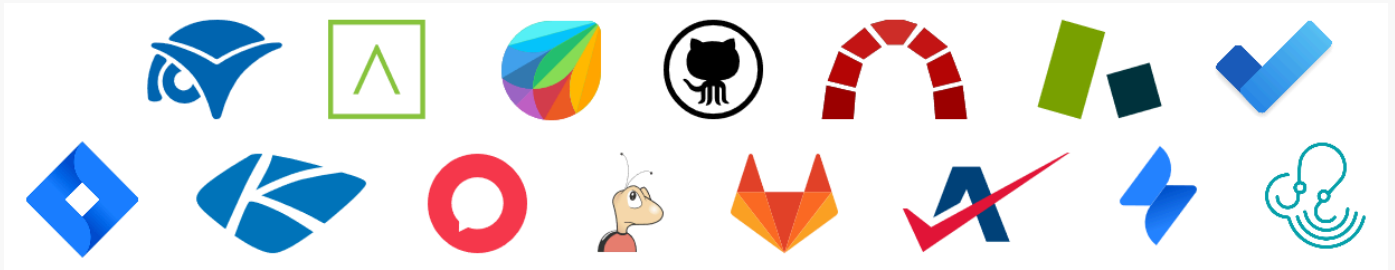


ConnectWise Manage Integration

 CHECKCENTRAL

 BINARYFORTRESS

ConnectWise Manage Integration

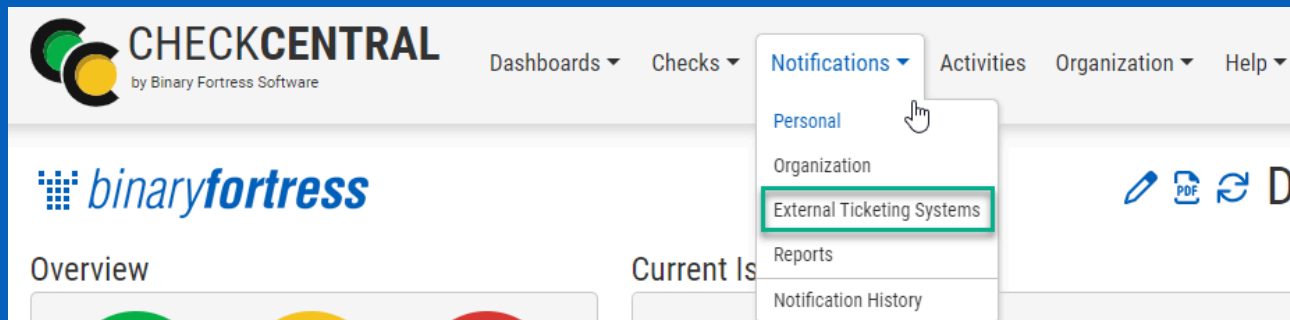


CheckCentral integrates with several RMMs, PSAs, and ticketing software, including ConnectWise Manage, helping you consolidate service ticket issues.

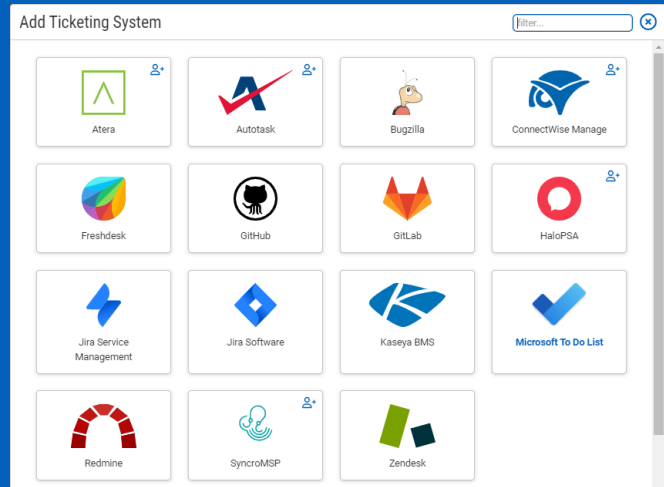
To integrate ConnectWise with CheckCentral, begin by logging into your CheckCentral account.

