

DUO / CONNECTWISE INTEGRATION: GETTING STARTED

This document provides an end-to end walkthrough for a new customer setting up Contuit's **integration between ConnectWise Manage and Duo**, including securing your Contuit account with Duo for authentication. Note that this is a 3rd-party integration with pricing set by Contuit. Visit contuit.com/duo/ for details.

A few quick notes before getting started:

1. This end-to-end setup process takes most customers under an hour, assuming they already have Agreement Types and Products set up in ConnectWise for Duo billing.
2. We show you how to create an authenticated Contuit account (Step 1) and set up our **Billing Sync** automation (Steps 2 - 4). Step 5 optional instructions to set up optional **Bypass Code automation**.
3. If you do not follow the same naming conventions for companies between ConnectWise and Duo, you may need to follow the steps in **Appendix 1** to manually match Duo accounts to ConnectWise companies.
4. Please contact support@contuit.com if you run into any issues with these instructions.

Step 1: Create a Contuit account.

Navigate to <https://app.contuit.com/partners/duo#/>.

contuit + duo
Welcome Duo Partners

Utilize prebuilt solutions to automate onboarding, billing, and issuing bypass codes.

Ready to Get Started?

Company Name: Andrew Company

New Admin Name: Andrew

New Admin Email: andrew.hinton+demo@contuit.com

New Admin password: [REDACTED]

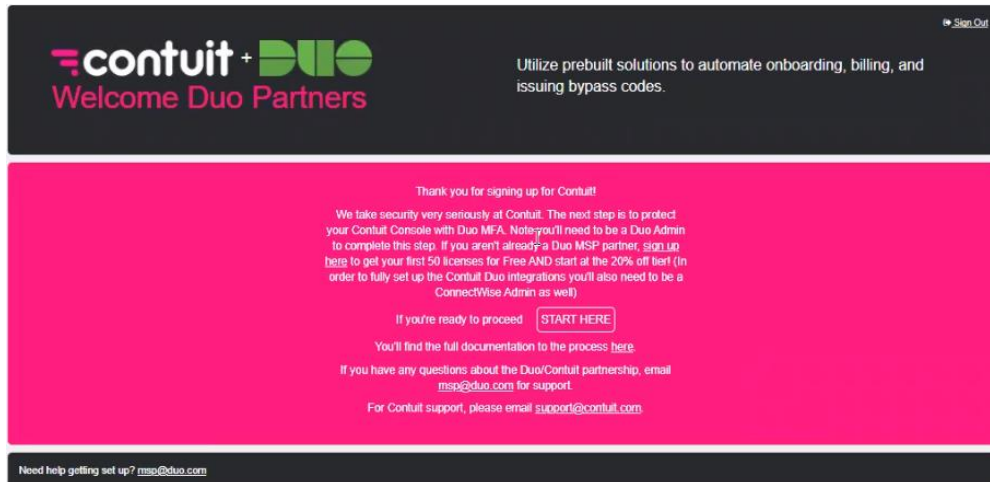
Confirm password: [REDACTED]

I agree to Contuit Terms and Conditions

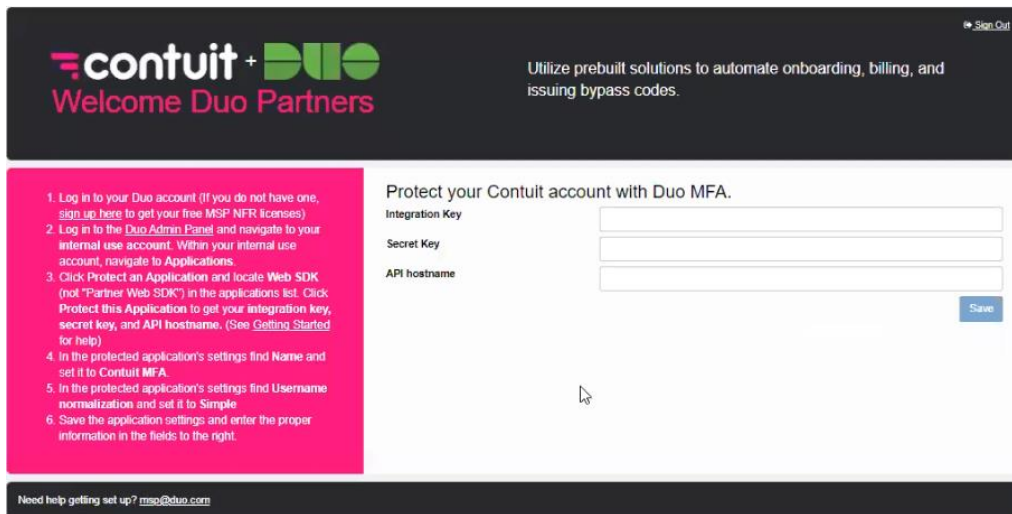
Set up billing Add billing later

Need help getting set up? msp@duo.com

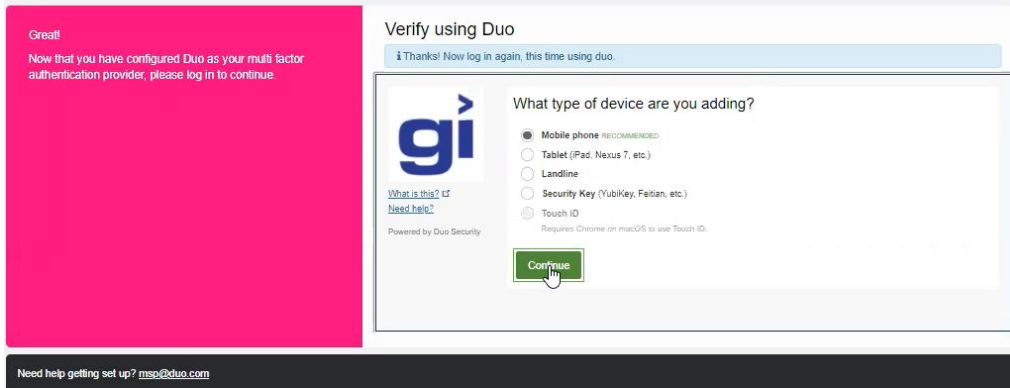
Enter your account information like above and select whether you agree to Contuit's Terms and Conditions. Our Duo solution has a 2-week free trial with no payment method needed, so you can choose to **Add billing later**. Once you click this button, a Contuit account will be created for your organization.



