ConnectWise Manage Integration

CHECKCENTRAL

BINARYFORTRESS

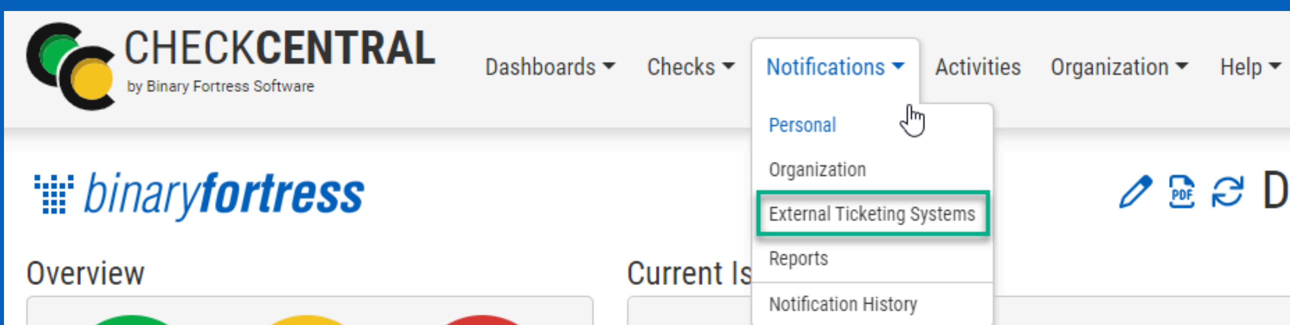
ConnectWise Manage Integration

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

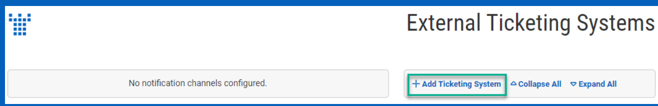
To integrate ConnectWise with CheckCentral, begin by logging into your CheckCentral account.

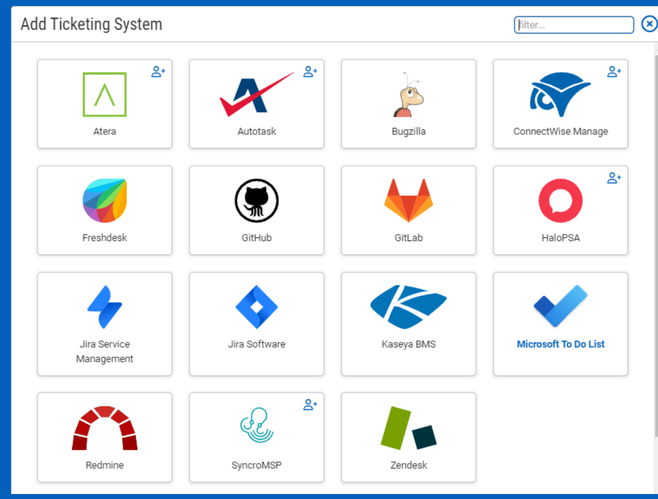
CheckCentral

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

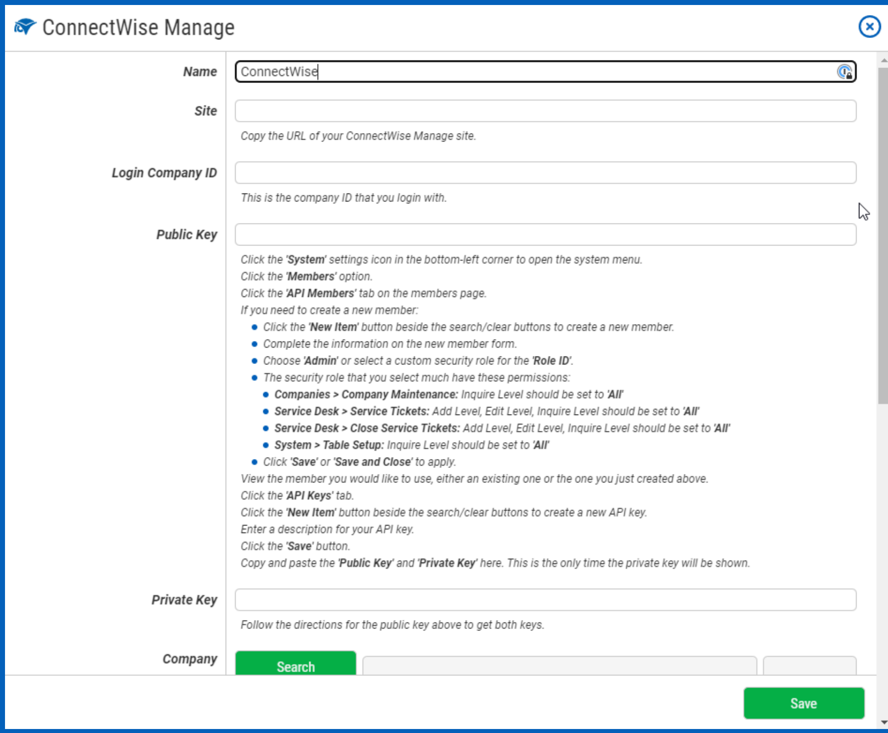


Click Add Ticketing System and choose ConnectWise Manage.





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

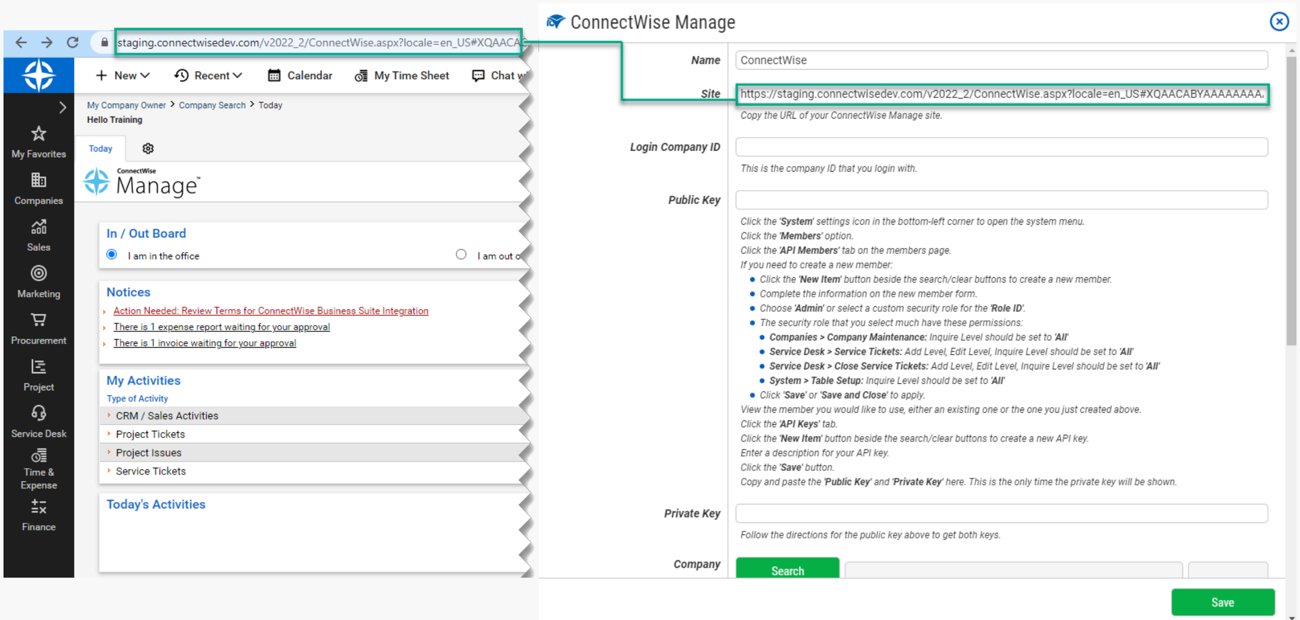


You can name this configuration anything you'd like.

