

# Configure ConnectWise Manage integration with less than Admin permissions

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Exciting news! Our ConnectBooster Support documentation is moving to a new location. Be sure to bookmark the new link below.

<https://help.cb.kaseya.com/help/Content/0-HOME/Home.htm>

## Disclaimer:

The instructions listed below are an **alternative** to using "Admin" as the Role ID, when configuring the ConnectWise Manage Member for integrating with ConnectBooster. While ConnectBooster does NOT require "ADMIN" permissions, it does simplify and expedite the configuration process.

*Note: ConnectBooster development typically tests with "Admin" type role access. This helps ensure future proofing, for any ConnectWise API updates or new features ConnectBooster may release.*

## Video:

SETUP VIDEO

*NOTE: The configurations as shown in this video, represent the settings necessary as of 2/5/2020. Unless otherwise noted, there is no guarantee they represent a comprehensive setup after that point.*

\*Video Addendum\*:

In October of 2020 ConnectWise released a new version which address a requirement for the "Inquire Level" of the "Report Writer" module found under the "System" section to be set to **ALL**. This is necessary for customers who wish to have the portal pull custom invoice images which are rendered using the new Report Writer options of Manage.

## Text Instructions:

### Security Role

Navigate to System + Security Roles. Create new, or modify an existing Security Role.

	+ New ▾ Recent ▾ Calendar Chat with Support		
	Security Roles		
	Security Roles		
	+ Actions ▾ SEARCH CLEAR		
	<input type="checkbox"/> Name ^ Last Update Updated By		
	<input type="checkbox"/> All ▾		
	<input type="checkbox"/> Admin 3/23/01 Conversion		
	<input type="checkbox"/> C&A PI 2/5/20 Admin1		
	<input type="checkbox"/> Engineer 8/20/02 zadmin		
	<input type="checkbox"/> Executive 8/21/02 zadmin		
	<input type="checkbox"/> Finance 8/20/02 zadmin		
	<input type="checkbox"/> JustinTestCWPPermission 12/3/20 Admin1		
	<input type="checkbox"/> Manager 8/20/02 zadmin		
	<input type="checkbox"/> Sales 12/11/03 zAdmin		
	<input type="checkbox"/> Subcontractor 12/12/03 zAdmin		

Companies

Set "Inquire Level" to ALL for:

- Company Maintenance
- Company/Contact Group Maintenance
- Contacts
- Reports

## Security Modules for Role - CB API

Role: 

		<a href="#">Add Level</a>	<a href="#">Edit Level</a>	<a href="#">Delete Level</a>	<a href="#">Inquire Level</a>	<a href="#">Last Update</a>
^ Companies						2/5/20
Company Maintenance	None	▼	None	▼	None	▼
Company/Contact Group Maintenance	None	▼	None	▼	None	▼
Configuration - Display Passwords	None	▼	None	▼	None	▼
Configurations ( <a href="#">customize</a> )	None	▼	None	▼	None	▼
Contacts	None	▼	None	▼	None	▼
CRM/Sales Activities	None	▼	None	▼	None	▼
Import Contacts	None	▼	None	▼	None	▼
Manage Attachments	None	▼	None	▼	None	▼
Management	None	▼	None	▼	None	▼
Notes	None	▼	None	▼	None	▼
Reports ( <a href="#">customize</a> )	None	▼	None	▼	None	▼
Surveys	None	▼	None	▼	None	▼
Team Members	None	▼	None	▼	None	▼
Tracks	None	▼	None	▼	None	▼
UserCentric	None	▼	None	▼	None	▼

## Finance

Set "Inquire Level" to ALL for:

- Agreement Invoicing
- Agreement Sales
- Agreements
- Billing View Time
- Company Finance
- Invoice Approval
- Invoicing
- Reports