To secure your account, we ask you to protect it with Duo MFA. This will require you to have access to the [Duo Admin Panel](#) to retrieve the necessary Keys. If you have access to this Portal, click on **START HERE** to proceed.



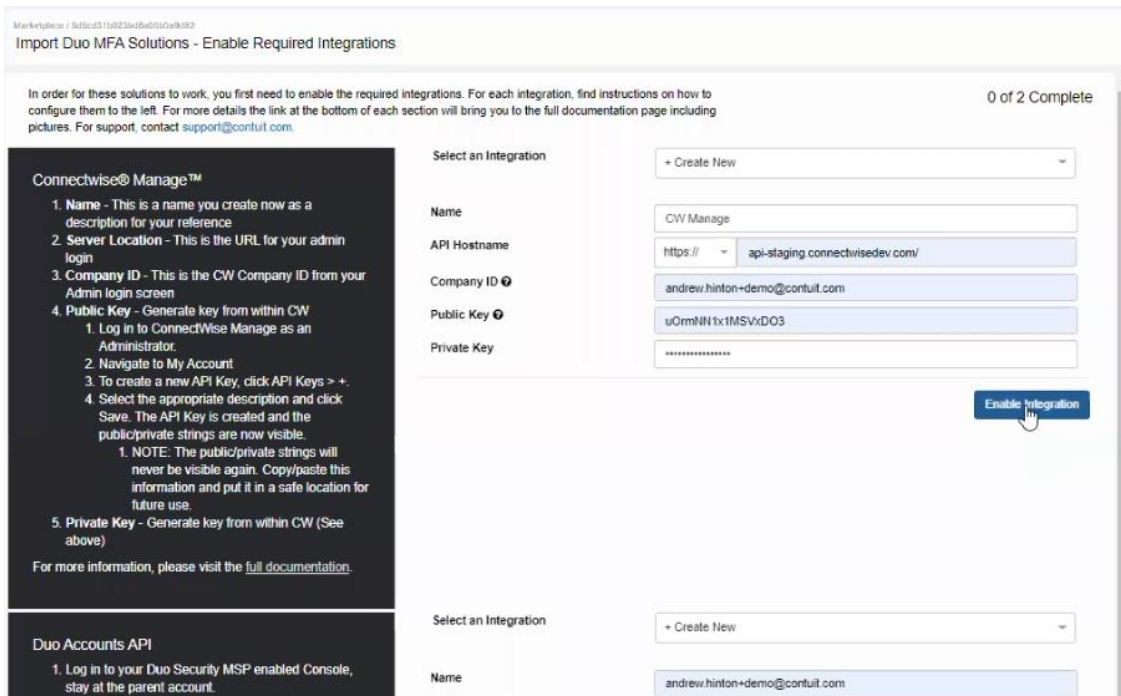
This brings up the screen where you will enter your Duo keys, [retrieved separately from the Duo Admin Panel](#). Instructions from Duo are shown here on the left in the pink box. Once you click **Save** you'll be asked to log in to your Contuit account, using the email/password you created above.



Once you've logged in, you will start to set up Duo 2FA. If you click **Start setup** on the first screen you can then choose how you wish to be verified. follow Duo's steps to enter relevant information (e.g. mobile phone number) and verify your account. You may be asked how you want to be authenticated when you log in – once you've made this selection, click on **Continue to Login**. You'll then be asked to verify using Duo: select the relevant option and (once verified) you will be logged in to the Contuit portal to set up your integrations.

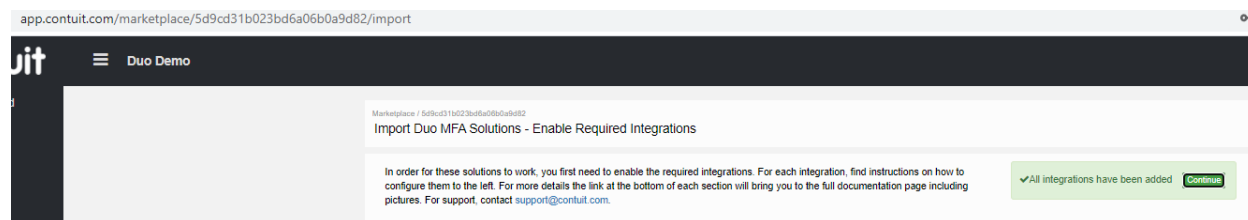
Step 2: Provide API keys and Import the 'CW / Duo Sync' Bundle

Now that the Contuit instance is created, this step will gather your API keys and install various components (integrations, processes, and data).



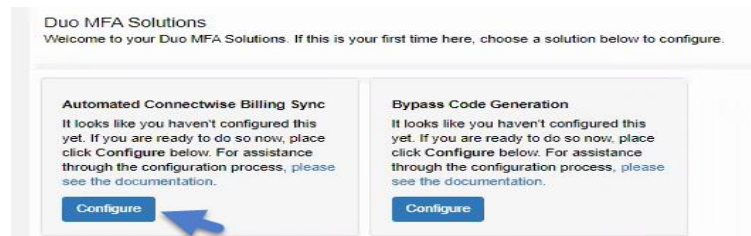
ConnectWise: Most of the information you need to integrate ConnectWise will come from ConnectWise itself, so you will need to be logged in to their portal as an admin. Instructions are in the black box to the left. If this is your first time integrating ConnectWise, you will leave the **Select an Integration** dropdown on “+ Create New”. You can name this ConnectWise integration anything you like, as long as that name doesn’t conflict with any other integration you have created in Contuit. Above, we’ve named it “CW Manage”. **API Hostname** here means the same as **Server Location** and is the URL for your CW admin login. You will be asked to enter the **Public and Private API keys**. Once this is all complete you can click on **Enable Integration** and the ConnectWise integration setup should disappear.

Duo: As for ConnectWise, you can name this integration whatever you like (e.g. “Duo 2FA”) and enter the relevant Keys and API Hostname. Once complete, click **Enable Integration**.

