

How to Setup your ConnectWise Account

Welcome to our Family.

Please use this guide to help you set up synchronization of data with your PSA.



Q3 2022 Version 4.1



Create Security Roles

- 1. Click on <u>System</u> on the Left lower corner.
- 2. Select <u>Security roles</u> on the upper tab.

A motiva	+ New \sim		📰 Calendar	S My Time Sheet	💭 Chat with Support	Help Center	Tickets V Search	۹ 🥬	a
I≩ > ☆ My Favorites E Companies Sales	Setup Tables My Company Security Roles Members Mass Maintenar Report Writer	2 nce			-				
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Marketing	All Reports								
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Procurement	Authentication								
Project									
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Service Desk									
Time & Expense									
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Finance									
ැටු System									

On the Security Role page, click on the <u>+ Plus</u> icon in the upper left corner.





(212) 845-9888



Name the role

A motiva	+ New \sim	∙ necent ∨	📰 Calendar	o My Time Sheet	💬 Chat with Support	Help Center
> ☆	Security Roles > N New Role	ew Role				
My Favorites	< + 🗉	E 🕂 🗓				
₽	New Role					
Companies	Role ID: *					
Sales			_			

Set up each category with the next examples.

Companies

∧ Companies								
Company Maintenance	All	\sim	All	\sim	None	\sim	All	\sim
Company/Contact Group Maintenance	All	\sim	All	\sim	None	\sim	All	\sim
Configuration - Display Passwords	None	\sim	None	\sim	None	\sim	None	\sim
Configurations (customize)	None	\sim	None	\sim	None	\sim	None	\sim
Contacts	All	\sim	All	\sim	None	\sim	All	\sim
CRM/Sales Activities	All	\sim	All	\sim	None	\sim	All	\sim
Import Contacts	All	\sim	All	\sim	None	\sim	All	\sim
Manage Attachments	None	\sim	None	\sim	None	\sim	None	\sim
Management	All	\sim	All	\sim	None	\sim	All	\sim
Notes	All	\sim	All	\sim	None	\sim	All	\sim
Reports (<u>customize</u>)	All	\sim	All	\sim	None	\sim	All	\sim
Surveys	None	\sim	None	\sim	None	\sim	None	\sim
Team Members	All	\sim	All	\sim	None	\sim	All	\sim
Tracks	None	\sim	None	\sim	None	\sim	None	\sim
UserCentric	None	\sim	None	\sim	None	\sim	None	\sim





Finance

∧ Finance								
Accounting Interface	None	\sim	None	\sim	None	\sim	None	\sim
Agreement Invoicing	All	\sim	None	\sim	None	\sim	All	\sim
Agreement Sales	All	\sim	None	\sim	None	\sim	All	\sim
Agreements (<u>customize</u>)	None	\sim	None	\sim	None	\sim	None	\sim
Billing Rate Maintenance	None	\sim	None	\sim	None	\sim	None	\sim
Billing Reconciliation	None	\sim	None	\sim	None	\sim	None	\sim
Billing View Time	None	\sim	None	\sim	None	\sim	None	\sim
Company Finance	None	\sim	None	\sim	None	\sim	None	\sim
Expense Reimbursements	None	\sim	None	\sim	None	\sim	None	\sim
Financial Dashboard	None	\sim	None	\sim	None	\sim	None	\sim
Invoice Approval	None	\sim	None	\sim	None	\sim	None	\sim
Invoicing	All	\sim	None	\sim	None	\sim	All	\sim
Reports (<u>customize</u>)	None	\sim	None	\sim	None	\sim	None	\sim
Marketing								
∧ Marketing								
ConnectWise Campaign	None	\sim	None	\sim	None	\sim	None	\sim
Marketing Groups	None	\sim	None	\sim	None	\sim	None	\sim
Marketing Management	None	\sim	None	\sim	None	\sim	None	\sim
Marketing Reports (<u>customize</u>)	None	\sim	None	\sim	None	\sim	None	\sim
Procurement								
∧ Procurement								
Inventory Adjustments	None	\sim	None	\sim	None	\sim	None	\sim
Inventory Transfers	None	\sim	None	\sim	None	\sim	None	\sim
Product Billable Option	All	\sim	None	\sim	None	\sim	All	\sim
Product Catalog	All	\sim	None	\sim	None	\sim	All	\sim
Products	All	\sim	None	\sim	None	\sim	All	\sim
Purchase Orders	None	\sim	None	\sim	None	\sim	None	\sim
Purchasing Approvals	None	\sim	None	\sim	None	\sim	None	\sim
Purchasing Demand	None	\sim	None	\sim	None	\sim	None	\sim
Reports (<u>customize</u>)	None	\sim	None	\sim	None	\sim	None	\sim
RMA Entry	None	\sim	None	\sim	None	\sim	None	\sim
RMA Processing	None	\sim	None	\sim	None	\sim	None	\sim
Serial Number Search	None	\sim	None	\sim	None	\sim	None	\sim





