

ConnectWise Integration Instructions & Information

Table of Contents


ConnectWise Integration Instructions & Information	1
Connection Instructions (Setup)	1
Obtaining ConnectWise API Credentials	3
Mapping	4
Synchronizing Between CORE and ConnectWise Manage	5
Synchronizing New Subscriptions (Sales Orders)	6
Synchronizing Existing Subscriptions (Change Orders)	7
Synchronizing Existing Usage-based Subscriptions	9
Synchronizing Cancelled Subscriptions	10
Limitations	11

After the initial integration of ConnectWise with CORE, synchronization tasks are created for every existing active customer subscription. When a new subscription is provisioned or a change in a subscription occurs, a corresponding task is created for synchronization between the CORE, Marketplace and ConnectWise. These tasks are created after clicking 'Check Changes' to update a task list.

Connection Instructions (Setup)

- Log in to CORE using your CORE credentials.
- To access ConnectWise, click the "Integrations" tab in UX1.
- On the ConnectWise tile, click "Install" to open the below window and enter in the required credentials. See page 3.
- If an API member is missing any permission, a corresponding list of the missing permissions is displayed. See below.
- At this step, you can specify whether to load prices from the ConnectWise Catalogue or the CORE Marketplace by default.

You can also specify whether to automatically create and process synchronization tasks. You can select from the two options of change checking periodicity: once per day, or once per 5 minutes.

 **ConnectWise Connection** ×

ConnectWise Integration works by synchronizing your Cloud Marketplace with your ConnectWise PSA so you can easily track all the products your end customers purchase from you.

Connection setup

Enter your ConnectWise log-in information.

Company ID

Public Key

Private Key

API Base URL

Price source

Load prices from (by default)

Cloud Marketplace ▾

Automatically synchronize tasks ☒

Auto-sync period

Once per day ▾

Notifications

☒ Notify me about errors and when my action is needed

☐ Notify me about all created and synchronized tasks

Obtaining ConnectWise API Credentials

The CORE Marketplace communicates with ConnectWise through API. The following API credentials are required:

- Company ID
- Public Key
- Private Key
- API Base URL

These are generated for a specific API member - we recommend you create a new API member with a specific security role for this integration. To do this, complete the following steps:

- Configuring a security role for an API member
- In the ConnectWise Manage control panel, go to System > Security Roles.
- Create a role with the following permissions:

Permission Requirements :

Permission	Level	Purpose
Companies		
Company Maintenance	Inquire Level = All	Required to list companies to import accounts and synchronize subscriptions
Contacts	Inquire Level = All	Required to list company contacts to import accounts
Finance		
Agreements	Inquire Level = All	Required to get company agreements with additions to synchronize subscriptions
	Add Level = All	Required to synchronize missing addons from CORE to ConnectWise
	Edit Level = All	Required to synchronize resource amount changes from CORE to ConnectWise
	Delete Level = All	Required to synchronize deleted resources from CORE to ConnectWise
Invoicing	Inquire Level = All	Required to get the period the agreement is invoiced to set the proper dates for Additions
Procurement		
Product Catalog	Inquire Level = All	Required to get products defined in ConnectWise to synchronize subscriptions
	Add Level = All	Required to create automatically catalog entries in case no match is found
System		
Table Setup	Inquire Level = All	Required to get table list

Creating a new API member

1 - In the ConnectWise Manage control panel, go to
System > Members > API Members

2 - Create an API member.

Generating the API keys

1 - In the ConnectWise Manage control panel, go to
System > Members > API Members > Created_API_Member > API Keys

2 - Generate an API key

Note: The private key is only available for a short time on key creation.

Mapping

To ensure that there are no mismatches, all subscriptions and agreements are updated, and all changes happening in the CORE Marketplace are synchronized with ConnectWise; the objects in both systems must be mapped.

That is, CORE Product Catalogue, Customer Catalogue, Order and Subscription must be mapped with the respective ConnectWise objects: Product Catalogue, Company, and Agreement.

Note: Once a Product/Agreement is mapped, it will stay mapped for future tasks unless changed (mapping is only required once per product/agreement).

Mapping Customers

Ways to map customers:

- Through the subscription synchronization wizard, during subscription synchronizing.
- Through the customer import wizard, automatically.
- Through the Customer mapping screen.

To link your customers using the Customer mapping screen, complete the following steps:

1. Log in to CORE using your credentials.
2. To access ConnectWise, click the “Integrations” tab in UX1.
3. On the ConnectWise tile, click Manage to enter your dashboard.
4. On the dashboard, click the gear icon and select Mapping (see below).
5. On this screen you can perform individual mapping and/or import customers from your ConnectWise instance.

You can unlink a customer by selecting the three dots and clicking “Un-map”.

Mapping Products

- Find the associated order you wish to synchronize to ConnectWise and click on “Sync Changes”. In the below example, this is a Sales Order (New Subscription) for Exchange Online (Plan 1).
- Select the Product drop-down where you can either add the product into ConnectWise from CORE, or alternatively select an existing Product already in ConnectWise. Fill in the require details and click “Add and Map”

Mapping Agreements

- Providing you have mapped the Product correctly; you will be prompted to map the appropriate agreement, below is an example of one selected.
- Click Sync All to push these changes into ConnectWise.