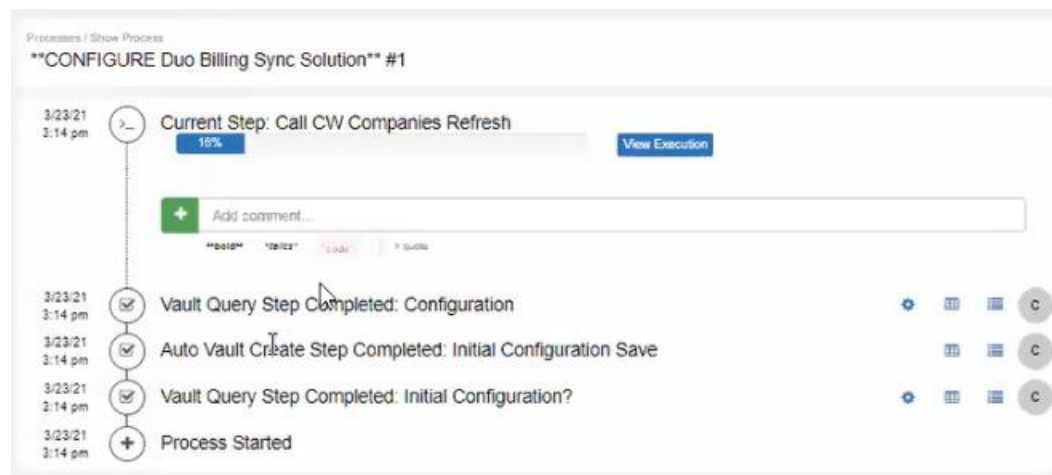


When the integrations are both set up, a confirmation form will appear; select the green **Continue** button.

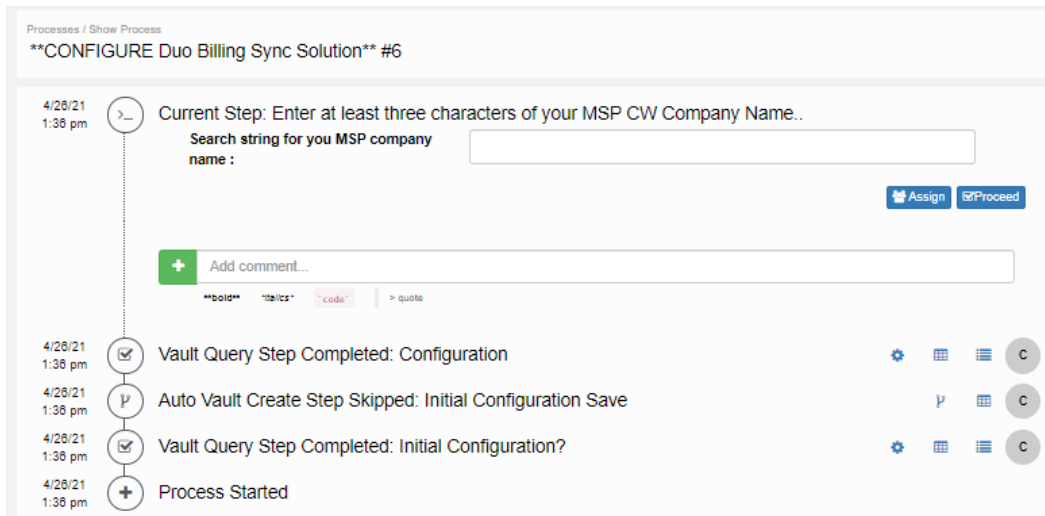
Step 3: Configure Billing Sync



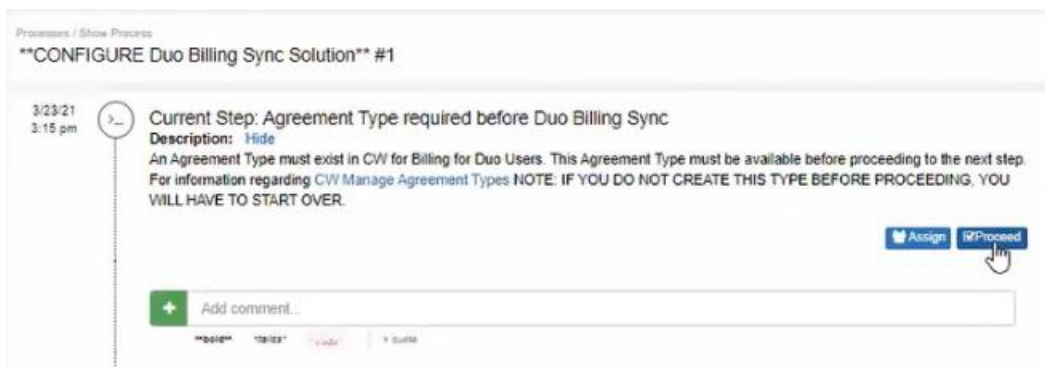
Start by selecting the **Configure** button for the “Automated ConnectWise Billing Sync” feature first.



You will then be led through several orchestrated configuration steps, some of which require you to select items before proceeding. If at any point in time the current process seems to “hang”, click the refresh button in Contuit or on your browser. Doing so will not kill progress.

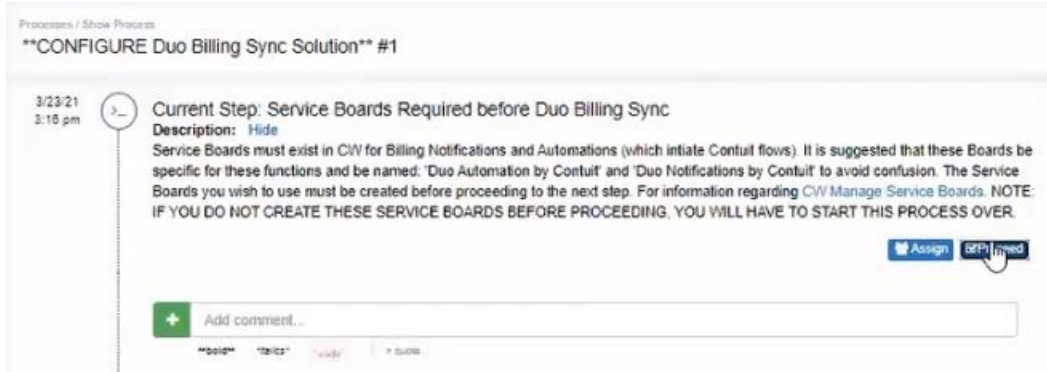


The first step will ask you to enter at least the first 3 characters of your MSP’s company as created in ConnectWise (the one where your tickets get sent), then hit **Proceed**. The process “*Call CW Companies Refresh*” should start automatically. Once that process completes, you will select the correct company from the drop-down list, then click on **Proceed**.

