ConnectWise Manage Integrations Setup

1. ConnectWise Manage Public Assets

ConnectWise Manage Public Datasets

ConnectWise Manage Public Widgets

2. How to connect ConnectWise Manage API to MSPbots

2.1. **Gather the following information:**

1. ConnectWise Manage URL
2. Company ID

2.2. **Create Security Role for MSPbots**

1. Log in to your ConnectWise Manage Console,
2. Click System / Security Roles.
3. You can copy some roles if they have all read-only access already or you can create a new role.
4. Role ID: MSPbots
   a. **Make sure you give it the correct level and correct Restrict Board access.**
   b.
5. Permission:

   a. **Please set "All" to "Inquire level"** for all fields. No add, edit, or delete level permission is needed for now. Keep them at "None".
      i. Please check the "**permission**" using the permission-checking function.
      ii.
      iii. Make sure you give "ALL" to inquire level for all fields, **I know, it is a very tedious task!** 😃

Security Modules for Role - MSPBOTS Read Only

Role: MSPBOTS Read Only ▾

< + ▭ ▭ ↻ ▢ History ▾ 🗑

▾	Add Level		Edit Level		Delete Level		Inquire Level	
⌃ Companies								
Company Maintenance	None	▾	None	▾	None	▾	All	▾
Company/Contact Group Maintenance	None	▾	None	▾	None	▾	All	▾
Configuration - Display Passwords	None	▾	None	▾	None	▾	None	▾
Configurations (customize)	None	▾	None	▾	None	▾	All	▾
Contacts	None	▾	None	▾	None	▾	All	▾
CRM/Sales Activities	None	▾	None	▾	None	▾	All	▾
Import Contacts	None	▾	None	▾	None	▾	All	▾
Manage Attachments	None	▾	None	▾	None	▾	All	▾
Management	None	▾	None	▾	None	▾	All	▾
Notes	None	▾	None	▾	None	▾	All	▾
Reports (customize)	None	▾	None	▾	None	▾	All	▾
Surveys	None	▾	None	▾	None	▾	All	▾
Team Members	None	▾	None	▾	None	▾	All	▾
Tracks	None	▾	None	▾	None	▾	All	▾
UserCentric	None	▾	None	▾	None	▾	All	▾

iv.

Security Modules for Role - MSPBOTS Read Only

Role: MSPBOTS Read Only ▾

< + ▭ ▭ ↻ ▢ History ▾ 🗑

▾	Add Level		Edit Level		Delete Level		Inquire Level	
▾ Companies								
⌃ Finance								
Accounting Interface	None	▾	None	▾	None	▾	All	▾
Agreement Invoicing	None	▾	None	▾	None	▾	All	▾
Agreement Sales	None	▾	None	▾	None	▾	All	▾
Agreements (customize)	None	▾	None	▾	None	▾	All	▾
Billing Rate Maintenance	None	▾	None	▾	None	▾	All	▾
Billing Reconciliation	None	▾	None	▾	None	▾	All	▾
Billing View Time	None	▾	None	▾	None	▾	All	▾
Company Finance	None	▾	None	▾	None	▾	All	▾
Expense Reimbursements	None	▾	None	▾	None	▾	All	▾
Financial Dashboard	None	▾	None	▾	None	▾	All	▾
Invoice Approval	None	▾	None	▾	None	▾	All	▾
Invoicing	None	▾	None	▾	None	▾	All	▾
Reports (customize)	None	▾	None	▾	None	▾	All	▾

