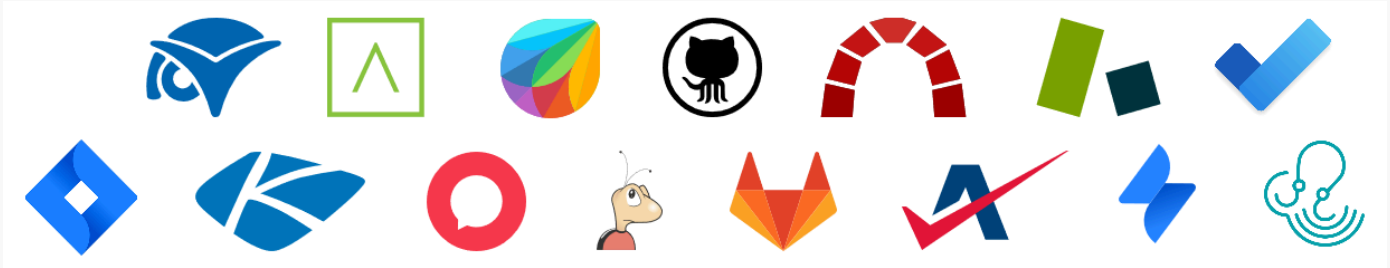


# ConnectWise Manage Integration

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# ConnectWise Manage Integration

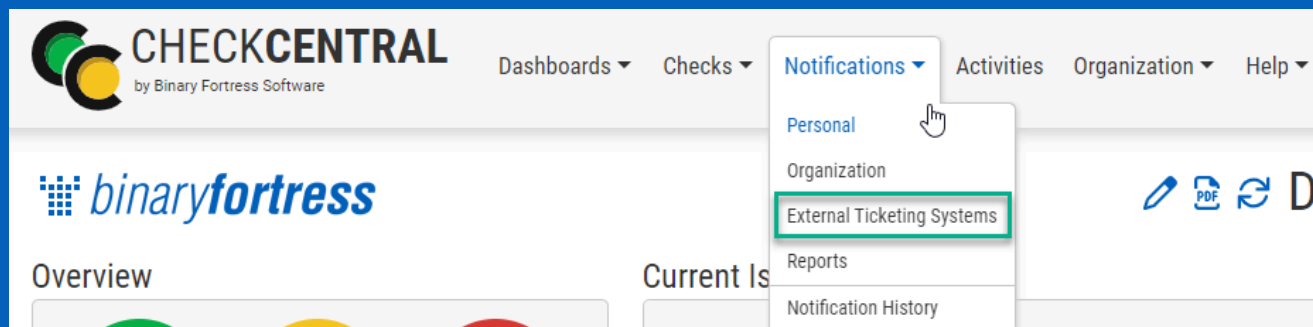


CheckCentral integrates with several RMMs, PSAs, and ticketing software, including ConnectWise Manage, helping you consolidate service ticket issues.

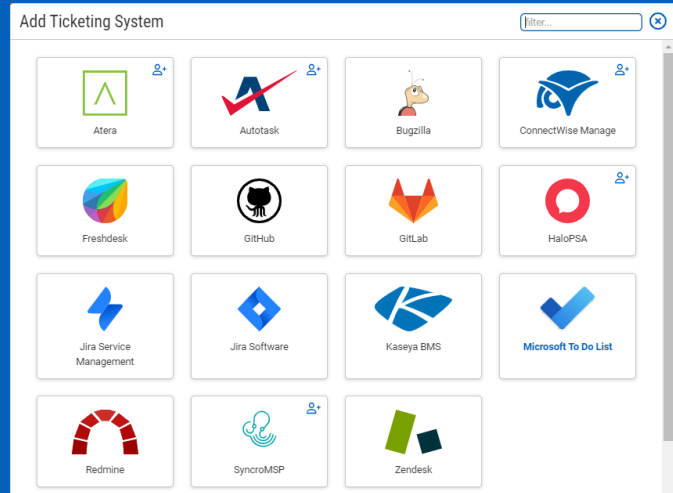
To integrate ConnectWise with CheckCentral, begin by logging into your CheckCentral account.

## CheckCentral

From the main menu, click Notifications, then External Ticketing Systems.



Click Add Ticketing System and choose ConnectWise Manage.



This will bring up the configuration options required for CheckCentral to communicate with ConnectWise servers via the API.

**ConnectWise Manage**

**Name**

**Site**

Copy the URL of your ConnectWise Manage site.

**Login Company ID**

This is the company ID that you login with.

**Public Key**

Click the 'System' settings icon in the bottom-left corner to open the system menu.  
Click the 'Members' option.  
Click the 'API Members' tab on the members page.  
If you need to create a new member:  
• Click the 'New Item' button beside the search/clear buttons to create a new member.  
• Complete the information on the new member form.  
• Choose 'Admin' or select a custom security role for the 'Role ID'.  
• The security role that you select much have these permissions:  
• Companies > Company Maintenance: Inquire Level should be set to 'All'  
• Service Desk > Service Tickets: Add Level, Edit Level, Inquire Level should be set to 'All'  
• Service Desk > Close Service Tickets: Add Level, Edit Level, Inquire Level should be set to 'All'  
• System > Table Setup: Inquire Level should be set to 'All'  
• Click 'Save' or 'Save and Close' to apply.  
View the member you would like to use, either an existing one or the one you just created above.  
Click the 'API Keys' tab.  
Click the 'New Item' button beside the search/clear buttons to create a new API key.  
Enter a description for your API key.  
Click the 'Save' button.  
Copy and paste the 'Public Key' and 'Private Key' here. This is the only time the private key will be shown.

**Private Key**

Follow the directions for the public key above to get both keys.

