

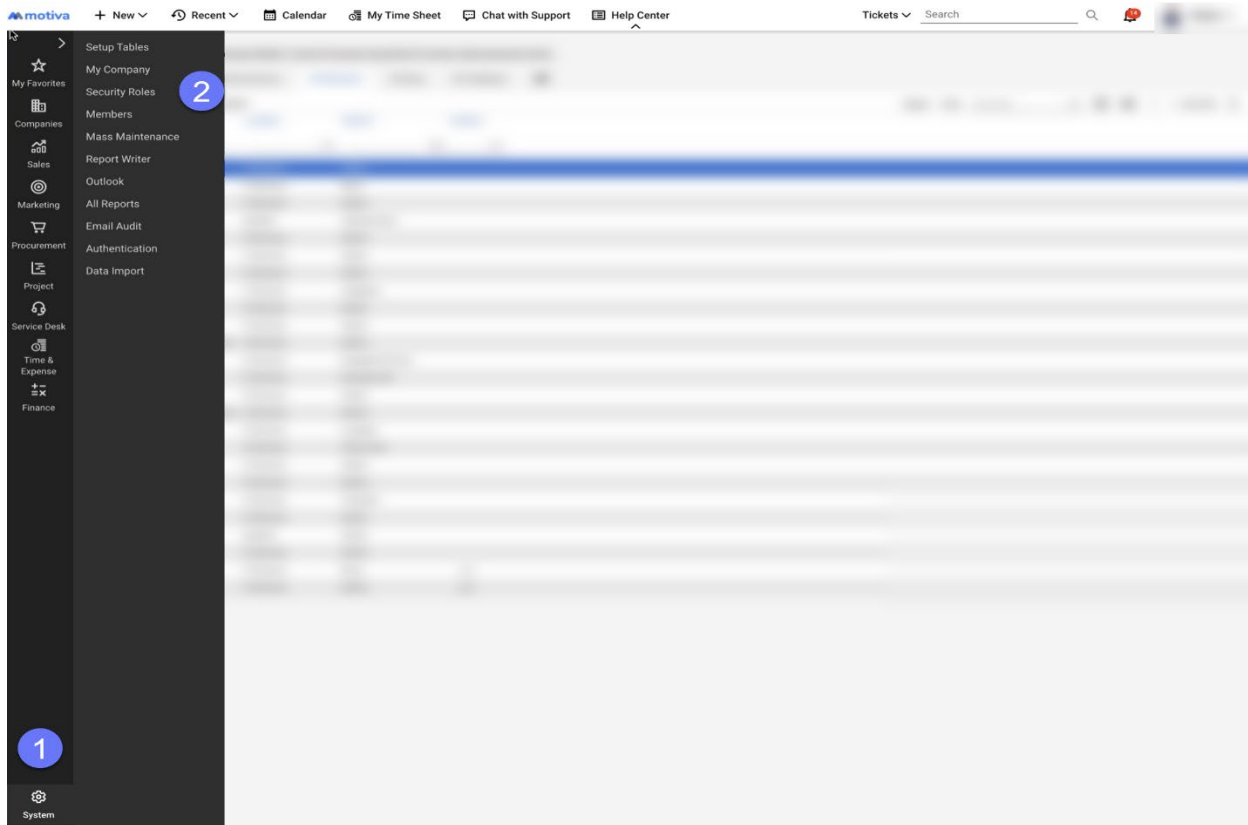
How to Setup your ConnectWise Account

Welcome to our Family.

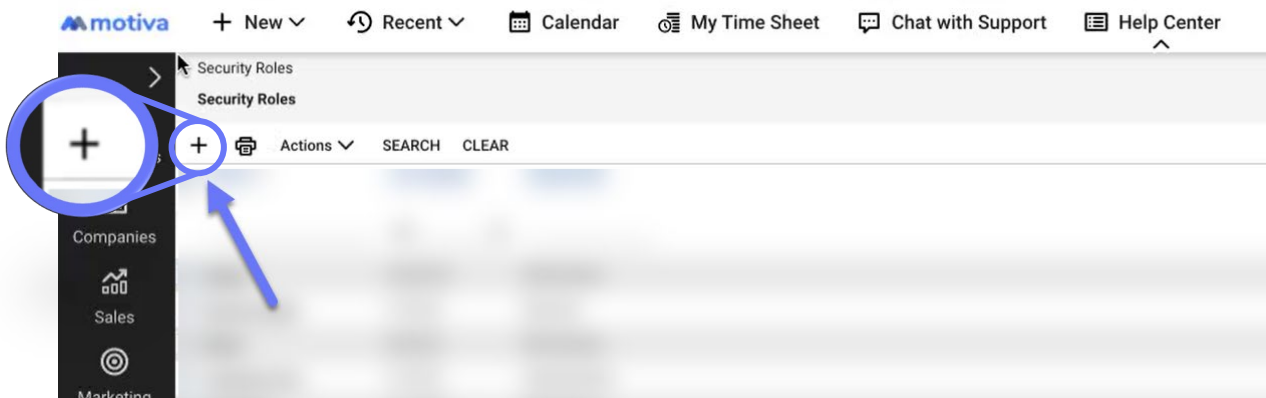
Please use this guide to help you set up synchronization of data with your PSA.