Note #1: If automatic synchronization of tasks is on and mapping is not in place, you will see the error “Failed auto-sync.” attached to each task.

Note #2: If you received the error “Something went wrong” at this stage, then it is likely that your agreement and/or Product are misconfigured and/or incompatible.

Synchronizing Between CORE and ConnectWise Manage

The main idea of synchronizing between the CORE Marketplace and ConnectWise is to allow a reseller to easily process order placement and invoicing within the two systems. Below are instructions and details on how to perform this synchronization.

Synchronizing New Subscriptions (Sales Orders)

To synchronize new customer subscriptions between CORE and ConnectWise, complete the following steps:

1. In your UX1 for Resellers, click Integrations.
2. On the ConnectWise tile, click Manage to enter your dashboard.
3. On the dashboard, click Check Changes to update the list of tasks.
4. Select a synchronization task for your customer. For example, Green Lane LLC 1000048531 with the Sales Order type . Click **Sync Changes**.

Note: The Sales Order type means that a subscription is new. The Change Order type means that the existing subscription is upgraded or downgraded. The Billing Order type means that this is an existing usage-based subscription.

5. In the synchronization wizard that opens, link the customer between CORE and ConnectWise.
6. Click Continue.

Note: If a customer was linked before, this step is skipped.

7. Link the product and agreement between CORE and ConnectWise. Click Continue. See the Mapping for further details on Product, Customer and Agreement mapping.

The agreement additions represent a separate fee that is charged in the scope of the agreement. You can select additions and configure addition parameters, such as dates, description, quantity, price, and cost, as well as whether to include bills and taxes and load prices from the ConnectWise Catalogue or CORE.

Setup Billing Amount

The agreement may have a setup billing amount. This is an amount to be invoiced once for this agreement.

Recurring Billing Amount

The agreement may have a recurring billing amount. This is an amount to be invoiced each billing period for this agreement.

Important:

- Agreements with the same billing cycle must be selected here, that is, monthly agreements for monthly subscriptions, and so on.
- The agreement currency and the currency in CORE must be the same.

Confirm the synchronization by clicking Sync.

Synchronizing Existing Subscriptions (Change Orders)

To synchronize customer subscriptions that were upgraded or downgraded between CORE and ConnectWise, complete the following steps:

1. In your UX1 for Resellers, click Integrations
2. On the ConnectWise tile, click Manage to enter your dashboard.
3. On the dashboard, click Check Changes to update the list of tasks.
4. Select a synchronization task for your customer.
5. For example, Green Lane LLC 1000048531 with the Change Order type. Click Sync Changes.

Note: The Change Order type means that the existing subscription is upgraded or downgraded. The Sales Order type means that a subscription is new. The Billing Order type means that this is an existing usage-based subscription.

6. On this step, select an agreement. Then, check changes to the agreement.

The agreement additions represent a separate fee that is charged in the scope of the agreement. You can select additions and configure addition parameters, such as dates, description, quantity, price, and cost, as well as whether to include bills and taxes and load prices from the ConnectWise Catalogue or the CORE Marketplace.

Prorated Billing Amount

The agreement may have a prorated billing amount.

Important: Prorated amounts are calculated only for CORE Marketplace prices.

- The system calculates a prorated amount for an addition based on the effective date of the addition when the effective date differs from the billing period start date.
- The prorated price is calculated as: $[(\# \text{ of days in the period} - \text{Effective date}) * \text{Resource Price}] / (\# \text{ of days in the period})$.
o The prorated cost is calculated as: $[(\# \text{ of days in the period} - \text{Effective date}) * \text{Resource Cost}] / (\# \text{ of days in the period})$.

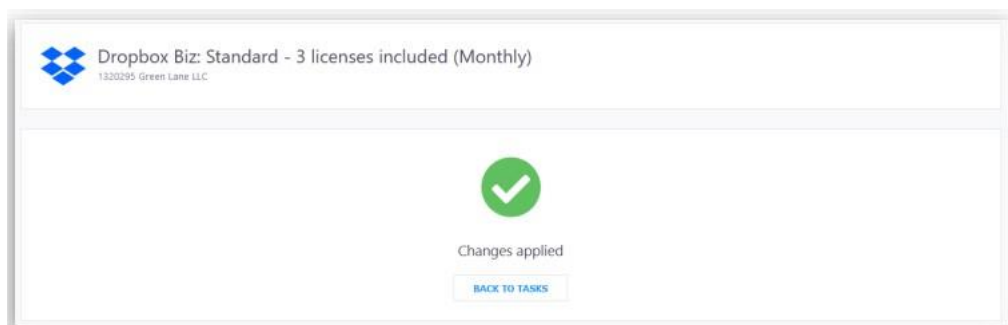
Recurring Billing Amount

The agreement may have a recurring billing amount. This is an amount to be invoiced each billing period for this agreement.