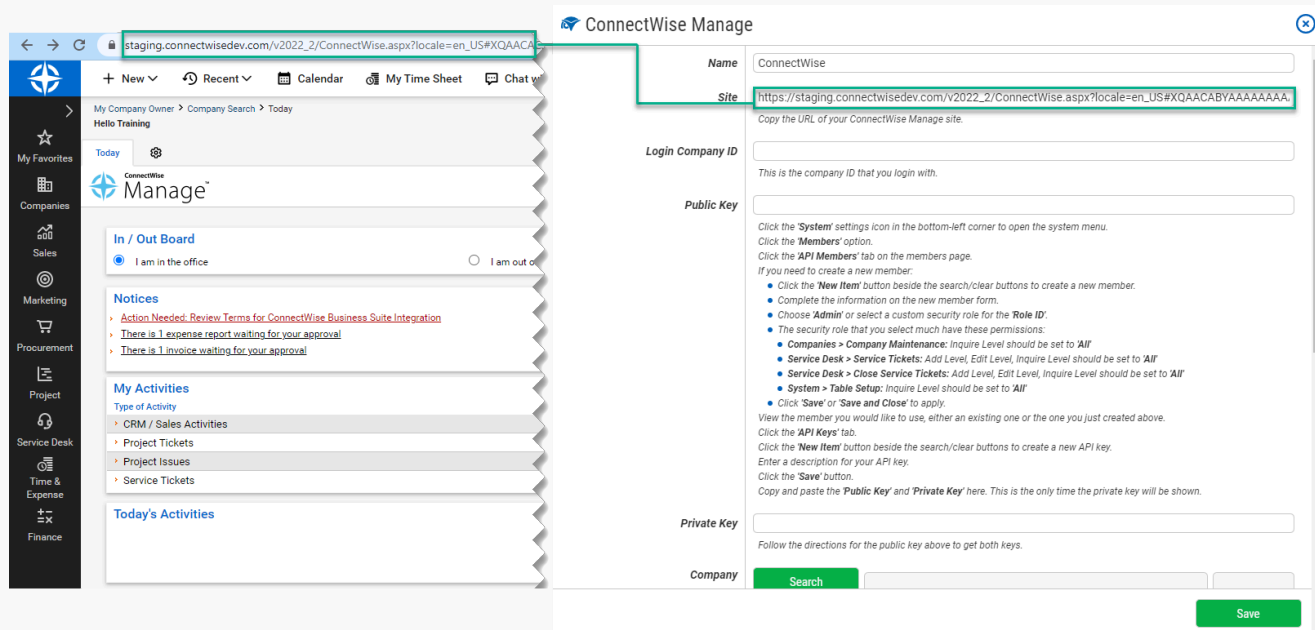
**Company**

You can name this configuration anything you'd like.

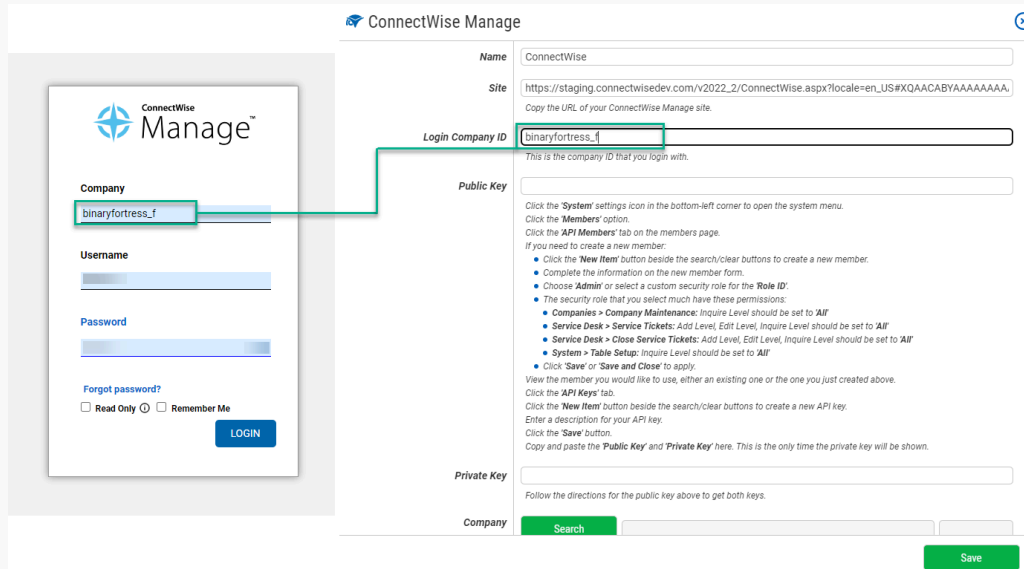
The other details require you to visit your ConnectWise Manage site.

# ConnectWise and CheckCentral

Open your ConnectWise Manage site in a browser. Copy the URL for your portal and paste it into the Site field of CheckCentral's integration prompt.



Copy your ConnectWise Manage Company ID and paste it into the Login Company ID field in CheckCentral.

