



ConnectWise Integration

Fetches on 16/12/2025



Abstract

This article explains how to integrate IRONSCALES with ConnectWise PSA. You will learn how to prepare ConnectWise, map your customers and products, and complete the setup in the IRONSCALES wizard so incidents and usage data flow reliably into your PSA environment.

Table of Contents

Introduction

How IRONSCALES Maps to ConnectWise

How the Integration Works

Preparing ConnectWise PSA

- Create a Security Role

- Create an API Member

- Generate API Keys

- Collect Required Details

Using the IRONSCALES Wizard

Post-Setup Sanity Checks

- Usage and Billing in ConnectWise

Technical Explanation

- Supported Event Types



Introduction

The ConnectWise PSA integration is available only to IRONSCALES MSP partners. It connects your IRONSCALES tenants with the corresponding Companies, Agreements, and Products in ConnectWise, allowing security events and daily usage to appear in the correct customer accounts. End-customer tenants cannot configure or view this integration.

This setup is GUI only and must be completed in the ConnectWise PSA console and the IRONSCALES wizard. API-based setup is not supported.

How IRONSCALES Maps to ConnectWise

IRONSCALES and ConnectWise use different terms for similar concepts. The integration aligns these items so incidents and billing updates appear in the correct PSA workflows.

| IRONSCALES Term | ConnectWise Term | Description |
|-------------------|----------------------|---|
| Tenant (Customer) | Company | Maps each IRONSCALES tenant to its corresponding ConnectWise Company. |
| Product / SKU | Product Catalog Item | Used to post usage to Agreements for billing. |
| Daily Usage | Agreement Addition | Daily seat counts posted automatically. |
| Incident | Service Ticket | Created when supported IRONSCALES events occur. |



How the Integration Works

You configure the integration in two parts. First, you prepare ConnectWise by creating the role, API member, and keys that IRONSCALES will use. After that, you open the IRONSCALES wizard to connect the systems, map your data, and enable ticket creation and usage sync.

Preparing ConnectWise PSA

Complete all ConnectWise steps before opening the IRONSCALES wizard.

Create a Security Role

1. Go to **System** → **Security Roles** and select **Add**.
2. Name the role (for example, **IRONSCALES API Role**).
3. Configure the required permissions:
 - **Companies**: Company Maintenance → Inquiry: All
 - **Service Desk**: Service Tickets → Add, Edit, Inquiry: All; Close Service Tickets → Add, Edit, Inquiry: All
 - **System**: Table Setup → Inquiry: All; customize and enable:
 - Company / Company Status
 - Service / Priority
 - Service / Service Board
 - Time / Work Type
 - **Finance**: Agreements (customize) → Add, Edit, Inquiry: All
 - **Procurement**: Product Catalog → Inquiry: All
4. Save the role.



Create an API Member

1. Go to **System** → **Members**.
2. Open the **API Members** tab and select **Add**.
3. Name the member (for example, **IRONSCALES Integration**).
4. Assign the role you created.
5. (Optional) Restrict access to specific Service Boards.
6. Save the member.

Generate API Keys

1. Open the API Member.
2. Select the **API Keys** tab and choose **Add**.
3. Name the key.
4. Save to generate the **Public Key** and **Private Key**.
5. Copy both keys. The Private Key cannot be viewed again.