Important: Agreements with the same billing cycle must be selected here, that is, monthly agreements for monthly subscriptions, and so on.

The agreement currency and the currency in CORE must be the same.

Confirm the synchronization by clicking Sync.



Synchronizing Existing Usage-based Subscriptions

To synchronize customer subscriptions that include usage-based services between the CORE Marketplace and ConnectWise, complete the following steps:

1. In your UX1 for Resellers, click Integrations.
2. On the ConnectWise tile, click Manage to enter your dashboard.
3. On the dashboard, click Check Changes to update the list of tasks.
4. Select a synchronization task for your customer. For example, FranciscoRGoogle021000047883 with the Billing Order type. Click Sync Changes.

Note: The Billing Order type means that this is an existing usage-based subscription. The Sales Order type means that a subscription is new. The Change Order type means that the existing subscription is upgraded or downgraded.

5. On this step, select an agreement. Then, check changes to the agreement.

The agreement additions represent a separate fee that is charged in the scope of the agreement. You can select additions and configure addition parameters, such as dates, description, quantity, price, and cost, as well as whether to include bills and taxes and load prices from the ConnectWise Catalog or CORE Marketplace.

Recurring Billing Amount

The agreement may have a recurring billing amount. This is an amount to be invoiced each billing period for this agreement.

Overuse Billing Amount

The agreement may have an overuse billing amount.

- The system calculates an overuse amount for an addition when a resource overuse occurred from the billing period start date.
- The overuse price is calculated as: (Resource Overused Amount * Resource Overuse Price).
- The overuse cost is calculated as: (Resource Overused Amount * Resource Overuse Cost).

Important: Agreements with the same billing cycle must be selected here, that is, monthly agreements for monthly subscriptions, and so on.

The agreement currency and the currency in CORE must be the same.

Confirm the synchronization by clicking **Sync**.

Synchronizing Cancelled Subscriptions

To synchronize cancelled customer subscriptions between Reseller Marketplace and ConnectWise, complete the following steps:

1. In your UX1 for Resellers, click Integrations.
2. On the ConnectWise tile, click Manage to enter your dashboard.
3. On the dashboard, click Check Changes to update the list of tasks.
4. Select a synchronization task with the Cancellation Order type. Click Sync Changes. **Note:** The Cancellation Order type means that this subscription is canceled. The Billing Order type means that this is an existing usage-based subscription. The Sales Order type means that a subscription is new. The Change Order type means that the existing subscription is upgraded or downgraded.
5. Link the product between the CORE Marketplace and ConnectWise. Click Continue. (You can create a ConnectWise product by clicking Add Product to ConnectWise in the dropdown menu and configuring its parameters).
6. On this step, select an agreement. Then, check changes to the agreement.

The agreement additions represent a separate fee that is charged in the scope of the agreement. You can select additions and configure addition parameters, such as dates, description, quantity, price, and cost, as well as whether to include bills and taxes and load prices from the ConnectWise Catalogue or Reseller Marketplace.

Recurring Billing Amount

The agreement may have a recurring billing amount. This is an amount to be invoiced each billing period for this agreement.

Overuse Billing Amount

The agreement may have an overuse billing amount.

The system calculates an overuse amount for an addition when a resource overuse occurred from the billing period start date.

The overuse price is calculated as: $(\text{Resource Overused Amount} * \text{Resource Overuse Price})$.

The overuse cost is calculated as: $(\text{Resource Overused Amount} * \text{Resource Overuse Cost})$.

Cancellation Billing Amount

The agreement may have a cancellation billing amount.

Important: Agreements with the same billing cycle must be selected here, that is, monthly agreements for monthly subscriptions, and so on.

The agreement currency and the currency in CORE must be the same.

Note: If an addition was not billed yet, the Cancellation Date is not displayed, and this addition will be removed after synchronization.

Confirm the synchronization by clicking **Sync**.

Limitations

- Statement Billing (Align Billing Order with Statement Day is not currently supported).
- Infinigate cannot assist you with your ConnectWise configuration, only this integration functionality.
- During subscription reconciliation, it is possible to select the billing period even if it was invoiced in ConnectWise.
- There is no automatic mapping for Products and Agreements (subject to change) - Only ConnectWise Manage can be integrated.
- 'Included' resources do not show for mapping; this will be fixed in future as new offers with the proper 'minimum' quantities instead of 'included' will be published.
- If prices are loaded from CORE (Cloud Marketplace), the Unit Cost and Price may be identical; this will be fixed in future as new offers with the proper markup/markdown are published. You can workaround this by loading prices directly from ConnectWise.

Supported Configurations for Synchronization between CORE Marketplace and ConnectWise

You can review the spreadsheet found here for a table contents of the supported configurations. If you are unsure, please contact Infinigate (partners@infinigate.cloud).

Disclaimer

Please note that this integration package is regularly updated and therefore the screenshots may become out of date quickly after publication due to new/changed features. If you require any assistance, please contact us.



Infinigate Cloud

Delme Place
Cams Hall Estate
Delme 3
Fareham
PO16 8UX

www.infinigate.cloud