ConnectWise Manage On-Premise Integration Setup

The integration of MSPbots and ConnectWise Manage allows you to manage all aspects of your IT department and system with Business Intelligence (BI) automation and real-time reporting. Use this article as a guide for setting up the connection of ConnectWise Manage On-Premise to MSPbots. Once connected, you can start utilizing MSPbots solutions with ConnectWise to track time, tickets, and communication, manage projects, get real-time visibility into your company's health, and run your IT department more efficiently.

What's on this page:

Prerequisites

You must have the following to ensure a successful connection between MSPbots and Kaseya VSA:

- A new read-only account in your SQL Server or MySQL for communicating with MSPbots
- Advanced knowledge of SQL databases and scripts
- Admin role for modifying the settings in the MSPbots app

How to establish the MSPbots integration with Kaseya VSA

1. Connect the MSPbots agent.

Use this integration setup option only if you are an advanced user with knowledge of SQL databases and scripts. For more information on connecting your software to MSPbots using API or SQL agent, refer to Reminders for Connecting to MSPbots via API or SQL Agent.

a. Go to **Integrations** on the MSPbots app menu.
b. Find the **ConnectWise Manage On-Premise** and click the **Config** icon.
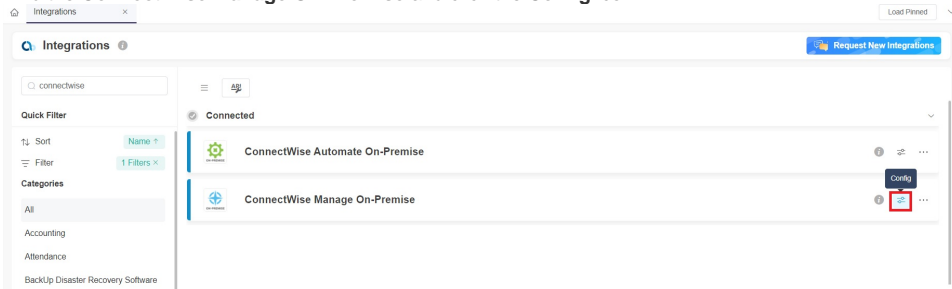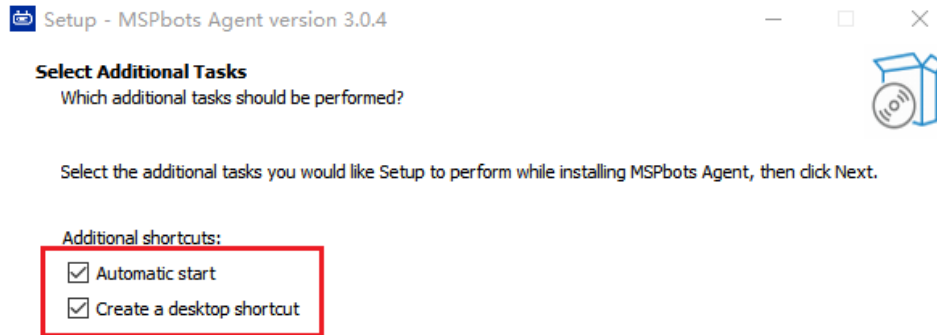

c. Next, click the download icon for the **MSPbots SQL Agent Client** to start downloading the installer file.
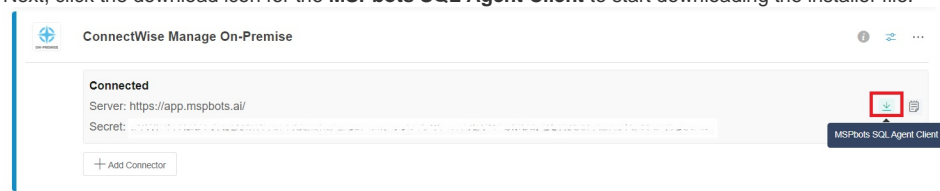
d. After the download completes, follow the prompts to install the MSPbots SQL Agent Client.

e. During the setup, select **Automatic Start** and **Create a desktop shortcut**, then click **Next**.