^ Finance								2/5/20
Accounting Interface	None	▼	None	▼	None	▼	None	▼
Agreement Invoicing	None	▼	None	▼	None	▼	All	▼
Agreement Sales	None	▼	None	▼	None	▼	All	▼
Agreements ( <a href="#">customize</a> )	None	▼	None	▼	None	▼	All	▼
Billing Rate Maintenance	None	▼	None	▼	None	▼	None	▼
Billing View Time	None	▼	None	▼	None	▼	All	▼
Company Finance	None	▼	None	▼	None	▼	All	▼
Expense Reimbursements	None	▼	None	▼	None	▼	None	▼
Financial Dashboard	None	▼	None	▼	None	▼	None	▼
Invoice Approval	None	▼	None	▼	None	▼	All	▼
Invoicing	None	▼	None	▼	None	▼	All	▼
Reports ( <a href="#">customize</a> )	None	▼	None	▼	None	▼	All	▼

## Procurement

Set "Inquire Level" to ALL for:

- Product Billable Option
- Product Catalog
- Products
- Reports

^ Procurement								2/5/20
Inventory Adjustments	None	▼	None	▼	None	▼	None	▼
Inventory Transfers	None	▼	None	▼	None	▼	None	▼
Product Billable Option	None	▼	None	▼	None	▼	All	▼
Product Catalog	None	▼	None	▼	None	▼	All	▼
Products	None	▼	None	▼	None	▼	All	▼
Purchase Orders	None	▼	None	▼	None	▼	None	▼
Purchasing Approvals	None	▼	None	▼	None	▼	None	▼
Purchasing Demand	None	▼	None	▼	None	▼	None	▼
Reports ( <a href="#">customize</a> )	None	▼	None	▼	None	▼	All	▼
RMA Entry	None	▼	None	▼	None	▼	None	▼
RMA Processing	None	▼	None	▼	None	▼	None	▼
Serial Number Search	None	▼	None	▼	None	▼	None	▼

## Project

Set "Inquire Level" to ALL for:

- Close Project Tickets
- Close Projects
- Project Contacts
- Project Finance
- Project Headers
- Project Management
- Project Notes

- Project Phase
- Project Reports
- Project Scheduling
- Project Ticket - Dependencies
- Project Ticket Tasks
- Project Tickets

^ Project								2/5/20
Close Project Tickets	None	▼	None	▼	None	▼	All	▼
Close Projects	None	▼	None	▼	None	▼	All	▼
Project Contacts	None	▼	None	▼	None	▼	All	▼
Project Finance	None	▼	None	▼	None	▼	All	▼
Project Headers	None	▼	None	▼	None	▼	All	▼
Project Management	None	▼	None	▼	None	▼	All	▼
Project Notes	None	▼	None	▼	None	▼	All	▼
Project Phase	None	▼	None	▼	None	▼	All	▼
Project Product	None	▼	None	▼	None	▼	None	▼
Project Reports ( <a href="#">customize</a> )	None	▼	None	▼	None	▼	All	▼
Project Scheduling ( <a href="#">customize</a> )	None	▼	None	▼	None	▼	All	▼
Project Teams	None	▼	None	▼	None	▼	None	▼
Project Templates	None	▼	None	▼	None	▼	None	▼
Project Ticket - Dependencies	None	▼	None	▼	None	▼	All	▼
Project Ticket Tasks	None	▼	None	▼	None	▼	All	▼
Project Tickets	None	▼	None	▼	None	▼	All	▼

## Sales

Set "Inquire Level" to ALL for:

- Closed Opportunity
- Opportunity
- Opportunity Finance
- Reports

^ Sales								2/5/20
Closed Opportunity	None	▼	None	▼	None	▼	All	▼
Opportunity	None	▼	None	▼	None	▼	All	▼
Opportunity Finance	None	▼	None	▼	None	▼	All	▼
Reports ( <a href="#">customize</a> )	None	▼	None	▼	None	▼	All	▼
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

