

ConnectWise Strategy

Mark Smith



Agenda

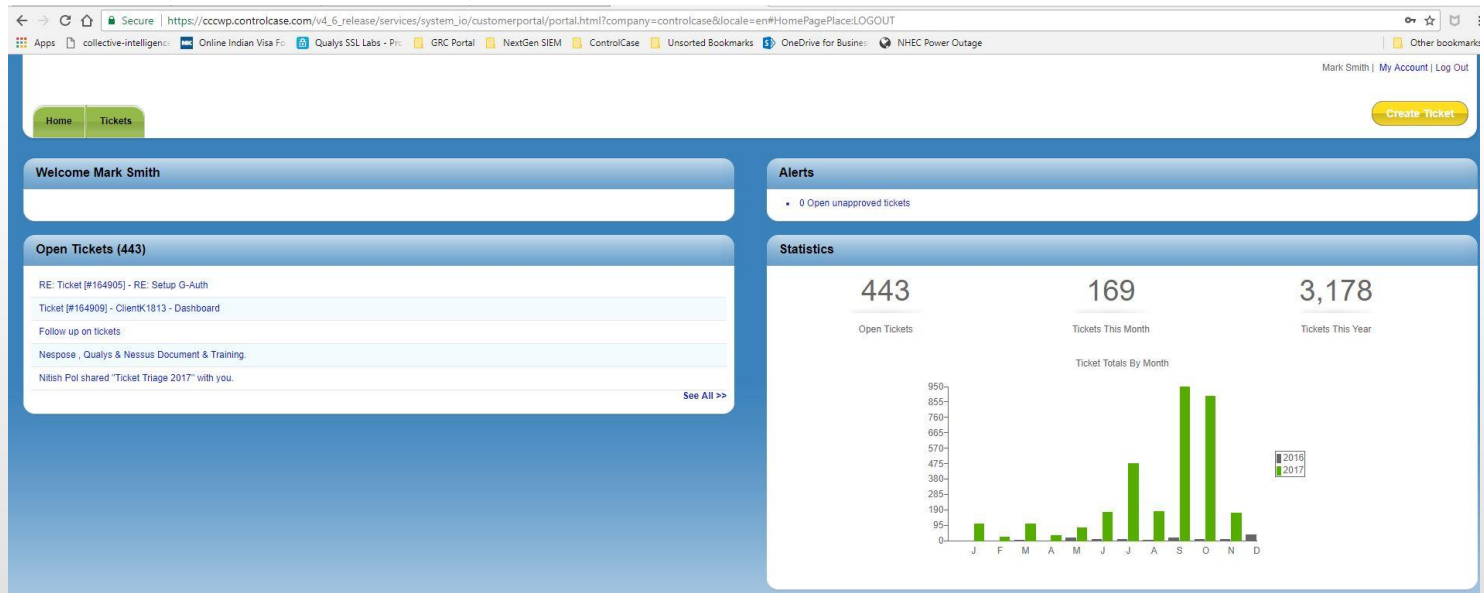
- ConnectWise Today
- ConnectWise Tomorrow
- Questions



