Configure ConnectWise Manage integration with less than Admin permissions

Last Modified on 08/06/2021 10:10 am CDT

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.*

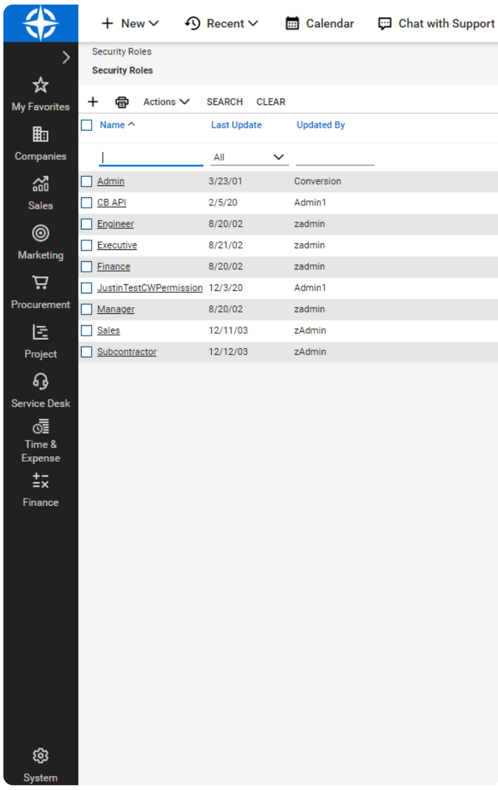
Video Addendum:

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

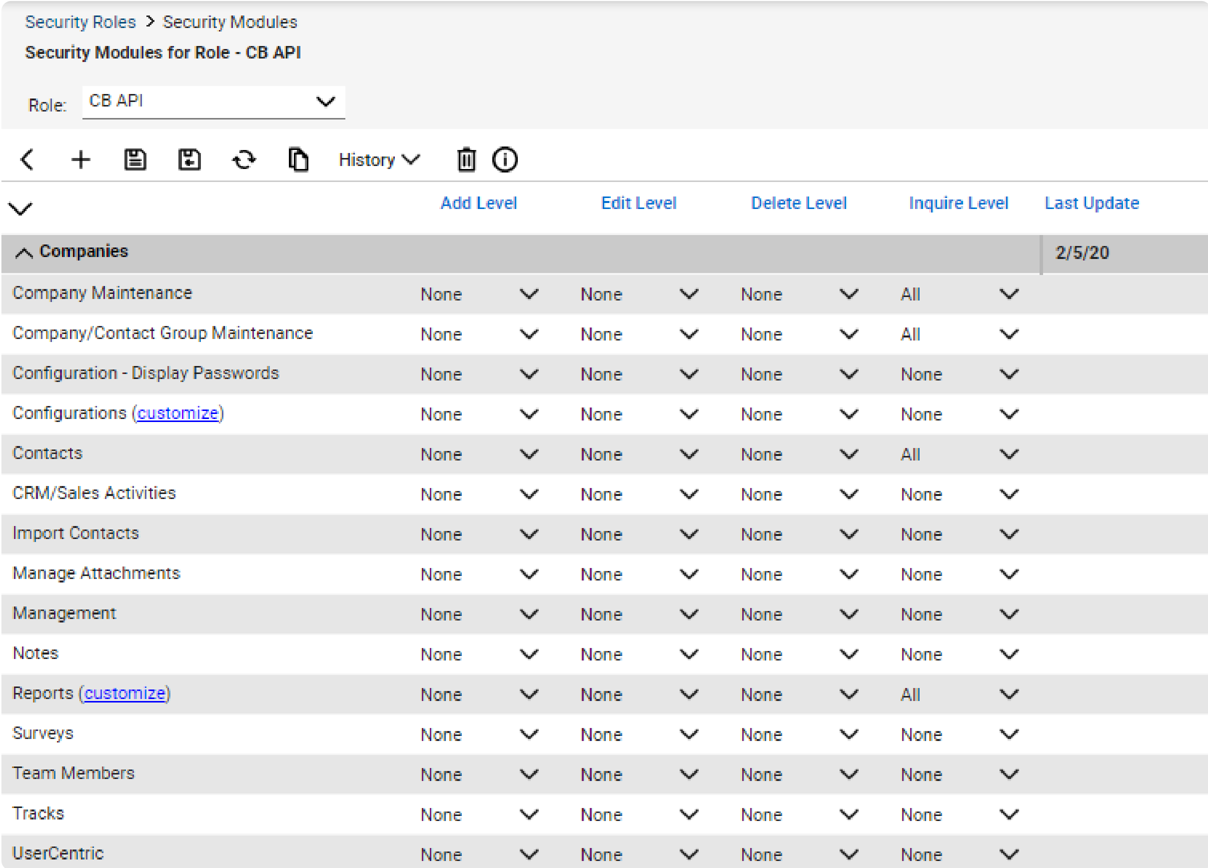
Navigate to System + Security Roles. Create new, or modify an existing Security Role.



Companies

Set "**Inquire Level**" to ALL for:

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


Security Roles > Security Modules

Security Modules for Role - CB API

Role: CB API

History

Companies	Add Level	Edit Level	Delete Level	Inquire Level	Last Update
Companies					2/5/20
Company Maintenance	None	None	None	All	
Company/Contact Group Maintenance	None	None	None	All	
Configuration - Display Passwords	None	None	None	None	
Configurations (customize)	None	None	None	None	
Contacts	None	None	None	All	
CRM/Sales Activities	None	None	None	None	
Import Contacts	None	None	None	None	
Manage Attachments	None	None	None	None	
Management	None	None	None	None	
Notes	None	None	None	None	
Reports (customize)	None	None	None	All	
Surveys	None	None	None	None	
Team Members	None	None	None	None	
Tracks	None	None	None	None	
UserCentric	None	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 (customize)	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 (customize)	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 (customize)	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 Phase
- Project Reports
- Project Scheduling
- Project Ticket - Dependencies
- Project Ticket Tasks

- Project Management
- Project Notes
- 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 (customize)	None	None	None	All	
Project Scheduling (customize)	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 (customize)	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 (customize)	None	None	None	All	
Resource Scheduling (customize)	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 (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)	All	All	None	All	
Marketplace Sharing	None	None	None	None	
Mass Maintenance (customize)	None	None	None	None	
Member Maintenance	None	None	None	None	
My Account (customize)	None	None	None	None	
My Company	None	None	None	All	
Report Writer	None	None	None	All	
Security Roles	None	None	None	None	
System Reports (customize)	None	None	None	All	
Table Setup (customize)	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 (customize)	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.

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.