Create Security Roles

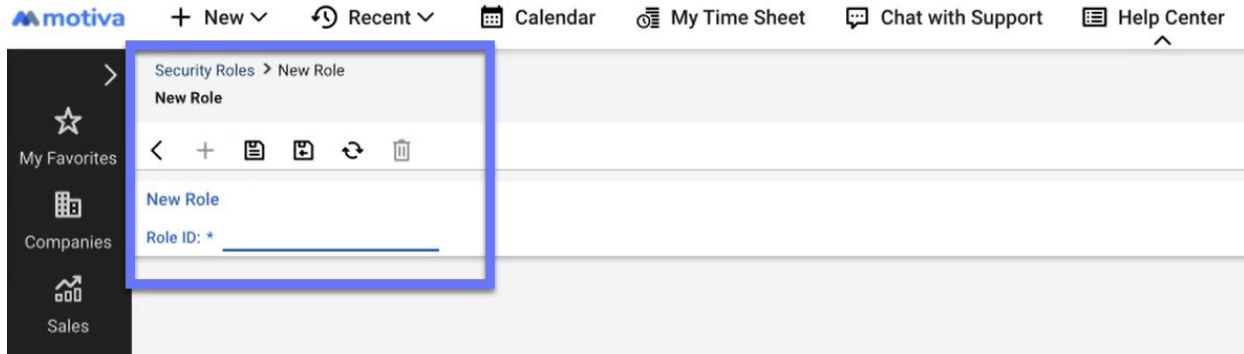
1. Click on [System](#) on the Left lower corner.
2. Select [Security roles](#) on the upper tab.



On the Security Role page, click on the [+ Plus](#) icon in the upper left corner.



Name the role



Set up each category with the next examples.

Companies

^ Companies								
Company Maintenance	All	▼	All	▼	None	▼	All	▼
Company/Contact Group Maintenance	All	▼	All	▼	None	▼	All	▼
Configuration - Display Passwords	None	▼	None	▼	None	▼	None	▼
Configurations (customize)	None	▼	None	▼	None	▼	None	▼
Contacts	All	▼	All	▼	None	▼	All	▼
CRM/Sales Activities	All	▼	All	▼	None	▼	All	▼
Import Contacts	All	▼	All	▼	None	▼	All	▼
Manage Attachments	None	▼	None	▼	None	▼	None	▼
Management	All	▼	All	▼	None	▼	All	▼
Notes	All	▼	All	▼	None	▼	All	▼
Reports (customize)	All	▼	All	▼	None	▼	All	▼
Surveys	None	▼	None	▼	None	▼	None	▼
Team Members	All	▼	All	▼	None	▼	All	▼
Tracks	None	▼	None	▼	None	▼	None	▼
UserCentric	None	▼	None	▼	None	▼	None	▼

Finance

^ Finance									
Accounting Interface	None	▼	None	▼	None	▼	None	▼	
Agreement Invoicing	All	▼	None	▼	None	▼	All	▼	
Agreement Sales	All	▼	None	▼	None	▼	All	▼	
Agreements (customize)	None	▼	None	▼	None	▼	None	▼	
Billing Rate Maintenance	None	▼	None	▼	None	▼	None	▼	
Billing Reconciliation	None	▼	None	▼	None	▼	None	▼	
Billing View Time	None	▼	None	▼	None	▼	None	▼	
Company Finance	None	▼	None	▼	None	▼	None	▼	
Expense Reimbursements	None	▼	None	▼	None	▼	None	▼	
Financial Dashboard	None	▼	None	▼	None	▼	None	▼	
Invoice Approval	None	▼	None	▼	None	▼	None	▼	
Invoicing	All	▼	None	▼	None	▼	All	▼	
Reports (customize)	None	▼	None	▼	None	▼	None	▼	