ConnectWise Today

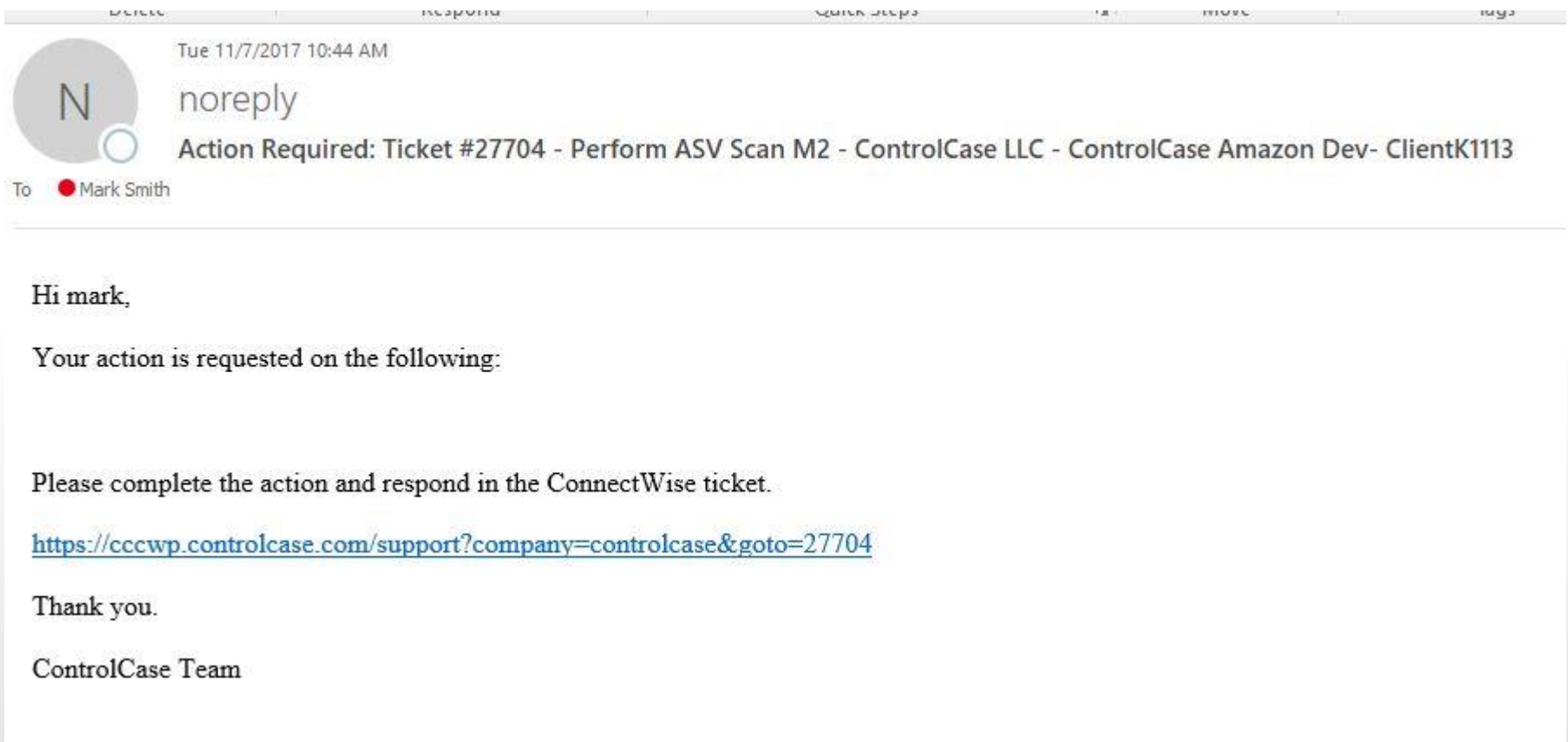
ConnectWise Today

- CRM – Ticketing and CRM System with workflow built for MSP industry
 - › Automation of service delivery
 - › Real-Time Visibility of customer service status
 - › Achieve faster resolution time
 - › Increase customer satisfaction
- Customer Support Portal



ConnectWise Today

- Status Email Notification



The screenshot shows an email notification interface. At the top, there are several icons: a trash can, a reply icon, a search icon, a flag icon, a move icon, and a refresh icon. Below these icons is a circular profile picture containing the letter 'N'. To the right of the profile picture, the text reads: 'Tue 11/7/2017 10:44 AM', 'noreply', and 'Action Required: Ticket #27704 - Perform ASV Scan M2 - ControlCase LLC - ControlCase Amazon Dev- ClientK1113'. Below the profile picture and text, it says 'To Mark Smith'. The main body of the email contains the following text: 'Hi mark,', 'Your action is requested on the following:', 'Please complete the action and respond in the ConnectWise ticket.', a blue hyperlink '<https://cccwp.controlcase.com/support?company=controlcase&goto=27704>', 'Thank you.', and 'ControlCase Team'.