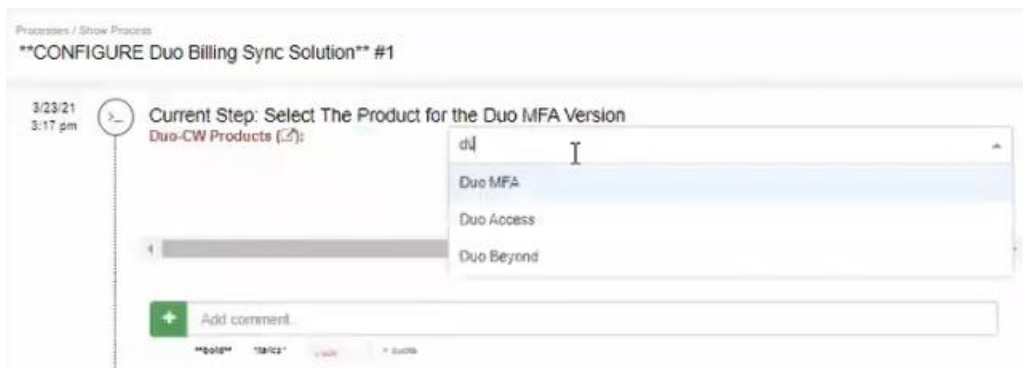


In the next step you will select the Agreement type that Contuit will look for. Before clicking *Proceed* you should confirm that an **AGREEMENT TYPE** exists in ConnectWise for Billing for Duo Users, and create one if it doesn’t exist. For more information on how to create Agreements check out: [CW Manage Agreement Types](#). If you use more than one agreement type to sell Duo (not recommended), you will need to contact us at support@contuit.com.

Click **Proceed** when you are ready to select your Agreement Type – Contuit will automatically refresh your list of CW Agreement Types. Use the drop-down arrow to view the Agreement Types that Contuit has retrieved from CW Manage, select the desired Agreement Type (e.g. you might have named this “Duo Services”), and click **Proceed**.

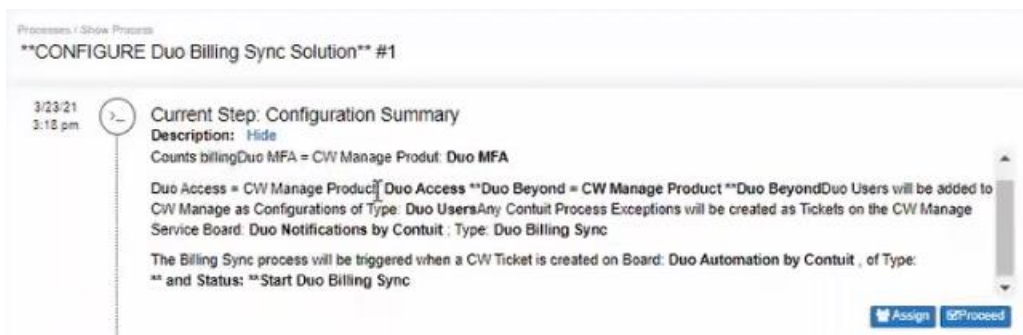


Now you need to set up service boards in ConnectWise that Contuit will use to run our automations. Before clicking “Proceed” go back to ConnectWise and **create two new boards named (1) “Duo Notifications by Contuit” and (2) “Duo automation by Contuit”**. Then click **proceed** and select the relevant board for notification from the drop-down menu, followed by the automation board. Once these steps are completed Contuit will start to refresh your Duo “products”.



Now you need to match your ConnectWise products to the relevant Duo Versions (i.e. MFA, Access and Beyond), respectively. NOTE: The products and corresponding costs and pricing need to exist in ConnectWise before proceeding. For more info about how to create products see [CW Manage Products](#). Once you have created the Duo Product(s) in ConnectWise (with their associated cost and price), you can proceed to select the relevant products for each Duo Version in turn, using the drop-down menus.

Note: If you don’t have all three Versions added as product in CW (e.g. because you only sell Duo MFA), you can select “Not Applicable” from the list for any irrelevant Versions.



Finally, you will be presented with a “*Configuration Summary*” – click **Proceed** here to finish the billing sync configuration. You are now ready to run the Billing Sync!

Step 4: Schedule or Run Billing Sync

Duo Demo

Processes
Playbook

Toggle Columns Search processes All Basic Trigger CBD Event All Drafts Live Archived

Process Name	Actions	Initiation
CONFIGURE Duo Billing Sync Solution	View Process ▶ Execute Archive	basic
CONFIGURE Duo ByPass Solution	View Process ▶ Execute Archive	basic
INITIATE Duo ByPass Code Request	View Process ▶ Execute Archive	basic
INITIATE Synchronize Duo Billing	View Process ▶ Execute Archive	basic

Now that you are ready to run the billing sync, you can do so at any time. Alternatively, you can schedule the sync to run weekly/monthly. Most customers elect to schedule the sync (“set and forget”). This can be done easily within Contuit, starting from this screen above where you will land after completing Step 3. Just find “**INITIATE Synchronize Duo Billing**” and click on **Execute**.

Execute or Schedule Process

Run Now
If you want to run the process right now, select this option

Execute

Schedule
You may also schedule the process to run in the future or on an interval