CheckCentral

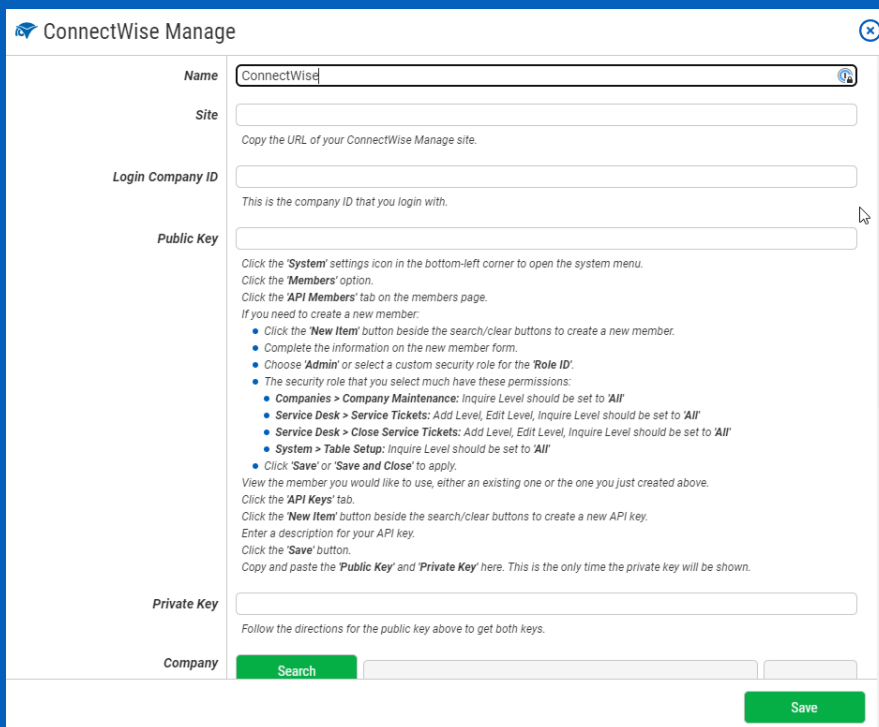
From the main menu, click Notifications, then External Ticketing Systems.



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.

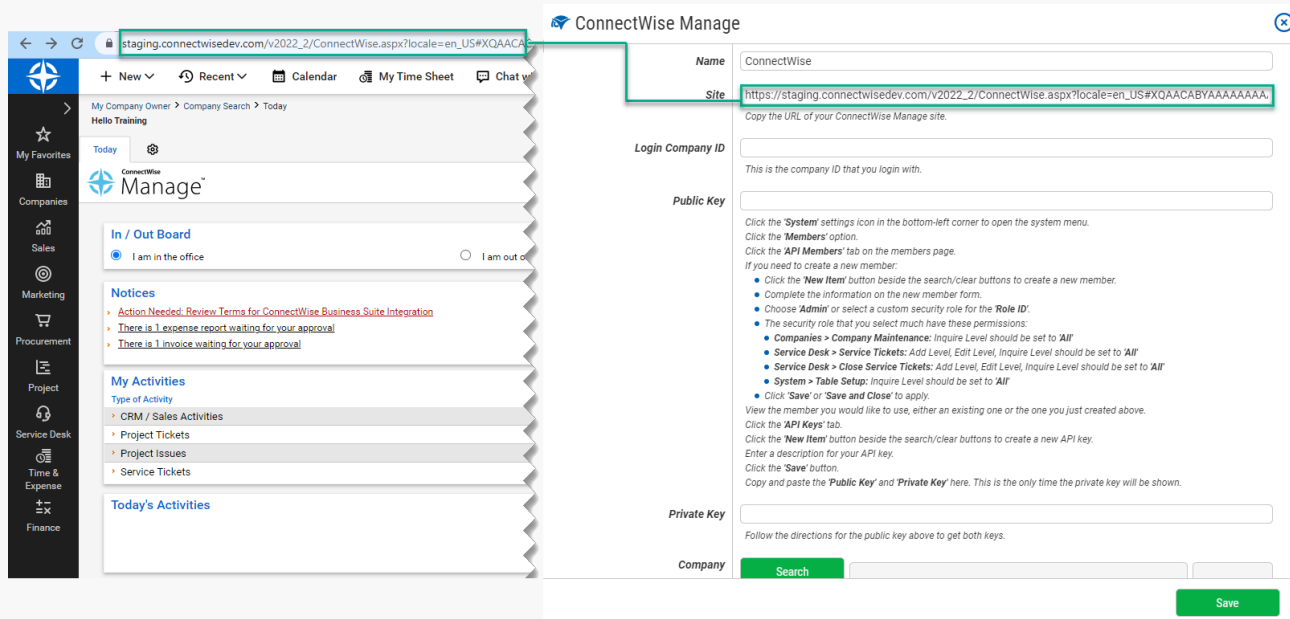


You can name this configuration anything you'd like.

