is created. Please make a note of it.										

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

ConnectWise » Setti	
You have not set up valid authentication with ConnectWis	se yet.
ConnectWise Authentication Info	
ConnectWise Company	ConnectWise Site Name
appriver	api-yourconnectwiselogin.com
Public Key	Private Key
	R******
	✓ Save Authentication

- 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 Charge Mappings Logs	
ConnectWise » Customer Mappings	Give feedback Help Info
Import Companies Skip this step Click Import Companies to begin mapping.	

 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.

	/ise » Customer Mappings	💙 Give feedback, 📄 Help Infr
All AppRiver Customers are mapped to C	ConnectWise Companies!	
		✓ Save Customer Mapping:
		Save Customer Mapping
AppRiver Customer	ConnectWise Company	 Save Customer Mappings The customer mappings were saved successfull
AppRiver Customer Bird inc.	ConnectWise Company Bird Inc.	✓ Save Customer Mapping: ✓ The customer mappings were saved successfull
AppRiver Customer Bird inc. Cat Inc.	ConnectWise Company Bird Inc. Cat Inc.	 ✓ Save Customer Mappings ✓ The customer mappings were saved successful ×

- 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

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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.

Settings Customer Mappings (8) Charge Mappings	Logs	
ConnectWise » (Charge Mappings	Give feedback Help Info
Select an AppRiver Product To Map 3		
Web Protection (2/2) SecureSurf Spam & Virus Protection	1	
(2/8) Socure Tide Office 365 CSP (0/2) OneDrive for Business Plan 2 (2/2) Office 365 Business (0/2) Azure Information Protection Plan 1	1	۲
(02) Visio Online Plan 1 (04) Exchange Online Kooks (02) Azure Information Protection Premium P2 (010) Office 365 Enterprise E4 (02) Azure Active Directory Premium P2 (22) Power BI P0 (02) SharePoint Online Plan 1 (00) Skype of Business Online Plan 2	© 2018 AppRiver Easy, Effective, Affordatie ** built: 1 #5 0 on CPVweb01	Powered by appriver

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

elect an AppRi	ver Product To Map 😮			
(2/8) SecureTid	e •		✓ Sav	e Charge Mapping
Charge Type	AppRiver Charge Name	ConnectWise Product Description	ConnectWise Product ID	
Renewal	SecureTide Alias Domains			>
Renewal	SecureTide Primary Domain		Misc	,
Renewal	SmartHost Alias Domains		Miscellaneous	,
One-Time	SmartHost One-Time Setup		10ft Patch Cable	,
Renewal	SmartHost Primary Domains		Web Site Service	,
Renewal	SmartHost Users		System Support	,
Renewal	SecureTide Users	Spam Users	Workstation	,
One-Time	One-Time Setup Fee	Miscellaneous	Block Time Renewal	>

- 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**.

+ New ~	∮ Recent ∨ 👘	Calendar 🔛 Chat with Support	Tickets 🗸	Sea	irch		۹	2 Training ~
🔊 ConnectWise	Product Catalog Product Catalog							
☆ My Favorites (Testing)	+ Actions \checkmark SEARCH	CLEAR	Export	View	(No View)		<u>~</u>	1 - 30 of 38 🗸 🔅
Companies	Product ID ^	Description	Price	Cost	Taxable	Serialized	Serialized Cos	т Туре
👸 Sales	AR_DLP_MAIL	DLP Mailboxes	1.00	1.00				Fixed Cost Service
Marketing	AR_EXG_PUBLICFOLDER	EXG Public Folder	1.00	1.00				Fixed Cost Service
	AR_GlobalRelayLite_SETUP	GR Lite Setip	1.00	1.00				Fixed Cost Service
Procurement	AR-BIZARCHIVING-SETUP	Business Archiving Setup Fee	150.00	75.00				Fixed Cost Service
Product Catalog	AR-BIZARCHIVING-USERS	Business Archiving Users	7.00	3.50				Fixed Cost Service
	AR-COMPARCHIVING-SETUP	Compliance Archiving Setup	150.00	75.00				Fixed Cost Service
Purchasing Approvals	AR-COMPARCHIVING-USERS	Compliance Archiving Users	9.95	5.95				Fixed Cost Service
Purchasing	AR-CPP-SETUP	CipherPost Pro Setup	25.00	20.00				Fixed Cost Service
Purchase Orders	AR-CPP-USERS	CipherPost Pro Users	7.95	5.00				Fixed Cost Service
Pacaiving	AR-EXG-ACTIVESYNC-LITE	ActiveSync Lite Users	2.25	1.70				Fixed Cost Service
Receiving	AR-EXG-FULL-USERS	Exchange Full Users	9.95	8.75				Fixed Cost Service
Product Shipment	AR-EXG-JOURN-USER	Exchange Journaling User Destinations	0.99	0.72				Fixed Cost Service
Inventory Transfers	AR-EXG-LITE-MAPI	Exchange Lite MAPI Feature	1.50	1.00				Fixed Cost Service
Inventory Adjustments	AR-EXG-LITE-PLUS-USERS	Exchange Lite Plus Users	4.50	3.90				Fixed Cost Service
	AR-EXG-LITE-USERS	Exchange Lite Users	3.00	2.20				Fixed Cost Service
RMA Processing	AR-EXG-RES-MAILBOX	Exchange Resource Mailboxes	5.00	3.50				Fixed Cost Service
Procurement Reports	AR-EXG-SETUP	Hosted Exchange Setup Fee	25.00	20.00				Fixed Cost Service
	AR-EXG-SHARED-STORAGE	Exchange Shared Mailbox Storage	4.99	3.50				Fixed Cost Service
Project	AR-ROUTED-USERS	Exchange Routed Users	0.99	0.72				Fixed Cost Service
O contro Dark	AR-SH-Domain	Smart Host Domain Fee	4.00	4.00				Fixed Cost Service
ag Service Desk	AR-SH-NT-Domain	Smart Host No Trial Domain	4.00	0.00				Fixed Cost Service
Time & Expense	AR-SH-NT-USERS	Smart host No Trial Users	0.50	0.75				Fixed Cost Service
	AR-SH-USERS	Smart Host Users	0.75	0.50				Fixed Cost Service
≟x Finance	AR-SS-SETUP	SecureSurf Setup Fee	25.00	20.00				Fixed Cost Service
	AR-SS-USERS	SecureSurf Users	2.95	2.10				Fixed Cost Service