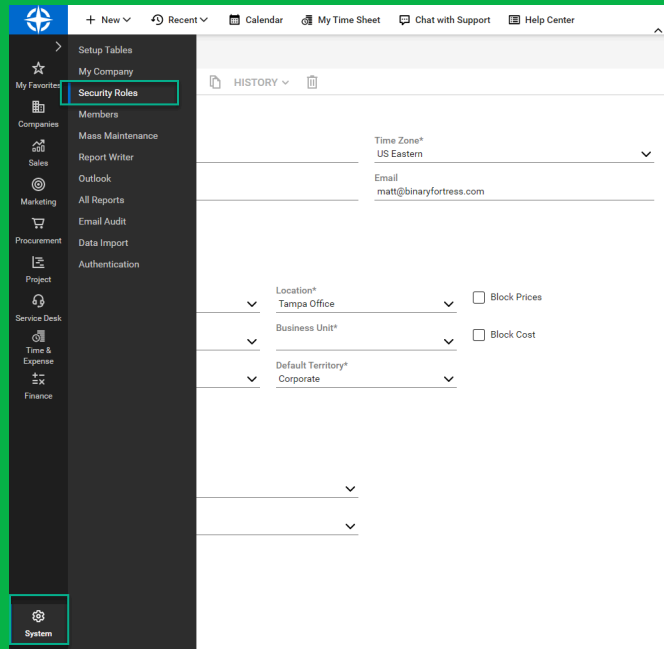


Complete your login to the ConnectWise Manage.

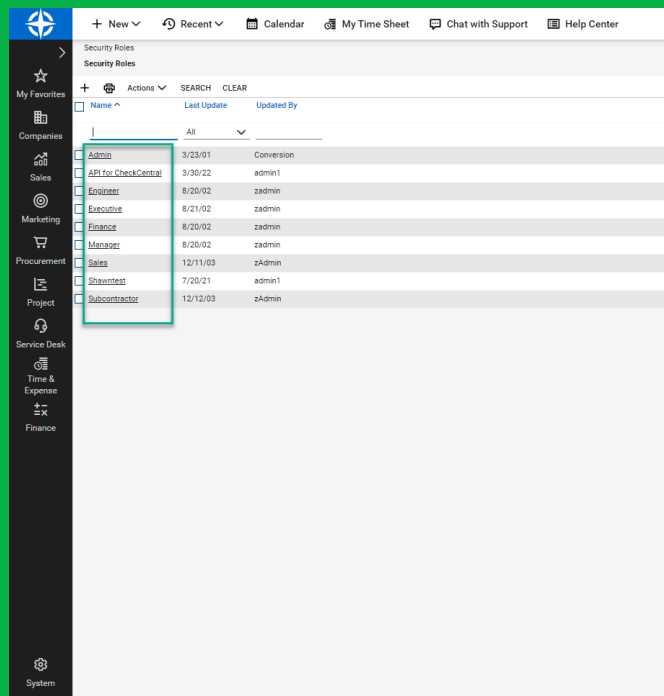
# ConnectWise

The ConnectWise Member used for this integration requires a Role ID with specific permissions. This may be the Admin role or a custom role.

To confirm Role ID permissions, click System in the bottom-left corner. Then click "Security Roles."



Click Admin or the custom security role to be used. Create a new one if needed.



The Role ID must have the following permissions:

- Companies > Company Maintenance - Inquire Level set to All
- Service Desk > Service Tickets - Add, Edit, and Inquire Levels set to All
- Service Desk > Close Service Tickets - Add, Edit, and Inquire Levels set to All
- System > Table Setup - Inquire Level set to All

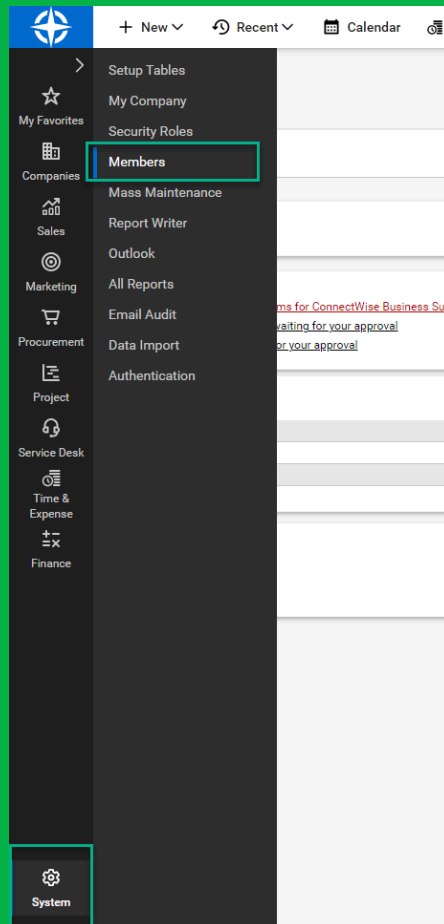
Module	Add Level	Edit Level	Delete Level	Inquire Level	Last Update	Updated By
Companies					6/2/15	zSys Admin
Company Maintenance	All	All	All	All		
Company/Contact Group Maintenance	All	All	All	All		
Configuration - Display Passwords	None	None	None	All		
Configurations (customize)	All	All	All	All		
Contacts	All	All	All	All		
CRM/Sales Activities	All	All	All	All		
Import Contacts	All	All	All	All		
Manage Attachments	All	All	All	All		
Management	All	All	All	All		
Notes	All	All	All	All		
Reports (customize)	All	All	All	All		
Surveys	All	All	All	All		
Team Members	All	All	All	All		
Tracks	All	All	All	All		
User/Centric	All	All	All	All		
Finance					10/25/22	zSys Admin
Marketing					12/12/17	zSys Admin
Procurement					6/26/18	CONVERSION
Project					10/25/22	zSys Admin
Sales					12/12/17	zSys Admin
Service Desk					8/2/22	zSys Admin
System					6/24/21	CM-MAS-769
Time & Expense					6/26/18	CONVERSION

