BeachheadSecure
ConnectWise PSA™ Integration Setup Guide

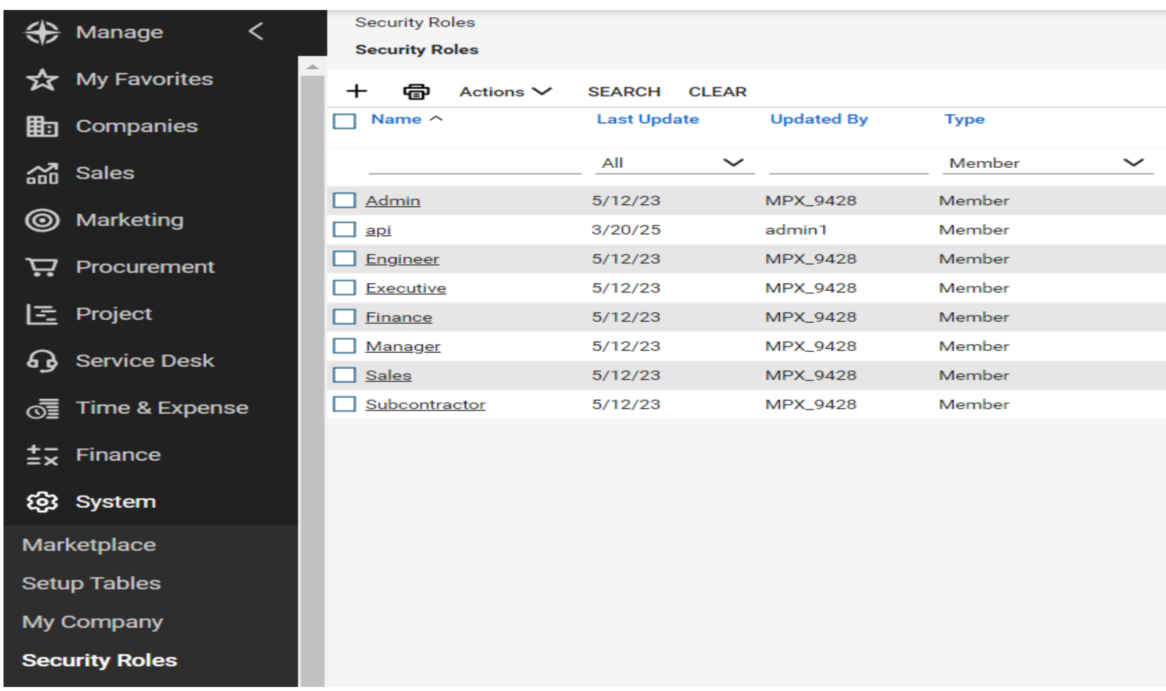
The Beachhead Solutions and ConnectWise PSA™ integration empowers MSPs to leverage ConnectWise PSA™ Service Tickets to capture detailed information and track time for each customer issue. Additionally, this integration streamlines invoicing, automating customer billing management and ensuring accuracy without the need for manual input.

Before starting the setup process on Beachhead Solutions, go to ConnectWise PSA™ and follow these steps:

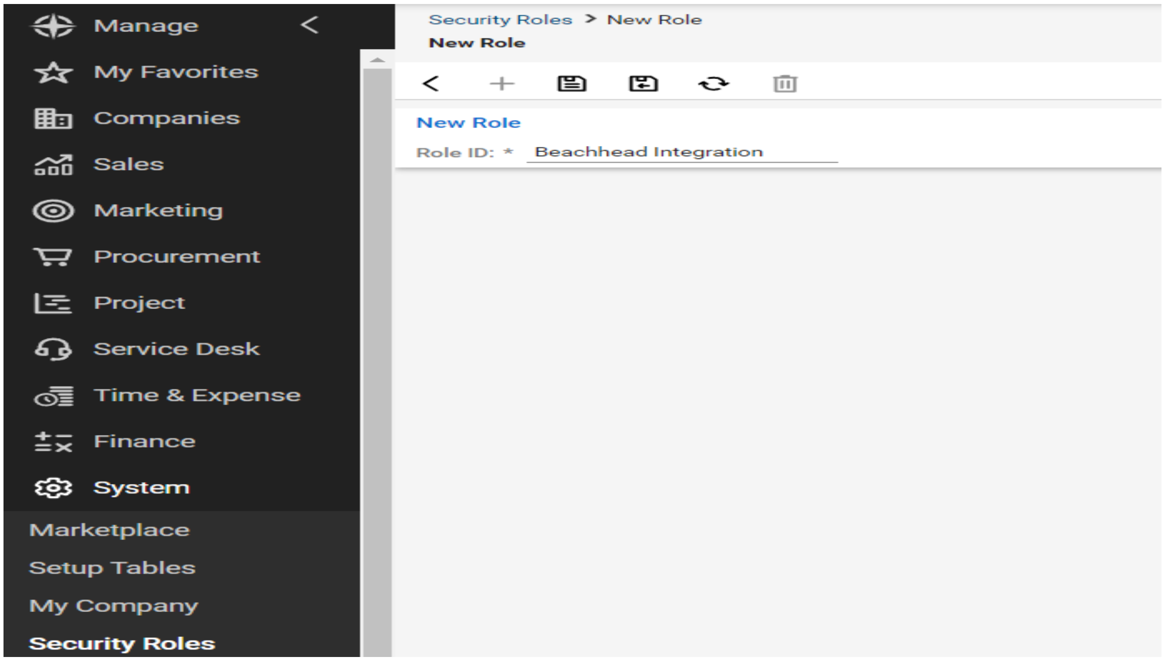
1. Create a Security Role for Beachhead Solutions Integration.

