# **DUO / CONNECTWISE INTEGRATION: GETTING STARTED**

This document provides an end-to end walkthrough for a <u>new customer</u> setting up Contuit's **integration between ConnectWise Manage and Duo**, including securing your Contuit account with Duo for authentication. Note that this is a 3<sup>rd</sup>-party integration with pricing set by Contuit. Visit <u>contuit.com/duo/</u> 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**.
- 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 <u>support@contuit.com</u> if you run into any issues with these instructions.

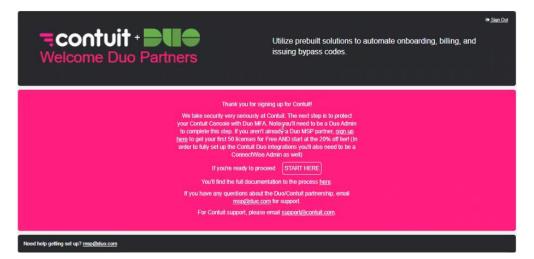
#### Step 1: Create a Contuit account.

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

<b>Contuit</b> + <b>Due</b> Welcome Duo Partner		e prebuilt solutions to automate onboarding, billing, and ng bypass codes.
Optimized in the second seco	Ready to Get Started? Company Name New Admin Name New Admin Email New Admin password Confirm password	Andrew Company Andrew Andrew andrew hinton-demo@contuit com
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 <u>2-week free trial</u> 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 <u>Duo Admin Panel</u> to retrieve the necessary Keys. If you have access to this Portal, click on **START HERE** to proceed.

<b>Contuit</b> + <b>Due</b> Welcome Duo Partner		t <del>≉ Sign Out</del>
<ol> <li>Log in to your Duo account (If you do not have one, <u>sign up have to pat your free MSP NFR licenses)</u></li> <li>Log in to the <u>Duo Admin Panel</u> and navigate to your internal use account. Whith your internal use account, navigate to Applications.</li> <li>Click Protect an Application and locate Web SDK (not "Partner Web SDK) in the applications list. Click Protect this Application to get your integration key, secret key, and API hostname. (See <u>Getting Started</u> for help).</li> <li>In the protected application's settings find Name and set in to Contuit WFA.</li> <li>In the protected application's settings find Username normalization and settings and enter the proper information in the fields to the right.</li> </ol>	Protect your Contuit account with Duo MFA. Integration Key Secret Key API hostname	Save
Need help getting set up? msp@duo.com		

This brings up the screen where you will enter your Duo keys, <u>retrieved separately from the Duo Admin</u> <u>Panel</u>. 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.



<b>Contuit</b> + <b>Due</b> Welcome Duo Partner	
Great! Now that you have configured Duo as your multi factor	Verify using Duo i Thanks! Now log in again, this time using duo.
authentication provider, please log in to continue.	What type of device are you adding?  Multi type of device are you adding?  Type of device are you adding?  Multi type of device are you adding?  M
Need help getting set up? msp@duo.com	

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).

onfigure them to the left. For more details the link at the bottom of eac ictures. For support, contact support@contuit.com.	d integrations. For each integration, find in the section will bring you to the full docume		0 of 2 Complete	
	Select an Integration	+ Create New	·	
Connectwise® Manage™				
<ol> <li>Name - This is a name you create now as a description for your reference</li> </ol>	Name	CW Manage		
<ol> <li>Server Location - This is the URL for your admin login</li> </ol>	API Hostname	https:// - api-staging.connectwise	edev.com/	
3. Company ID - This is the CW Company ID from your Admin login screen	Company ID 😡	andrew.hinton+demo@contuit.com		
<ol> <li>Public Key - Generate key from within CW</li> <li>Log in to ConnectWise Manage as an</li> </ol>	Public Key 😡	uOrmNN1x1MSVxDO3		
Administrator. 2. Navigate to My Account	Private Key			
<ol> <li>To create a new API Key, click API Keys &gt; +.</li> <li>Select the appropriate description and click Save. The API Key is created and the public/private strings are now visible.</li> <li>NOTE: The public/private strings will new backfields prior Querkark this</li> </ol>			Enable Integration	
never be visible again. Copy/paste this information and put it in a safe location for future use. 5. Private Key - Generate key from within CW (See above)				
information and put it in a safe location for future use. 5. Private Key - Generate key from within CW (See				



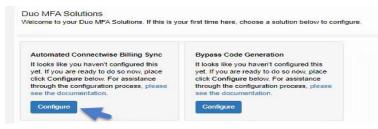
**ConnectWise**: Most of the information you need to integrate ConnectWise will come from ConnectWise itself, so you will need to be logged in to their portal as an admin. Instructions are in the black box to the left. If this is your first time integrating ConnectWise, you will leave the **Select an** *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*.