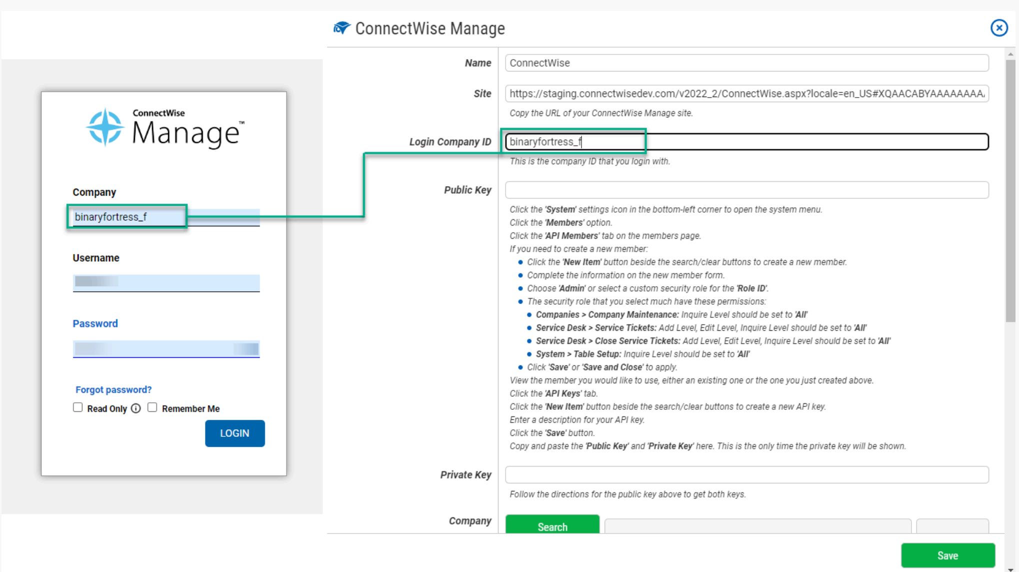
The other details require you to visit your ConncectWise Manage site.

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.

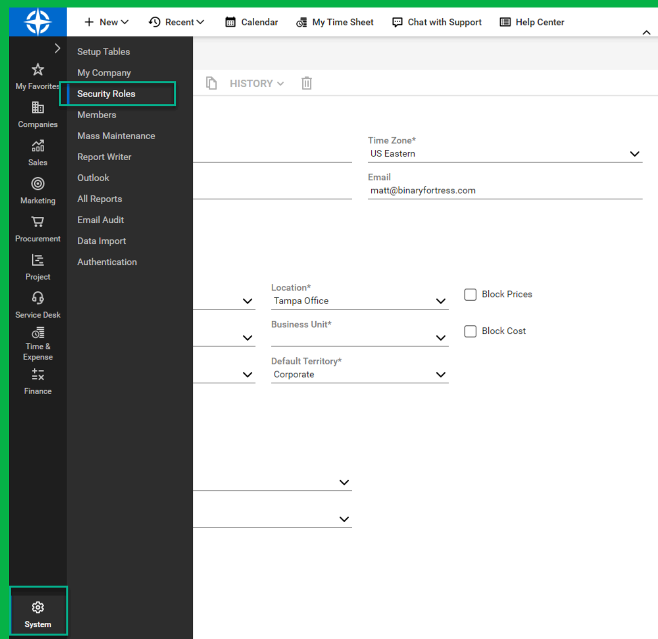


Complete your login to the ConnectWise Manage.

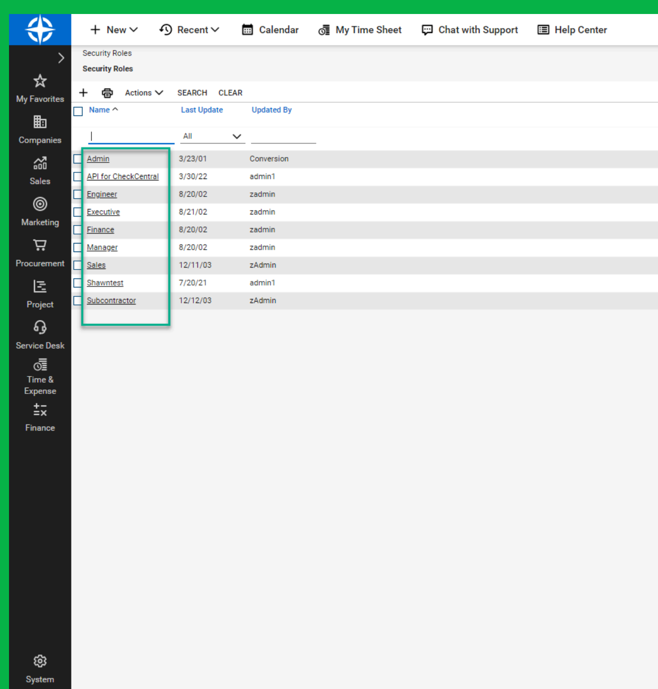
ConnectWise

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."