The security role will be used to generate an API key that will be used in the integration setup page within Beachhead solution’s ConnectWise PSA™ integration page.

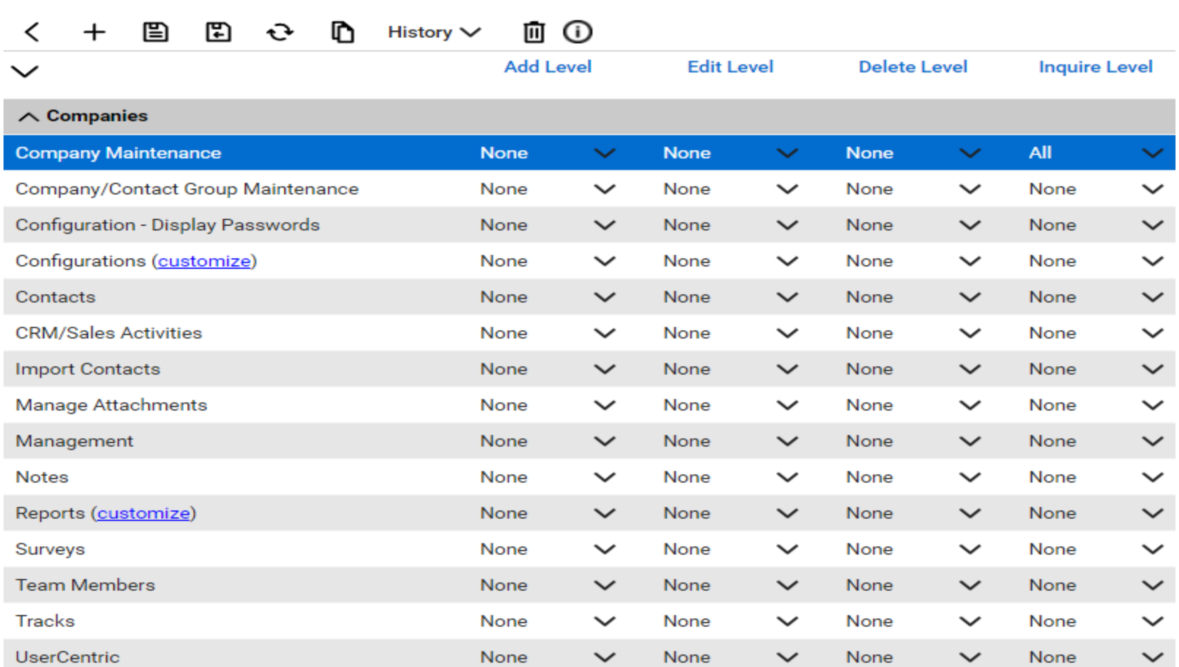
- From **ConnectWise PSA™** navigate to **System > Security Roles**.



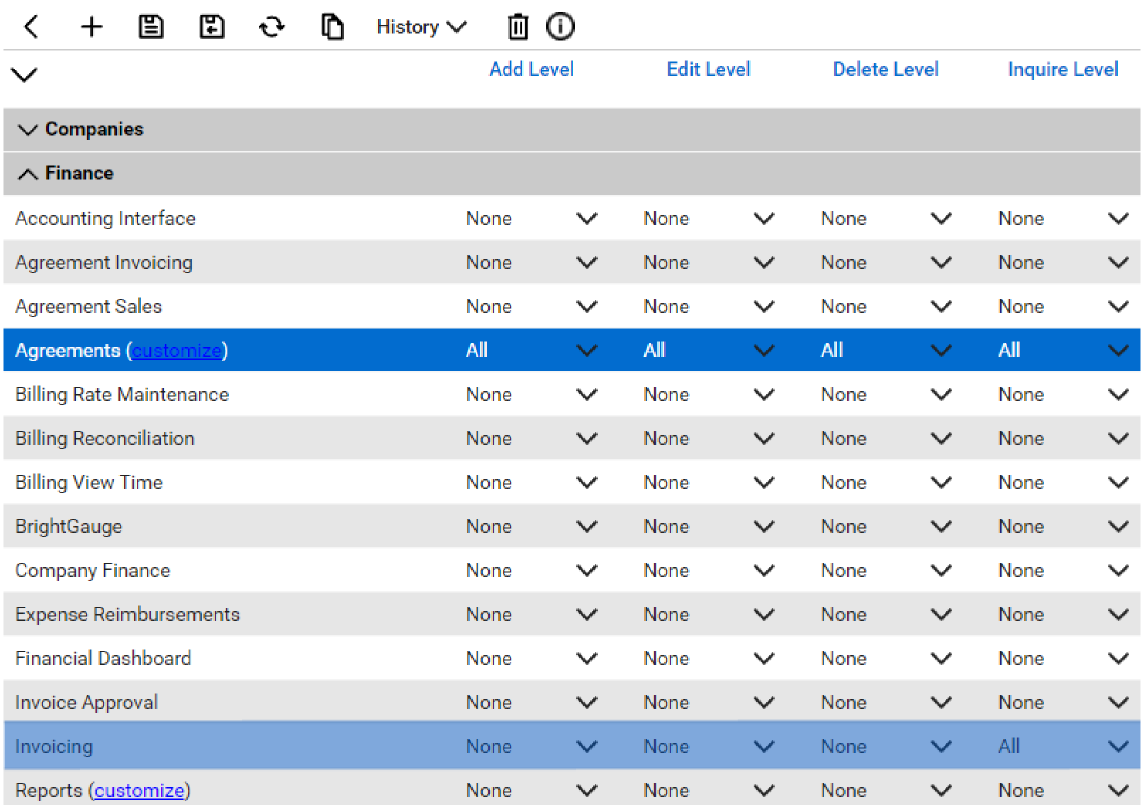
- Click the “+” button to add a new security role.
- Name the role ID then click the save icon.