Project

∧ Project								
Close Project Tickets	None	\sim	None	\sim	None	\sim	None	\sim
Close Projects	None	\sim	None	\sim	None	\sim	None	\sim
Project Contacts	None	\sim	None	\sim	None	\sim	None	\sim
Project Finance	None	5/23/22	None Walter Contreras	\sim	None	\sim	None	\sim
Project Headers	None	5/23/22 V	None	\sim	None	\sim	None	\sim
Project Management	None	\sim	None	\sim	None	\sim	None	\sim
Project Notes	None	\sim	None	\sim	None	\sim	None	\sim
Project Phase	None	\sim	None	\sim	None	\sim	None	\sim
Project Product	None	\sim	None	\sim	None	\sim	None	\sim
Project Reports (<u>customize</u>)	None	\sim	None	\sim	None	\sim	None	\sim
Project Scheduling (<u>customize</u>)	None	\sim	None	\sim	None	\sim	None	\sim
Project Teams	None	\sim	None	\sim	None	\sim	None	\sim
Project Templates	None	\sim	None	\sim	None	\sim	None	\sim
Project Ticket - Dependencies	None	\sim	None	\sim	None	\sim	None	\sim
Project Ticket Tasks	None	\sim	None	\sim	None	\sim	None	\checkmark
Project Tickets	None	\sim	None	\sim	None	\sim	None	\sim

Sales

∧ Sales								
Closed Opportunity	All	\sim	All	\sim	None	\sim	All	\sim
Opportunity	All	\sim	All	\sim	None	\sim	All	\sim
Opportunity Finance	All	\sim	All	\sim	None	\sim	All	\sim
Reports (<u>customize</u>)	None	\sim	None	\sim	None	\sim	None	\sim
Sales Dashboard	None	\sim	None	\sim	None	\sim	None	\sim
Sales Funnel	None	\sim	None	\sim	None	\sim	None	\sim
Sales Order Finance	None	\sim	None	\sim	None	\sim	None	\sim
Sales Orders	None	\sim	None	\sim	None	\sim	None	\sim





Service Desk

∧ Service Desk								
Change Approvals	None	\sim	None	\sim	None	\sim	None	\sim
Close Service Tickets	None	\sim	None	\sim	None	\sim	None	\sim
CloudConsole	None	\sim	None	\sim	None	\sim	None	\sim
ConnectWise Chat	None	\sim	None	\sim	None	\sim	None	\sim
ConnectWise Control	None	\sim	None	\sim	None	\sim	None	\sim
ITBoost	None	\sim	None	\sim	None	\sim	None	\sim
Knowledge Base Approver	None	\sim	None	\sim	None	\sim	None	\sim
Knowledge Base Creator	None	\sim	None	\sim	None	\sim	None	\sim
Launch Remote Access	None	\sim	None	\sim	None	\sim	None	\sim
Merge Tickets	None	\sim	None	\sim	None	\sim	None	\sim
Print Service Signoff	None	\sim	None	\sim	None	\sim	None	\sim
Reports (<u>customize</u>)	None	\sim	None	\sim	None	\sim	None	\sim
Resource Scheduling (<u>customize</u>)	None	\sim	None	\sim	None	\sim	None	\sim
Service Ticket - Dependencies	None	\sim	None	\sim	None	\sim	None	\sim
Service Tickets	None	\sim	None	\sim	None	\sim	None	\sim
Service Tickets - Finance	None	\sim	None	\sim	None	\sim	None	\sim
SLA Dashboard	None	\sim	None	\sim	None	\sim	None	\sim
Smileback	None	\sim	None	\sim	None	\sim	None	\sim
Ticket Templates	None	\sim	None	\sim	None	\sim	None	\sim