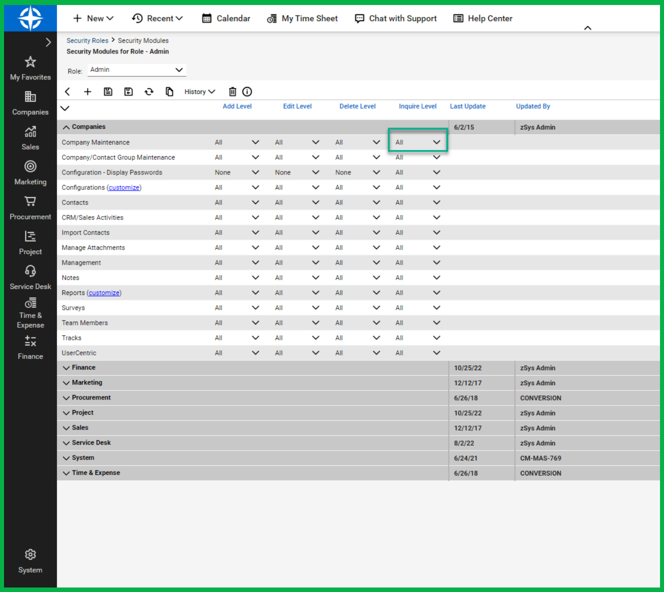


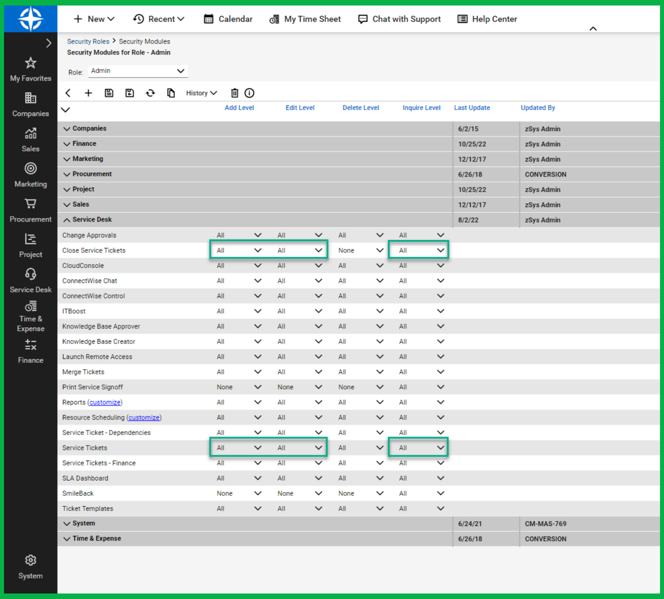
Click Admin or the custom security role to be used. Create a new one if needed.

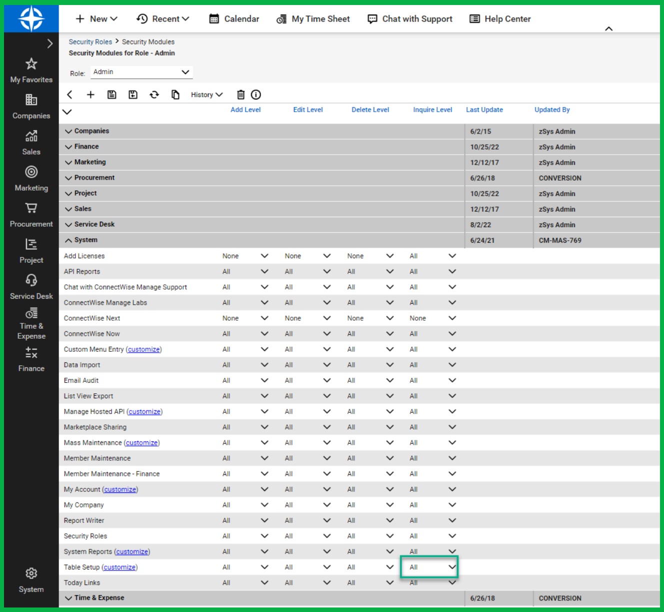


The Role ID must have the following permissions:

- 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

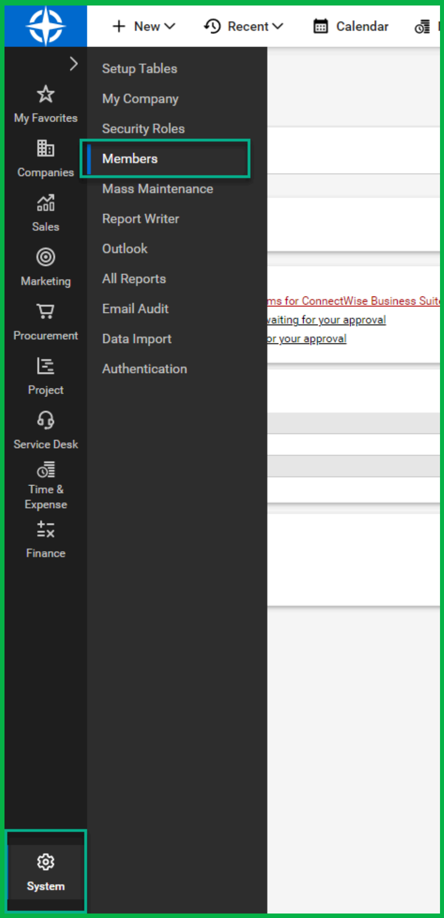




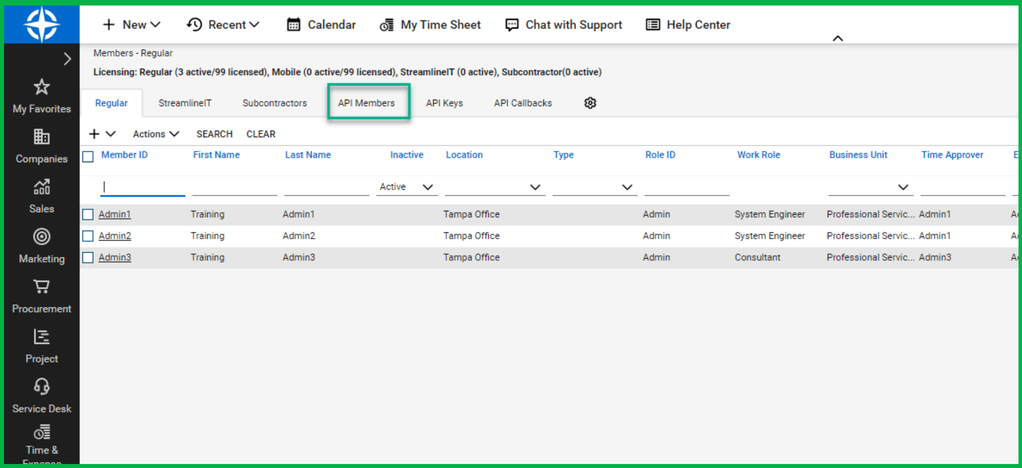


If changes are made, click "Save."

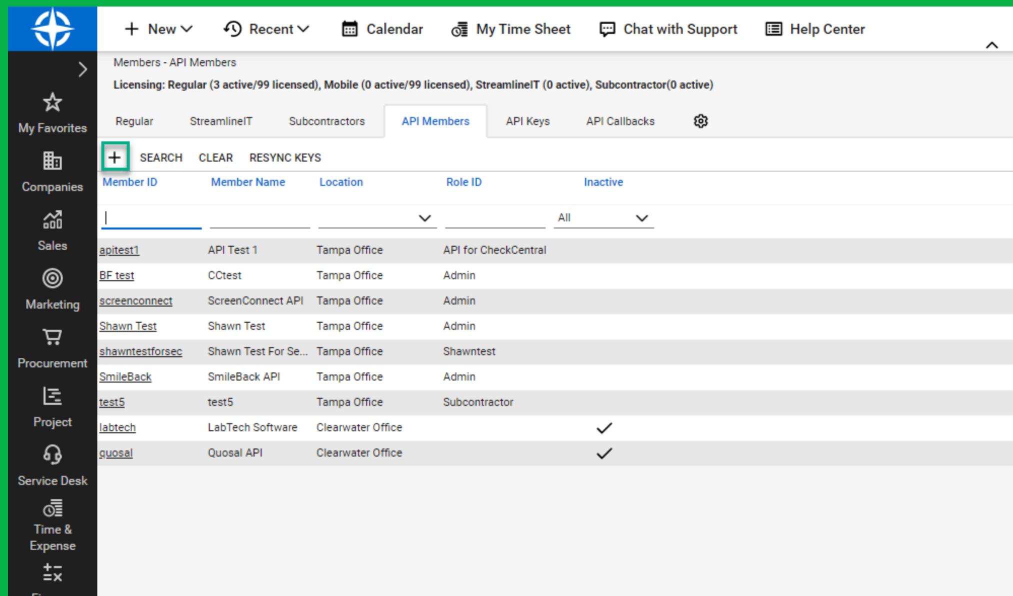
Click System again in the bottom-left corner. Then click "Members."