Module	Add Level	Edit Level	Delete Level	Inquire Level	Last Update	Updated By
Service Desk					8/2/22	zSys Admin
Change Approvals	All	All	All	All		
Close Service Tickets	All	All	All	All		
CloudConsole	All	All	All	All		
Connectwise Chat	All	All	All	All		
Connectwise Control	All	All	All	All		
ITBlast	All	All	All	All		
Knowledge Base Approver	All	All	All	All		
Knowledge Base Creator	All	All	All	All		
Launch Remote Access	All	All	All	All		
Merge Tickets	All	All	All	All		
Print Service Signoff	None	None	None	None		
Reports (customize)	All	All	All	All		
Resource Scheduling (customize)	All	All	All	All		
Service Ticket - Dependencies	All	All	All	All		
Service Tickets	All	All	All	All		
Service Tickets - Finance	All	All	All	All		
SLA Dashboard	All	All	All	All		
SmileBack	None	None	None	All		
Ticket Templates	All	All	All	All		
System					6/24/21	CM-MAS-769
Time & Expense					6/26/18	CONVERSION

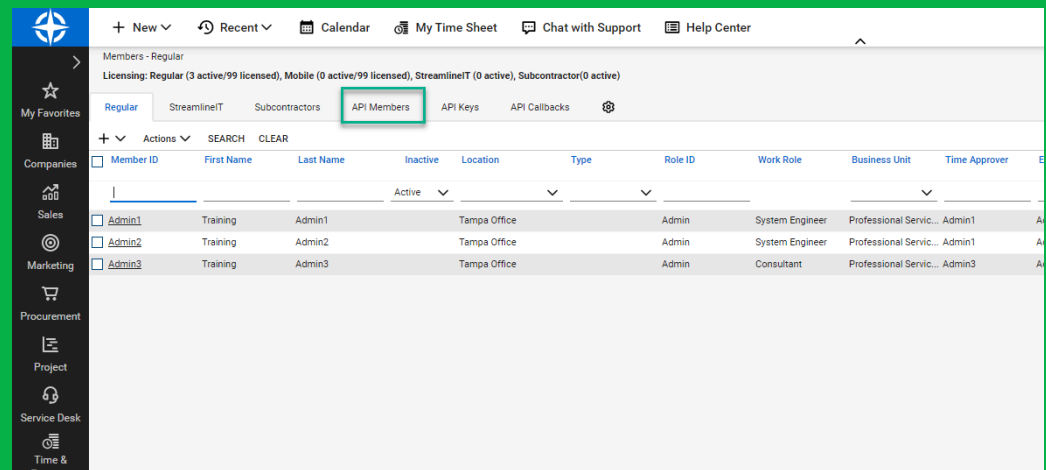
Module	Add Level	Edit Level	Delete Level	Inquire Level	Last Update	Updated By
System					6/24/21	CM-MAS-769
Add Licenses	None	None	None	All		
API Reports	All	All	All	All		
Chat with ConnectWise Manage Support	All	All	All	All		
ConnectWise Manage Labs	All	All	All	All		
ConnectWise Next	None	None	None	None		
ConnectWise Now	All	All	All	All		
Custom Menu Entry (customize)	All	All	All	All		
Data Import	All	All	All	All		
Email Audit	All	All	All	All		
List View Export	All	All	All	All		
Manage Hosted API (customize)	All	All	All	All		
Marketplace Sharing	All	All	All	All		
Mass Maintenance (customize)	All	All	All	All		
Member Maintenance	All	All	All	All		
Member Maintenance - Finance	All	All	All	All		
My Account (customize)	All	All	All	All		
My Company	All	All	All	All		
Report Writer	All	All	All	All		
Security Roles	All	All	All	All		
System Reports (customize)	All	All	All	All		
Table Setup (customize)	All	All	All	All		
Today Links	All	All	All	All		
Time & Expense					6/26/18	CONVERSION

If changes are made, click "Save."

Click System again in the bottom-left corner. Then click "Members."



Click the "API Members" tab.



Click "New Item."

The screenshot shows the 'API Members' page in CheckCentral. The top navigation bar includes 'New', 'Recent', 'Calendar', 'My Time Sheet', 'Chat with Support', and 'Help Center'. The left sidebar contains various modules like 'My Favorites', 'Companies', 'Sales', 'Marketing', 'Procurement', 'Project', 'Service Desk', 'Time & Expense', and 'Finance'. The main content area shows a list of API members with columns for Member ID, Member Name, Location, Role ID, and Inactive status. A red box highlights the '+ New' button in the top left corner of the main content area.

Complete the required information in the new member form.

The screenshot shows the 'New Member' form in CheckCentral. The form is divided into several sections: 'Profile', 'System', and 'Service Defaults'. The 'Profile' section includes fields for Member ID\*, Member Name\*, Time Zone\*, and Email. The 'System' section includes fields for Role ID\*, Location\*, Level\*, Business Unit\*, Name\*, and Default Territory\*. The 'Service Defaults' section includes a 'Service Board' dropdown and a 'Restrict Board Access' dropdown. Red boxes highlight the 'Profile' and 'System' sections.



For the Role ID field, choose Admin or a custom role. *The chosen role requires certain permissions as confirmed in the previous steps.*

The screenshot shows the 'New Member' form in the CheckCentral system. The 'Role ID' dropdown menu is highlighted with a red box, showing 'Admin' as the selected option. The form includes sections for Profile, System, and Service Defaults.

Profile			
Member ID*	MSully	Time Zone*	US Eastern
Member Name*	Matt Sully	Email	

System			
Role ID*	Admin	Location*	Tampa Office
Level*	Corporate (Level 1)	Business Unit*	Admin
Name*	Corporate	Default Territory*	Corporate

Service Defaults	
Service Board	Default Board
Restrict Board Access	

Click "Save."