Marketing

^ Marketing									
ConnectWise Campaign	None	▼	None	▼	None	▼	None	▼	
Marketing Groups	None	▼	None	▼	None	▼	None	▼	
Marketing Management	None	▼	None	▼	None	▼	None	▼	
Marketing Reports (customize)	None	▼	None	▼	None	▼	None	▼	

Procurement

^ Procurement									
Inventory Adjustments	None	▼	None	▼	None	▼	None	▼	
Inventory Transfers	None	▼	None	▼	None	▼	None	▼	
Product Billable Option	All	▼	None	▼	None	▼	All	▼	
Product Catalog	All	▼	None	▼	None	▼	All	▼	
Products	All	▼	None	▼	None	▼	All	▼	
Purchase Orders	None	▼	None	▼	None	▼	None	▼	
Purchasing Approvals	None	▼	None	▼	None	▼	None	▼	
Purchasing Demand	None	▼	None	▼	None	▼	None	▼	
Reports (customize)	None	▼	None	▼	None	▼	None	▼	
RMA Entry	None	▼	None	▼	None	▼	None	▼	
RMA Processing	None	▼	None	▼	None	▼	None	▼	
Serial Number Search	None	▼	None	▼	None	▼	None	▼	

Project

^ Project								
Close Project Tickets	None	▼	None	▼	None	▼	None	▼
Close Projects	None	▼	None	▼	None	▼	None	▼
Project Contacts	None	▼	None	▼	None	▼	None	▼
Project Finance	None	▼	None	▼	None	▼	None	▼
Project Headers	None	▼	None	▼	None	▼	None	▼
Project Management	None	▼	None	▼	None	▼	None	▼
Project Notes	None	▼	None	▼	None	▼	None	▼
Project Phase	None	▼	None	▼	None	▼	None	▼
Project Product	None	▼	None	▼	None	▼	None	▼
Project Reports (customize)	None	▼	None	▼	None	▼	None	▼
Project Scheduling (customize)	None	▼	None	▼	None	▼	None	▼
Project Teams	None	▼	None	▼	None	▼	None	▼
Project Templates	None	▼	None	▼	None	▼	None	▼
Project Ticket - Dependencies	None	▼	None	▼	None	▼	None	▼
Project Ticket Tasks	None	▼	None	▼	None	▼	None	▼
Project Tickets	None	▼	None	▼	None	▼	None	▼

Sales

^ Sales								
Closed Opportunity	All	▼	All	▼	None	▼	All	▼
Opportunity	All	▼	All	▼	None	▼	All	▼
Opportunity Finance	All	▼	All	▼	None	▼	All	▼
Reports (customize)	None	▼	None	▼	None	▼	None	▼
Sales Dashboard	None	▼	None	▼	None	▼	None	▼
Sales Funnel	None	▼	None	▼	None	▼	None	▼
Sales Order Finance	None	▼	None	▼	None	▼	None	▼
Sales Orders	None	▼	None	▼	None	▼	None	▼

