# **ConnectWise Manage Integrations Setup**

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### 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

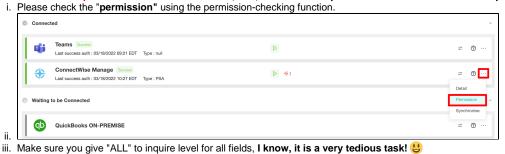
#### 2.2. Create Security Role for MSPbots

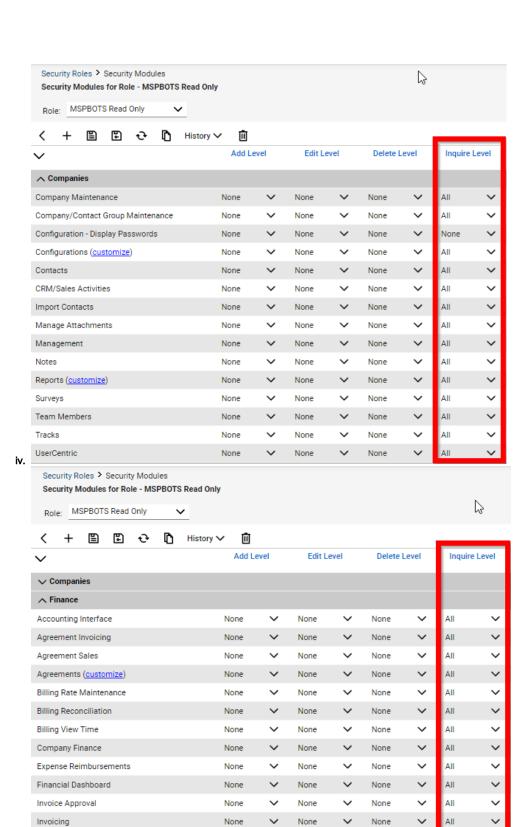
- 1. Log in to your ConnectWise Manage Console,
- 2. Click System / Security Roles.
- 3. You can copy some roles if they have all read-only access already or you can create a new role.
- 4. Role ID: MSPbots
  - a. Make sure you give it the correct level and correct Restrict Board access. System Role ID\* Block Prices MSPBot Headquarters Department\* Block Cost Corporate (Level 1) Managed Services Name\* Default Territory\* Headquarters Service Defaults 13 Service Board Default Board Restrict Board Access

b. L

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".





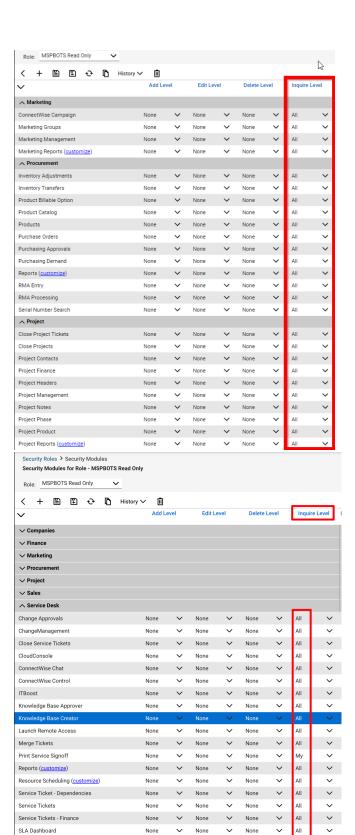
None

None

All

None

Reports (customize)

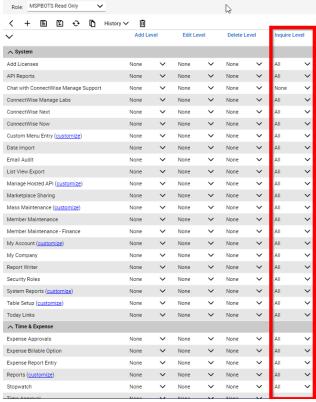


None

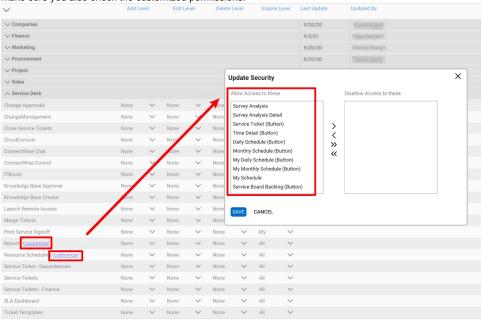
None

None

Ticket Templates



v. Make sure you also check the customized permissions:



- 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.