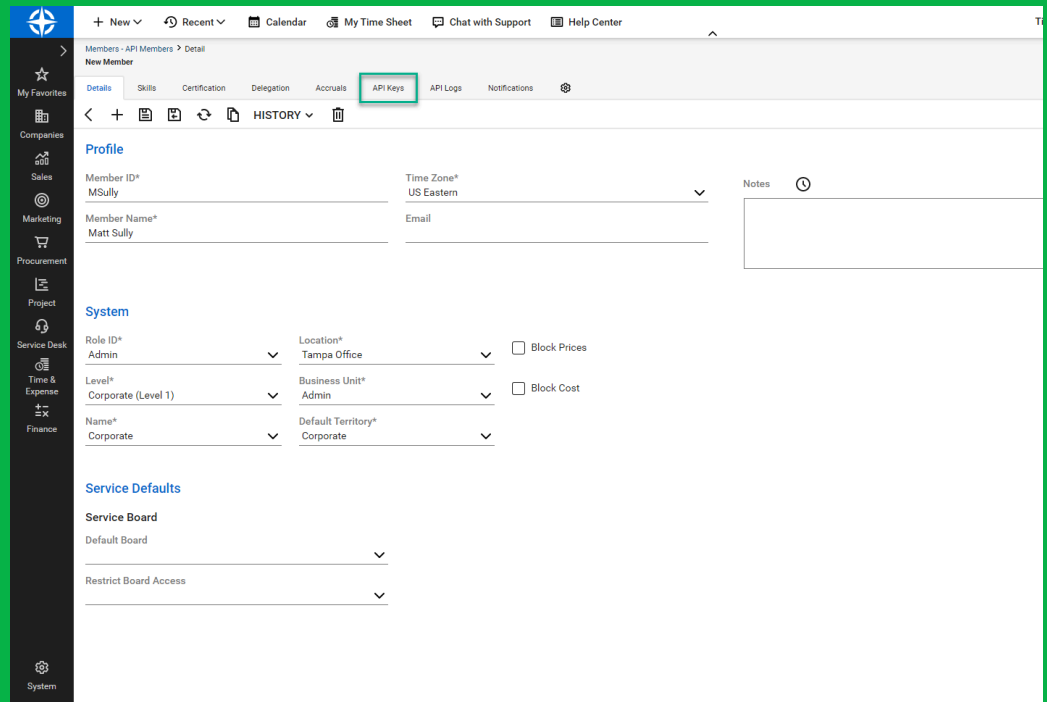
The screenshot shows the 'New Member' form in the CheckCentral system. The 'Save' button is highlighted with a red box. The form includes sections for Profile, System, and Service Defaults.

Profile			
Member ID*	MSully	Time Zone*	US Eastern
Member Name*	Matt Sully	Email	

System			
Role ID*	Admin	Location*	Tampa Office
Level*	Corporate (Level 1)	Business Unit*	Admin
Name*	Corporate	Default Territory*	Corporate

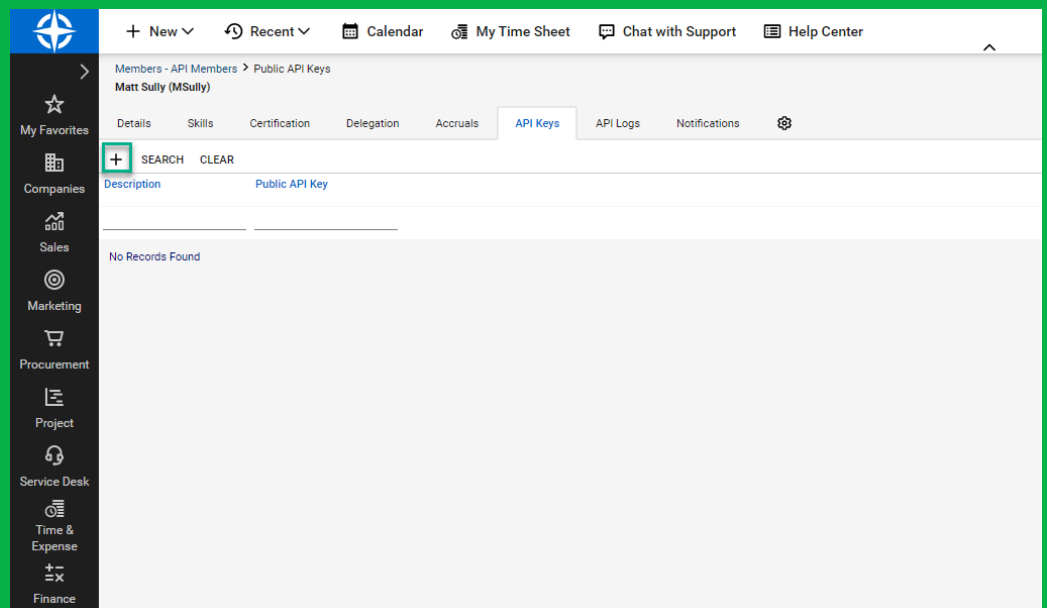
Service Defaults	
Service Board	Default Board
Restrict Board Access	

Click the "API Keys" tab.



The screenshot shows the 'New Member' form in the software. The 'API Keys' tab is highlighted with a red box. The form includes sections for Profile, System, and Service Defaults. The Profile section contains fields for Member ID\*, Member Name\*, Time Zone\*, and Email. The System section contains fields for Role ID\*, Location\*, Level\*, Business Unit\*, Name\*, and Default Territory\*. The Service Defaults section contains fields for Service Board and Restrict Board Access.