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

Product Catalog							
+ Actions ✓ SEARCH	CLEAR	Export	View	(No View)	~	0 <	1 - 30 o
Product ID ^	Description	Price	Cost	Taxable	Serialized	Serialized Co	st Type
1							
AR_DLP_MAIL	DLP Mailboxes	1.00	1.00				Fixed C
AR_EXG_PUBLICFOLDER	EXG Public Folder	1.00	1.00				Fixed C
AR_GlobalRelayLite_SETUP	GR Lite Setip	1.00	1.00				Fixed C
AR-BIZARCHIVING-SETUP	Business Archiving Setup Fee	150.00	75.00				Fixed C
AR-BIZARCHIVING-USERS	Business Archiving Users	7.00	3.50				Fixed C
AR-COMPARCHIVING-SETUP	Compliance Archiving Setup	150.00	75.00				Fixed C
AR-COMPARCHIVING-USERS	Compliance Archiving Users	9.95	5.95				Fixed C
AR-CPP-SETUP	CipherPost Pro Setup	25.00	20.00				Fixed C
AR-CPP-USERS	CipherPost Pro Users	7.95	5.00				Fixed C
AR-EXG-ACTIVESYNC-LITE	ActiveSync Lite Users	2.25	1.70				Fixed C





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

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Product Overview							^
Product ID:	*	AR-ST-Setup Fee		Product Type:	*	Fixed Cost Service	~
Description:	*	Spam service setup fee		Product Class:	*	Non-Inventory	~
Category:	*	Managed Services	~	Price Attribute:		T & M	\sim
Subcategory:	*	Managed Services	~	Serialized:			
UOM:	*	Each	~	Apply Cost by Serial #:			
Unit Price:			5.00	Default Minimum Otach Laugh			
Unit Cost:			0.00	Derault Winimum Stock Level.			
Salas Tay		0		Phase Bundle:			
Integration Cross Reference	¢			Drop Ship:		0	
Entity Type:			\sim	Special Order:			
SLA:			~				

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

Select an AppR	iver Product To Map 🕝							
(2/8) SecureTid	le 🔻		✓ Save Cha	arge Mappings				
Charge Type	AppRiver Charge Name	ConnectWise Product Description	ConnectWise Product ID	ConnectWise Product ID				
Renewal	SecureTide Alias Domains			×				
Renewal	SecureTide Primary Domain		Misc	×				
Renewal	SmartHost Alias Domains		Miscellaneous	×				
One-Time	SmartHost Alias Domains SmartHost One-Time Setup		10ft Patch Cable	×				
Renewal	SmartHost Primary Domains		Remote Backups	×				
Renewal	SmartHost Users		System Support	×				
Renewal	SecureTide Users	Spam Users	Workstation	×				
One-Time	One-Time Setup Fee	Miscellaneous	Block Time Renewal SPAM -ConnectFilter	×				
			AR-ST-Setun Fee					

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

Select an AppRi	ver Product To Map 🧐		
(2/8) SecureTid	e *		✓ Save Charge Ma
Charge Type	AppRiver Charge Name	ConnectWise Product Description	ConnectWise Product ID
Renewal	SecureTide Alias Domains	Spam service setup fee	AR-ST-Setup Fee
Renewal	SecureTide Primary Domain		
Renewal	SmartHost Alias Domains		
One-Time	SmartHost One-Time Setup		
Renewal	SmartHost Primary Domains		
Renewal	SmartHost Users		
Renewal	SecureTide Users	Spam Users	AR-ST-Users
One-Time	One-Time Setup Fee	Miscellaneous	Miscellaneous

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.