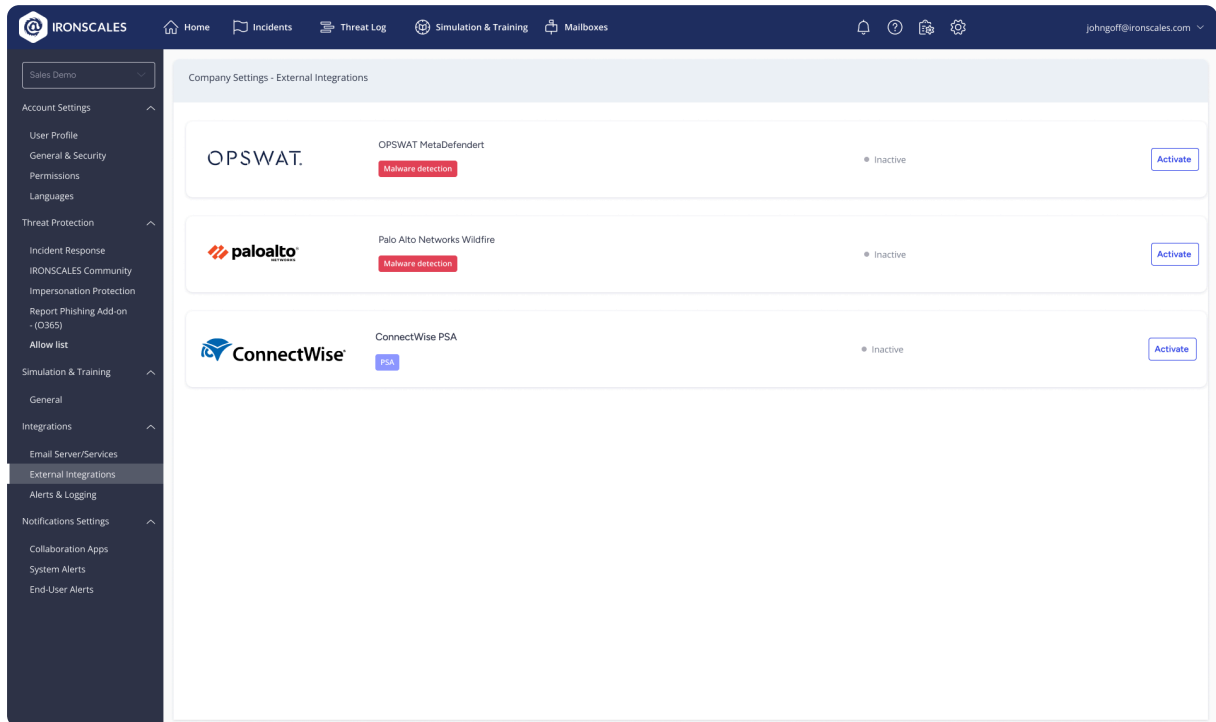
Collect Required Details

Before you move to IRONSCALES, make sure you have the PSA Site URL, Company ID, Public Key, and Private Key.