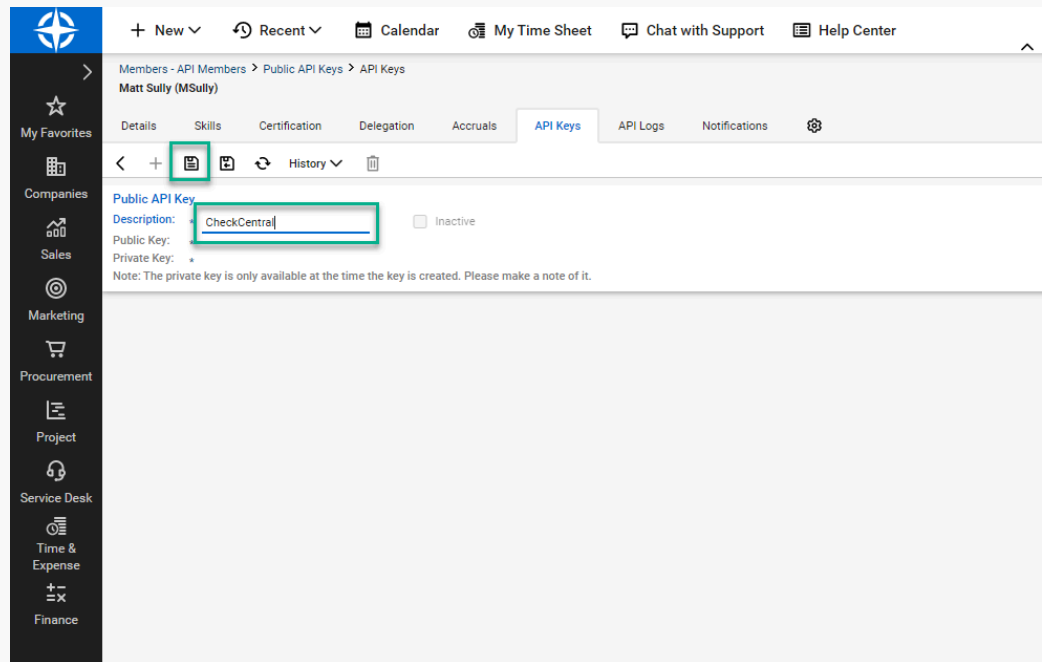
Click "New Item."



The screenshot shows the 'API Keys' tab for 'Matt Sully (MSully)'. The 'New Item' button is highlighted with a red box. The tab contains a search bar with 'SEARCH' and 'CLEAR' buttons. Below the search bar, there is a table with columns 'Description' and 'Public API Key'. The table is currently empty, and a message 'No Records Found' is displayed at the bottom.

## ConnectWise and CheckCentral

In ConnectWise, give your API key a description and click "Save."



Members - API Members > Public API Keys > API Keys  
Matt Sully (MSully)

Details Skills Certification Delegation Accruals **API Keys** API Logs Notifications

Public API Key

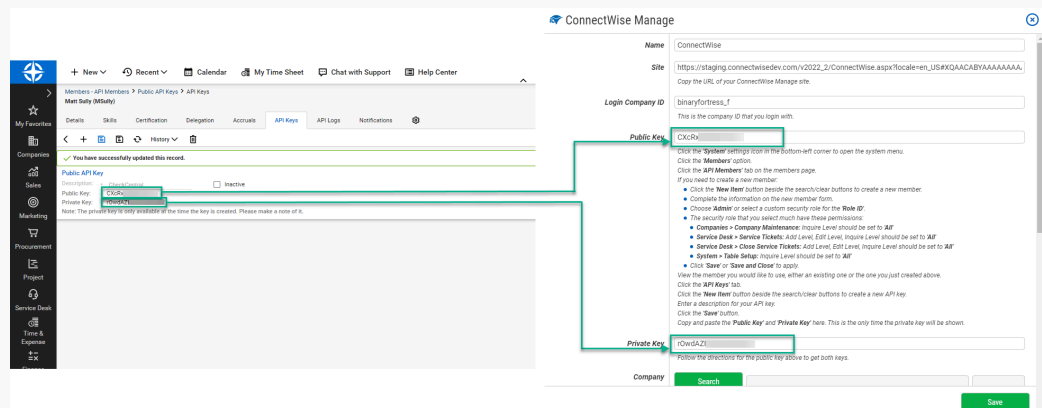
Description:  ☐ Inactive

Public Key:

Private Key:

Note: The private key is only available at the time the key is created. Please make a note of it.

Copy the Public and Private Keys, pasting them into the corresponding fields in CheckCentral.



ConnectWise Manage

Name: ConnectWise

Site: [https://staging.connectwise.com/v2022\\_2/ConnectWise.aspx?locale=en\\_US#XOACABYAAAAA](https://staging.connectwise.com/v2022_2/ConnectWise.aspx?locale=en_US#XOACABYAAAAA)

Login Company ID: binaryfortress\_7

This is the company ID that you login with.

Public Key:

Private Key:

Company:

# CheckCentral

For associating companies with tickets, you can select a specific company from the list or set the channel to automatically select the account based on the Check Group name. *Only companies with an active finance status will be shown here.*

Get Company

search...

Leave this blank to list all companies, this is limited to 1000 companies.

Automatically select customer based on check group name

Active

- Big Design, Inc.
- Binary Fortress
- Binary Fortress Test
- Blue Light, Co. 3
- BlueWeb, Company
- ConnectWise
- Crazy Commerce, Co.
- DigitalTorch, Inc.
- Future Message, Co.
- Green Torch, Inc.
- Green Vision, Co.
- Help-U-Sell Realty
- High Design, Co.
- IndigoStrawberry, Co.
- InteractiveGoldfish, Inc.
- Keith's Used Goods Emporium
- Key Pool, Co.
- MagicRooster, L.L.C.
- Microsoft
- PinkNetworks, L.L.C.
- SolidCommerce, Inc.
- ThirstyDesign, L.L.C.
- Thompson, Lisa
- VioletPixel, L.L.C.
- Wickam, Mike
- Wild Eagle, Inc.
- Yellow Systems, L.L.C.
- Your Company

Search

Close

ConnectWise Manage

Follow the directions for the public key above to get both keys.