Start Date
March 23, 2021 12:00 AM

Frequency
Weekly

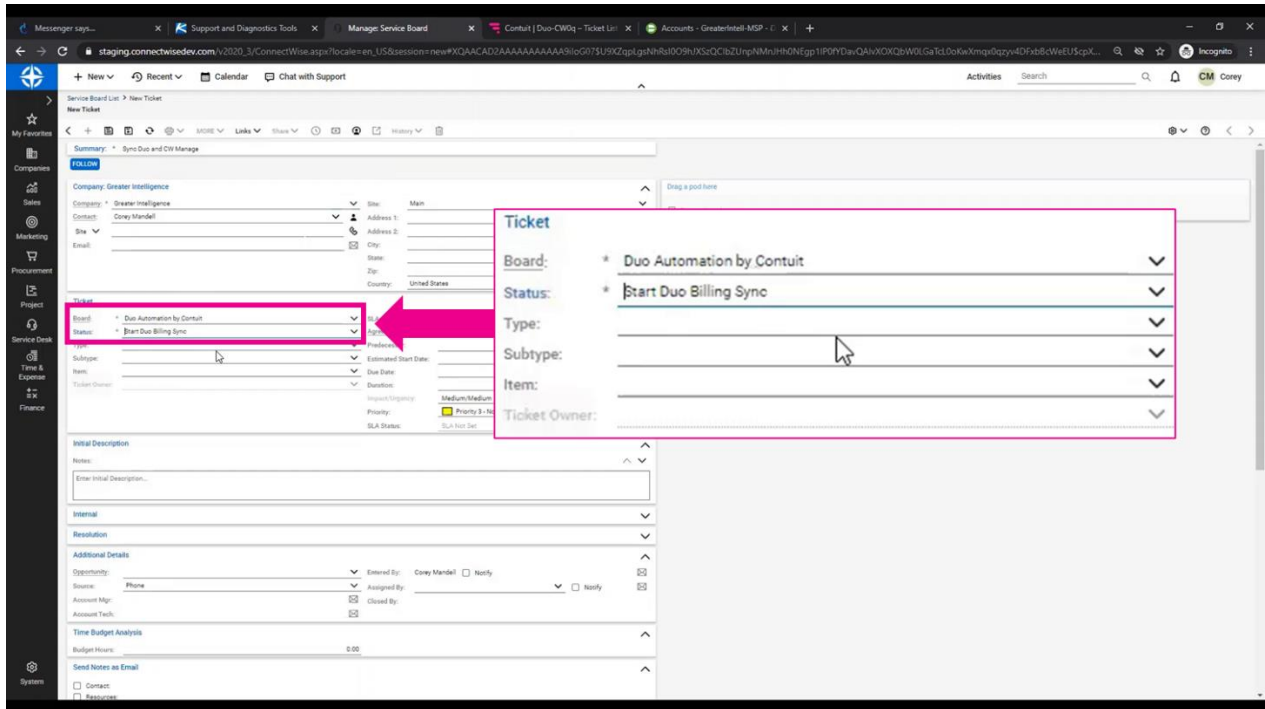
Fill Data

Cancel Schedule

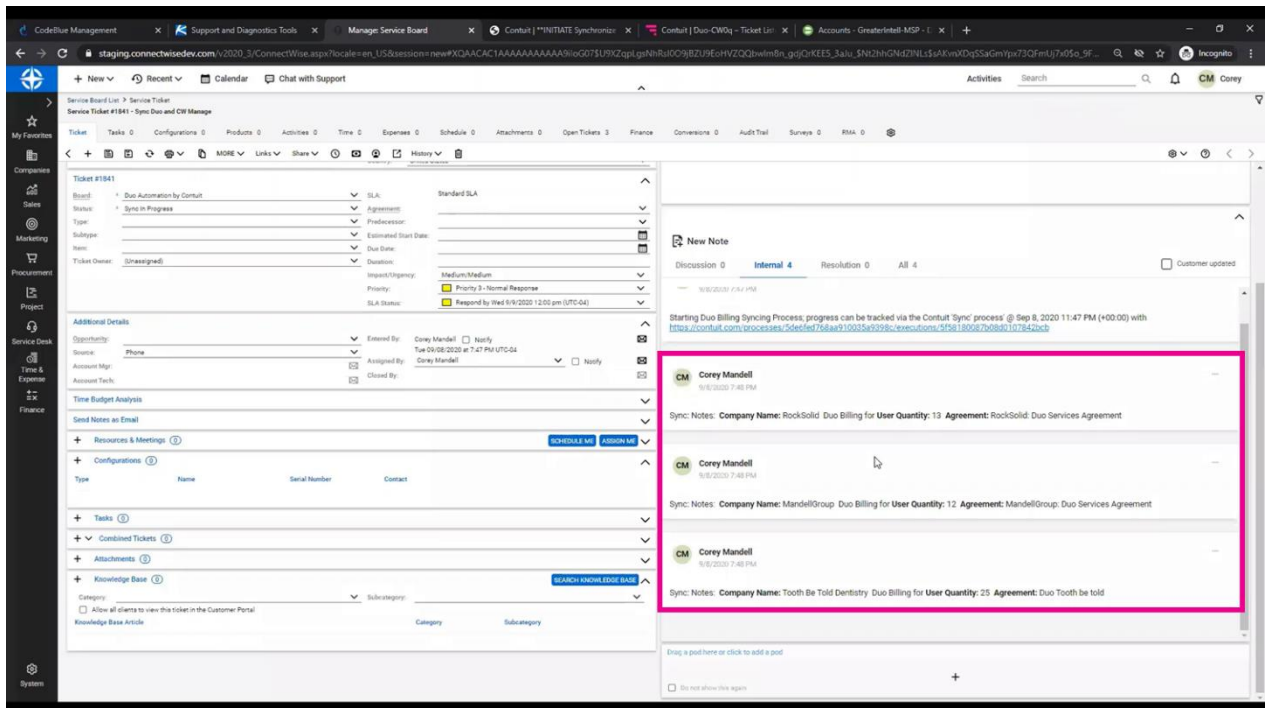
This will bring up an option to either **Execute** now, or **Schedule** execution to run weekly/monthly from a certain start date. We advise most customers to sync weekly, starting on a Friday (ignore the “*Fill Data*” button for the purpose of this integration). Then just click on “Schedule” and you are all set! Contuit will sync your Duo billing each week with no action required on your part, and keep a record of this action in ConnectWise tickets.

NOTE: If you do not follow the same naming conventions for companies between ConnectWise and Duo, Contuit will automatically create a ConnectWise ticket advising that a match is required. In this event you need to follow the steps in **Appendix 1** to match Duo accounts to ConnectWise companies.

You can stop reading here and move on to Step 5, unless (like some of our customers) you want to **run the sync within CW Manage itself rather than Contuit...**



To do this you just need to **open a ConnectWise ticket**. It does not matter which configuration the ticket is opened through; **all** Duo customers will be synced. Associate this ticket to the **Duo Automation by Contuit** board with status **Start Billing Sync**. Then you just save and refresh the ticket...