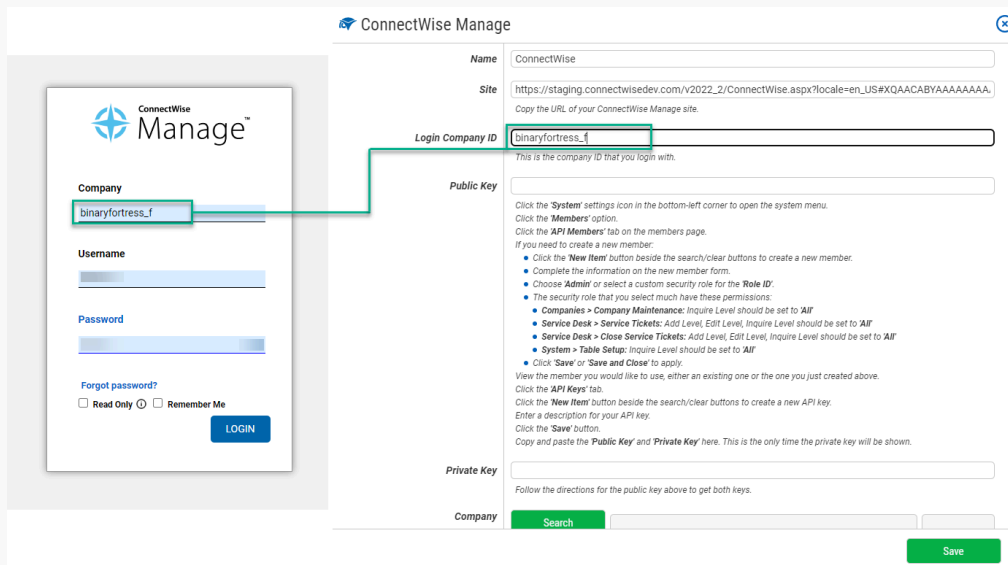
The other details require you to visit your ConnectWise Manage site.

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.

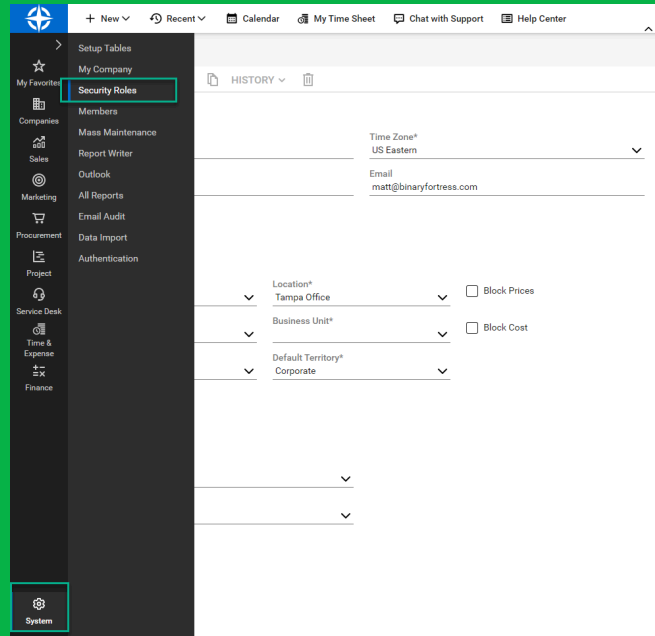


Complete your login to the ConnectWise Manage.

