

Kaseya® BMS[™] and Continuum

Integration Guide

Version 4.0.6

English

September 15, 2017

Copyright Agreement

The purchase and use of all Software and Services is subject to the Agreement as defined in Kaseya's "Click-Accept" EULATOS as updated from time to time by Kseya at http://www.kaseya.com/legal.aspx. If Customer does not agree with the Agreement, please do not install, use or purchase any Software and Services from Kaseya as continued use of the Software or Services indicates Customer's acceptance of the Agreement."

RMM Integration Settings -Continuum

The **RMM Integration Settings** page maintains configuration settings for integrating **Kaseya® BMS™** with a remote monitoring and management (RMM) systems. Once integration is complete you can monitor machines and devices using an integrated RMM and manage their corresponding tickets in **Kaseya® BMS™**. Linked Continuum assets are created in Kaseya® BMS[™] as the tickets are created.

RMM Integration - Continuum integrates **Kaseya® BMS™** with **Continuum**, a remote monitoring and management (RMM) system. Perform the following procedures to configure and activate integration.

Warning: Do not perform Step 5 - PSA Integration and Activation (page 4) until all other steps are completed. Once you enter the Callback URL and click Update, Continuum will start to send alerts into Kaseya® BMSTM and the ticket creation process will start.

Continuum Integration Summary

- Step 1 Recommended Settings (page 1)
- Step 2 RMM Integration Settings (page 2)
- Step 3 Ticket Status Mapping (page 3)
- Step 4 Account Mapping (page 3)
- Step 5 PSA Integration and Activation (page 4)

Step 1 - Recommended Settings

Add the following records in Kaseya® BMS™ to support data provided by Continuum.

Ticket Statuses

Admin > Service Desk Folder > Ticket Statuses

Add the following two statuses.

- Pending
- NOC Completed

Priorities

Admin > Service Desk Folder > Priorities

Add the following priorities.

- Low
- Emergency

Queue

Admin > Service Desk Folder > Queues

Add the following queue.

Monitoring Alert Tickets

Step 2 - RMM Integration Settings

Add a Continuum integration record in Kaseya® BMS™.

1. Select Admin > Service Desk > RMM Integration Settings.

= EXTREM	R	🖾 🌴 Home	🕯 Service Desk	or CRM	l Finance	📰 Projects	🔒 Reports	🕮 HR 🗳 Admin	New Ticket
		≓Home / RMM I	ntegration Settings						
Mary Jones Settings +		C New (N)	Q Search (S)	Clear S	earch (C) 📃 💆	Export 🔻			
🍰 Admin Dashboard		Records Found	:0						
🌣 My Company									
Business Process	▣								
쓭 HR	Ð								
쓭 CRM									
Security Roles									
	▣								
F Service Desk									
+									
> RMM Integration Settings									

2. Click New to create your integration.

= EXTREM	MR	🔤 🖷 Home 📩 Service	Desk 🕈 CRM			🔒 Reports	📕 Inventory	(iiii) HR	🕈 Admin	New Ticket	
Mary Jones			ings / New RMM Int	egration Settings							
Settings -	•	 Save (S) Save a 	nd Add New 📃 😑	Cancel (C) X	Delete (D)	C Refresh (R)				
		General Settings Ticket Sta	itus Mapping Inte	gration Logs							
😤 Admin Dashboard											
🌣 My Company	▣	Configuration Option	IS								
Business Process	▣	Enable RMM Integration:			Integ	ation Name:*		Inte	gration Type:		
Market HR	œ	Enable Disable							Continuum		•
	-	Integrator Username:*			Integ	ator Password:*		API	Token:*		
📽 CRM											
Security Roles		Callback URL:									
(1) Finance	▣	https://www.vorexlogin.com/	ContinuumCallback.asp	x?Client=reliable+ms	p						
F Service Desk	•	Ticket Defaults									
Service Desk											
		Priority:*			Queue				t Type:*		
くと		Medium				toring Alert		Inci	dent		•
~		Ticket Note Type:*				Source:*					
> RMM Integration Settings		Email Received			▼ Moni	toring System					

- 3. Enter the following in the General Settings > Configuration Options section.
 - Integration Name Enter a name that is easy to understand. You may want to add other integrations later.
 - > Integration Type Select Continuum from the drop-down list.
 - Integrator Username Create an "integrator username" you will use later to integrate with Continuum.
 - > Integrator Password Create an "integrator password".
 - > API Token Enter the API token provided by Continuum.