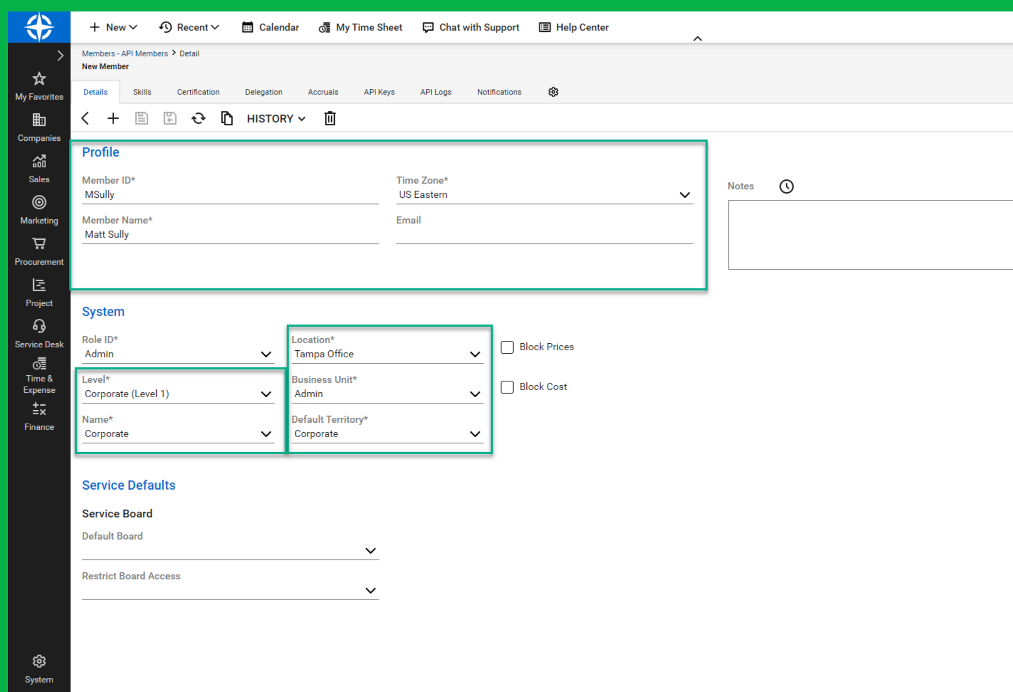
Click the "API Members" tab.



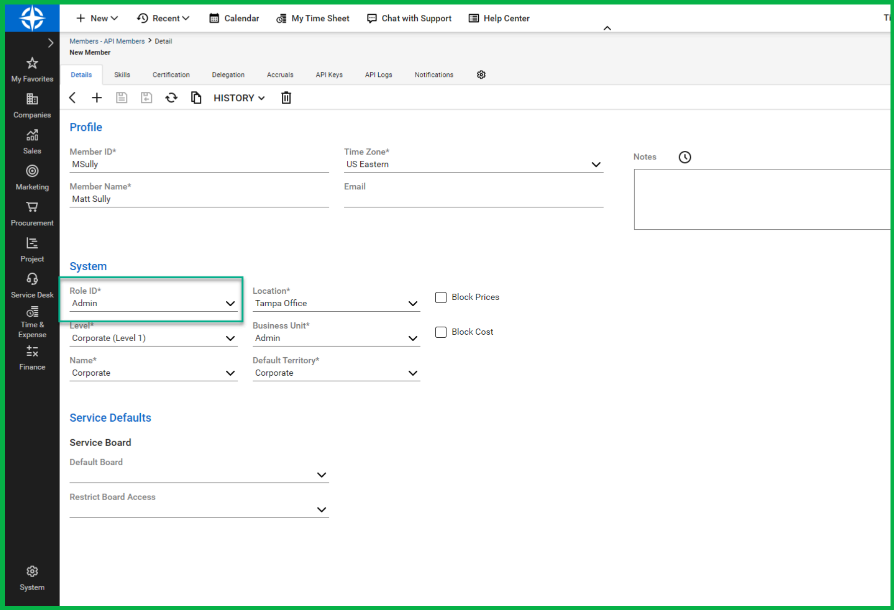
Click "New Item."



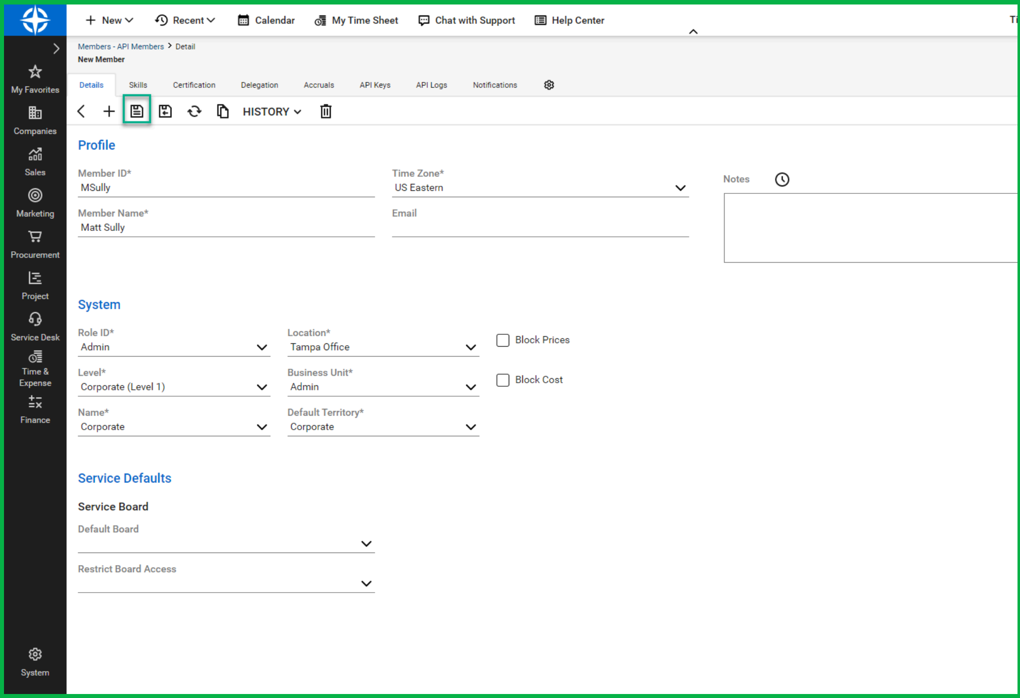
Complete the required information in the new member form.