Service Desk

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

System

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

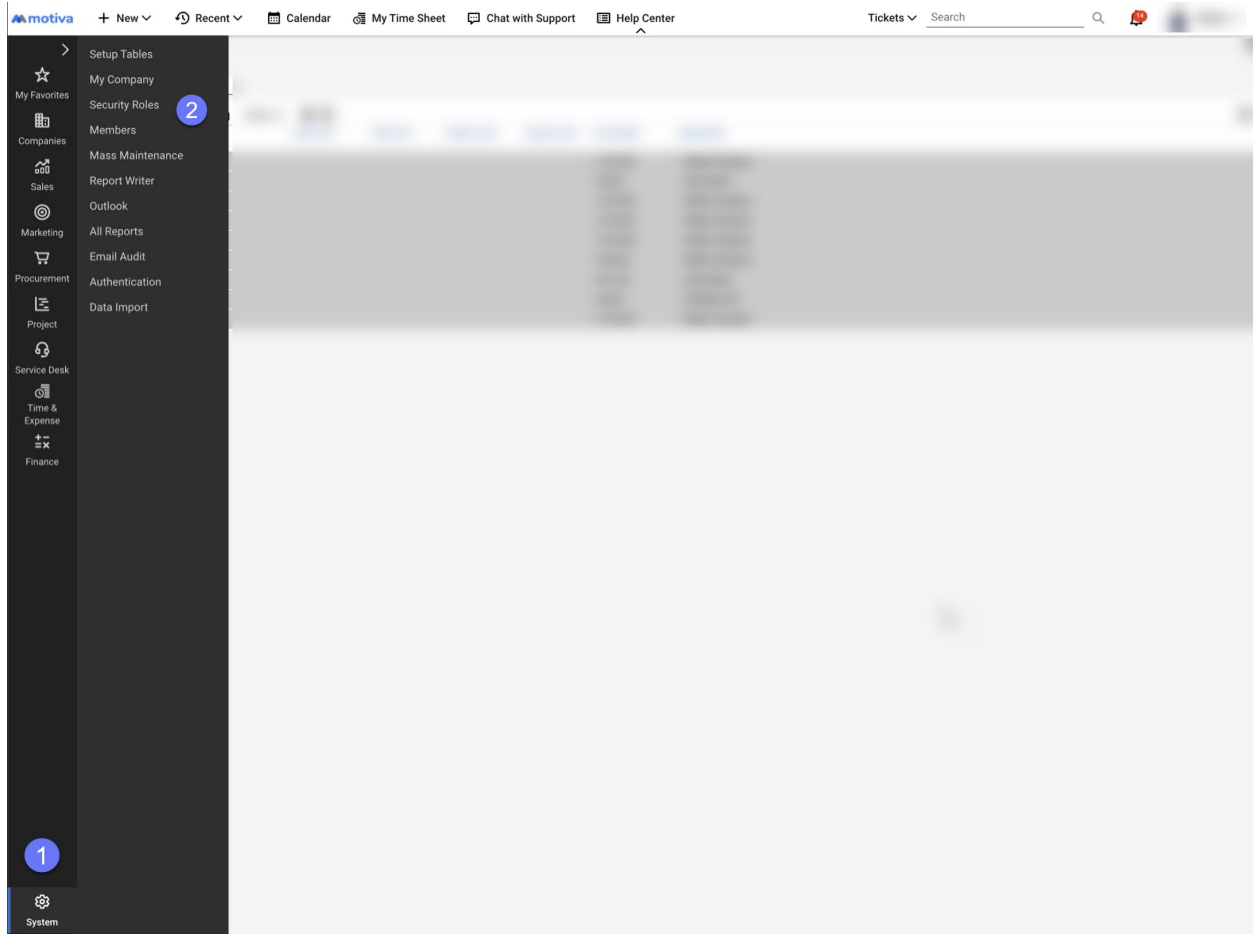
Time & Expense

^ Time & Expense								
Expense Approvals	None	▼	None	▼	None	▼	None	▼
Expense Billable Option	None	▼	None	▼	None	▼	None	▼
Expense Report Entry	None	▼	None	▼	None	▼	None	▼
Reports (customize)	None	▼	None	▼	None	▼	None	▼
Stopwatch	None	▼	None	▼	None	▼	None	▼
Time Approval	None	▼	None	▼	None	▼	None	▼
Time Entry	None	▼	None	▼	None	▼	None	▼
Time Entry Billable Option	None	▼	None	▼	None	▼	None	▼

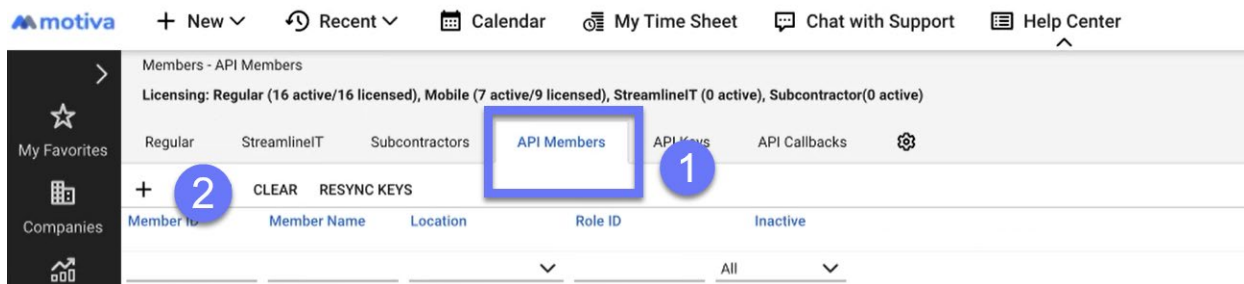
When finished please [click on the save icon](#).

API Key Creation

Click on [system](#) and then [security roles](#)



Click on [API Members](#) tab and then [click on the + Plus icon](#) on the left corner.




Fill up the information and [use BinoxMSP](#) to recognize the API Member.