Note: You can identify the *API Token* in Continuum by navigating to the *Admin > My Company > PSA Integration* page.

		Dashboard Tickets Quick	Access - Patches	Scripts	Communicator	Reports	Admin	RMM Setup	Continuity247
	Sites	PSA Integration				L			
	Terms & Conditions	Please select a desired inte	gration method to sy	nchronize y	our PSA system	with Continu	um's tick	eting system.	
Þ	Users	Autotask (API Integration)							
Þ	Products & Services	CommitCRM ConnectWise (API Integration	n)						
-	My Company	Tigerpaw Other certified vendors							
	Profile	API Token	480	G 5 3 H 4 7	G 6 4 H 4 4	ן			
	Logo	Integrator User							
	PSA Integration	Integrator Password	* .						
		Confirm Integrator Password	•						
		Callback URL	•						
		Callback Method	* POS	т			•	Update	Deactivate

- 4. In Kaseya® BMS[™], enter the following in the General Settings > Ticket Defaults section.
 - Priority Select a default priority.
 - Queue Select the queue you want tickets created from Continuum monitoring alerts to be assigned to. For example, Monitoring Alert Tickets, if you created that in step 1.
 - > Ticket Type Select a default ticket type.
 - > Ticket Note Type Select a default note type. General Notes is fine.
 - > Ticket Source Select a default ticket source. Monitoring System is recommended.
- 5. Click Save.

Step 3 - Ticket Status Mapping

```
Admin > Service Desk > RMM Integration > Continuum Integration > Ticket Status
Mapping
```

In Kaseya® BMS™:

- Map Continuum ticket statuses to Kaseya® BMS[™] ticket statuses.
- Map Kaseya® BMS[™] ticket statuses to Continuum ticket statuses.

= EXTREM	MR	🔤 👫 Home	🗚 Service Desk	출 CRM		📰 Projects	🔒 Reports	🛍 HR	🌣 Admin	New Ticket	
A		≓ Home / RMM	Integration Settings / Ec	lit RMM Inte	gration Settings:	Continuum Integ	ration				
Mary Jone Settings +	15	✓ Save (S)	Save and Add N	lew 😑	Cancel (C)	Delete (D)	C Refresh (R)			
		General Settings	Ticket Status Mapp	ing							
🏟 Admin Dashboard			-								
🍄 My Company		Ticket Statu:	s Mapping From		•						
Business Process		VOREX STATUS				CONTINUUM					
쓸 HR		New				New				•	•
쓸 CRM		Waiting For Custo	omer			Waiting Cu	tomer				¥
Security Roles		Completed				Closed				•	۲
Finance	▣	Escalated				Approval n	eded by backoffice			•	•
	Ð	Assigned				Scheduled					¥
Service Desk		In progress				Work in pro	gress by backoffice			•	٠
> Issue Types		Pending				Pending				•	•
> Ticket Types > Oueues		NOC Completed				Noc comple	ted .				•
> Queues		Ticket Ctetur	- Monning to								
> SLAs		TICKEL SLALU:	s Mapping to								
> Ticket Statuses		CONTINUUM STATUS				VOREX STATUS					
> Email Parser		New				New				•	ľ
> RMM Integration		Closed				Completed				•	
		Acknowledge				In progress				•	

Step 4 - Account Mapping

1. In Continuum, select the Admin > Sites page.

	_	Dashboard	Tickets Quick Access 🕶 I	Patches Scripts Co	mmunicator Report	Admin	RMM Setup	Continuity247
	Sites	Sites						
	Terms & Conditions							
-	Users	New	Edit Site Information Del	ete				
	Manage Users		Site Name	T) Site Code		Product	
		0	INP Main Office		INPMainOffice	_		
	Default Access	0	Dallas Office		DallasOffice			
Þ	Products & Services							
	My Company							

2. Copy the <site code> value.

- ➤ In Continuum, a site code equals an account in Kaseya® BMS[™].
- 3. In Kaseya® BMS[™], select the CRM > Accounts page.
- 4. Open an account that matches the <site code> information.