Company

Search

Only companies with an active finance status will be shown here.

Service Board

Search

Service Board Status

Search

Service Board Type

Search

Clear

Service Board Subtype

Search

Clear

Close Status

Search

Clear

Priority

Search

Clear

☐ Include companies that have a status with 'disallow saving' enabled.  
By default CheckCentral will ignore companies in ConnectWise that have a status with 'disallow saving' enabled.  
You can enable this setting to have CheckCentral see all the companies in ConnectWise including ones with 'disallow saving'.

☒ All Check Groups  
select an item (optional) ☒ ☐  
Select check groups to use with this channel.

Save

By default, CheckCentral will ignore companies in ConnectWise with a status of 'disallow saving' enabled. Enable the checkbox shown here to have CheckCentral disregard that status.

ConnectWise Manage

Only companies with an active finance status will be shown here.

Service Board

Search

Professional Services

1

Service Board Status

Search

New (not responded)

16

Service Board Type

Search

Clear

Server

13

Service Board Subtype

Search

Clear

Incident

1

Close Status

Search

Clear

Closed (resolved)

17

This is the (optional) status you would like a ticket to be set to when CheckCentral closes it.  
If this is left blank CheckCentral will attempt to auto-detect the correct status.

Priority

Search

Clear

Priority 2 - Quick Response

1

☐ Include companies that have a status with 'disallow saving' enabled.  
By default CheckCentral will ignore companies in ConnectWise that have a status with 'disallow saving' enabled.  
You can enable this setting to have CheckCentral see all the companies in ConnectWise including ones with 'disallow saving'.

Check Groups

☒ All Check Groups  
select an item (optional) ☒ ☐  
Select check groups to use with this channel.

☒ Enable this external ticketing system  
To enable this service for all checks in the selected check groups, use the ☒ icon after saving.

Save

For various Service settings, select from the various lists by clicking "Search." *Some lists are dependent on previous Service setting selections.*

For Close Status and Priority selections, choose from the available lists.

This is an optional status to be used when CheckCentral closes tickets. If this is left blank, CheckCentral will attempt to auto-detect the correct status.

Finally, choose which Check Groups will use this ConnectWise ticketing channel. By default, all check groups are selected. To be more selective, disable the All Check Groups checkbox then use the multi-select dropdown field below.

Once you've selected your check groups, ensure the 'Enable this external ticketing system' checkbox is enabled, and click Save.

The screenshot shows the 'SyncroMSP' configuration form. It includes fields for 'Name' (Syncro), 'SyncroMSP URL' (https://binaryfortress.syncromsp.com/), and 'API Token' (T0a622796b16c6). Below the API token field is a list of permissions to be checked, including 'Customers - List/Search', 'Customers - View Detail', 'Tickets - Create', 'Tickets - Edit', 'Tickets - View Details', and 'Ticket Comments - New'. The 'Customer' field has a 'Search' button and a dropdown menu. The 'Check Groups' section has a checkbox for 'All Check Groups' and a multi-select dropdown. At the bottom, there is a checkbox for 'Enable this external ticketing system' and a 'Save' button.

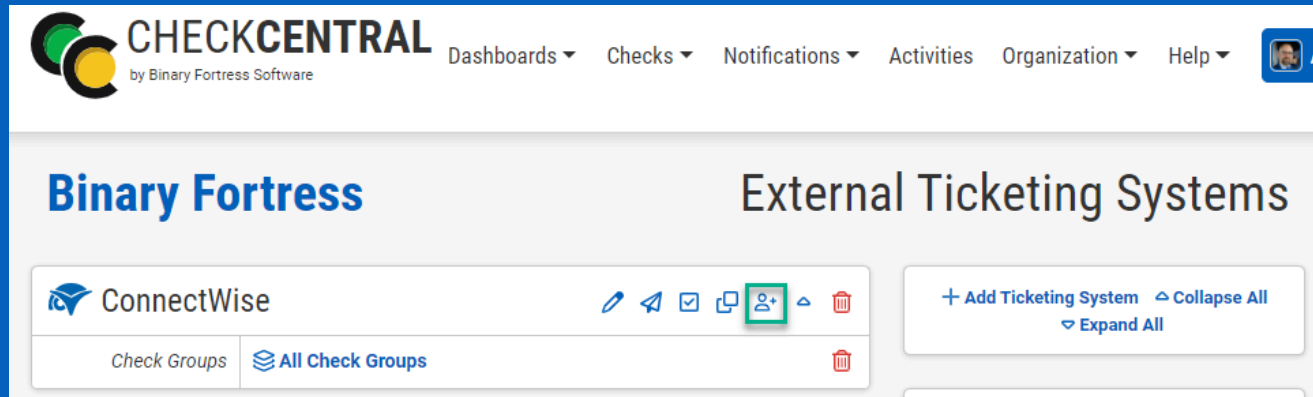
The screenshot shows the Check Central dashboard. The top navigation bar includes 'Dashboards', 'Checks', 'Notifications', 'Activities', 'Organization', and 'Help'. The main header area displays 'Binary Fortress' and 'External Ticketing Systems'. Below this, there is a 'ConnectWise' section with a 'Check Groups' dropdown and a 'All Check Groups' button. To the right, there is a '+ Add Ticketing System' button and a 'Collapse All' button. The bottom section shows a list of ticketing systems.

This External Ticketing System channel will now be available for use with any check under your Check Central account.

# Import Companies/Customers as Check Groups

## CheckCentral

To create and match customer-centric check groups, we'll use this new API connection to import companies/customers directly from ConnectWise Manage.