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Jit	≡	Duo Demo		
5			Markeytere / 66lect31te023te06e0806e0e1tz Import Duo MFA Solutions - Enable Required Integrations	
			In order for these solutions to work, you first need to enable the required integrations. For each integration, find instructions on how to configure them to the left. For more details the link at the bottom of each section will bring you to the full documentation page including pictures. For support, contact support@confluit.com.	✓All integrations have been added (Continue)

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.

**CONFIGU	Process JRE Duo Billing Sync Solution** #1				
3/23/21 3:14 pm	Current Step: Call CW Companies Refresh     View Execution				
	Add comment				
3/23/21 3:14 pm	Vault Query Step Completed: Configuration	0	m	=	c
3/23/21 3:14 pm	Auto Vault Crieate Step Completed: Initial Configuration Save		m	圜	c
3/23/21 2:14 pm	Vault Query Step Completed: Initial Configuration?	0		=	c
3/23/21 3:14 pm	+ Process Started				

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.



Processes / Show Process **CONFIGURE Duo Billing Sync Solution** #6			
4/28/21 1:38 pm Current Step: Enter at least three characters of your MSP CW Company Name Search string for you MSP company name :			
Add comment      "bold" "taits" 'code' > quote	<b>양</b> A	ssign	@Proceed
4/28/21 1:38 pm Vault Query Step Completed: Configuration	٥		≡ C
4/28/21 1:38 pm P Auto Vault Create Step Skipped: Initial Configuration Save		Y	
4/28/21 1:38 pm Vault Query Step Completed: Initial Configuration?	٥		≡ c
4/20/21 1:36 pm + Process Started			

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 <u>in ConnectWise</u> for Billing for Duo Users, and create one if it doesn't exist. For more information on how to create Agreements check out: <u>CW</u> <u>Manage Agreement Types</u>. If you use more than one agreement type to sell Duo (not recommended), you will need to contact us at <u>support@contuit.com</u>.

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*.



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		to avoid confusion. The Service
h to use must be created before proceeding to the T CREATE THESE SERVICE BOARDS BEFORE		
	Nooreento, too meente to	
		Assign Color Inved

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 <u>create two new boards</u> 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".

3/23/21 (>.		duct for the Duo MFA Version	
T	Duo-CW Products (2):	αų T	
		Duo MFA	
		Duo Access	
	4	Duo Beyond	

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 <u>ConnectWise</u> before proceeding. For more info about how to create products see <u>CW Manage</u> <u>Products</u>. 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 C Archive basic
	**INITIATE Synchronize Duo Billing**	View Process Execute 2 Archive basic

Now that you are ready to run the billing sync, you can do so at any time. <u>Alternatively, you can</u> <u>schedule the sync to run weekly/monthly</u>. 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 nov	r, 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). <u>Then just click on "Schedule" and you are all set!</u> 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...



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Companies	FOLLOW												
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0	Contact:	Corey Mandell	× 1	Address 1:		Ticket							
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E				Country: United	States	Status:	* Star	Duo Billing Sync			~		
Project	Board	<ul> <li>Duo Automation by Contuit</li> </ul>	~			T					~	-	
G Service Desk		* Btart Duo Billing Sync	~	Agen		Type:					~		
0	Subtype:	La la	÷	Predeceste Estimated Start Date		Subtype:			1		~		
Time & Expense	Ren: Ticket Owner			Due Date: Duration		Item:					~		
±∓ Finance				Impact/Urganity	Medium/Medium							-	
				Priority: SLA Status:	Priority 3 - No SLA Not Set	Ticket Owner:					~		
	Initial Descrip	stion					^						
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	Enter Initial D	escription_											
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	Opportunity:			Entered By: Core	y Mandell 🔲 Notify		123						
	Source:	Phone		Assigned By:		✓ □ Nacify							
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	Time Budget						^						
	Budget Hours		0.00				~						
8	Send Notes a						^						
System	Contact						~						
	Resources												

To do this you just need to **open a ConnectWise ticket**. It does not matter which configuration the ticket is opened through; <u>all</u> 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...