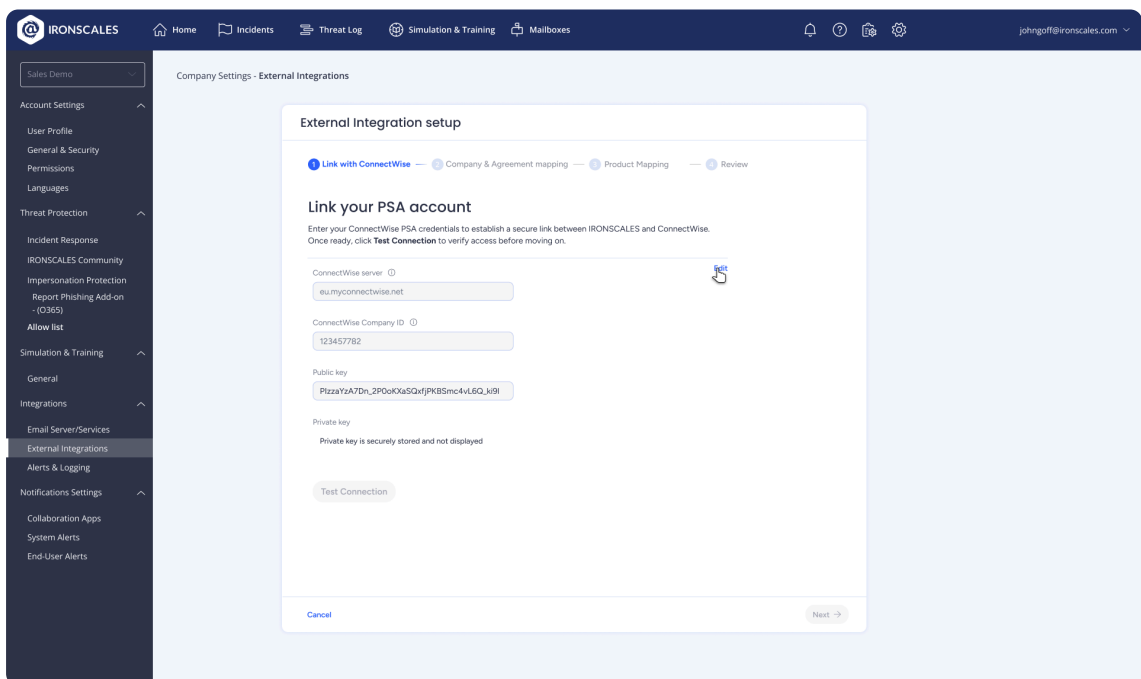


Using the IRONSCALES Wizard

After ConnectWise is ready, open the IRONSCALES console and select the ConnectWise PSA integration. The wizard guides you through several screens.



- 1. Connection:** Here you enter your ConnectWise URL, Company ID, and API keys. Then select **Test Connection** to confirm that IRONSCALES can reach your PSA environment.



2. Company and Agreement Mapping: Match each IRONSCALES tenant to a ConnectWise Company and choose the Agreement where usage will be posted.

IRONSCALES

Home

Incidents

Threat Log

Simulation & Training

Mailboxes

Sales Demo

Account Settings

User Profile

General & Security

Permissions

Languages

Threat Protection

Incident Response

IRONSCALES Community

Impersonation Protection

Report Phishing Add-on (0365)

Allow list

Simulation & Training

General

Integrations

Email Server/Services

External Integrations

Alerts & Logging

Notifications Settings

Collaboration Apps

System Alerts

End-User Alerts

johnhoff@ironscales.com

Company Settings - External Integrations

External Integration setup

Link with ConnectWise

Company & Agreement mapping

Product Mapping

Review

Map Companies & Agreements

Review the list of companies from ConnectWise. For each, select the matching IRONSCALES tenant and the Agreement where usage should be tracked.

All (6)

Unmapped (0)

1 - 3 of 3

| IRONSCALES Active tenant | ConnectWise companies | ConnectWise agreements | Sync |
|---------------------------|-----------------------|------------------------|--------------------------|
| FinTrust Bank Ltd. | Select option | Select option | <input type="checkbox"/> |
| Medi-Health Clinics Group | Select option | Select option | <input type="checkbox"/> |
| AeroLink Logistics | Select option | Select option | <input type="checkbox"/> |

< Back

Next >

3. Product Mapping: Map each IRONSCALES SKU (Core, Email Protect, ATO, DMARC, etc.) to a Product in your PSA catalog.

IRONSCALES

Home

Incidents

Threat Log

Simulation & Training

Mailboxes

Sales Demo

Account Settings

User Profile

General & Security

Permissions

Languages

Threat Protection

Incident Response

IRONSCALES Community

Impersonation Protection

Report Phishing Add-on (Q365)

Allow list

Simulation & Training

General

Integrations

Email Server/Services

External Integrations

Alerts & Logging

Notifications Settings

Collaboration Apps

System Alerts

End-User Alerts

Home

Incidents

Threat Log

Simulation & Training

Mailboxes

Alerts

Settings

john.goff@ironscales.com

Company Settings - External Integrations

External Integration setup

Link with ConnectWise

Company & Agreement mapping

Product Mapping

Review

Product Mapping

Match IRONSCALES packages and add-ons with their corresponding ConnectWise products. This ensures accurate usage tracking and billing.

