Setting up the Kaseya BMS integration

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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





ConnectBooster & Kaseya BMS Configuration Guide

Overview

Use this step-by-step guide for configuring ConnectBooster to synchronize with BMS.

Once completed, your ConnectBooster portal will then be able to pull Accounts, Contacts, Contracts, and more to help leverage AutoPay, and supercharge your Billing Automation!

The setup consists of two parts.

Part 1. The use of existing BMS credentials, or configuration of a dedicated "API Employee" (recommended).

Part 2. Entering the credentials into your ConnectBooster Integrations section.

Preparation

To perform the integration setup, you will need:

- Admin access to Kaseya BMS
- Admin level access on your ConnectBooster "Internal User" account

PART 1

Configuring BMS

1. Take note of your BMS **Company Name**. This value will be used during the setup portion inside your ConnectBooster portal.

Your Company Name should be the same value used on the BMS Login page.

	BMS	,
	Username	
	Password	Forgot password?
(Company Name Your Company Name Remember me	
	Log In	
	Or	
	C Log In with IT Comp	lete
	<u>Help & Support</u> © Kaseya	2 021

Creating a dedicated API Employee (recommended)

The User Type of "API Employee" is a special type that does not have access to the User Interface of BMS (more information on this can be found here).

2. To generate a dedicated API Employee, navigate to Admin --> HR--> Employees --> New

3. On the New Employee creation page, fill in the series of required fields denoted by asterisks/red boxes with the values of your choosing.

The three notable fields to pay attention to:

- User Type (Set to API Employee)
- Email Address (Set to an inbox you can retrieve the emailed password, as this User Type cannot manually set a password)
- Security Role (Note: While a role like "Administrator" will work, it is more access than what ConnectBooster actually needs)
 - To set paired down permissions, please follow the optional steps outlined in the next section below

= BMS		Home Service Desk CRM Finance Projects Reports H	R Inventory Admin New Ticket	🗘 🧭 😋 Colton 📧
Admin Dashboard		Home / Employees / New Employee		
My Company	~	Save (S) Save and Add New Cancel (C)		
Business Process	~	User Name.*	First Name:*	Last Name:
👹 HR	^	ConnectBooster Emp ID.*	Email Address:*	Job Title*
Departments				▼
Job Titles		Department:* 0	Manager.*	Employment Type.*
Skill Categories		▼	▼	•
Employees		Employee Roles:*	Security Roles:* Administrator, ConnectBooster (Optional)	Location.*
🐏 скм	÷	Vser Type:*	Administrator, ConnectBooster (Optional)	•
- Crim		Api Employee	ConnectBooster (Optional)	
Security	×		CRM Manager	
E Finance	•		External Manager	

4. Save to create the new User.

5. Use the Reset and Email Password button.

Termination Date:		Birth Date:		Password Management
SSN:		Marital Status:	•	Password reset feature is used when the user has
User Type:*		Gender:		forgotten their password. Click the Reset And Email Password button to
Api Employee			•	reset and send the user a Randomly Generated
Statuc:		Notes:		Password via email. Click Unlock User Account if user is Locked after
				several invalid login attempts.
			1	C Reset and Email Password
External Authentication Type:				Unlock user's Account
None AuthAnvil SAML SSO				Unlock user's Account
MFA Settings: MFA is currently disabled for this user.		-		

6. The email address used should receive the credentials.

Proceed to Part 2.

Creating a dedicated Security Role - (OPTIONAL)

Please note: it's possible any future features/enhancements may require permission changes to a Role set with bare minimum permissions outlined below.

Navigate to Admin --> Security --> Roles. Create "New".

Q Search	n Security Roles				
S New (N)	Q Search (S) Clear Search (C)	🗷 Export 👻			
Total Records:	9	/		Views:	System Default 🔹 🕏
	Name	Description	Active	System Role	External
ø	ConnectBooster (Optional)	Dedicated Security Role for the Integration	Yes	No	No
Ø	External User	External User	Yes	Yes	Yes
6	Service Desk Manager	Service Desk Manager	Yes	Yes	No
6	Finance Manager	Finance Manager	Yes	Yes	No
8	CRM Manager	CRM Manager	Yes	Yes	No
	Administrator	Administrator	Yes	Yes	No
6	External Manager	External Manager	Yes	Yes	Yes
ß	User	User	Yes	Yes	No
8	Project Manager	Project Manager	Yes	Yes	No

Note: The User Type "API Employee" can NOT have a Security Role Type set to "External"

= BMS	Home Service Desk CRM Finance Projects Reports HR Inventory Admin New Ticket
🚳 Admin Dashboard	Home / Security Roles / New Security Role
My Company	✓ Save (S) Save and Add New Clone (V) Cancel (C) X Delete (D) C Refresh (R)
Business Process	✓ Security Role Information
😁 HR	Name:* Description: Role Type:
😁 CRM	ConnectBooster This Role is Optional External ConnectBooster
Security	Active inductive
Roles	

Role Permissions:

ermissions Role Users	
> Home	Allow View All
> ServiceDesk	Allow View All Allow Modify All Allow Delete All
> CRM	Allow View All Allow Modify All
> Finance	Allow View All Allow Modify All
> Projects	Allow View All Allow Modify All
> Reports	Allow View All Allow Modify All
> HR	Allow View All Allow Modify All
> Inventory	Allow View All Allow Modify All

Important "Special Features" option:

Be sure to set "Has API Access", under the Admin permissions accordion.

	Module Name	View	Modify
	Admin Dashboard		
	Linked Accounts		
	My Company	✓	
	Business Process		
	HR	✓	
	CRM		
)	Security	\checkmark	
9	Finance		
)	Service Desk	✓	
3	Inventory	✓	
9	Logs	✓	
)	Imports	✓	

Save your changes, and proceed to assign the API Employee this new Security Role.

PART 2

ConnectBooster Setup

Next, within your ConnectBooster portal, navigate to Settings --> Configuration --> Integrations.

Select the Kaseya integration card --> Settings





Note: if this integration does not exist for you, please contact support@connectbooster.com to have this added to your portal.

Enter the credentials:

	Kaseya BM 60958c8a1673f2			
Company Name				Ĩ
Connectbooster BM	8			
Username				
relation -				
Password				
Server Url				
1. A 11. CONT.	5.00 C			
Make sure integration information is saved, before using the test connection but			nection button.	
		Close	Stream Disable	Sync Sa

- 3. Password
- 4. Default BMS Server endpoint (bms.kaseya.com)

Don't Forget to Save!

Next, validate the credentials via the "Test Connection" button.



Once you see the successful confirmation toast, you should be all set! The connection is complete!

A sync will begin within the hour, otherwise you may immediately initialize via the "Sync Now" button.

Selecting the Invoice Image

Utilize this function to allow your clients to view/print the identical invoice template from BMS.

Invoice Image Data

Navigate to Configurations --> Billing --> Scroll to the *Invoice Image Data* section.

ર્સ	Connect Booster		
۵ ** **	J. J	3	Invoice Image Data Source Data (Reorder with highest priority on top) Kaseya BMS (Connectbooster BMS) QuickBooks Online (193514683801904)
	Billing 2 Internal Settings Client Users Client Emails Service		Additional Options Show memo description notes Add as attachment to emails

Check the box for the BMS integration, and move it to the top of the list if you have multiple sources of invoices. **Don't forget to Save your changes!**

Congratulations!! You have now setup the invoice image data.

• More information regarding how this, and the related functions impact your portal behavior please see this article.

If you encounter issues, please don't hesitate to Contact Support.

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