

ConnectWise Automate Integration Setup

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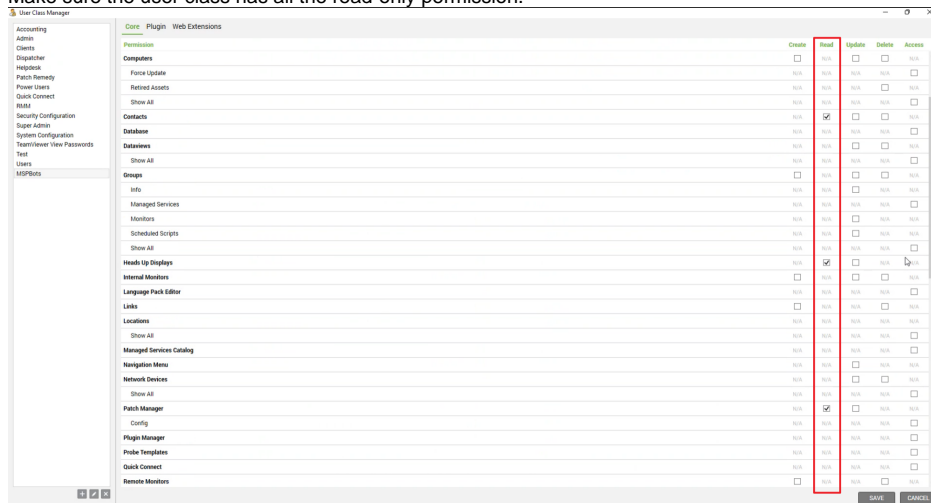
1. Setup in ConnectWise Automate

Create a dedicated Automate user account with the following settings:

1.1. Create a new user: "MSPbots"

1.2. Create a new user class: "MSPbots"

Make sure the user class has all the read-only permission.



1.3. General tab

Select the **Integrator** checkbox in the bottom-left corner of the window. This will **bypass Multi-Factor Authentication (MFA)** for accounts used for integrations.

Editing the information for Admin(1)

General | Permissions | Groups and Clients | User Avatar

User Information

Enter UserName: Admin

Change Password: [Change]

Email Address: [www.mspbots.com]

Ticket Config

Ticket Level: Highest

New Tickets: 0

Open Tickets: 0

☒ Ticket Router ☒ Supervisor

Local Account Lockout

Locked Out Until: N/A

Failed Login Attempts: 2

Last Failed Attempt Date: 11/25/2019 10:39:59 AM

Last Login IP Address: 8.25.14.3

Last Successful Login: N/A

☐ Integrator

Unlock Account View Permissions Save Cancel

1.4. Permissions tab

Allow read-only permissions to clients and select the **Allow HTTP Tunnel** checkbox. If you haven't modified the user class default settings, you can select Help Desk Users.

Our suggestion is to give READ-ONLY to all assets that you can select since we are developing more widgets and dashboards every week. This will save you the trouble of adding more permissions. However, if there is any data that you are not comfortable sharing, you can leave them unchecked for now.

1.5. Groups and Clients tab

Add All Agents and All Clients to Group Membership.

2. Setup in MSPbots

1. Go to <https://app.mspbots.ai/Integrations>
2. Find ConnectWise Automate.
3. Input your Automate URL, Username, and Password.
4. Click **Save and Sync**.

3. Troubleshooting

1. Error message: 403 - Forbidden: Access is denied. You do not have permission to view this directory or page using the credentials that you supplied.
 - a. Please check your firewall to see if the MSPbots server is allowed, [What MSPbots server IP addresses can I allow through the firewall?](#)