f. In the last step, select the **Launch MSPbotsAgentService** checkbox and click **Finish**. The window will automatically close when the service starts.
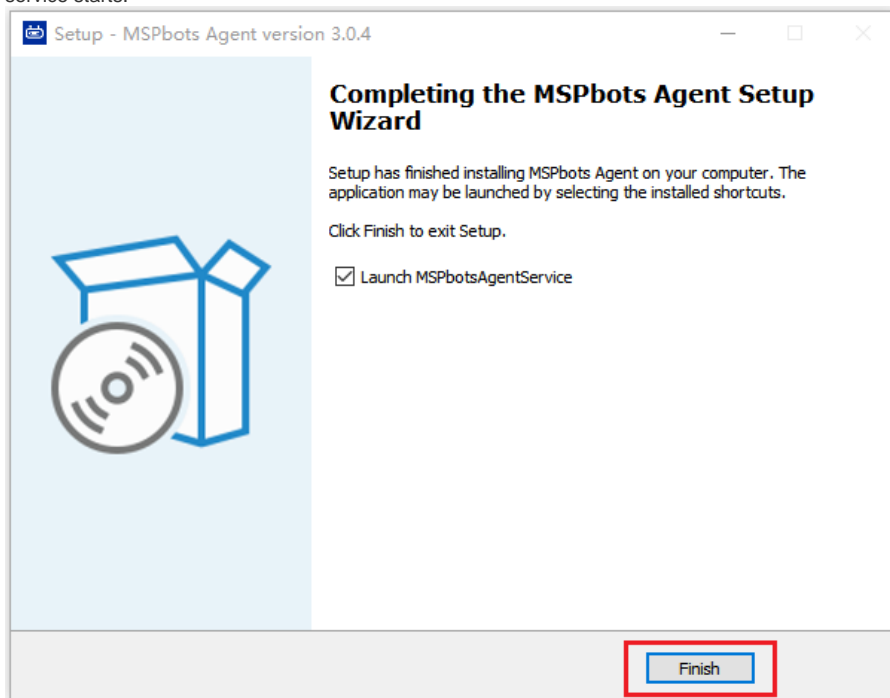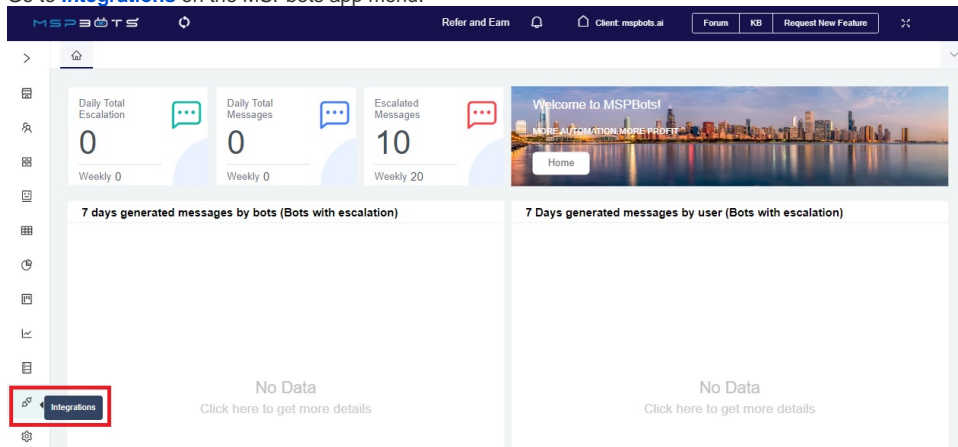
g. Launch the MSPbots agent and log in using your MSPbots account. You can minimize or close the window after login but do not log out.
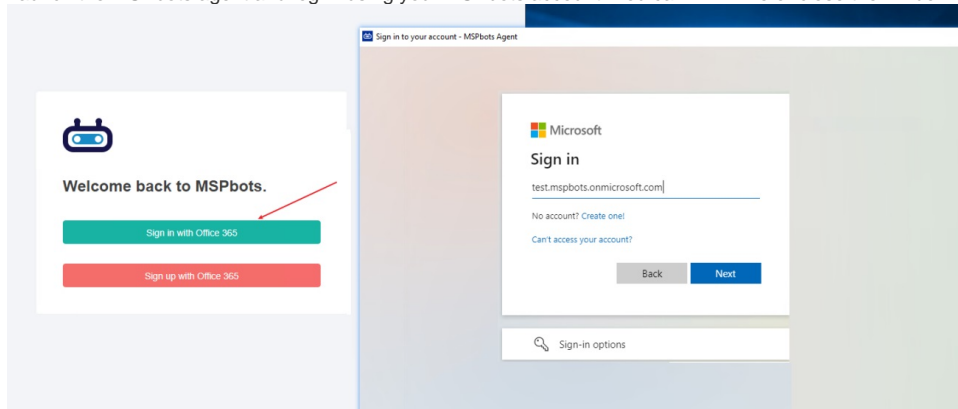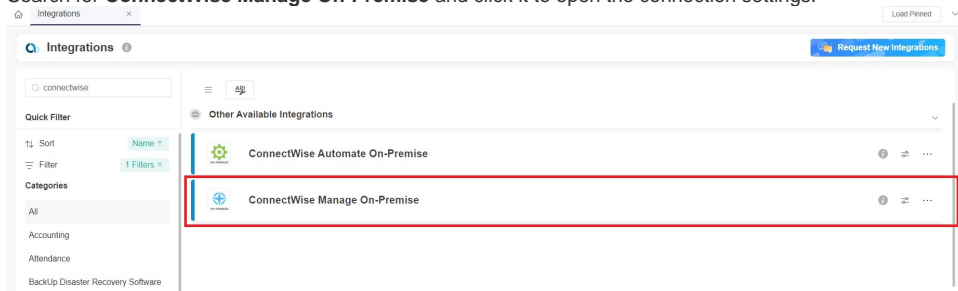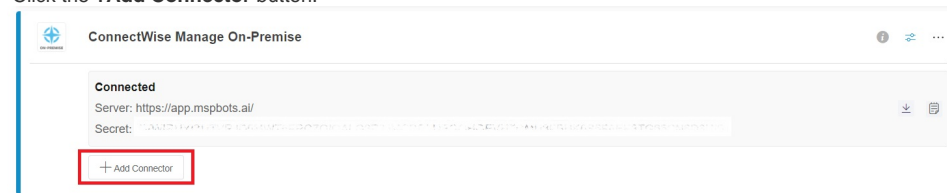