- After you saved the role Id a list of the different permissions that your role Id will need will auto-populate.
- Under the **Companies** dropdown find the **Companies Maintenance** row and select **Inquire Level** > **All.**



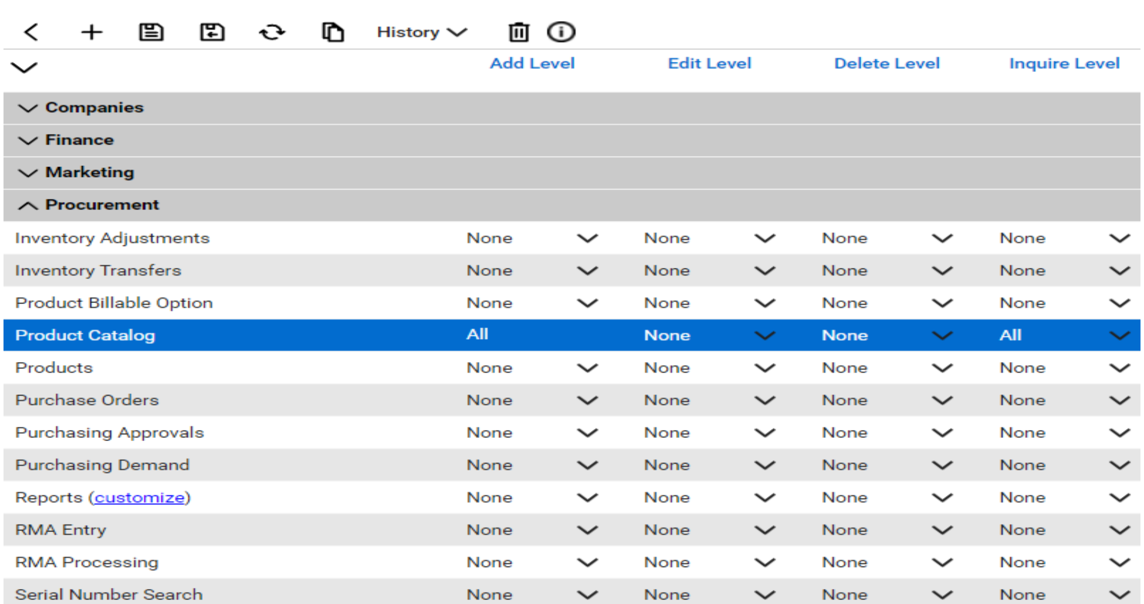
- Under the **Finance** dropdown find the **Agreements** row and select **Add Level** > **All**, **Edit Level** > **All, Delete Level** > **All, Inquire Level** > **All.**
- Also, under the Finance dropdown find the **Invoicing** row and select **Inquire Level** > **All.**



History

	Add Level	Edit Level	Delete Level	Inquire Level
Companies				
Finance				
Accounting Interface	None	None	None	None
Agreement Invoicing	None	None	None	None
Agreement Sales	None	None	None	None
Agreements (customize)	All	All	All	All
Billing Rate Maintenance	None	None	None	None
Billing Reconciliation	None	None	None	None
Billing View Time	None	None	None	None
BrightGauge	None	None	None	None
Company Finance	None	None	None	None
Expense Reimbursements	None	None	None	None
Financial Dashboard	None	None	None	None
Invoice Approval	None	None	None	None
Invoicing	None	None	None	All
Reports (customize)	None	None	None	None