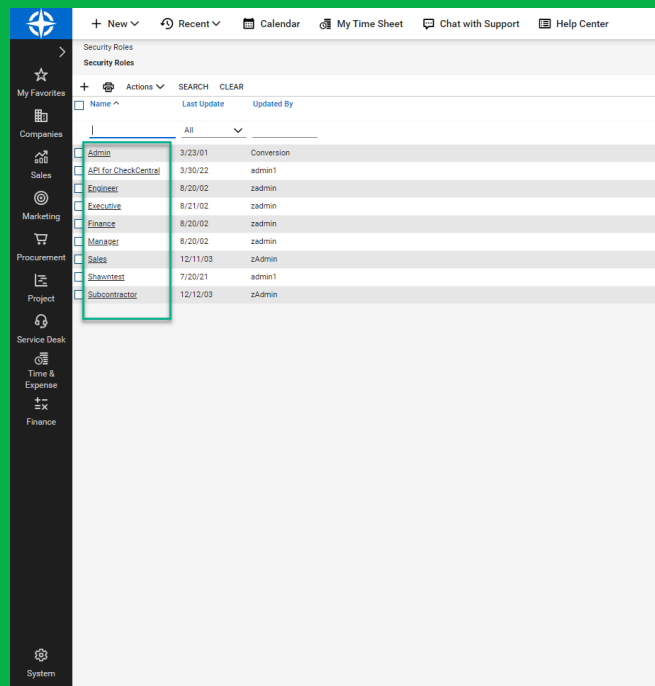
ConnectWise

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

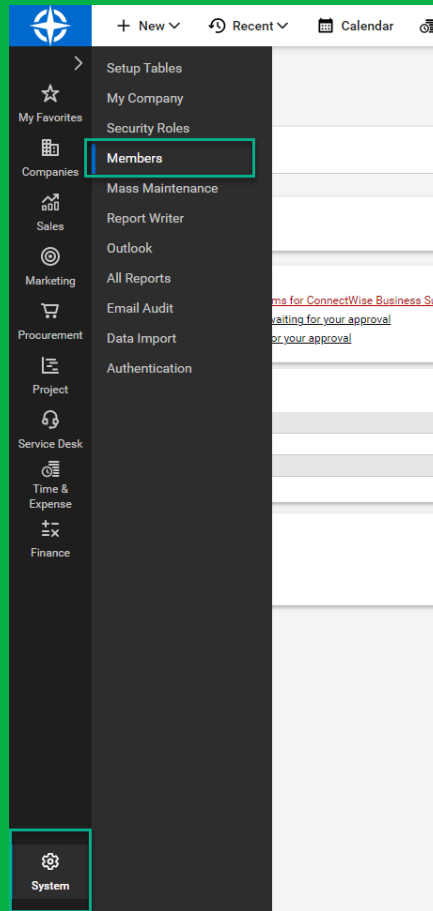
Module	Add Level	Edit Level	Delete Level	Inquire Level	Last Update	Updated By
Companies	All	All	All	All	6/2/18	sSys Admin
Company Maintenance	All	All	All	All		
Company/Contact Group Maintenance	All	All	All	All		
Configuration - Display Passwords	None	None	None	All		
Configurations (customize)	All	All	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		
UserCenter	All	All	All	All		
Finance						
Marketing					10/25/22	sSys Admin
Procurement					12/12/17	sSys Admin
Project					4/26/18	CONVERSION
Sales					12/12/17	sSys Admin
Service Desk					8/2/22	sSys 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
Companies	All	All	All	All	6/2/18	sSys Admin
Finance					10/25/22	sSys Admin
Marketing					12/12/17	sSys Admin
Procurement					6/26/18	CONVERSION
Project					10/25/22	sSys Admin
Sales					12/12/17	sSys Admin
Service Desk					8/2/22	sSys Admin
Change Approvals	All	All	All	All		
Close Service Tickets	All	All	None	All		
CloudConsole	All	All	All	All		
ConnectWise Chat	All	All	All	All		
ConnectWise Control	All	All	All	All		
ITBoost	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	All		
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

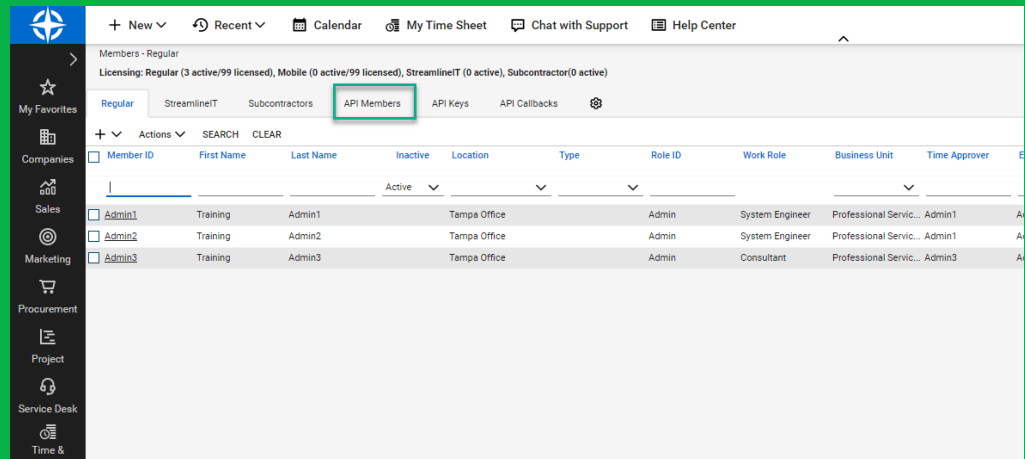
Module	Add Level	Edit Level	Delete Level	Inquire Level	Last Update	Updated By
Companies					6/2/18	sSys Admin
Finance					10/25/22	sSys Admin
Marketing					12/12/17	sSys Admin
Procurement					6/26/18	CONVERSION
Project					10/25/22	sSys Admin
Sales					12/12/17	sSys Admin
Service Desk					8/2/22	sSys Admin
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."