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Ticket #1841	1			^			
Board	Duo Automation by Contuit	V SLA:	Standard SLA				
Status	* Syno in Progress	✓ Agreement		~			
Type:		Predecessor:		~			
Subtype:		<ul> <li>Estimated Start Date</li> </ul>			New Note		
herr:		Due Date:					
Ticket Owner:	(Unassigned)	<ul> <li>Duration:</li> </ul>			Discussion 0 Internal 4 Resolution 0 All 4	□ °	Custome
		Impact/Urgency;	Medium/Medium	~			
		Priority:	Priority 3 - Normal Response	~	SUBCEDIN CALINA		
		SLA Stanis:	Respond by Wed 9/9/2020 12:00 pm (UTC-04)	~			
Additional De	etalls			^	Starting Duo Billing Syncing Process; progress can be tracked via the Contuit 'Sync' process' @ Sep 8, 2020 11:47 Pt https://contuit.com/processes/5de6fed768aa910035a9398c/executions/5f58180087b08d0107842bcb	M (+00:00) with	
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Send Notes a				Ť	Sync: Notes: Company Name: RockSolid Duo Billing for User Quantity: 13 Agreement: RockSolid: Duo Services Ag	reement	
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...and the ticket will be updated to show the billing sync has executed <u>for all Duo customers</u>. 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.

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 C Archive basic
	**CONFIGURE Duo ByPass Solution**	View Process Execute C Archive basic
	**INITIATE Duo ByPass Code Request**	View Process Execute C Archive basic
	**INITIATE Synchronize Duo Billing**	View Process Execute 27 Archive basic

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

	Contuit	*
	Duo Automation by Contuit	
CA Current step: Select ByPass Board	Duo Exceptions by Comuit	
Description: Hide Select the Board where ByPass request tickets will stored an	Firmware Updates	
	Integration	
Duo-CW Service Boards (C?):	Mananed Cisco Services	٣
	Required	

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*.

CA Current step: Select 'Request' Status for Description: Hide Select the 'Request' Status of Board: Add 'Duo A the CW 'Duo User' Configuration Ticket.	or ByPass Tickets Automation by Contuit' as a Service Baord ; this status will trigger the Contuit 'Duo ByPass Codes' process for
Duo-CW Ticket ByPass Statuses (🗷):	Select
	Add 'Requent ByPass Codes' as a NEW STATUS

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 Sea	rch			
Expiration Date:		thr	ough	Advanced Search
+ 🖉 🖶	Actions 🗸 SE	ARCH CLEAR	Export View ••• 😥	1 - 12 of 12 >
Configuration Ty	pe Status	Configuration Name	Company	Complete Exp
Duo Users	Show V			✓ All
Duo Users	Active	Duo User: accounts@xce	ellerate.com Mandell Group Inc.	~
Duo Users	Active	Duo User: corey	Mandell Group Inc.	~
Duo Users	Active	Duo User: jjones	Mandell Group Inc.	~
Duo Users	Active	<u>Duo User: jon</u>	Mandell Group Inc.	$\checkmark$
Duo Users	Active	<u>Duo User: jsmith</u>	Mandell Group Inc.	~

Find the Configuration in ConnectWise Manage for <u>any one of your active Duo users</u>. 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.

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Companies	< + 🗉 🗉	· ͡ Create Ticket	🖒 Manage Device Links 🗸 S	Share 🗸
Companies	Configuration Name	* Duo User: corey		
Contacts	Configuration Details			
Configurations	Type: * Duo l	lsers	✓ Expiration Date:	
Company Activity	Status: * Active	9	Vendor:	
Exceptions	SLA:		Manufacturer:	
	Install Date:		Mfg Part #:	

Click on Create Ticket.



Service Ticket					
Service Ticket #1515 - Duo User: corey					
Ticket Tasks 0 Configurations 1	Products 0 Activities	s 0 Time 0 Expenses 0	Schedule 0 Attachments	0 Open Tickets 1 Finance	Conversions 0 Audit
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Summary: * Duo User: corey					
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	Count	onited states			
Ticket #1515			ByPass	s codes for:	
Board: * Duo Automation by Contuit	✓ SLA:	Standard SLA	17223	3540	
Status: * Request ByPass Codes	✓ Agreen	ment:	29520		
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Subtype:	✓ Estimation	ated Start Date:	<b></b>		
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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 <u>support@contuit.com</u> 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 <u>not</u> 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 <u>automatically</u>. 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 <u>support@contuit.com</u> if you run into any issues with these instructions.