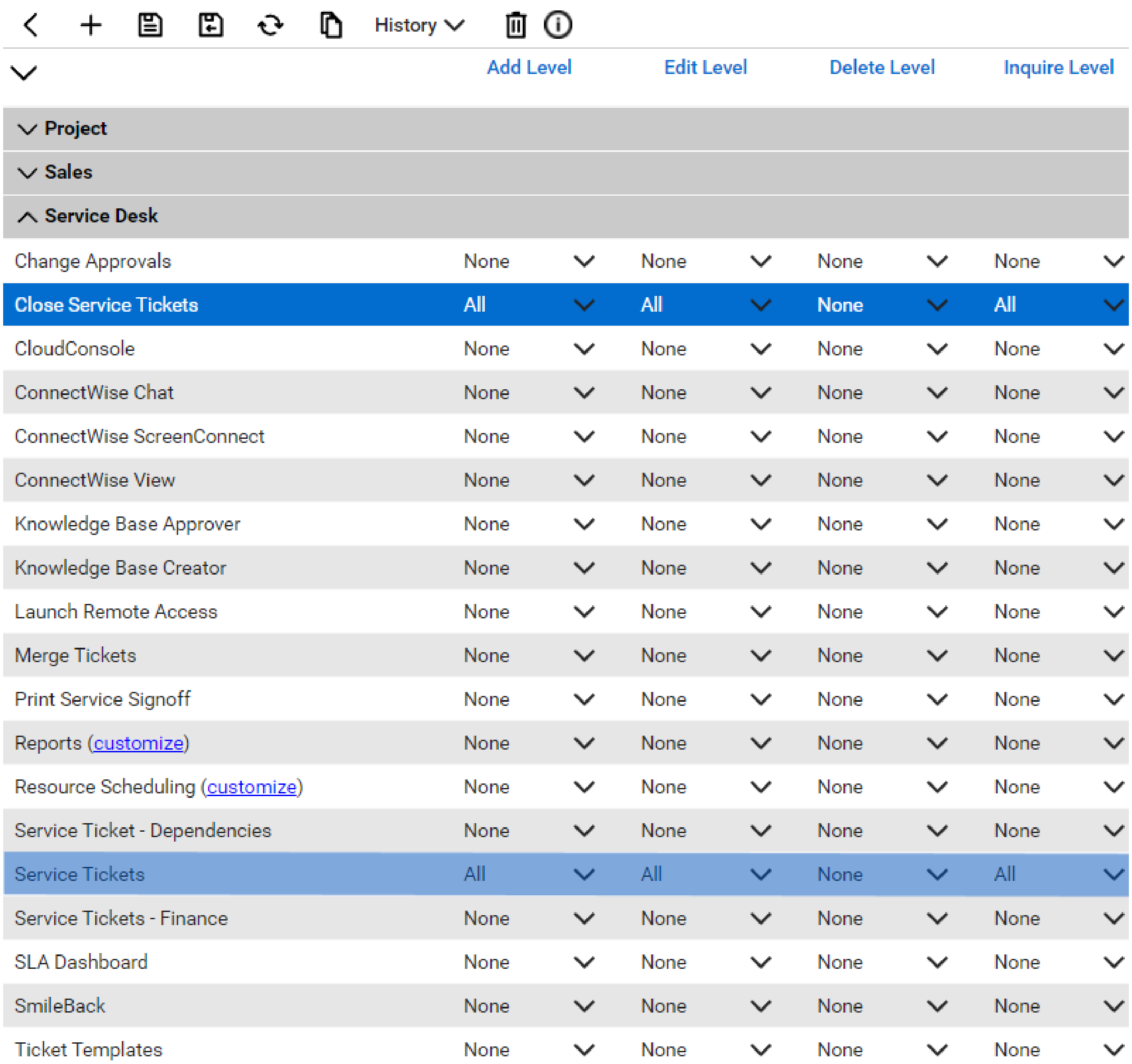
- Under the **Procurement** dropdown find the **Product Catalog** row then select **Add Level** > **All** and **Inquire Level** > **All.**