From the External Ticketing Systems page, click on the Customer Import icon above your newly-created channel.

If no similar check groups exist, your customers will be listed under Check Groups to be Created.

### Import Customers as Check Groups

Check Groups to be Created (5)

Acme's Finest  
Canada Syrup Company  
Number One MSP  
Top Notch  
World Computers

Check Groups to be Updated (1)

Acorn Construction

Check Groups Already Matched (-)

Notes

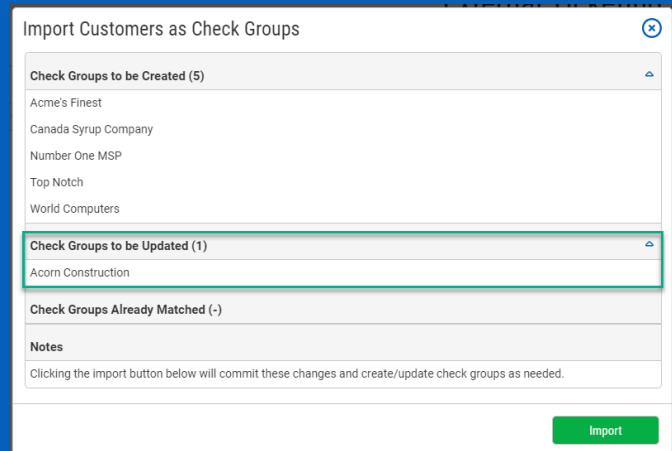
Clicking the import button below will commit these changes and create/update check groups as needed.

Import

If you've already created Check Groups using company/customer names, they will display in the Check Groups to be Updated section, ensuring they match with ConnectWise.

Existing Groups Already Matched with ConnectWise will be skipped.

Now click Import to complete the import.



Import Customers as Check Groups

**Check Groups to be Created (5)**

- Acme's Finest
- Canada Syrup Company
- Number One MSP
- Top Notch
- World Computers

**Check Groups to be Updated (1)**

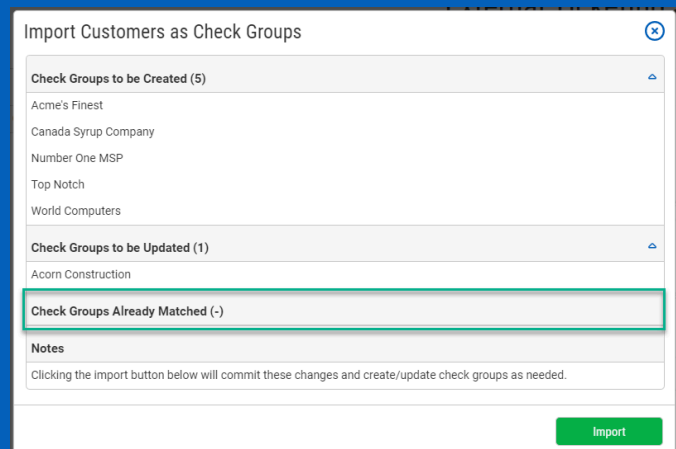
- Acorn Construction

**Check Groups Already Matched (-)**

**Notes**

Clicking the import button below will commit these changes and create/update check groups as needed.

**Import**



Import Customers as Check Groups

**Check Groups to be Created (5)**

- Acme's Finest
- Canada Syrup Company
- Number One MSP
- Top Notch
- World Computers

**Check Groups to be Updated (1)**

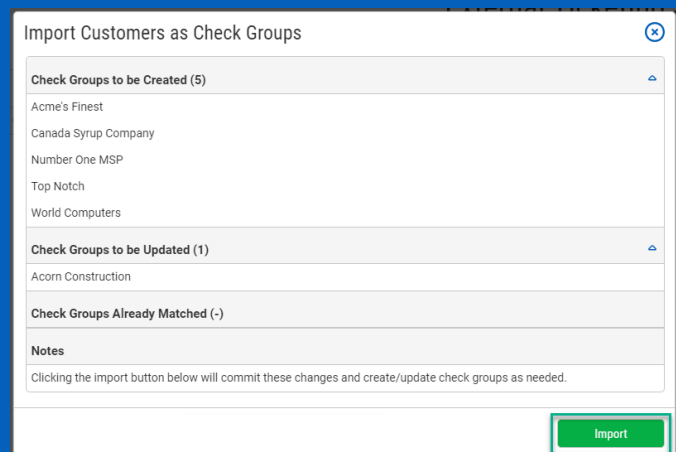
- Acorn Construction

**Check Groups Already Matched (-)**

**Notes**

Clicking the import button below will commit these changes and create/update check groups as needed.

**Import**



Import Customers as Check Groups

**Check Groups to be Created (5)**

- Acme's Finest
- Canada Syrup Company
- Number One MSP
- Top Notch
- World Computers

**Check Groups to be Updated (1)**

- Acorn Construction

**Check Groups Already Matched (-)**

**Notes**

Clicking the import button below will commit these changes and create/update check groups as needed.

**Import**



# About CheckCentral

CheckCentral Monitoring consolidates and simplifies backup, system, and software email updates into a clean, graphical dashboard, bringing peace of mind to IT administrators of SMBs, Enterprises, and MSPs.

To learn more about CheckCentral, visit: <https://www.checkcentral.cc>

# About Binary Fortress Software

Binary Fortress has spent 17 years in pursuit of one goal: create software to make life easier. Our software ranges from display management and system enhancement utilities to monitoring tools and digital signage. IT administrators, professional gamers, coffee-shop owners, and MSPs all rely on Binary Fortress to make their days better, and their lives easier.

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<https://www.binaryfortress.com>