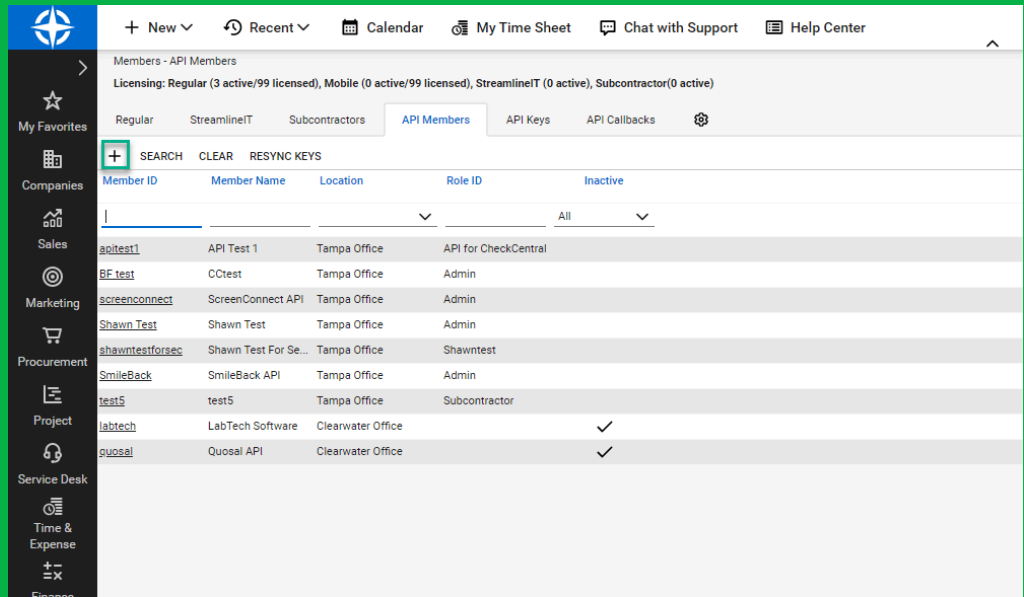
Click System again in the bottom-left corner. Then click "Members."



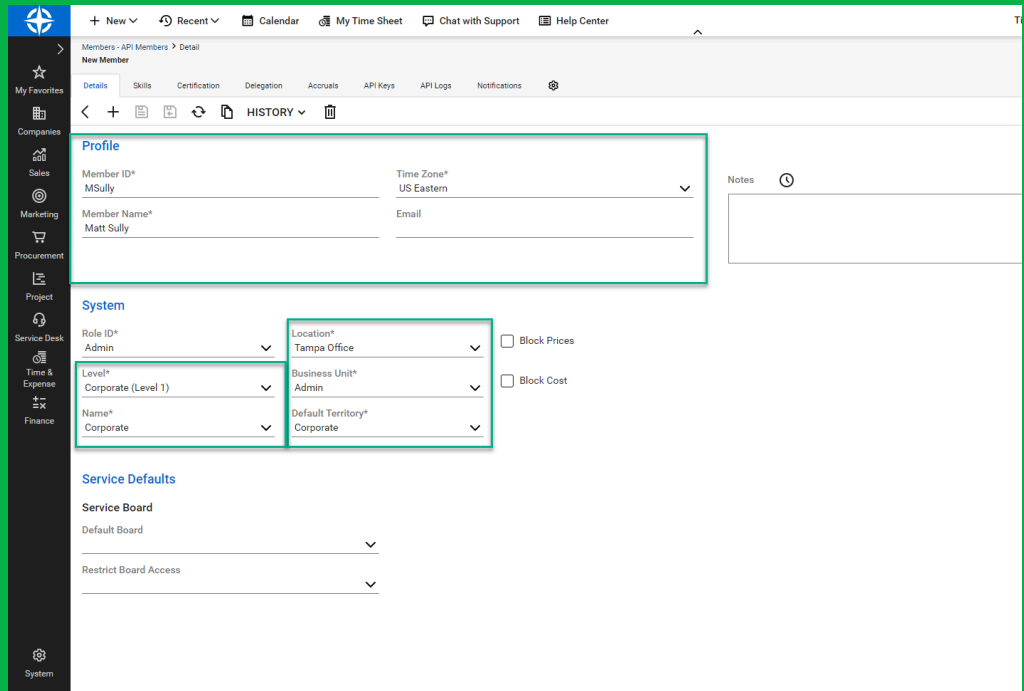
Click the "API Members" tab.



Click "New Item."



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.*

Members - API Members > Detail
New Member

Details Skills Certification Delegation Accruals API Keys API Logs Notifications

Profile

Member ID* MSully Time Zone* US Eastern

Member Name* Matt Sully Email

System

Role ID* Admin Location* Tampa Office Block Prices

Level* Corporate (Level 1) Business Unit* Admin Block Cost

Name* Corporate Default Territory* Corporate

Service Defaults

Service Board

Default Board

Restrict Board Access

Click "Save."

Members - API Members > Detail
New Member

Details Skills Certification Delegation Accruals API Keys API Logs Notifications

Profile

Member ID* MSully Time Zone* US Eastern

Member Name* Matt Sully Email

System

Role ID* Admin Location* Tampa Office Block Prices

Level* Corporate (Level 1) Business Unit* Admin Block Cost

Name* Corporate Default Territory* Corporate

Service Defaults

Service Board

Default Board

Restrict Board Access

Click the "API Keys" tab.