History

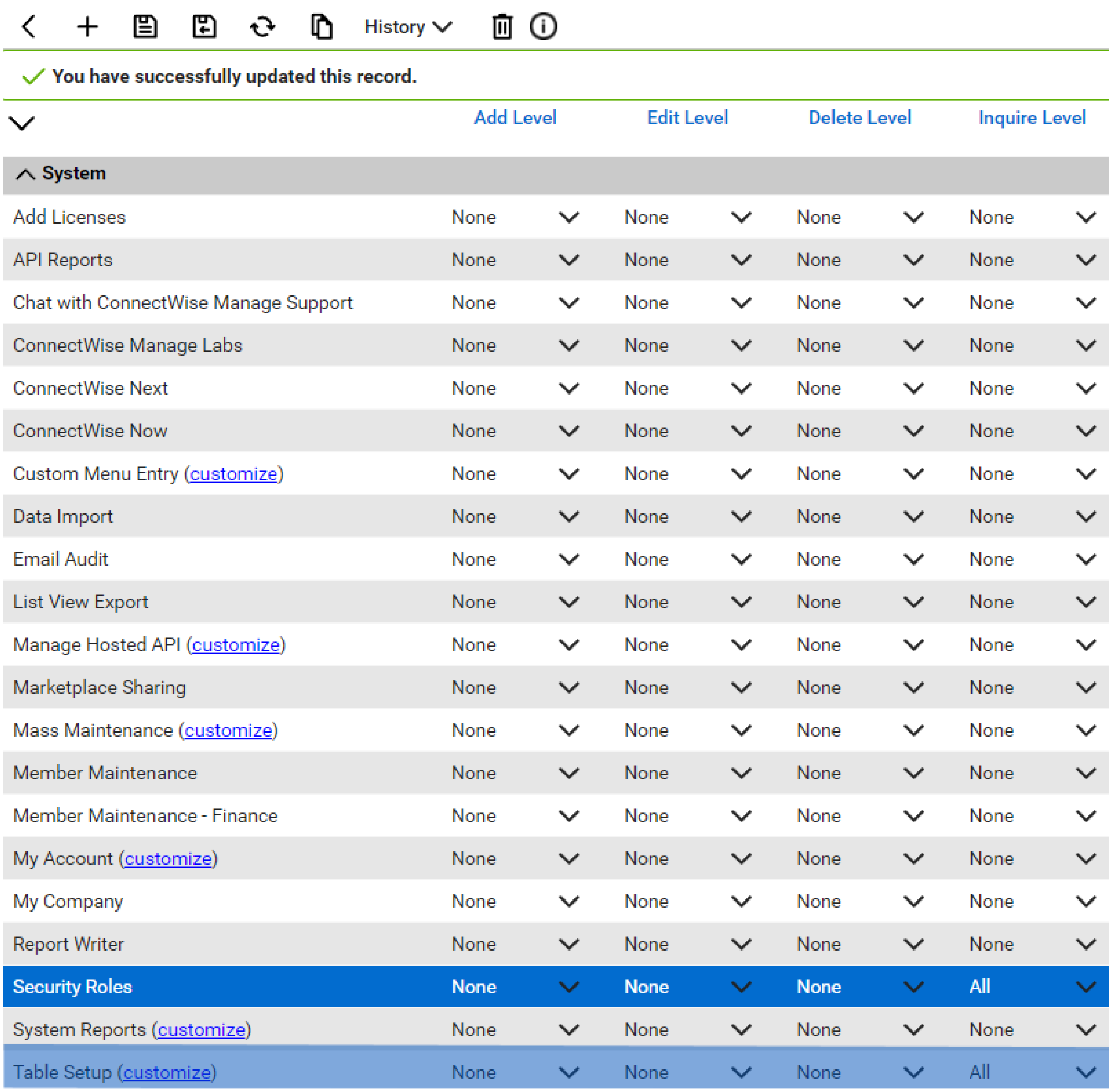
	Add Level	Edit Level	Delete Level	Inquire Level
Companies				
Finance				
Marketing				
Procurement				
Inventory Adjustments	None	None	None	None
Inventory Transfers	None	None	None	None
Product Billable Option	None	None	None	None
Product Catalog	All	None	None	All
Products	None	None	None	None
Purchase Orders	None	None	None	None
Purchasing Approvals	None	None	None	None
Purchasing Demand	None	None	None	None
Reports (customize)	None	None	None	None
RMA Entry	None	None	None	None
RMA Processing	None	None	None	None
Serial Number Search	None	None	None	None

- Under the **Service Desk** dropdown find the **Close Service Tickets** row and select **Add Level** > **All**, **Edit Level** > **All, Inquire Level** > **All.**
- Also, under the **Service Desk** dropdown find the **Service Tickets** row and select **Add Level** > **All**, **Edit Level** > **All, Inquire Level** > **All.**



	Add Level	Edit Level	Delete Level	Inquire Level
Project				
Sales				
Service Desk				
Change Approvals	None	None	None	None
Close Service Tickets	All	All	None	All
CloudConsole	None	None	None	None
ConnectWise Chat	None	None	None	None
ConnectWise ScreenConnect	None	None	None	None
ConnectWise View	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	None
Resource Scheduling (customize)	None	None	None	None
Service Ticket - Dependencies	None	None	None	None
Service Tickets	All	All	None	All
Service Tickets - Finance	None	None	None	None
SLA Dashboard	None	None	None	None
SmileBack	None	None	None	None
Ticket Templates	None	None	None	None

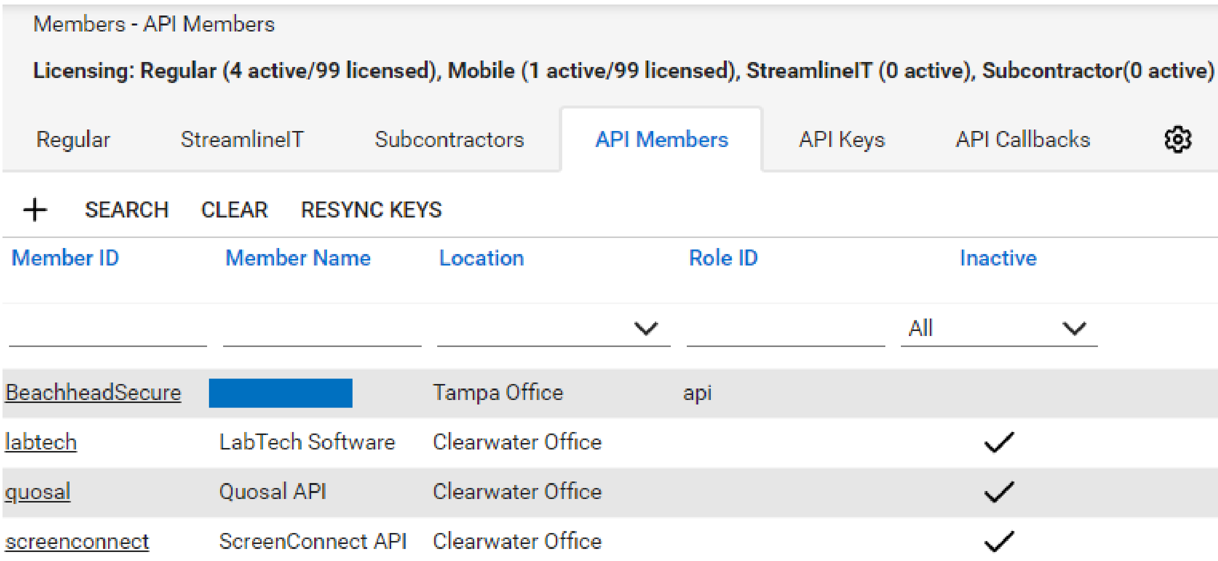
- Under the **System** dropdown find the **Security Roles** row and select **Inquire Level** > **All.**
- Also, under the **System** dropdown find the **Table Setup** row and select **Inquire Level** > **All.**
- Click the save button to update permissions for the role Id.