ConnectWise Today

- Consolidated Ticket Status Report

Daily Open Ticket Status Update -

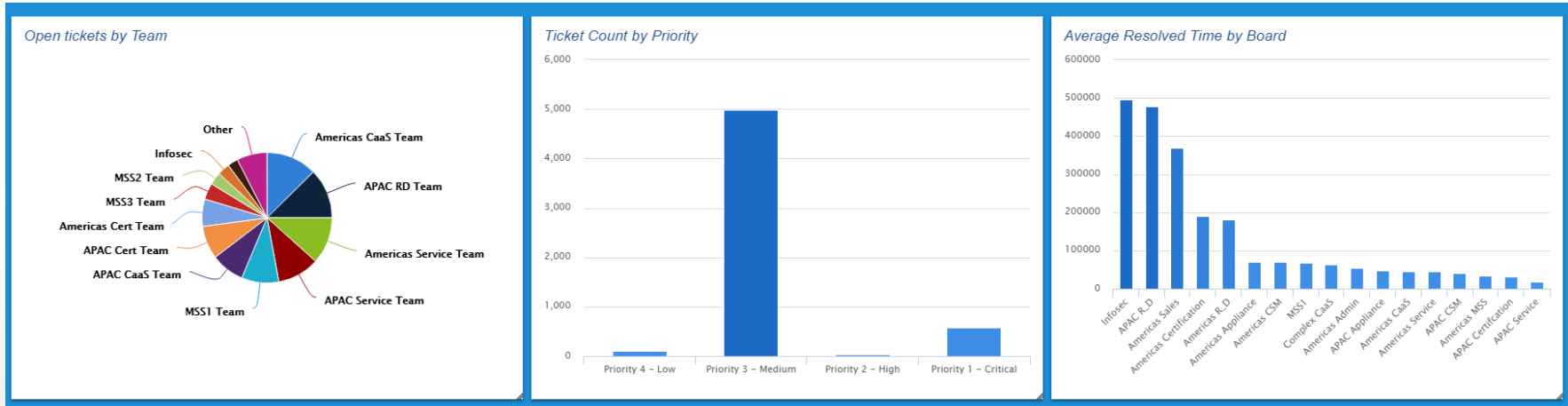
Please use "Save As" to save your changes. This report is subject to replacement upon a ConnectWise release.

PCI DSS					
Summary	Ticket #	Status ▲	Resolution	Last Update	Due Date
Perform Managed CDD Scan Q1	22712	>Customer Remediation	<p>Wednesday 25/10/2017 2:35am UTC-04/ Niraj Vengurlekar- Action for [REDACTED]</p> <p>Please refer the Non Compliant report.</p> <p>https://www.controlcase-compliance-manager.com/ClientK1245/modules/overview/index.php?file_pid=5728&perform=download</p> <p>Please mark all false positive findings in the report. For the remaining findings, either delete or encrypt the records. Once you provide the updated report, we will perform the rescan.</p>	11/4/2017 11:47 PM	12/7/2017
Perform IVA Q1	22719	>Customer Remediation	<p>Monday 10/30/2017 7:33am UTC-04/ Nikita Kale- Action For [REDACTED]</p> <p>Please refer below link to get " Non-Compliant Report"</p> <p>https://www.controlcase-compliance-manager.com/ClientK1245/modules/overview/index.php?file_pid=5788&perform=download</p>	11/4/2017 11:57 PM	12/7/2017
Perform ASV Scan M2	25111	>Customer Remediation	<p>Monday 16/10/2017 7:35am UTC-04/ Rameez Mahedi- Action for [REDACTED]</p> <p>Download Non-Compliant Summary Report from the below URL and remediate the findings</p> <p>https://www.controlcase-compliance-manager.com/ClientK1245/modules/overview/index.php?file_pid=5618&perform=download</p> <p>Detailed report has been added to the dashboard.</p>	11/4/2017 11:27 PM	11/7/2017
Perform Q2 Asset Management Review	27024	>New		11/6/2017 8:17 PM	12/7/2017
Sirius XM Canada New datasource Issue	22994	Assigned	Thursday 14/09/2017 11:13am UTC-04/ Swapnil Mudiraj- INTERNAL TICKET. CUSTOMER ACTION NOT NEEDED.	9/15/2017 2:59 PM	
Perform LM Assessment Q1	22704	Assigned		10/29/2017 6:28 PM	
Perform Firewall Review H1	22718	Manual Testing	Monday 30/10/2017 10:43pm UTC-04/ Huzafa Khan- NO ACTION REQUIRED	11/4/2017 10:08 PM	3/7/2018