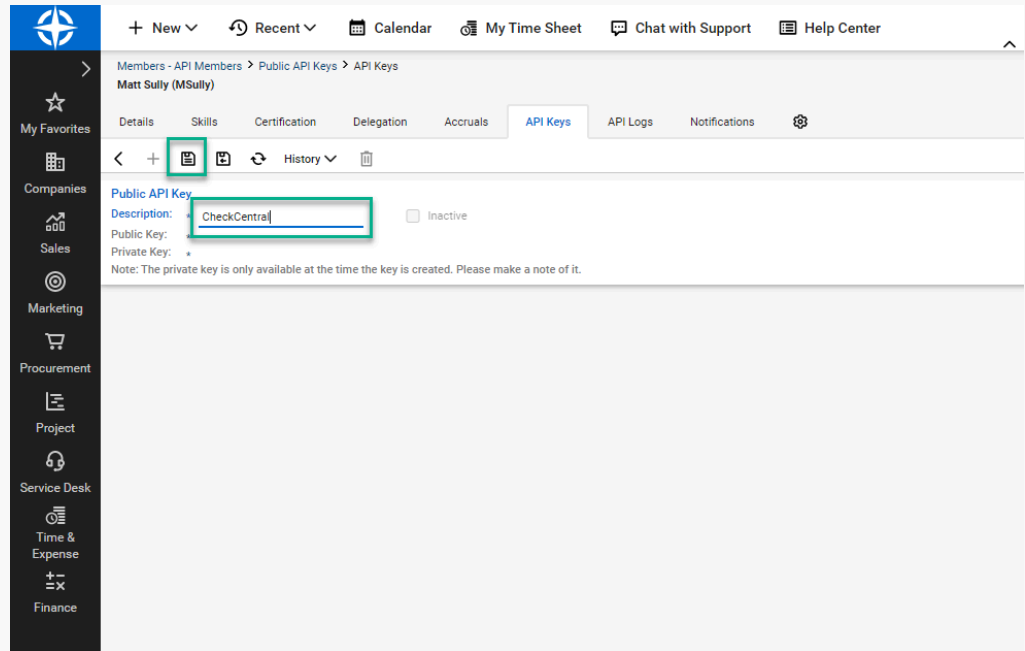
The screenshot shows the 'New Member' detail page in a web application. The breadcrumb trail is 'Members - API Members > Detail'. The 'API Keys' tab is highlighted with a red box. The page is divided into sections: Profile, System, and Service Defaults. The Profile section includes fields for Member ID* (MSully), Member Name* (Matt Sully), Time Zone* (US Eastern), and Email. The System section includes fields for Role ID* (Admin), Location* (Tampa Office), Level* (Corporate (Level 1)), Name* (Corporate), Business Unit* (Admin), and Default Territory* (Corporate). There are also checkboxes for 'Block Prices' and 'Block Cost'. The Service Defaults section includes 'Service Board' with 'Default Board' and 'Restrict Board Access' dropdowns.

Click "New Item."

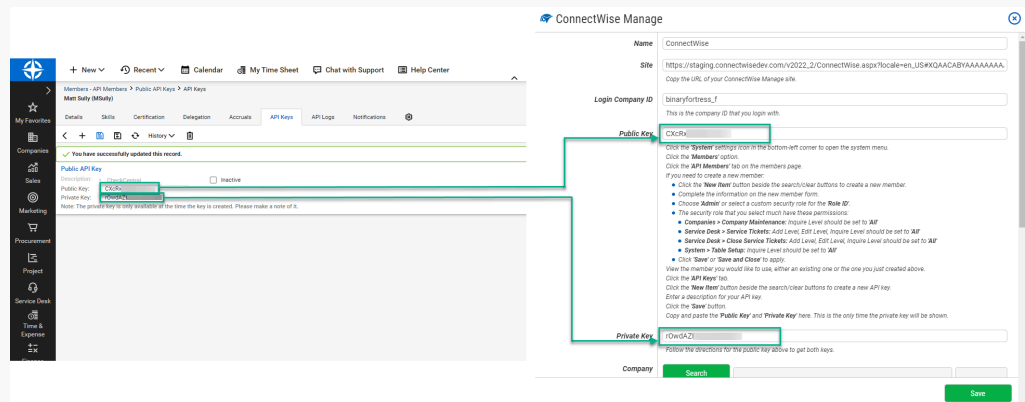
The screenshot shows the 'Public API Keys' list page for 'Matt Sully (MSully)'. The breadcrumb trail is 'Members - API Members > Public API Keys'. The 'API Keys' tab is selected. At the top, there is a '+ SEARCH CLEAR' button, with the '+' button highlighted by a red box. Below this is a table with a header row containing 'Description' and 'Public API Key'. The table is currently empty, and the text 'No Records Found' is displayed below it.