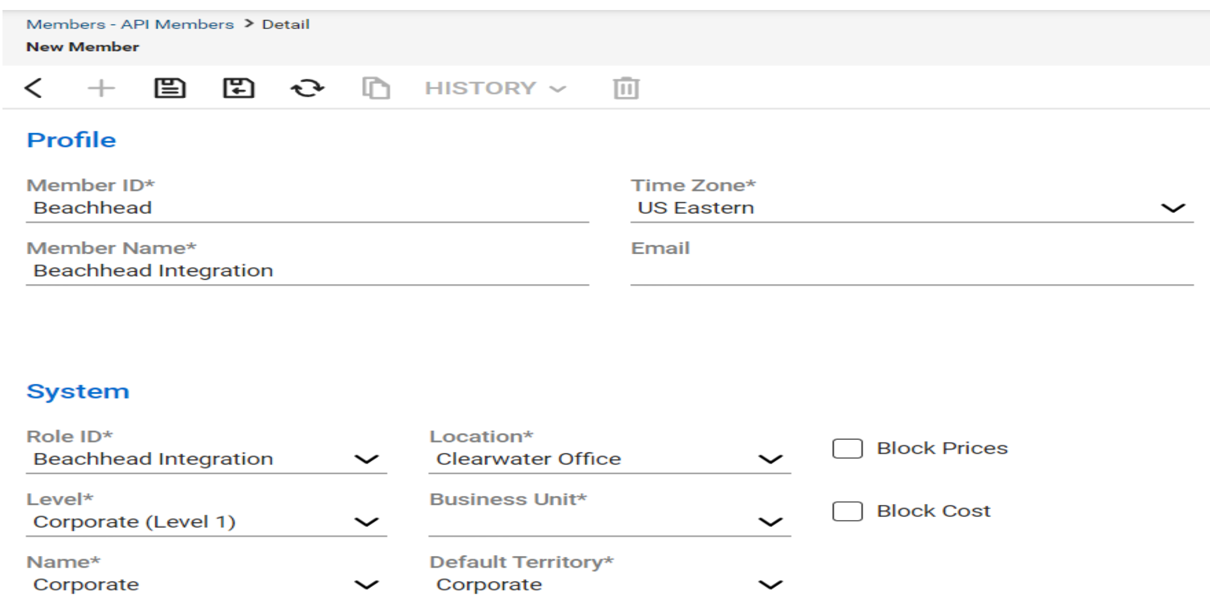
	Add Level	Edit Level	Delete Level	Inquire Level
System				
Add Licenses	None	None	None	None
API Reports	None	None	None	None
Chat with ConnectWise Manage Support	None	None	None	None
ConnectWise Manage Labs	None	None	None	None
ConnectWise Next	None	None	None	None
ConnectWise Now	None	None	None	None
Custom 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)	None	None	None	None
Marketplace Sharing	None	None	None	None
Mass Maintenance (customize)	None	None	None	None
Member Maintenance	None	None	None	None
Member Maintenance - Finance	None	None	None	None
My Account (customize)	None	None	None	None
My Company	None	None	None	None
Report Writer	None	None	None	None
Security Roles	None	None	None	All
System Reports (customize)	None	None	None	None
Table Setup (customize)	None	None	None	All

2. Generate an API Key

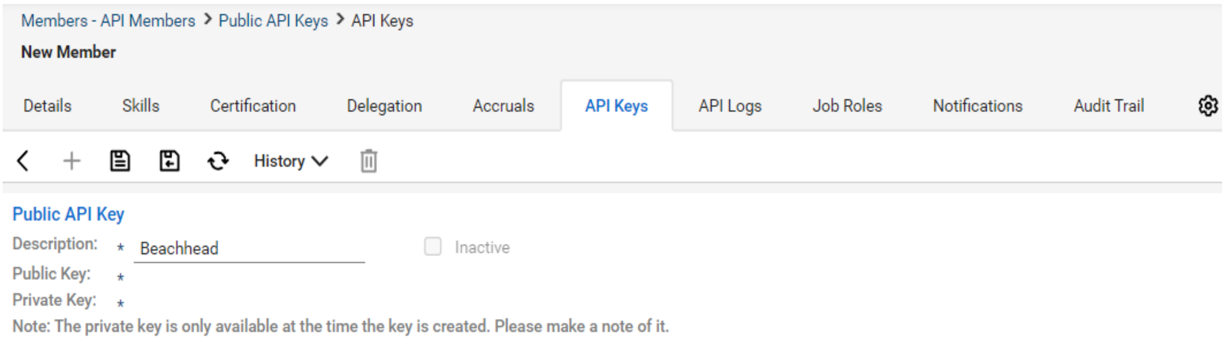
- Navigate to **System > Members > API Members** and click the "+" button to add a new API member.