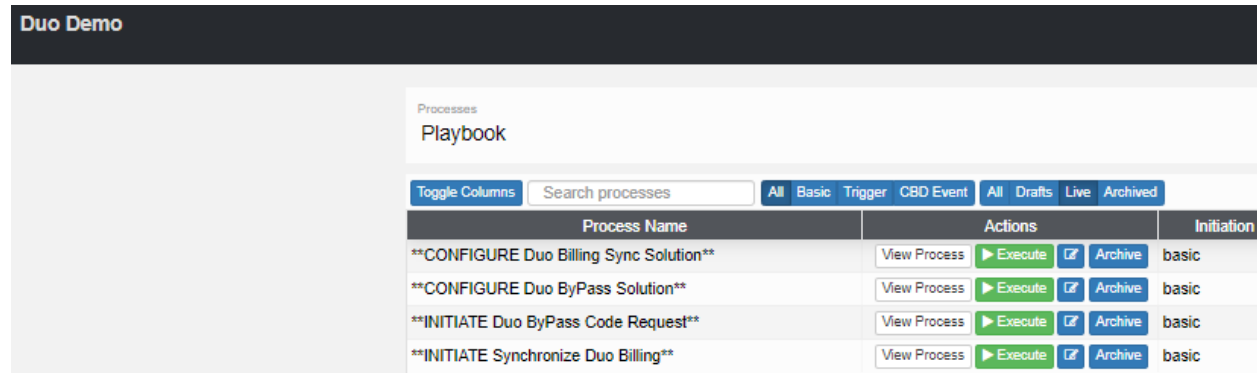


...and the ticket will be updated to show the billing sync has executed for all Duo customers. You can set this as a recurring ticket in CW Manage (as an alternative to setting up this recurrence in Contuit as above).

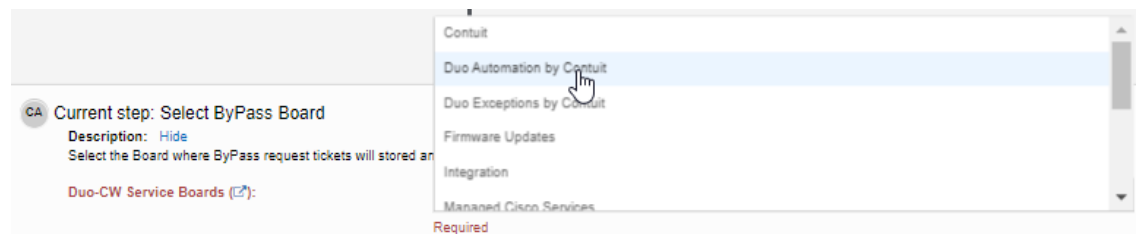
Step 5 (optional): Configure and Run ConnectWise Bypass Code Requests

This solution lets you quickly retrieve Duo Bypass codes for a selected user via the secure Duo Admin API, returning the codes directly to the initiating ticket. Customers are starting to use this feature increasingly as it avoids using less secure methods for credential sharing between MSP technicians, and provides a **fast and simple way to retrieve bypass codes** for both technicians and end customers.

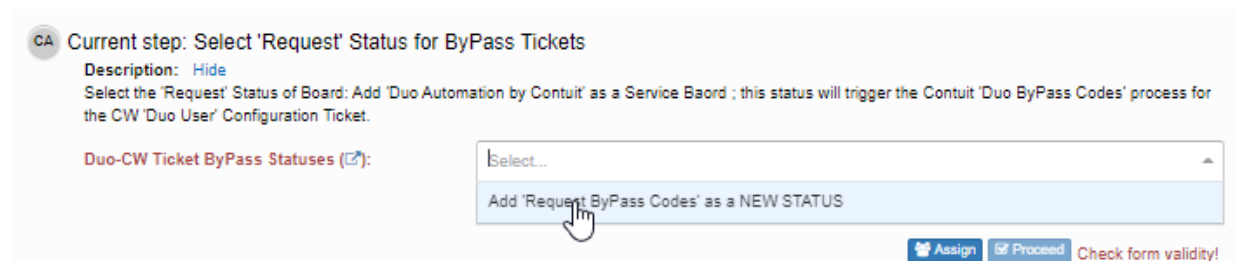
This will take you through an orchestrated sequence of steps, like Step 3 above for the Billing Sync. If at any point in time the current process seems to hang, click the refresh button in Contuit or on your browser. Doing so will not kill progress.



Assuming you are starting on the screen above, find “Configure Duo Bypass Solution” and click on “Execute”.



This brings up Contuit’s orchestration tool again. First you will be selecting the Service Board that will be used for the automation of requests for Duo Bypass Codes. It is suggested (best practice) you select the “Duo Automation by Contuit” board created by the Billing Sync Configuration process in Step 3. Then click **Proceed**.



Use the drop-down arrow to view the *Status* selections for the Service Board selected above. Contuit will be ‘listening’ for tickets with this status to automate the acquisition of Bypass codes. Chances are that you haven’t set any *Status* options yet for this board, which is OK: the drop-down menu will ask if you would like to “**Add Request Bypass Codes as a NEW STATUS**”. By choosing that option and clicking **Proceed**, Contuit will add this Status to the Service Board selected above.

That completes setup for Contuit’s bypass code automation – let’s give it a test run!

Configuration Search

Expiration Date: through Advanced Search

Actions **SEARCH** CLEAR Export View ... 1 - 12 of 12

<input type="checkbox"/> Configuration Type	Status	Configuration Name	Company	Complete	Exp
Duo Users	Show				All
<input type="checkbox"/> Duo Users	Active	Duo User: accounts@xcellerate.com	Mandell Group Inc.	✓	
<input type="checkbox"/> Duo Users	Active	Duo User: corey	Mandell Group Inc.	✓	
<input type="checkbox"/> Duo Users	Active	Duo User: jjones	Mandell Group Inc.	✓	
<input type="checkbox"/> Duo Users	Active	Duo User: jon	Mandell Group Inc.	✓	
<input type="checkbox"/> Duo Users	Active	Duo User: jsmith	Mandell Group Inc.	✓	

Find the Configuration in ConnectWise Manage for any one of your active Duo users. For example, above we've retrieved the full list of users by going to Company -> Configurations, selecting 'Duo Users' as the type and hitting **SEARCH**. However you locate your example user, click on their **Configuration Name** to open their Config.