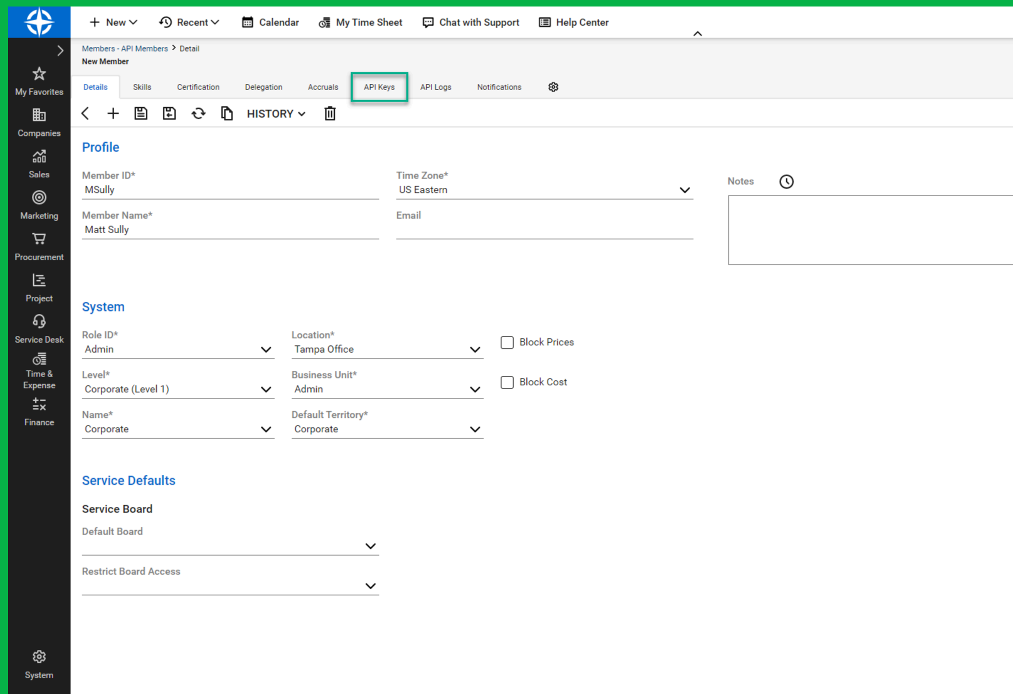
For the Role ID field, choose Admin or a custom role. *The chosen role requires certain permissions as confirmed in the previous steps.*



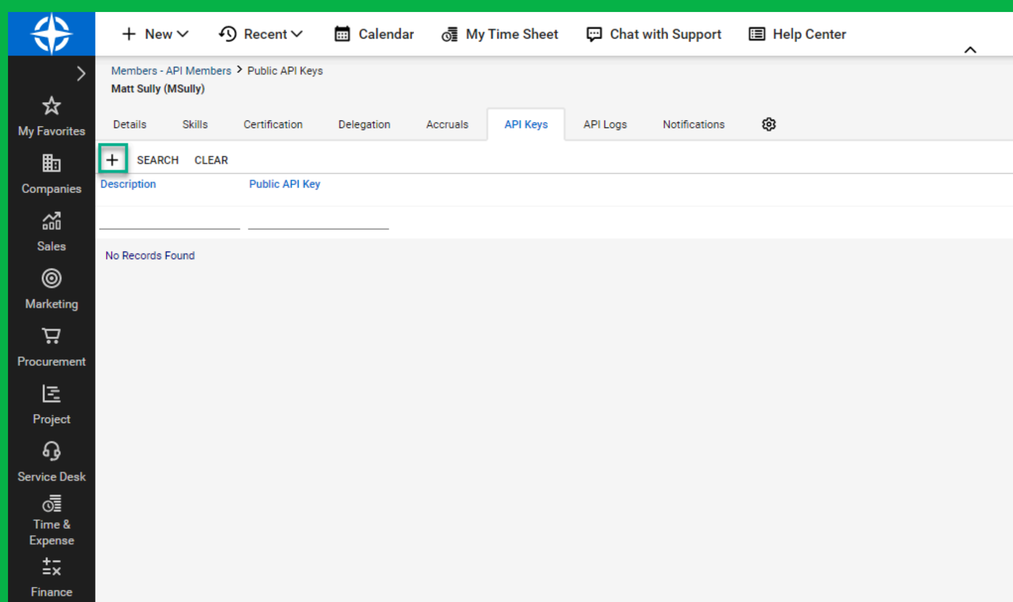
Click "Save."



Click the "API Keys" tab.

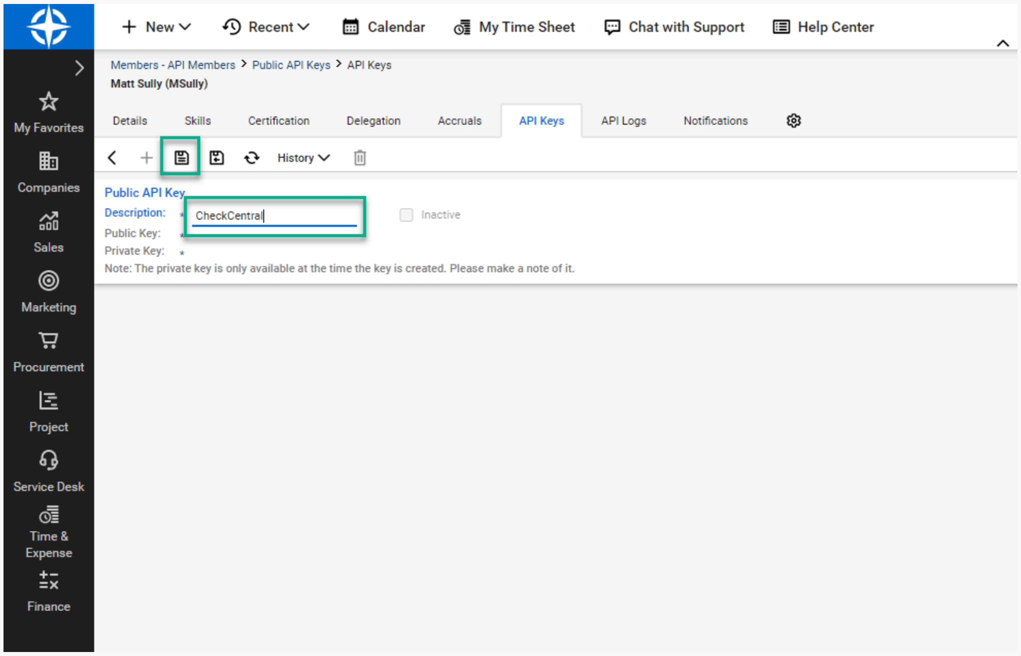


Click "New Item."