ConnectWise and CheckCentral

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

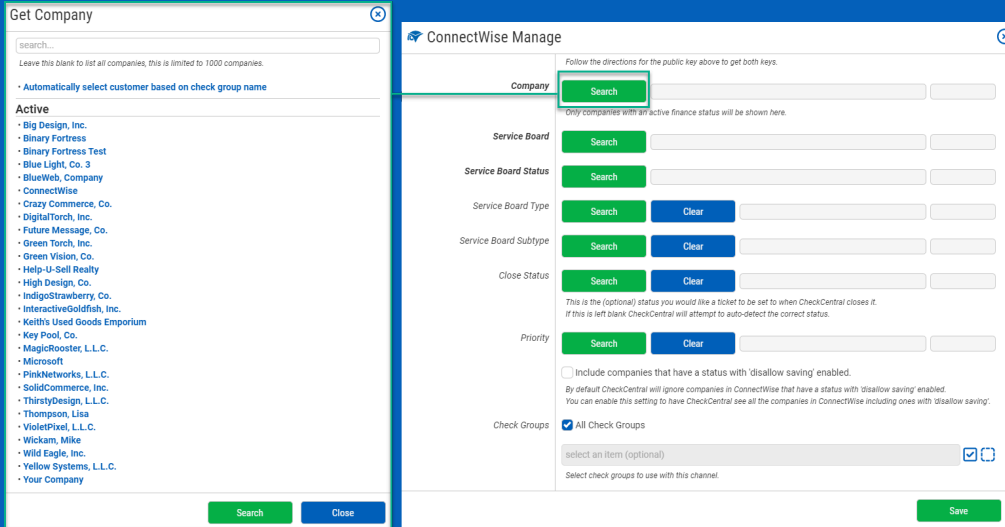


Copy the Public and Private Keys, pasting them into the corresponding fields in CheckCentral.

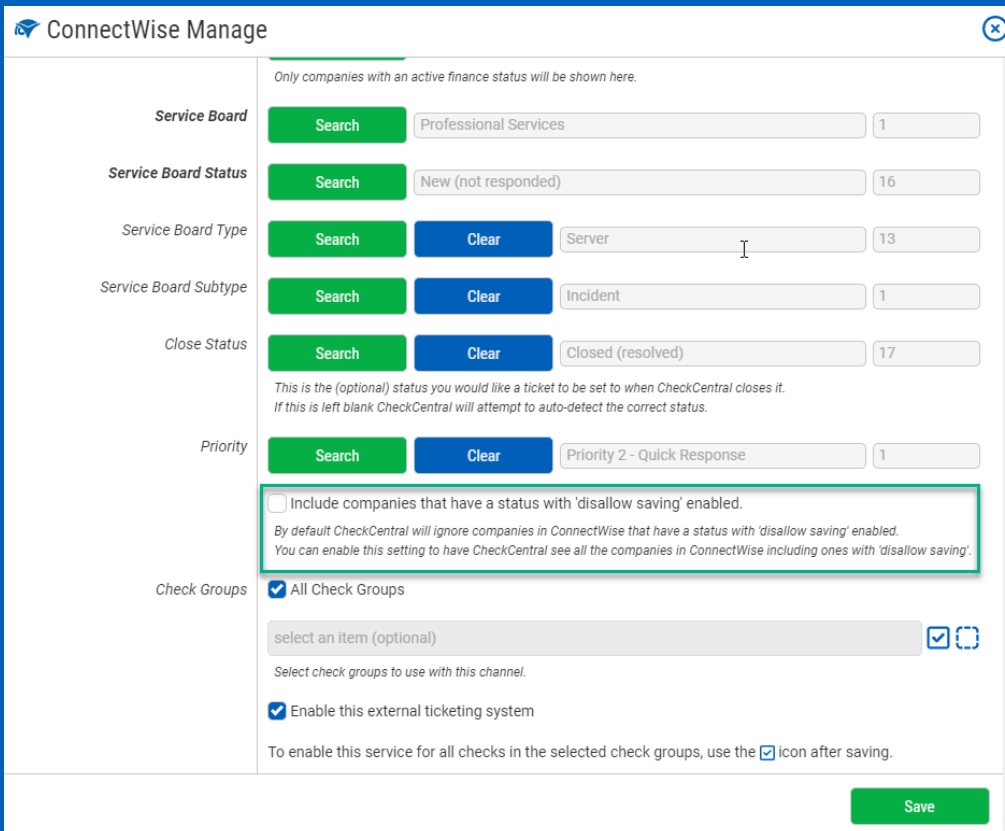


CheckCentral

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.

SyncroMSP
✕

Name

SyncroMSP URL
Copy and paste your SyncroMSP url here.