Configuration Search > Configuration

Duo User: corey

Configuration Agreement 0 Service 0 Attachments 0 Product 0 Config

Create Ticket Manage Device Links Share

Configuration Name * Duo User: corey

Configuration Details

Type:	* Duo Users	▼	Expiration Date:	<input type="text"/>
Status:	* Active	▼	Vendor:	<input type="text"/>
SLA:		▼	Manufacturer:	<input type="text"/>
Install Date:		📅	Mfg Part #:	<input type="text"/>

Click on **Create Ticket**.

Service Ticket
Service Ticket #1515 - Duo User: corey

Ticket | Tasks 0 | Configurations 1 | Products 0 | Activities 0 | Time 0 | Expenses 0 | Schedule 0 | Attachments 0 | Open Tickets 1 | Finance | Conversions 0 | Audit T

Summary: * Duo User: corey
Age: 1m | CONTROL SESSION | FOLLOW

Company: Mandell Group Inc.
Company: * Mandell Group Inc. | Site: Main
Contact: Collaboraton Network G2 | Address 1: | Address 2: | City: | State: | Zip: | Country: United States

Ticket #1515
Board: * Duo Automation by Contuit | SLA: Standard SLA
Status: * Request ByPass Codes | Agreement: | Predecessor: | Estimated Start Date: |

Initial Description
CM Corey Mandell
10/30/2019 2:36 AM
ByPass codes for:
172233549
295209723
504822974

Select the Service Board (*'Duo Automation by Contuit'*) and Status (*'Request Bypass Codes'*) that you set above – then **Save** and **Refresh**. If your setup was successful, the Duo Bypass codes will be placed as a *Note* for the *Service Ticket* as shown above. Note that the ticket is not automatically closed.

CONGRATULATIONS – You're now set up for regular billing syncs and bypass code automation with Duo!! We hope you enjoy the extra time this saves you each month. Please raise a ticket with support@contuit.com if you run into any issues with the above instructions – and reach out if you have any helpful (or fun) ideas for other automations!

Regards,

The Contuit Team



APPENDIX 1: MAPPING DUO ACCOUNTS TO CONNECTWISE COMPANIES

This appendix outlines how to appropriately map *Duo Account Names* to *ConnectWise Manage (CW) Companies*.

NOTE: These steps are only required if an MSP has not already set up Duo and ConnectWise using the same naming conventions. If names are the same then Contuit will follow the 'Ideal Path' outlined below, mapping accounts automatically. Any unmatched Duo accounts should be flagged to you by Contuit in a ConnectWise ticket, when you attempt to run the Billing Sync.

Please contact support@contuit.com if you run into any issues with these instructions.

'Ideal Path': Automatic mapping by Contuit

The screenshot shows a workflow process with the following steps and callouts:

- Step 18: Run Process to Refresh Accounts. Callout: 1. Get All Duo Accts.
- Step 19: Query Accounts
- Step 20: Run Process to Refresh CW Companies. Callout: 2. Get All CW Comps.
- Step 21: Run Process to Auto Assign Companies. Callout: 3. Loop thru and match Duo Accts. to CW Comps.
- Step 22: Query Accounts with No Company. Callout: 4. Notify if there is no match that can be found.
- Step 23: Run Process to Create Ticket for missing companies
- Step 24: Run Process to Close Duo Billing

Contuit offers continuous detection and mapping of new Accounts (or removed Accounts). Each time the Billing Sync is executed, Contuit 'refreshes' Accounts and Companies and then matches each Duo Account by first comparing the *Duo Account Name* to the *CW Company Identifier*, and if no match, then to the *CW Company Name*.

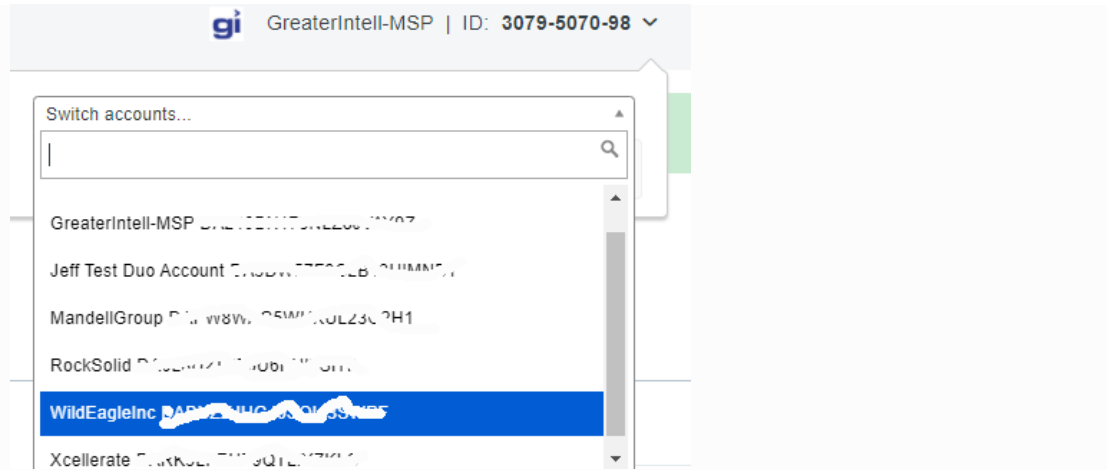
If there is still no match, a CW Manage ticket is automatically created and assigned. To resolve this mismatch, the Administrator can opt for one of three alternatives:

1. Manually update *Duo Account Names*, then re-execute Contuit's Billing Sync (**preferred**)
2. Manually 're-map' directly in your *Contuit Vault*, or
3. Remove un-matched Duo Accounts from the *Duo Admin Portal*.