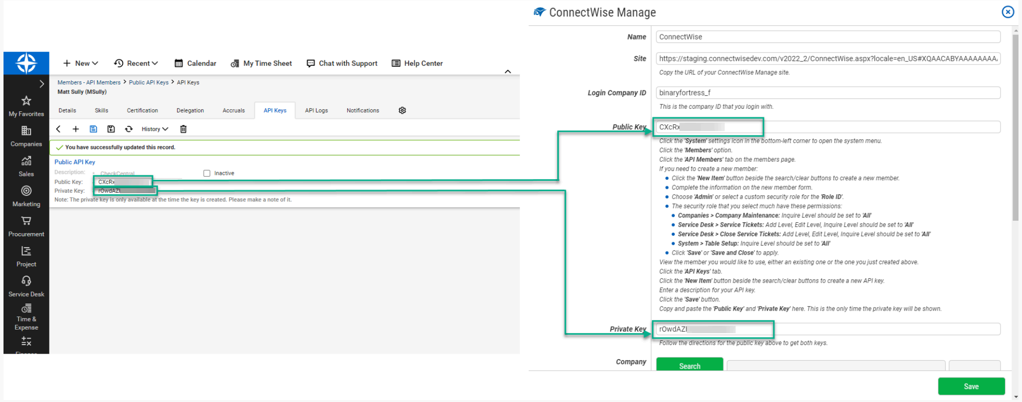


ConnectWise and CheckCentral

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

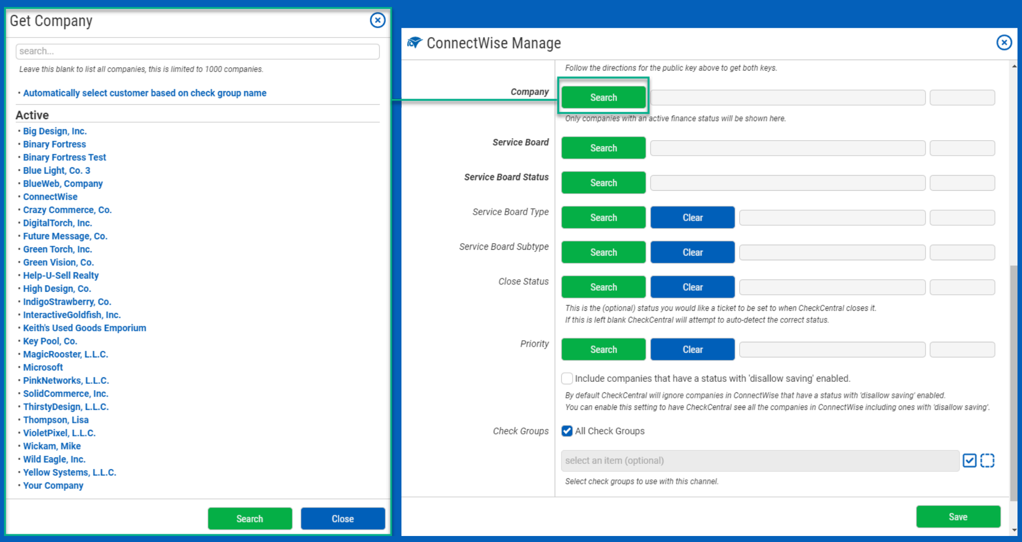


Copy the Public and Private Keys, pasting them into the corresponding fields in CheckCentral.

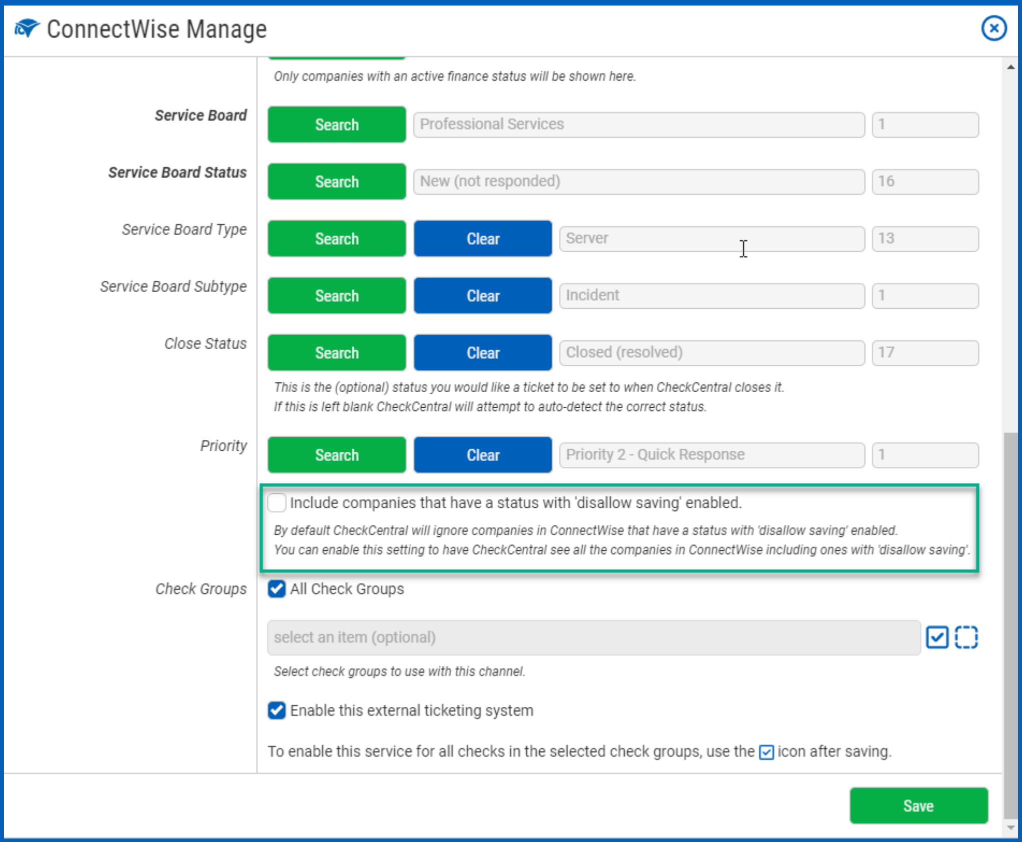


CheckCentral

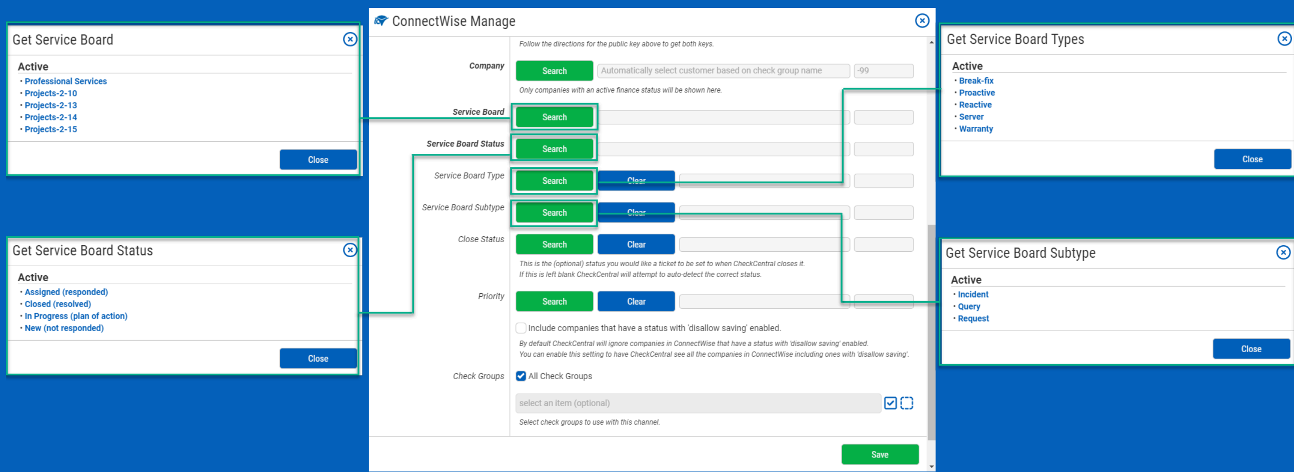
For associating companies with tickets, you can select a specific company from the list or set the channel to automatically select the account based on the Check Group name. *Only companies with an active finance status will be shown here.*



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.