Set "Inquire Level" to ALL for:

- Close Service Tickets
- Reports
- Service Ticket - Dependencies
- Service Tickets
- Service Tickets - Finance

Set "Add and Edit Level" to ALL for:

- Service Tickets
- Service Tickets - Finance

^ Service Desk								2/5/20
Agile Board	None	▼	None	▼	None	▼	None	▼
Change Approvals	None	▼	None	▼	None	▼	None	▼
Close Service Tickets	None	▼	None	▼	None	▼	All	▼
CloudConsole	None	▼	None	▼	None	▼	None	▼
ConnectWise Chat	None	▼	None	▼	None	▼	None	▼
ConnectWise Control	None	▼	None	▼	None	▼	None	▼
ConnectWise Manage Network	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 ( <a href="#">customize</a> )	None	▼	None	▼	None	▼	All	▼
Resource Scheduling ( <a href="#">customize</a> )	None	▼	None	▼	None	▼	None	▼
Service Ticket - Dependencies	None	▼	None	▼	None	▼	All	▼
Service Tickets	All	▼	All	▼	None	▼	All	▼
Service Tickets - Finance	All	▼	All	▼	None	▼	All	▼
SLA Dashboard	None	▼	None	▼	None	▼	None	▼
Ticket Templates	None	▼	None	▼	None	▼	None	▼

## System

Set "Inquire Level" to ALL for:

- API Reports
- Manage Hosted API
- My Company
- Report Writer
- System Reports

- Table Setup

Set "Add and Edit Level" to ALL for:

- Manage Hosted API
- Table Setup

^ System								2/5/20
Add Licenses	None	▼	None	▼	None	▼	None	▼
API Reports	None	▼	None	▼	None	▼	All	▼
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 ( <a href="#">customize</a> )	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 ( <a href="#">customize</a> )	All	▼	All	▼	None	▼	All	▼
Marketplace Sharing	None	▼	None	▼	None	▼	None	▼
Mass Maintenance ( <a href="#">customize</a> )	None	▼	None	▼	None	▼	None	▼
Member Maintenance	None	▼	None	▼	None	▼	None	▼
My Account ( <a href="#">customize</a> )	None	▼	None	▼	None	▼	None	▼
My Company	None	▼	None	▼	None	▼	All	▼
Report Writer	None	▼	None	▼	None	▼	All	▼
Security Roles	None	▼	None	▼	None	▼	None	▼
System Reports ( <a href="#">customize</a> )	None	▼	None	▼	None	▼	All	▼
Table Setup ( <a href="#">customize</a> )	All	▼	All	▼	None	▼	All	▼
Today Links	None	▼	None	▼	None	▼	None	▼

## Time & Expense

Set "Inquire Level" to ALL for:

- Reports
- Time Entry
- Time Entry Billable Option

^ Time & Expense								2/5/20
Expense Approvals	None	▼	None	▼	None	▼	None	▼
Expense Billable Option	None	▼	None	▼	None	▼	None	▼
Expense Report Entry	None	▼	None	▼	None	▼	None	▼
Reports ( <a href="#">customize</a> )	None	▼	None	▼	None	▼	All	▼
Stopwatch	None	▼	None	▼	None	▼	None	▼
Time Approval	None	▼	None	▼	None	▼	None	▼
Time Entry	None	▼	None	▼	None	▼	All	▼
Time Entry Billable Option	None	▼	None	▼	None	▼	All	▼

Congratulations! You have finished the setup of a custom Security Role, tailored for use by ConnectBooster. Follow below for the next step of assigning this new role to a dedicated ConnectWise Manage Member.

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## ConnectWise Member Setup:

Setting up the ConnectWise Manage integration

In the step of the "Role ID", simply select the new custom role created from the above steps.

If the ConnectWise integration does NOT exist, please contact ConnectBooster Support for creating **NEW** integrations or **CONVERTING** current platforms.

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