### 'Ideal Path': Automatic mapping by Contuit

≡	Step 18:	Run Process to Refresh Accounts 1. Get All Duo Accts.	ype:	Contuit - Run Process		i	Y	٥	Ŵ	+	4
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≡	Step 21:	Run Process to Auto Assign Companies	ype:	Contuit - Run Process for List		i	Y	0	ŵ	+	わ
≡	Step 22:	Query Accounts with No Company	Гуре:	4. Notify if there is no match	that	t cai	n be	foui	nd.		2
≡	Step 23:	Run Process to Create Ticket for missing companies	Гуре:	Contuit - Run Process		i	Y	0	Û	+	凸
=	Stop 24:	Due Desses to Core Due Differe	Supo:	Contribution Designed							~

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 <u>automatically</u> 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



Switch accounts	*
	٩
GreaterIntell-MSP C. L. T. S. L. L. S. MANTA	
MandellGroup Cia vv8vv, OSIA/Pi, JUL23COH1	
RockSolid Cases Carolina Content	
Xcellerate T. KNSS, THI BQ (2.277/214)	•

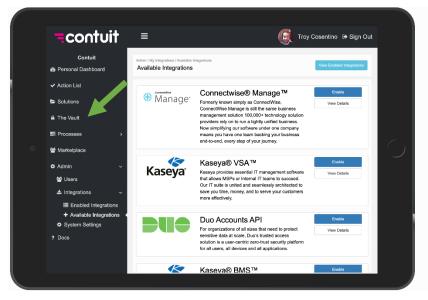
- 3. Click Settings in the left navigation panel
- 4. Enter the new desired name in the Account name text field. Note: you will need to change this field to match the CW Company Identifier or CW Company Name in ConnectWise
- 5. Scroll down and click **Save Changes**
- 6. *Repeat* for any other unmatched 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 V The	e Vault						
Duo	-CW Companies		Ŧ	Create Duo-CW C	ompany		
Toggk	e Columns 🛛 🔻 Filter 🔤 🕇	Clear Filter 🛛 🕄 Reload 🛛 I	Run Process 👻				
	id	identifier	name	Duold	DefaultContactId	DefaultContactName	Actions
			Glen				
• (	20377	Glenview Trust	The Glenview Trust		8401	Bill Hawes	View Details 🛛 🖬
	20379	GTC	Glenview Trust Com		8543	Bill Hawes	View Details 🕼 🚺
	20381	Glenview Trust2	Glenview Trust Com				View Details 🕼 🔯
	20382	Glenview Trust23	Glenview Trust Com				View Details 🛛 🚺

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

ult / Show Vault Structure Vault							<b>*</b> /
CW MSP Customer Duo		v	Create Duo-CW MS	SP Customer Duo Account			
Name	CW Company Ident	Duo Edition	Duold	Companyld	URI	Associated Compa	Aci
The Glenview Trust		MFA	FUNDARY TET SKUT			No	View Details 🕼 🚺
Churchill Mortgage	Churchill Mortgage	MFA	Providence Company	2110.1		Yes	View Details 🕼 🚺
Studio Bank VPN	StudioBank	MFA	PATUS INFORMATION	21210		Yes	View Details 🕼 🚺
Snecial Kids	Snecial Kids Therany	MEA	Deservice	,		Vec	View Details 17

5. 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.

		<i>"identifier</i> " goes h
Set up attributes		
■ Name	The Glenview Trust Company	
CW Company Identifier	Glenview Trust	"id" goes here
Duo Edition	MFA	
Duold	5 .42 WUTT .dKr 91 JU 101	
Companyld	C.3. T	
URI		
Associated Company?	No	
et up relationships		
Customers (2):	Internal Customer	
ssociate integrations		
Integrations	Select	



### 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.

Q Search for users, groups, applications, or devices			gi	GreaterIntell-MSP	ID: 3079-5070-98 🗸	Corey Mandell 🗸
Dashboard > Accounts						
Accounts					Bulk Edit Subccounts	Add Account
					٩	
Name	Edition		Users	s Telepho	ny Credits	
GreaterIntell	Duo MFA	Edit	3	Unlimit	ed	Û
Jeff Test Duo Account	Duo Access	Edit	3	Unlimit	ed	ū
MandellGroup	Duo MFA	Edit	12	Unlimit		Î

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

Regards,

The Contuit Team