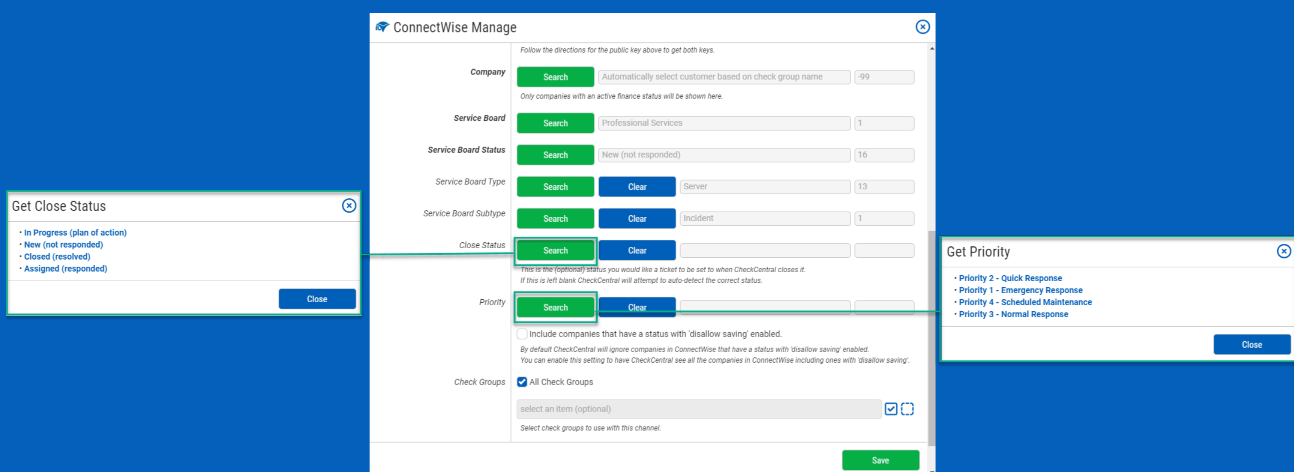


For various Service settings, select from the various lists by clicking "Search." *Some lists are dependent on previous Service setting selections.*



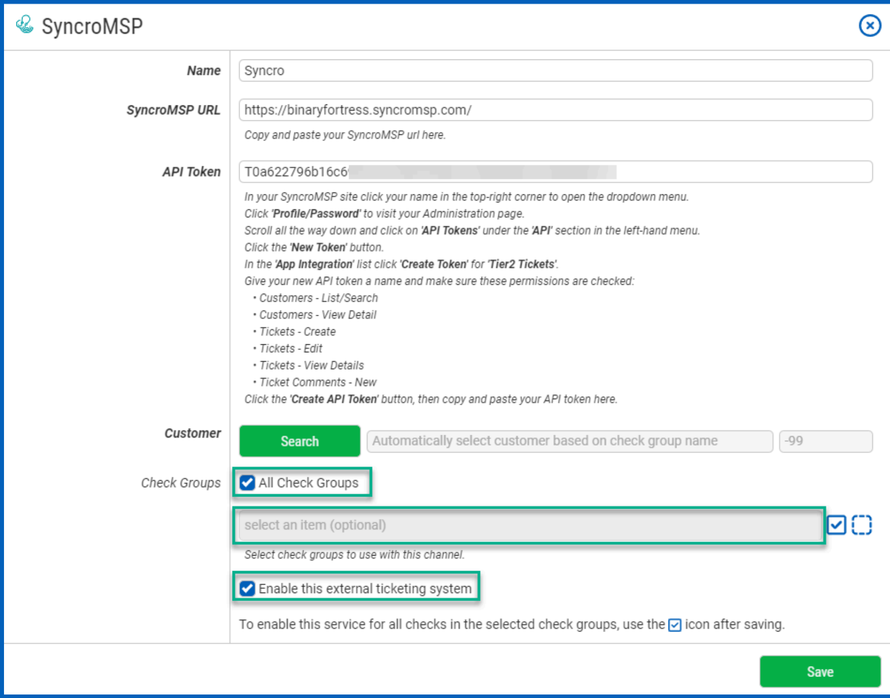
For Close Status and Priority selections, choose from the available lists.

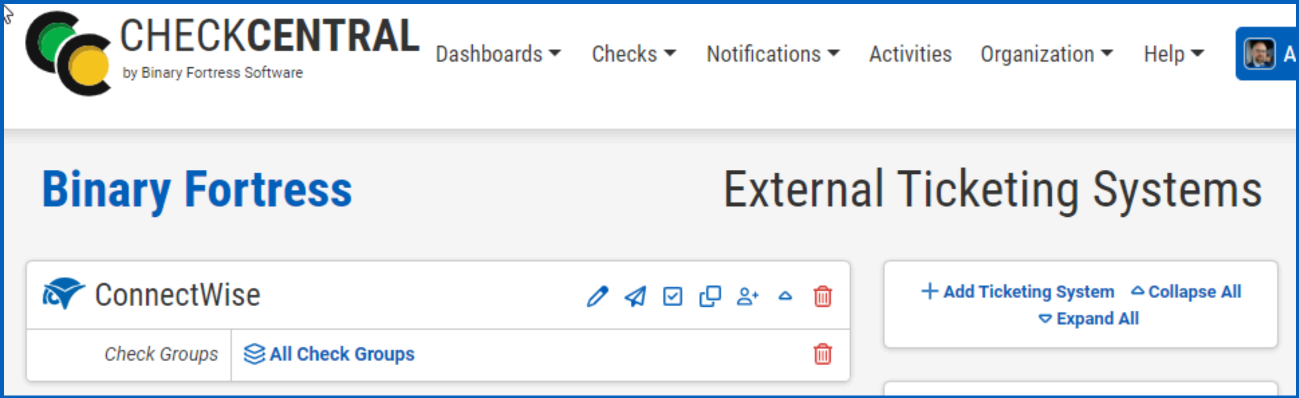
This is an optional status to be used when CheckCentral closes tickets. If this is left blank, CheckCentral will attempt to auto-detect the correct status.



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.