= EXTREMA	🔤 🎢 Home 📅 Service Desk	CRM I Finance ■ P		🛍 HR 🗘 Admir	n New Ticket	
	Home / Accounts Management / Ec	lit Account: Dallas Office				
Mary Jones Settings +	 Save (S) Save and Add 	New 🗢 Cancel (C) 🗶 De	ete (D) 🖸 Refresh (R)	🕤 🕄 Set as Child		
	Account					
2 CRM Dashboard						
쓭 Accounts	Account Name:*	Account Type: Is Internal	Status:			
Contacts	Dallas Office	Client	Active	InActive		
uu contacts	Website:	Acquired Date:	Business T	ype:*		
& Activities			E General			*
✗ Opportunities	Credit Limit:	Default Currency: *	Net Days:			
D -	\$0	US Dollar	• 0			
Quotations	Description:		Account M	0		
			Mary J	ones		
	Locations Account Contacts	Assigned Resources Tax Settings	Opportunities Activit	iles Notes Cu	ustom Fields Attach	ments 🧿
	O Add					
	ACTIONS LOCATION ADDRESS 1	ADDRESS 2 CITY	STATE COUNTRY	ZIP CODE	PHONE	MAIN ACTIVE
	Dallas 14001 Dallas	Parkway Suite 1220 Dallas	TX UNITED STATE	S 75240	469-291-1730	VV

- 5. Double-click a Location record to edit.
 - The location record should correspond to the <site_code> for this account. You may have several locations defined for this account.



- 6. Click the RMM Integration tab.
- 7. Paste the <site code> into the Continuum Location Code field.
- 8. Click Save.

ADD/EDIT		×
Location		
🖌 S	ave (5) O Cancel (C) 🔀 Convert To Main (M)	
Add	ess Info RMM Integration Custom Fields	
Со	ntinuum Integration	
	rder to link this location (site) with the site record of your RMM account, you have to specify the equivalent tion's from your RMM account.	
	ontinuum Location Code:	
	DallasOffice	

Step 5 - PSA Integration and Activation

Configure Continuum to use Kaseya® BMS™ as its PSA Integration solution.

Warning: Do not perform this step until all other steps are completed. Once you enter the Callback URL and click Update, Continuum will start to send the alerts into Kaseya[®] BMS[™] and the ticket creation process will start.

1. In Continuum, select the Admin > My Company > PSA Integration page.

	Dashboard Tickets Quick Access 🕶	Patches Scripts Communicator F	Reports Admin RMM Setup Continuity247
Sites	PSA Integration		
Terms & Conditions	Please select a desired integration n	nethod to synchronize your PSA system with	n Continuum's ticketing system.
Users	Autotask (API Integration)		
Products & Services	CommitCRM ConnectWise (API Integration)		
👻 My Company	Tigerpaw		
Profile	Other certified vendors	49H52H49H57H55	
Logo	2. Integrator User	* TestUser	
PSA Integration	3. Integrator Password	* [7.
	4. Confirm Integrator Password	*	
	5. Callback URL	* :// <yourpsaurl> /ContinuumCallbac</yourpsaurl>	ck.aspx?Client
	6. Callback Method	* POST	Update Deactivate

- 2. Select the Other certified vendors option.
 - Integrator User Enter the Integrator Username you specified in Step 2 RMM Integration Setup (page 2).
 - Integrator Password Enter the Integrator Password you specified in Step 2 RMM Integration Setup (page 2).
 - > Confirm Integrator Password Re-enter the Integrator Password.
 - Callback URL Enter a URL similar to the following: https://bms.kaseya.com/ContinuumCallback.aspx?Client=Company_Name

Note: You can identify the *Callback URL* in Kaseya® BMSTM by navigating to the *Admin* > *Service Desk* > *RMM Integration Settings* page. Open the RMM Integration Settings record you created in **Step 2** (*page 2*) and copy the value in the **Callback URL** field.

- > Callback Method Select POST from the drop-down list.
- 3. Click on the **Update** button.
 - ➤ A ticket originates in Continuum and gets created in Kaseya® BMS[™].
 - > Linked Continuum assets are created in Kaseya® BMS[™] as the tickets are created.
 - > Updates to the status and notes of a Kaseya® BMS™ ticket are posted back to its corresponding ticket in Continuum.
 - > If a ticket is manually created new in Kaseya® BMS™ Continuum is not updated.