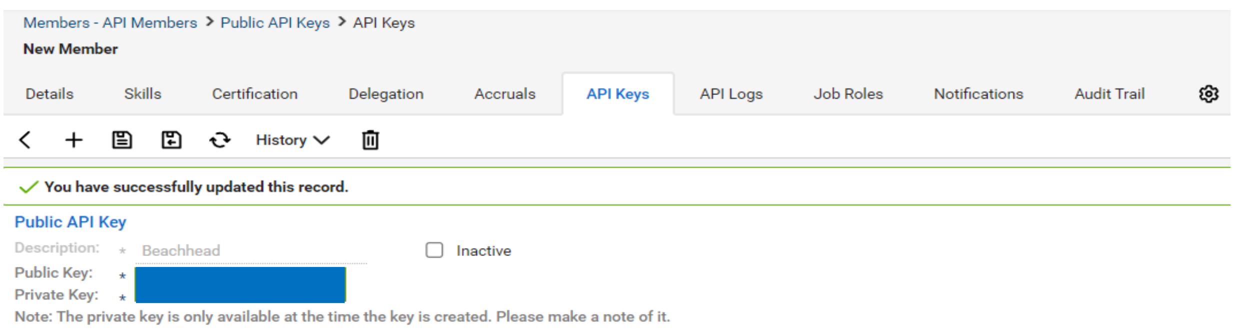
- Under the **Profile** section fill in the **Member ID** and **Member Name** fields.
- Under the **System** section select the **Role Id** that you just created and select a **Business Unit**.
- Then save the member details.



- Select the **API Keys** tab, click “+” to generate a new API key, enter a description, and save.



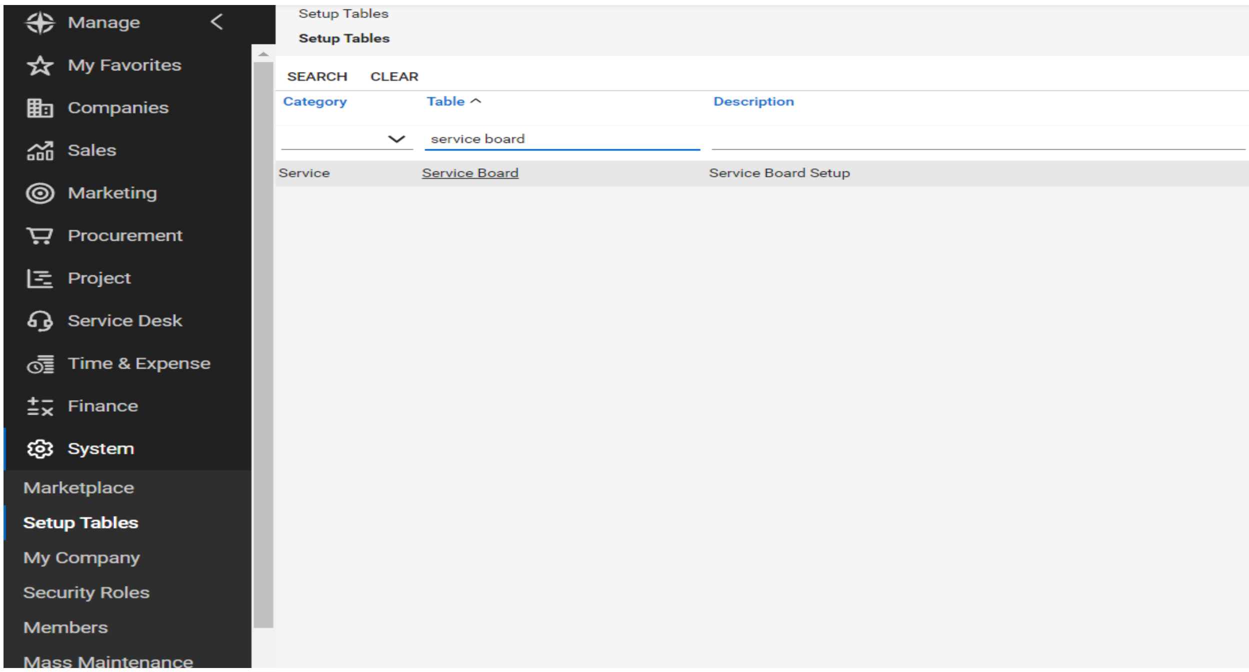
- Select the **API Keys** tab, click “+” to generate a new API key, enter a description, and save.
- **Note:** Save the public key and Private key in a secure location. The Private key will no longer be accessible after leaving the page. The private key will be used in the integration setup.