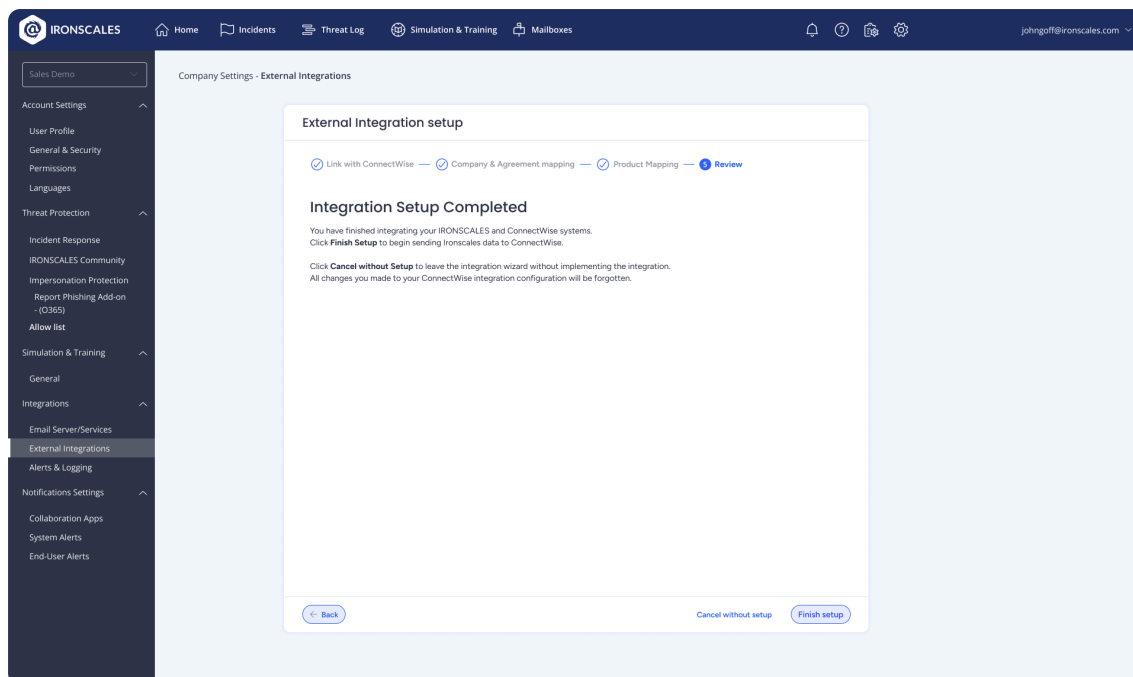
| IRONSCALES Product / Addons | ConnectWise Product |
|-----------------------------|---------------------------|
| Core | <div>Select Product</div> |
| Email Protect | <div>Select Product</div> |
| IRONSCALES Protect | <div>Select Product</div> |
| Complete Protect | <div>Select Product</div> |
| Addons | |
| ATO | <div>Select Product</div> |
| DMARC | <div>Select Product</div> |
| SAT Bundle Plus | <div>Select Product</div> |
| Incident Management | <div>Select Product</div> |

Back

Next

4. Review and Enable: Review connection status and mappings. Select **Save & Enable** to activate the integration.





Post-Setup Sanity Checks

After you enable the integration, check the following items to confirm everything is working correctly:

Usage and Billing in ConnectWise

IRONSCALES sends daily seat and domain counts to the Agreement Additions of the Agreement you mapped in the wizard.

ConnectWise uses two dates to decide which billing period an Addition belongs to:

- **Next Invoice Date** - tells you whether the current period has already been invoiced.
- **Effective Date** - the month the usage will be billed for.



IRONSCALES uses this logic when posting usage:

- If **Next Invoice Date is today or earlier** - the period is not invoiced yet. IRONSCALES creates or updates the Addition with **Effective Date set to the 1st of this month**.
- If **Next Invoice Date is after today** - the period is already invoiced. ConnectWise blocks new additions for the current cycle. IRONSCALES creates the Addition with **Effective Date set to the 1st of next month**.

Depending on the Agreement's invoice state, you may see:

- Additions for the current month, or
- Additions starting next month if the Agreement was already invoiced when usage arrived.

Quantities update daily. No duplicate lines are created.

Technical Explanation

This section explains how the integration functions after it is enabled. This information is helpful for deeper understanding but not required for setup.

Supported Event Types

IRONSCALES creates tickets for unclassified incidents, user-challenged messages, quarantine release requests, and account takeover activity. Additional types may be supported in future phases.