Alternative #1: Manually update Duo Account names (preferred)

The strongly preferred approach for matching is to change the name of your Duo accounts such that they are aligned with your ConnectWise naming conventions. To adjust *Duo Account names*, follow these steps:

1. **Log in** to the Duo Admin Panel
2. **Switch** to the Account that needs to be renamed



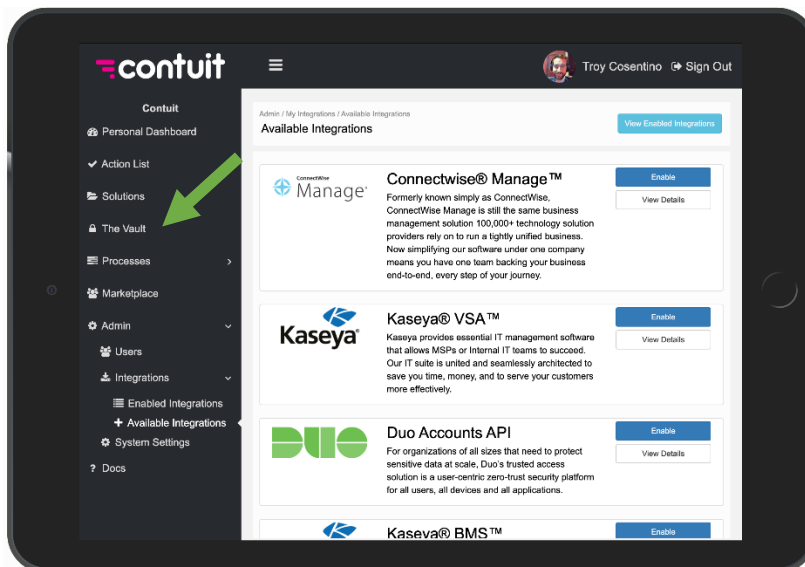
3. Click **Settings** in the left navigation panel
4. Enter the new desired name in the *Account name* text field. Note: you will need to change this field to match the *CW Company Identifier* or *CW Company Name* in ConnectWise
5. Scroll down and click **Save Changes**
6. **Repeat** for any other unmatched Duo accounts.

The next time the Duo / CW Billing Sync runs, the process will find the match.

Alternative #2: Manually ‘re-map’ directly in your Contuit Vault

If the Duo Admin does not want to change the Name of the Duo Account for any reason, the matching can be done manually in Contuit itself by following these steps:

1. Log in to your Contuit account, click on **The Vault** in the left-hand navigation panel, and open the **Duo-CW Companies** vault table.



2. Select **Filter** and search for the first CW Company that needs to be matched to the missing Duo account. Locate and copy the “*id*” and “*identifier*” from the table as shown below into

a separate document (e.g. Notepad or similar). **Repeat** for other companies that will require matching so that you have a full list of unmatched ConnectWise records.

The Vault

The Vault

Duo-CW Companies

Toggle Columns Filter Clear Filter Reload Run Process

	id	identifier	name	Duold	DefaultContactId	DefaultContactName	Actions
<input type="checkbox"/>	20377	Glenview Trust	The Glenview Trust ...		8401	Bill Hawes	View Details Edit Delete
<input type="checkbox"/>	20379	GTC	Glenview Trust Com...		8543	Bill Hawes	View Details Edit Delete
<input type="checkbox"/>	20381	Glenview Trust2	Glenview Trust Com...				View Details Edit Delete
<input type="checkbox"/>	20382	Glenview Trust23	Glenview Trust Com...				View Details Edit Delete

- Now open the Duo-CW MSP Customer Duo Accounts vault table.
- Find the first record(s) without a corresponding *CW Company Identifier*. Select the **edit** icon as shown below.

The Vault / Show Vault Structure

The Vault

Duo-CW MSP Customer Duo Accounts

Toggle Columns Filter Reload Run Process

	Name	CW Company Ident...	Duo Edition	Duold	CompanyId	URI	Associated Compa...	Actions
<input type="checkbox"/>	The Glenview Trust ...		MFA				No	View Details Edit Delete
<input type="checkbox"/>	Churchill Mortgage	Churchill Mortgage	MFA				Yes	View Details Edit Delete
<input type="checkbox"/>	Studio Bank VPN	StudioBank	MFA				Yes	View Details Edit Delete
<input type="checkbox"/>	Special Kids	Special Kids Therapu	MFA				Yes	View Details Edit Delete

- Enter the *“id”* that you noted in step #2 above into the *CompanyId* field and enter the *“identifier”* into the *CW Company Identifier* field.

Then hit **Save**. Repeat this step for any other records saved in step #2.

The Vault / Show Vault Structure

Edit Duo-CW MSP Customer Duo Account

Set up attributes

Name: The Glenview Trust Company

CW Company Identifier: Glenview Trust

Duo Edition: MFA

Duold: [value]

CompanyId: [value]

URI: [empty]

Associated Company?: No

Set up relationships

Customers: Internal Customer

Associate integrations

Integrations: Select...

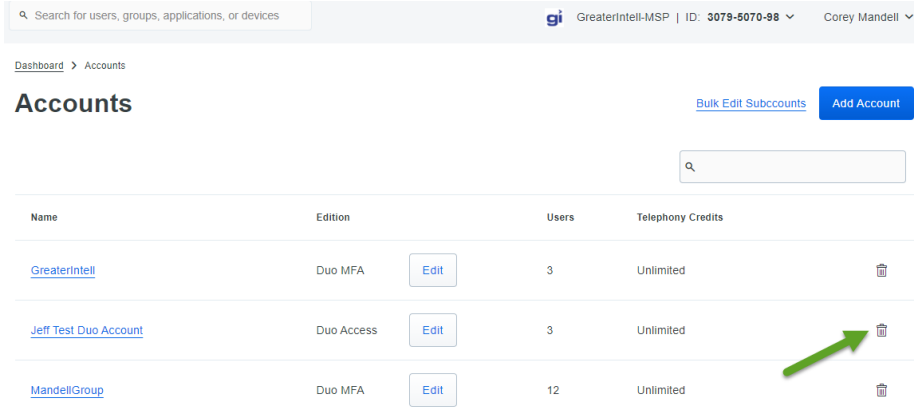
Save

“identifier” goes here

“id” goes here

Alternative #3: Remove Duo Account

If the Duo Admin deletes the Duo Account from the *Duo Admin Portal* (as shown below), the next Billing Sync will ignore all the MFA records and not sum them for any associated Agreement/Additions records.



Search for users, groups, applications, or devices

GreaterIntell-MSP | ID: 3079-5070-98 | Corey Mandell

Dashboard > Accounts

Accounts [Bulk Edit Subaccounts](#) [Add Account](#)

Search

Name	Edition	Users	Telephony Credits
GreaterIntell	Duo MFA	3	Unlimited
Jeff Test Duo Account	Duo Access	3	Unlimited
MandellGroup	Duo MFA	12	Unlimited

After following the above instructions, the next Billing Sync should run with no unmatched accounts. Please raise a ticket with support@contuit.com if you run into any issues with the above instructions.

Regards,

The Contuit Team