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System

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

Time & Expense

へ Time & Expense								
Expense Approvals	None	\sim	None	\sim	None	\sim	None	\sim
Expense Billable Option	None	\sim	None	\sim	None	\sim	None	\sim
Expense Report Entry	None	\sim	None	\sim	None	\sim	None	\sim
Reports (<u>customize</u>)	None	\sim	None	\sim	None	\sim	None	\sim
Stopwatch	None	\sim	None	\sim	None	\sim	None	\sim
Time Approval	None	\sim	None	\sim	None	\sim	None	\sim
Time Entry	None	\sim	None	\sim	None	\sim	None	\sim
Time Entry Billable Option	None	\sim	None	\sim	None	\sim	None	\sim

When finished please click on the save Icon.





API Key Creation

Click on system and then security roles

A motiva	+ New \sim		🛅 Calendar	🗿 My Time Sheet	🛱 Chat with Support	Help Center	Tickets V Sear	ch	۹ 🚇	· · · ·
> Ary Favorites My Favorites Companies Sales Sales Decoursement Procurement Procurement Sarrice Deck	Setup Tables My Company Security Roles Members Mass Maintenan Report Writer Outlook All Reports Email Audit Authentication Data Import	2 nce								
Genee Deax O Time & Expense ±x Finance										
1 & System										

Click on <u>API Members</u> tab and then <u>click on the + Plus icon</u> on the left corner.

A motiva	+ New	V Recent	✓	alendar 👩 M	y Time Sheet	🖵 Chat wit	h Support	Help Center	
>	Members - AP	I Members							
	Licensing: Re	gular (16 active/16 lic	ensed), Mobile (7	7 active/9 licensed), St	reamlineIT (0 activ	ve), Subcontractor(0	active)		
☆					1				
My Favorites	Regular	StreamlineIT	Subcontractors	API Members	APLYOVS	API Callbacks	ŝ		
₽	+ 2	CLEAR RESYNC	KEYS						
Companies	Member 10	Member Name	Location	Role ID		Inactive			
				0.10		2.027			
a				~	All	~			





Fill up the information and <u>use BinoxMSP</u> to recognize the API Member. <u>*Important</u> Under Role ID, please select the role we just created in the previous step.

Here's an example:

	API Memb (binoxtest)		etail								
Details	Skills	Ce	ertificatio	on	Delegation	Accru	als	API Keys	API Logs	Notifications	ŝ
< +		F	Ð	D	HISTORY	~ 1	Î				
Profile											
Member BinoxM								e Zone* Eastern			~
Member BinoxM							Ema	il			
Syster	n										
Role ID* Binox				~	Location* IT Service			~	Block	Prices	
Level* Corpora	ate (Leve	1)		~	Business Professio		vices	~	Block	Cost	
Name* Motiva	Network	S		~	Default Te Motiva N			~			
Servic	e Defa	ults									
Service	Board										
Default	Board					~					
Restrict	Board A	ccess				~					

When finished, please click on the <u>save</u> button.







Once you create the member, click on it, and select API Keys tab.



Click on the + Plus icon to generate Public and Private key.

Members - API Members > Public API Keys > API Keys binoxtest (binoxtest)						
Details	Details Skills		Certificatio	on Delegation	n Accruals	API Keys
< +	Ð	Ł	€ Hist	ory 🗸 🔟		
Public API Key						
Description:	*	Inactive				
Public Key:	*					
Private Key:	*					
Note: The private key is only available at the time the key is created. Please make a note of it.						

Use a description such as BinoxMSP, and be sure to <u>save your public and private key</u> in a safe place. You will need it during BINOX onboarding.

You are all set up! That is all you need to prepare for your onboarding day. Please do not email these keys to us, these are for your private consumption only. We are excited to have you be a part of our community of MSPs who are looking to grow their business. Should you have any questions, please do not hesitate to contact us support@binoxmsp.com Meet you on the onboarding!