Role: MSPBOTS Read Only

History | Add Level | Edit Level | Delete Level | Inquire Level

Module	Add Level	Edit Level	Delete Level	Inquire Level
Marketing				
ConnectWise Campaign	None	None	None	All
Marketing Groups	None	None	None	All
Marketing Management	None	None	None	All
Marketing Reports (customize)	None	None	None	All
Procurement				
Inventory Adjustments	None	None	None	All
Inventory Transfers	None	None	None	All
Product Billable Option	None	None	None	All
Product Catalog	None	None	None	All
Products	None	None	None	All
Purchase Orders	None	None	None	All
Purchasing Approvals	None	None	None	All
Purchasing Demand	None	None	None	All
Reports (customize)	None	None	None	All
RMA Entry	None	None	None	All
RMA Processing	None	None	None	All
Serial Number Search	None	None	None	All
Project				
Close Project Tickets	None	None	None	All
Close Projects	None	None	None	All
Project Contacts	None	None	None	All
Project Finance	None	None	None	All
Project Headers	None	None	None	All
Project Management	None	None	None	All
Project Notes	None	None	None	All
Project Phase	None	None	None	All
Project Product	None	None	None	All
Project Reports (customize)	None	None	None	All

Security Roles > Security Modules

Security Modules for Role - MSPBOTS Read Only

Role: MSPBOTS Read Only

History | Add Level | Edit Level | Delete Level | Inquire Level

Module	Add Level	Edit Level	Delete Level	Inquire Level
Companies				
Finance				
Marketing				
Procurement				
Project				
Sales				
Service Desk				
Change Approvals	None	None	None	All
ChangeManagement	None	None	None	All
Close Service Tickets	None	None	None	All
CloudConsole	None	None	None	All
ConnectWise Chat	None	None	None	All
ConnectWise Control	None	None	None	All
ITBoost	None	None	None	All
Knowledge Base Approver	None	None	None	All
Knowledge Base Creator	None	None	None	All
Launch Remote Access	None	None	None	All
Merge Tickets	None	None	None	All
Print Service Signoff	None	None	None	My
Reports (customize)	None	None	None	All
Resource Scheduling (customize)	None	None	None	All
Service Ticket - Dependencies	None	None	None	All
Service Tickets	None	None	None	All
Service Tickets - Finance	None	None	None	All
SLA Dashboard	None	None	None	All
Ticket Templates	None	None	None	All

⌵ | | Add Level | Edit Level | Delete Level | **Inquire Level**

System

Add Licenses	None ⌄	None ⌄	None ⌄	All ⌄
API Reports	None ⌄	None ⌄	None ⌄	All ⌄
Chat with ConnectWise Manage Support	None ⌄	None ⌄	None ⌄	None ⌄
ConnectWise Manage Labs	None ⌄	None ⌄	None ⌄	All ⌄
ConnectWise Next	None ⌄	None ⌄	None ⌄	All ⌄
ConnectWise Now	None ⌄	None ⌄	None ⌄	All ⌄
Custom Menu Entry (customize)	None ⌄	None ⌄	None ⌄	All ⌄
Data Import	None ⌄	None ⌄	None ⌄	All ⌄
Email Audit	None ⌄	None ⌄	None ⌄	All ⌄
List View Export	None ⌄	None ⌄	None ⌄	All ⌄
Manage Hosted API (customize)	None ⌄	None ⌄	None ⌄	All ⌄
Marketplace Sharing	None ⌄	None ⌄	None ⌄	All ⌄
Mass Maintenance (customize)	None ⌄	None ⌄	None ⌄	All ⌄
Member Maintenance	None ⌄	None ⌄	None ⌄	All ⌄
Member Maintenance - Finance	None ⌄	None ⌄	None ⌄	All ⌄
My Account (customize)	None ⌄	None ⌄	None ⌄	All ⌄
My Company	None ⌄	None ⌄	None ⌄	All ⌄
Report Writer	None ⌄	None ⌄	None ⌄	All ⌄
Security Roles	None ⌄	None ⌄	None ⌄	All ⌄
System Reports (customize)	None ⌄	None ⌄	None ⌄	All ⌄
Table Setup (customize)	None ⌄	None ⌄	None ⌄	All ⌄
Today Links	None ⌄	None ⌄	None ⌄	All ⌄

Time & Expense

Expense Approvals	None ⌄	None ⌄	None ⌄	All ⌄
Expense Billable Option	None ⌄	None ⌄	None ⌄	All ⌄
Expense Report Entry	None ⌄	None ⌄	None ⌄	All ⌄
Reports (customize)	None ⌄	None ⌄	None ⌄	All ⌄
Stopwatch	None ⌄	None ⌄	None ⌄	All ⌄

v. Make sure you also check the customized permissions:

	Add Level	Edit Level	Delete Level	Inquire Level	Last Update	Updated By
⌄ Companies					9/20/20	
⌄ Finance					9/3/21	
⌄ Marketing					9/20/20	
⌄ Procurement					9/20/20	
⌄ Project						
⌄ Sales						
⌃ Service Desk						
Change Approvals	None ⌄	None ⌄	None			
ChangeManagement	None ⌄	None ⌄	None			
Close Service Tickets	None ⌄	None ⌄	None			
CloudConsole	None ⌄	None ⌄	None			
ConnectWise Chat	None ⌄	None ⌄	None			
ConnectWise Control	None ⌄	None ⌄	None			
ITBoost	None ⌄	None ⌄	None			
Knowledge Base Approver	None ⌄	None ⌄	None			
Knowledge Base Creator	None ⌄	None ⌄	None			
Launch Remote Access	None ⌄	None ⌄	None			
Merge Tickets	None ⌄	None ⌄	None			
Print Service Signoff	None ⌄	None ⌄	None ⌄	My ⌄		
Reports (customize)	None ⌄	None ⌄	None ⌄	All ⌄		
Resource Scheduling (customize)	None ⌄	None ⌄	None ⌄	All ⌄		
Service Ticket - Dependencies	None ⌄	None ⌄	None ⌄	All ⌄		
Service Tickets	None ⌄	None ⌄	None ⌄	All ⌄		
Service Tickets - Finance	None ⌄	None ⌄	None ⌄	All ⌄		
SLA Dashboard	None ⌄	None ⌄	None ⌄	All ⌄		
Ticket Templates	None ⌄	None ⌄	None ⌄	All ⌄		

Update Security ✕

Allow Access to these | | Disallow Access to these
- Survey Analysis
- Survey Analysis Detail
- Service Ticket (Button)
- Time Detail (Button)
- Daily Schedule (Button)
- Monthly Schedule (Button)
- My Daily Schedule (Button)
- My Monthly Schedule (Button)
- My Schedule
- Service Board Backlog (Button)

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SAVE CANCEL

a. **It is very important for MSPbots to have permission to read your data because, without data, the bots and reports won't work.**
b. Since we need data to create dashboards and to drive the bots for automation, just share data that you are comfortable sharing and of course, any data that you want to analyze via dashboards or to create automation with. For example, if you want the auto dispatchers to put a higher priority on clients who pay you more, we need their MRR data. Most MSPs share everything, except the password field, since we have a lot of pre-built dashboards.

2.3. Create API key

1. Click System / Members / API Members / + .
2. Fill in the blanks and select options on the required fields marked with a "*".
   a. Put the member ID and Member Name: MSPbots
   b. For the required drop-down fields, choose an option based on your company configuration.
   c. Click **Save** to go to the next screen.
   d. Role ID: MSPbots

e. Click **API Keys**, then "+", then type "MSPbots" in the description, and save.
f. You will get the **Public Key** and **Private Key**. Copy and paste them into the setup window in MSPBOTS to finish the setup.
3. Set up your API in MSPbots.
a. Login to Integration.
b. Navigate to **ConnectWise Manage**.
c. Click the **Config** option.
d. Copy and paste the details into the setup window.

3. ConnectWise Manage Product Website

https://www.connectwise.com/platform/business-management/manage

4. ConnectWise Manage API Documentation

It is useful to add more functions to ConnectWise Manage. If you want to do this, read https://developer.connectwise.com/Products/Manage.

5. FAQ

5.1. What kind of permission does MSPbots need?

MSPbots need data from ConnectWise to generate reports and to drive the bots using data-driven decision-making. This makes having read-only permission for MSPbots to all your data important, especially if you want to create automated processes.

In the future, we will create more bots that can perform actions like creating and closing tickets. We will be asking permission accordingly.