API Token
In your SyncroMSP site click your name in the top-right corner to open the dropdown menu. Click 'Profile/Password' to visit your Administration page. Scroll all the way down and click on 'API Tokens' under the 'API' section in the left-hand menu. Click the 'New Token' button. In the 'App Integration' list click 'Create Token' for 'Tier2 Tickets'. Give your new API token a name and make sure these permissions are checked:

- Customers - List/Search
- Customers - View Detail
- Tickets - Create
- Tickets - Edit
- Tickets - View Details
- Ticket Comments - New

Click the 'Create API Token' button, then copy and paste your API token here.

Customer Search

Check Groups All Check Groups

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

CHECKCENTRAL
by Binary Fortress Software

Dashboards ▾ Checks ▾ Notifications ▾ Activities Organization ▾ Help ▾

A

Binary Fortress

External Ticketing Systems

ConnectWise

✎ 📧 📄 👤 ⬆ 🗑

Check Groups

☰
All Check Groups

🗑

+ Add Ticketing System
 ⬆ Collapse All

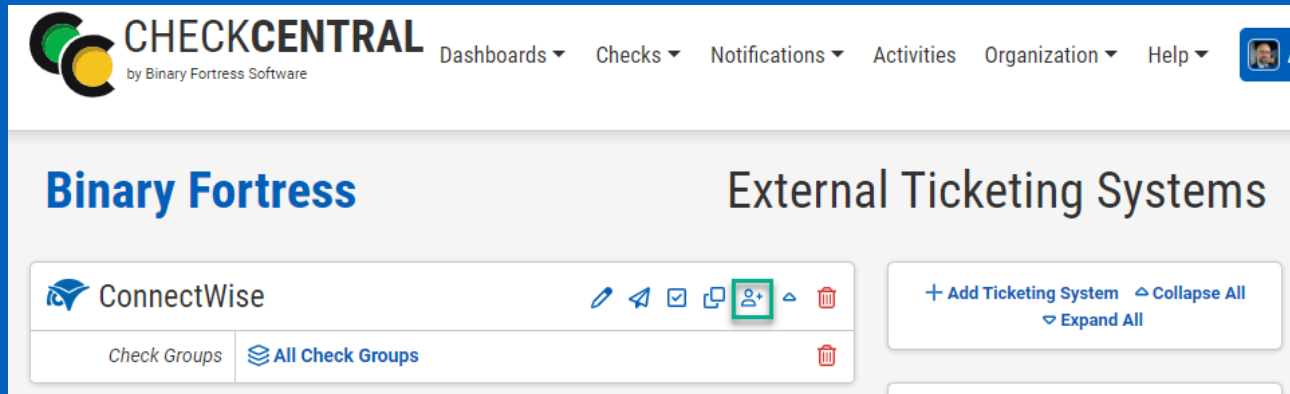
⬇ Expand All

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

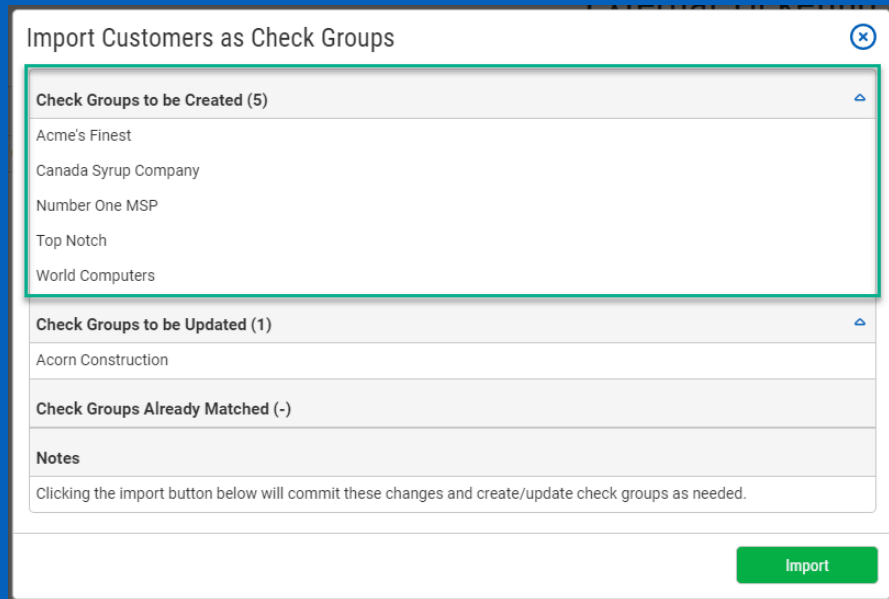
CheckCentral

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.

✕

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

Existing Groups Already Matched with ConnectWise will be skipped.

✕

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

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

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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<https://www.binaryfortress.com>