ConnectWise Today

- Real Time Monitoring of Activity

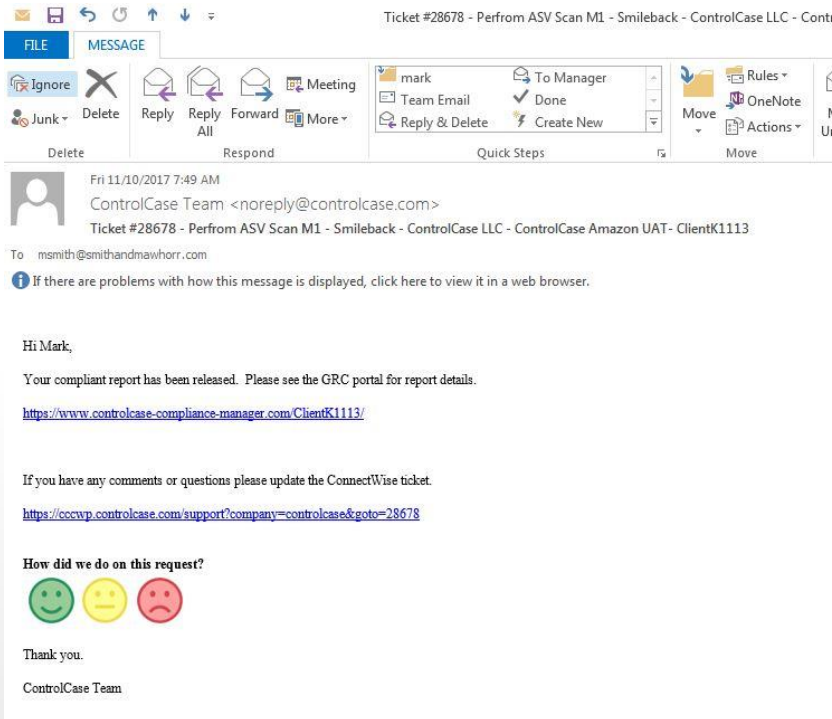




ConnectWise Tomorrow

ConnectWise Tomorrow

- Customer Satisfaction Score



Ticket #28678 - Perform ASV Scan M1 - Smileback - ControlCase LLC - ControlCase

FILE MESSAGE

Ignore X Delete Reply Reply All Forward More Meeting To Manager Done Create New Team Email Reply & Delete

mark To Manager Done Create New Team Email Reply & Delete

Rules OneNote Actions

Move Move

Delete Respond Quick Steps Move

Fri 11/10/2017 7:49 AM
ControlCase Team <noreply@controlcase.com>
Ticket #28678 - Perform ASV Scan M1 - Smileback - ControlCase LLC - ControlCase Amazon UAT - ClientK1113


To msmith@smithandmawhorr.com

If there are problems with how this message is displayed, click here to view it in a web browser.

Hi Mark,

Your compliant report has been released. Please see the GRC portal for report details.
<https://www.controlcase-compliance-manager.com/ClientK1113/>

If you have any comments or questions please update the ConnectWise ticket.
<https://ccwvp.controlcase.com/support?company=controlcase&goto=28678>

How did we do on this request?


Thank you.
ControlCase Team



Would you like to change your reaction?



We're delighted you had a great experience!
Can you tell us what made it so good?

My experience was great because...