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

+ New ~	A Rec	ent 🗸	🛄 Calendar	Chat with	Support	^		Ag	reements 🗸	Search			۹	💈 Trair	ning 🗸
🛷 ConnectWise <	Company S Company S	Search Search													
☆ My Favorites (Testing)	+ 🐵	SEARCH	CLEAR						Export	View (No	View)	~ (Ð <	0 - 0 of 0	~ >
Companies	Lead	Compan	y Name 🔿		Company ID	Phone Number	Territory		Type	Market		Status		Emered	51
Companies	Active V					_		~	~				~	Al	~ _
Contacta	Enter Search	n Criteria													
Configurations															
Company Activity Exceptions															
👸 Sales															
Marketing															
Procurement															
E Project															
G Service Desk															
🖉 Time & Expense															
=x Finance															
😥 System															

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

Company Se Company Se	arch							
+ 🖶	SEARCH CLEAR			Export View	(No View)	~ 0)	< 1 - 40 of 41 ∨
Lead	Company Name ^	Company ID	Pho	one Number	Territory	Туре		Market
Active 🗸					~		~	
	A Resold Customer	029388			My Accounts	Custome	r	Legal
	A Resold Customer	0293882			My Accounts	Custome	r	Legal
	A Resold Customer 1	5555555			My Accounts	Custome	r	Legal
	Animal Depot	AnimalDepot	હ	(111) 525-5112	My Accounts	Custome	r	
	BenePartum Law Group	BenePartumLawGr	S	(651) 994-4300	Clearwater Office	Custome	r	
	Big Design, Inc.	BigDesignInc	હ	(813) 988-1000	Corporate	Custome	r	Retail
	Bird Inc.	BirdInc	S	(850) 512-2882	My Accounts	Custome	r	
	Black Rooster, Inc.	BlackRoosterInc	હ	(813) 593-2200	Corporate	Custome	r	Retail
	Blue Light, Co.	BlueLightCo	S	(813) 298-6100	Corporate	Custome	r	Retail
	BlueWeb, Company	BlueWebCompany	હ	(813) 481-5001	Corporate	Custome	r	Retail
	Cat Inc.	Catinc	S	(850) 512-2882	My Accounts	Custome	r	
	ConnectWise	ConnectWise	હ	(813) 935-7100	Tampa Office	Vendor		
	Crazy Commerce, Co.	CrazyCommerceCo	S	(813) 966-4150	Corporate	Custome	r	Retail
	Cup Brew	СВ			Corporate	Custome	r	
	DigitalTorch. Inc.	DigitalTorchInc	S	(813) 410-7380	Corporate	Custome	r	Retail
	Dog Inc.	DogInc	S	(850) 555-5555	My Accounts	Custome	r	Communication
	Endsight	Endsight	S	(510) 823-4604	Corporate	Custome	er 🛛	Service
	Future Message, Co.	FutureMessageCo	S	(813) 474-3130	Corporate	Custome	r	Retail



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

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Company Notes Contacts 1 Opport	unities 0	Tracks 0	Activities 0 Service 0	Projects	0 Agreements 1
+ 🖺 🗈 😌 🖶 Company Finance	MORE V	 ✓ Links ✓ I 	History 🗸 Share 🗸 📋	@ \	⁄
Company: Dog Inc.				^	Drag a pod here or clic
Company: * Dog Inc.		Phone: (8	350) 555-5555	S	
Site: Main	~	Fax:			Do not show this ag
1 Dog Ave.	0	Web Site:		•	
Gulf Breeze, FL 32501 United States		LinkedIn: Er	nter URL	in	
		Facebook: Er	nter URL	٢	
		Twitter: Er	nter URL	9	
Company Details				^	
Type: * Customer	\sim	Company ID:	* Doginc		
Status: * Active	\sim	Market:	Communication	\sim	
Territory: My Accounts	~	Date Acquired:	Thu 10/19/2017	~	
Primary Contact				×	

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

D	ompany Search > . og Inc.	Agreement	Search										
<	Company	Notes	Contacts	1	Opportunities 0	Tracks 0	Activities 0	Service (Projects	D	Agreements 1	Do	ocu >
<	+ 🖶 🗚	\sim	SEARCH	CLEAR			Export View	(No View)	~	0	< 1-1 of	1~	>
	Agreement Type	Agree	ment Name		Company Nar	ne ^	Contact		Amount Billing	Cycle	Date Start		Date
		~										~	
	Managed Service	Manac	ed Services		Dog Inc.		Dave Mungai		\$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.