****Important*** Under Role ID, please select the role we just created in the previous step.

Here's an example:


Members - API Members > Detail

binotest (binotest)







Details Skills Certification Delegation Accruals API Keys API Logs Notifications 

< +     HISTORY  

Profile



Member ID*	Time Zone*
BinoxMSP	US Eastern 
Member Name*	Email
BinoxMSP	

System

Role ID*	Location*	<input type="checkbox"/> Block Prices
Binox 	IT Services 	
Level*	Business Unit*	<input type="checkbox"/> Block Cost
Corporate (Level 1) 	Professional Services 	
Name*	Default Territory*	
Motiva Networks 	Motiva Networks 	

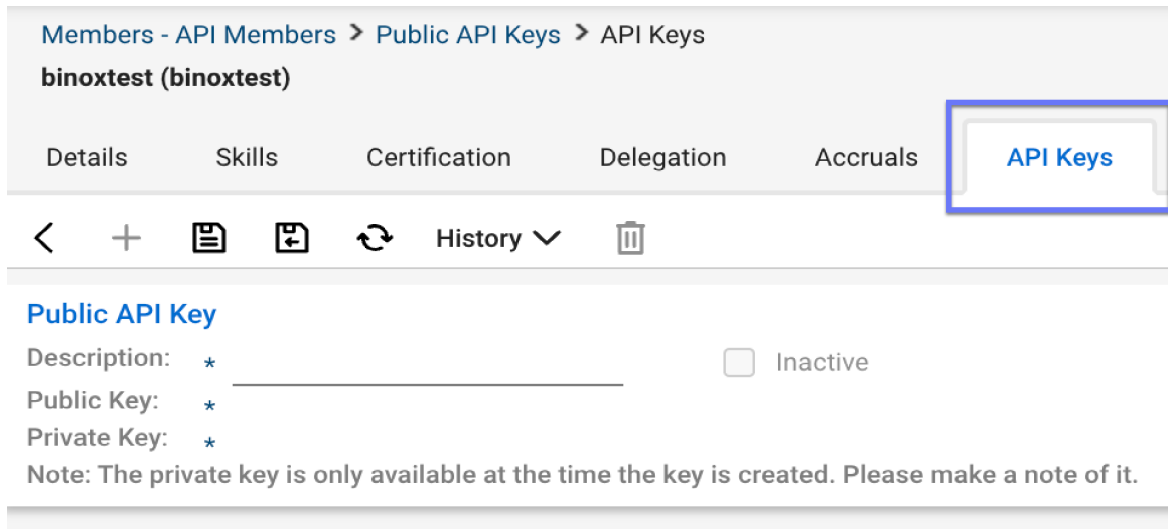
Service Defaults

Service Board

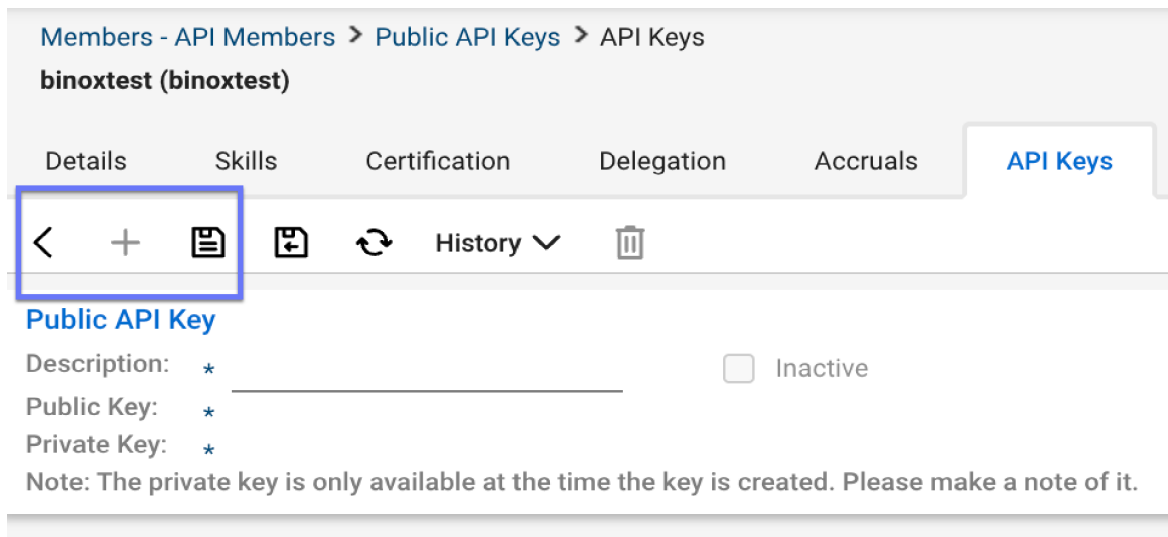
Default Board	
Restrict Board Access	

When finished, please click on the [save](#) 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.](#)



Use a description such as BinoxMSP, and be sure to [save your public and private key](#) 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!