

ConnectWise Manage Integrations Setup

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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.**

System

Role ID*
MSPBot

Location*
Headquarters

Level*
Corporate (Level 1)

Department*
Managed Services

Name*
[Masked Name]

Default Territory*
Headquarters

☐ Block Prices

☐ Block Cost

Service Defaults

Service Board

Default Board

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.

Connected

Teams Success
Last success auth : 03/18/2022 09:21 EDT Type : null

ConnectWise Manage Success
Last success auth : 03/18/2022 10:27 EDT Type : PSA

Waiting to be Connected

QuickBooks ON-PREMISE

Permission

ii.

iii. Make sure you give "ALL" to inquire level for all fields, I know, it is a very tedious task! 😊

Security Roles > Security Modules

Security Modules for Role - MSPBOTS Read Only

Role: MSPBOTS Read Only

[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	▼

Security Roles > Security Modules

Security Modules for Role - MSPBOTS Read Only

Role: MSPBOTS Read Only

[Add Level](#)
[Edit Level](#)
[Delete Level](#)
[Inquire Level](#)

Module	None		None		None		All	
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	▼

[illegible]

Role: MSPBOTS Read Only

[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	Robert Wang
Finance						9/3/21	Robert Wang
Marketing						9/20/20	Robert Wang
Procurement						9/20/20	Robert Wang
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	▼	▼
Report (customize)	None	▼	None	▼	None	▼	▼
Resource Scheduling (customize)	None	▼	None	▼	None	▼	▼
Service Ticket - Dependencies	None	▼	None	▼	None	▼	▼
Service Tickets	None	▼	None	▼	None	▼	▼
Service Tickets - Finance	None	▼	None	▼	None	▼	▼
SLA Dashboard	None	▼	None	▼	None	▼	▼
Ticket Templates	None	▼	None	▼	None	▼	▼

Update Security

Allow 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)

Disallow Access to these

>

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<<

SAVE

CANCEL

- It is very important for MSPbots to have permission to read your data because, without data, the bots and reports won't work.
- 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

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