Company Search > Agreement Search > Agreement Managed Services				
Agreement Additions 4 Adjustments 0 Agree	ements 0 Wor	k Roles 0 Work Types	0 Sites 0	Invoice 0
く + 目 目 む 合 骨 Agreement 骨 Reconciliatio	n 🗈 Links 🗸	Share V History V	± 10 10 10 10 10 10 10 10 10 10 10 10 10 1	\odot < >
Agreement Recap			\sim	Drag a pod here
Agreement: Managed Services			~	
Company: Dog Inc.			~	Do not show
Internal Notes			~	
Application Parameters			~	
Covered Work Roles and Work Types			~	
Recurring Invoicing Parameters			^	
Billing Cycle: * Monthly V	Billing Start Date: *	Sun 10/01/2017	~	
Cycle Based On: * Calendar Year 🗸	Tax Code:	State	~	
Billing Amount: 0.00 USD	Terms:		~	
Billing Amount Taxable	Currency: *	US Dollars	\sim	
Children Amount: \$0.00	Prorate Agreem	ent		

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.

Co	mpany Search 3 anaged Services	Agreement Search	Additions								
<	Agreement	Additions 3	Adjustments 0	Agreements 0	Work Roles 0	Work Types 0	Sites 0	Invo	ice 0	Service	0
<	+ Action	s 🗸 SEARCH	CLEAR		Export View	w (No View)	~	0	<	1 - 3 of 3 🗸	
	Sequence	Effective		Cancelled	Product ID	Descriptio	n				
		All		~	-						
	1.00	10/01/2017		10/31/2017	AR-ST-Setup Fee	Spam serv	ice setup fee				
	3.00	10/20/2017			AR-ST-Domain	Spam serv	rice domain fee				
	4.00	10/01/2017			AR-ST-Users	Spam Use	r Fee				

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.

- 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.

CERTIFIED INTEGRATOR	Conne	ectWis	se » Logs			Give feedback
Date Range						
2017-Oct-01	to 201	7-Oct-31	🛱 Quick Date 🗸	Q Search	⊥ Downloa	ad CSV
		Cust	comer	Status		Code
				Any	•	
Date	Customer	Status	Event Description			♦ Code
2017-Oct-24 8:44:04 AM	Bear Inc.	Error	Subscription SecureSurf, Secure Quantity 55	eSurf User Count increase	d by 5, New	CustomerMappingNotFound
2017-Oct-24 8:12:32 AM	Dog Inc.	Success	Subscription SecureTideTest, M New Quantity 65	onthly Secure Tide Users i	ncreased by 5,	SuccessfullyAdjustedQuantity
2017-Oct-24 8:12:32 AM	Dog Inc.	Warning	Subscription SecureTideTest, M New Quantity 65	onthly Secure Tide Users i	ncreased by 5,	TrialSubscriptionNoProrateCreated
2017-Oct-23 11:51:40 AM	Bird inc.	Error	Subscription SecureTide No Tria New Quantity 25	al, Smart Host No Trial Use	ers increased by 5,	ChargeMappingNotFound
2017-Oct-23 11:51:40 AM	Bird inc.	Success	Subscription SecureTide No Tria New Quantity 25	al, SecureTide no Trial Use	ers increased by 5,	SuccessfullyCreatedProrateAddition
2017-Oct-23 11:51:39 AM	Bird inc.	Success	Subscription SecureTide No Tria New Quantity 25	al, SecureTide no Trial Use	ers increased by 5,	SuccessfullyAdjustedQuantity
2017-Oct-23 11:51:38 AM	Bird inc.	Warning	Subscription SecureTide No Tria New Quantity 25	al, SecureTide no Trial Use	rs increased by 5,	QuantityMismatch
2017-Oct-23 11:47:13 AM	Bird inc.	Error	Subscription SecureTide No Tria New Quantity 20	al, Smart Host No Trial Use	ers increased by 5,	ProductMappingNotFound
2017-Oct-23 11:47:13 AM	Bird inc.	Error	Subscription SecureTide No Tria New Quantity 20	al, SecureTide no Trial Use	ers increased by 5,	ProductMappingNotFound

 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.

	ctWise » Settings		Give feedback	Help Inf
ConnectWise Authentication In	fo			
Sync AppRiver With ConnectW	/ise (ON)			
ConnectWise Notifications				
Monthly Invoice Audit Rep	port 3	Billing Adjustment Exception Send this notification	Alert 3	
O Add Recipient		O Add Recipient		
Email	Remove All	Email		
No recin	ient saved vet!	No recipient	saved vet!	

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.

lling Adjustment Exception Alert ?
Send this notification Changes are saved
Add Recipient
nail 🗢 Remove All
ave@conmediam.com

- 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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