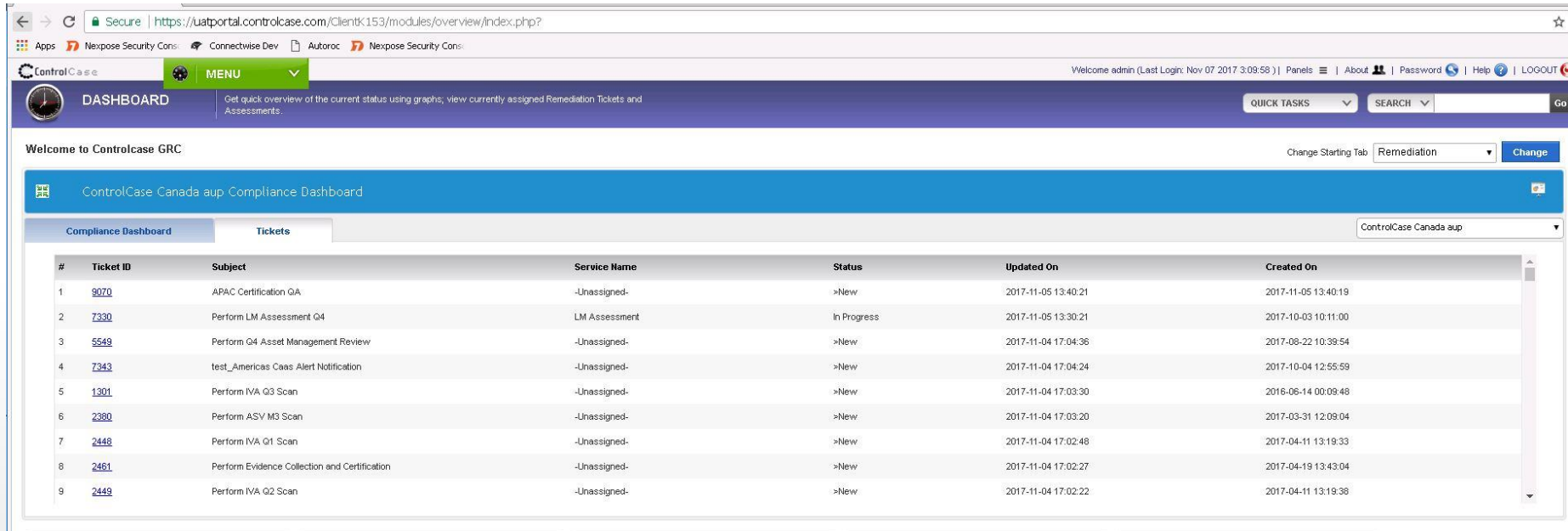
ConnectWise Tomorrow

- GRC Portal – Connectwise Integration Phase 1 (Dec 2017)
 - › Clicking on ticket number opens Support Portal in new window

The screenshot displays the ControlCase GRC Portal interface. The browser address bar shows the URL: <https://uatportal.controlcase.com/Client:153/modules/overview/index.php?>. The page header includes the ControlCase logo, a menu, and user information: "Welcome admin (Last Login: Nov 07 2017 3:03:58)". The main content area is titled "Welcome to ControlCase GRC" and features a "Compliance Dashboard" with tabs for "Compliance Dashboard" and "Tickets". The dashboard displays process start and end dates (2015-12-30 to 2018-12-31), the last compliance date (2014-12-30), and the installed appliance (SAQ D, HIPAA, SOC 1, ISO, EI3PA, AUP). A "Compliance Activity Status" section is visible, along with a "Message" dialog box that reads: "Ticket#: 3861" and "Process status: Technical Application Issues". The dialog box has an "Ok" button. The background shows various compliance modules like ASV Scan, PCI Training, and EI3PA Training, each with a "REPORT" button and a "Previous Reports" link.

ConnectWise Tomorrow

- GRC Portal – Connectwise Integration Phase 1
 - › Clicking on ticket number opens Support Portal in new window



The screenshot displays the ControlCase GRC portal interface. The browser address bar shows the URL: <https://uatportal.controlcase.com/ClientK:153/modules/overview/index.php?>. The page header includes the ControlCase logo, a 'MENU' dropdown, and a welcome message for 'admin' (last login: Nov 07 2017 3:09:58). The main content area is titled 'ControlCase Canada aup Compliance Dashboard' and features a 'Tickets' tab. A table lists 9 tickets with columns for #, Ticket ID, Subject, Service Name, Status, Updated On, and Created On.

#	Ticket ID	Subject	Service Name	Status	Updated On	Created On
1	9070	APAC Certification QA	-Unassigned-	>New	2017-11-05 13:40:21	2017-11-05 13:40:19
2	7330	Perform LM Assessment Q4	LM Assessment	In Progress	2017-11-05 13:30:21	2017-10-03 10:11:00
3	5549	Perform Q4 Asset Management Review	-Unassigned-	>New	2017-11-04 17:04:36	2017-08-22 10:39:54
4	7343	test_Americas Caas Alert Notification	-Unassigned-	>New	2017-11-04 17:04:24	2017-10-04 12:55:59
5	1301	Perform IVA Q3 Scan	-Unassigned-	>New	2017-11-04 17:03:30	2016-06-14 00:09:48
6	2380	Perform ASV M3 Scan	-Unassigned-	>New	2017-11-04 17:03:20	2017-03-31 12:09:04
7	2448	Perform IVA Q1 Scan	-Unassigned-	>New	2017-11-04 17:02:48	2017-04-11 13:19:33
8	2461	Perform Evidence Collection and Certification	-Unassigned-	>New	2017-11-04 17:02:27	2017-04-19 13:43:04
9	2449	Perform IVA Q2 Scan	-Unassigned-	>New	2017-11-04 17:02:22	2017-04-11 13:19:36



ConnectWise Tomorrow

- GRC Portal – Connectwise Integration Phase 2
 - › Enable ticket creation and update within GRC Portal
 - No second login to Support Portal
- Disabling support@controlcase.com 1 Jan 2018
 - › All tickets updates and communications through Support Portal or GRC portal



Questions