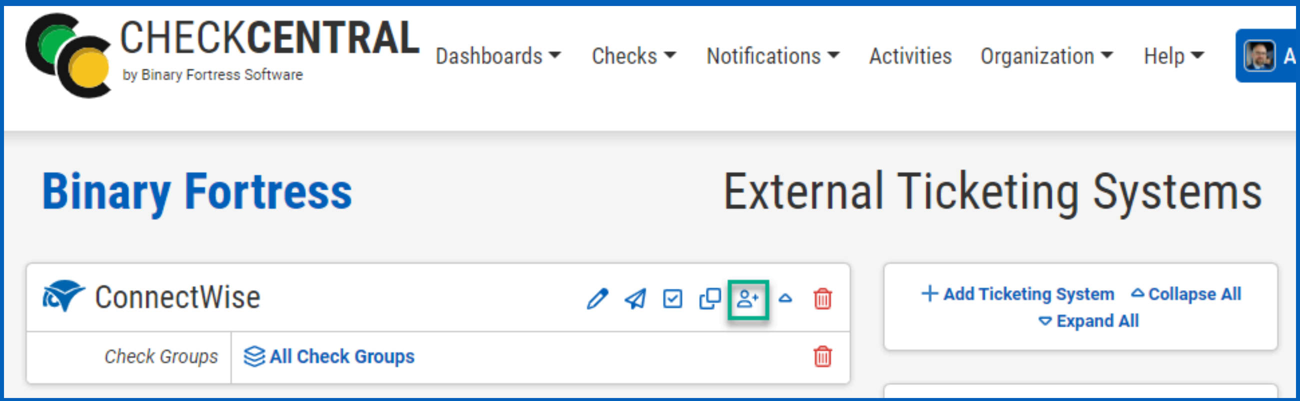


This External Ticketing System channel will now be available for use with any check under your Check Central account.

Import Companies/Customers as Check Groups

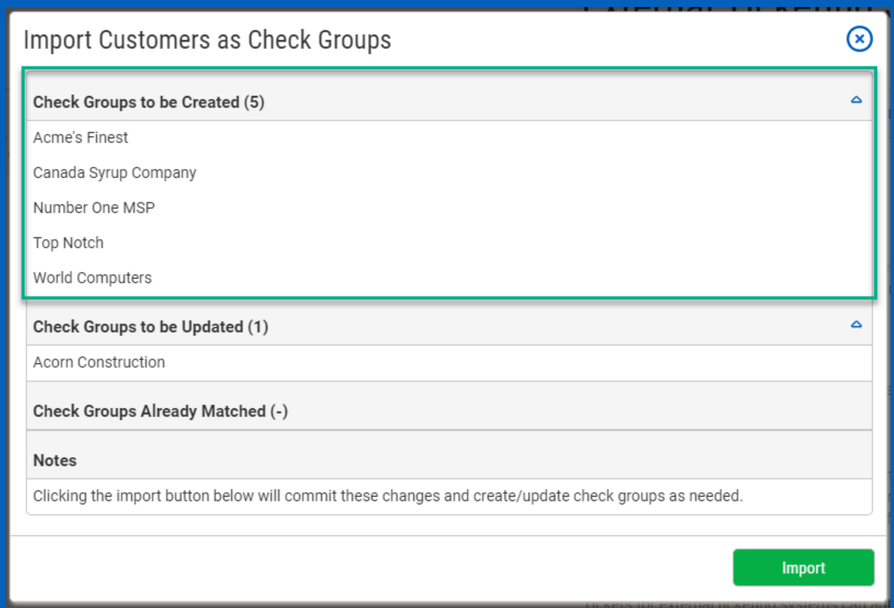
CheckCentral

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

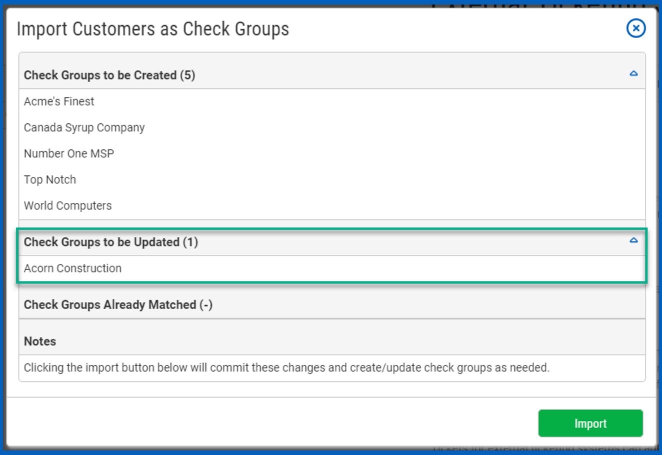


From the External Ticketing Systems page, click on the Customer Import icon above your newly-created channel.

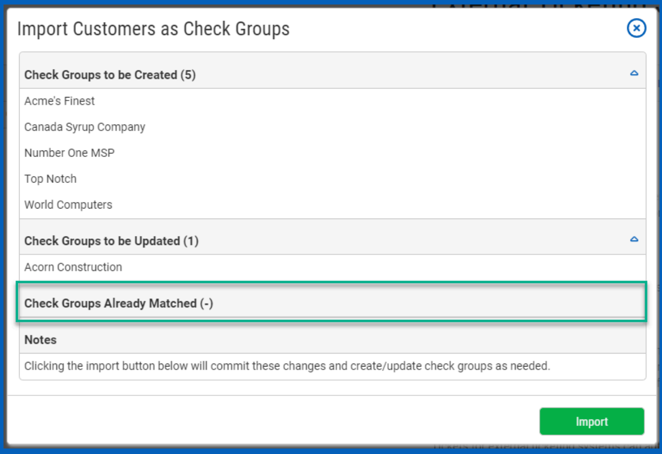
If no similar check groups exist, your customers will be listed under Check Groups to be Created.



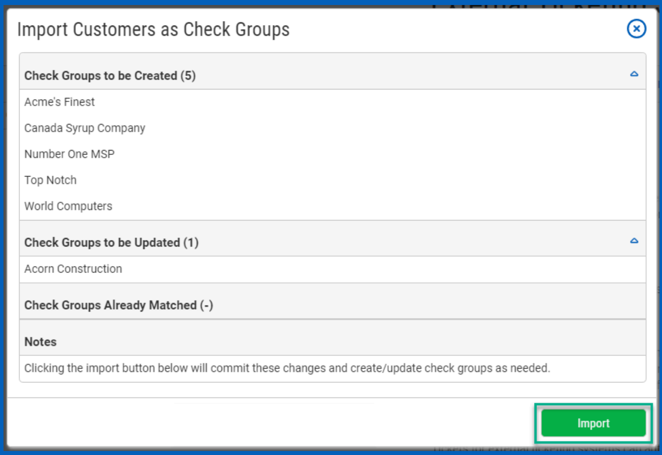
If you've already created Check Groups using company/customer names, they will display in the Check Groups to be Updated section, ensuring they match with ConnectWise.



Existing Groups Already Matched with ConnectWise will be skipped.



Now click Import to complete the import.



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.com**

About Binary Fortress Software

Binary Fortress has spent 19 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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