2. Set up the MSPbots Agent Connector.

a. Go to **Integrations** on the MSPbots app menu.

b. Search for **ConnectWise Manage On-Premise** and click it to open the connection settings.

c. Click the **+Add Connector** button.

The last success auth shows the last time when the MSPbots Agent successfully pulled the database configuration information. This process is set to occur every 5 minutes by default.

d. Fill in the following required fields.
e. **Database Type** - Select either **SQL Server** or **MySQL**.
f. **Agent** - This field is populated automatically with the name of the installed machine.
g. **IP** - Provide the internal IP address or FQDN of the SQL or MySQL server.
h. **Database Name**
i. **Time Zone** - Select the time zone used by the connected database.
j. **User ID** - This is the username of the user with read-only access to the database.

k. **Password** - This is the password of the user with read-only access to the database.

It may take a few moments for the agent to check in after installation.

⚠️ *If you have installed multiple MSPbots agents with different databases in different network segments, you have to select the device name where you manually installed the MSPbots Agent. You can find the device name in the Agent selection box. Select the one under the corresponding gateway of the database.*

l. Click **Save and Sync**.

3. Create a dataset and validate the data.

a. Go to **Datasets** on the MSPbots app menu and click the **New Agent Dataset** button.

b. When the New window appears, click **Integration** and select **ConnectWise Manage On-Premise**. Don't forget to fill in the dataset **Name** and **Description** fields.

New   ✕

* Name

    Name

* Integration   * Role

    Integration   ∧   Admin ✕   + 1   ∨

    ConnectWise Manage On-Premise

    ConnectWise Automate On-Premise

    E-Automate On-Premise

    SQL Agent

    Kaseya VSA On-Premise

    SQL Agent   ∨

* Description   Internal Notes

    Description   Internal Notes

                                                       Cancel   Confirm

c. Next, go to the **Data Cleaning** tab to show the Validate SQL section below.
    i. Select a database from the **DB** dropdown list.

New   ✕

* Name

    Name

* Integration   * Role

    Integration   ∨   Admin ✕   + 1   ∨

    ☑ Remind user to link integration

    Default   Fields Description   Data Cleaning

Refresh Type

    SQL   ∨

* DB

    Refresh Name   ∨

* SQL

    Please Enter Content, Required field cannot be empty

Validate SQL

Description

    Please Enter Content, Required field cannot be empty

* Sync Frequency(Mins)

    30

                                                       Cancel   Confirm

    ii. Scroll down to the Validate SQL section and fill in the **SQL field.** The most common SQL statement here is "*select * from TABLENAME*".
    iii. Input your desired **Sync Frequency** in minutes.

Sync Frequency is currently limited to 30 minutes and can only be decreased for smaller datasets. For larger datasets, the frequency may be limited due to a large amount of data ingestion and the constraints it would place on both your server and ours.

New   ✕

* Name

Name

* Integration

Integration ⌄

* Role

Admin ⊗   + 1 ⌄

☑ Remind user to link integration

Default   Fields Description   **Data Cleaning**

Refresh Type

SQL ⌄

* DB

Refresh Name ⌄

* SQL

Please Enter Content, Required field cannot be empty

Validate SQL

Description

Please Enter Content, Required field cannot be empty

* Sync Frequency(Mins)

30

Cancel   Confirm

d. Click **Confirm** when done. This will show a preview of the data for your validation. You can customize or use the default character length for string-type fields, and the time field can be set with a timezone.

e. Confirm if the data is correct, then click **OK** to create and save the dataset. The data will be synchronized in 10 minutes.

4. Save the logs and send the file to the MSPbots Support Team.

a. Open the **MSPbots Agent** client and click the **Save Log** button on the upper right corner of the window.

b. Click **Confirm** in the Tips pop-up window.

c. Next, select the location to save the logs, provide a filename, and click **Save**.
d. Send the file to **support@mspbots.ai**.

Related Topics

- [Reminders for Connecting to MSPbots via API or SQL Agent](#)
- [Public API](#)
- [SQL Agent Integration Setup](#)
- [How to Create a Read-only Account for Your SQL Server or MySQL](#)

- How to Fix the Deleted Ticket Issue in ConnectWise Manage
- How to Delete Tickets Using the API Tool
- How to Create a Read-Only Account on the MySQL or SQL Server