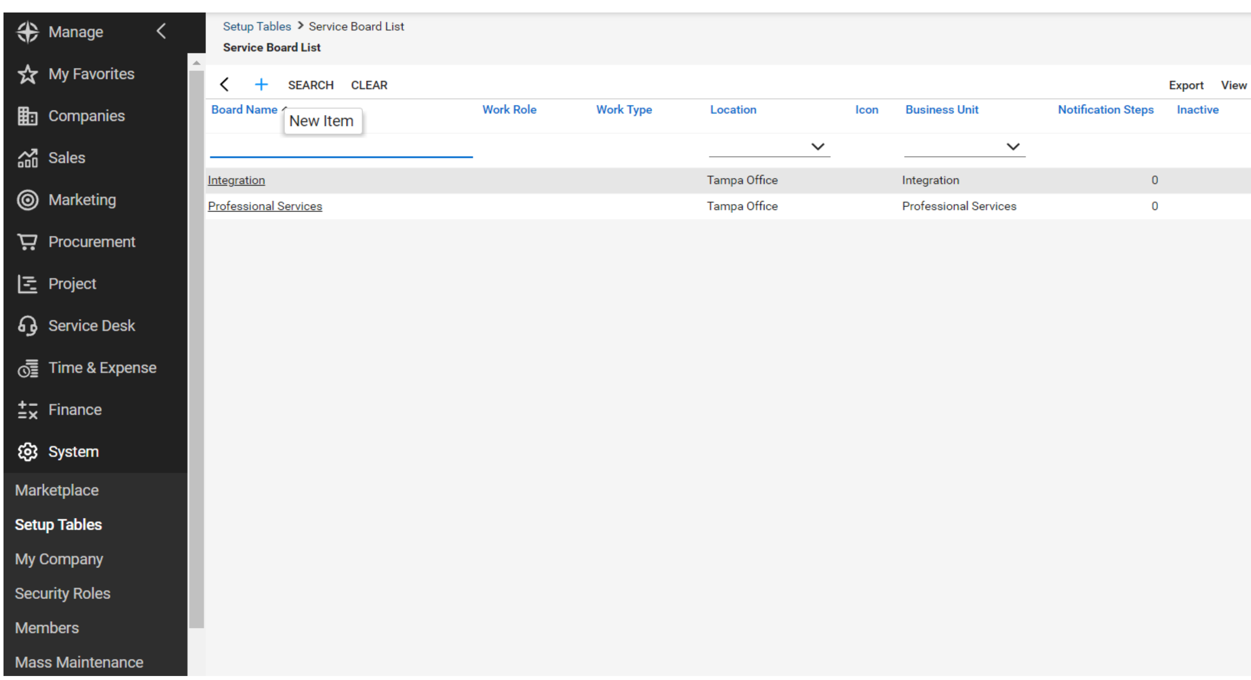
- If you don't already have a service board configured for your tickets, you can add a board by following the instructions below.

3. Set up a Service Board.

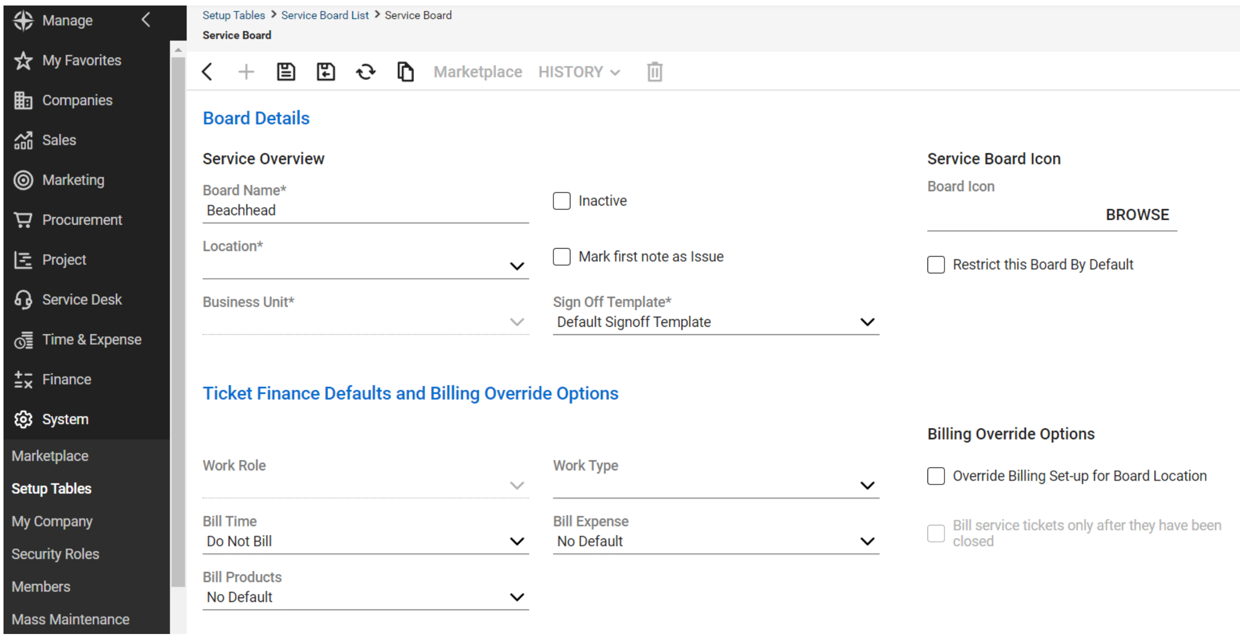
- Navigate to **System > Setup Tables** under the table column enter Service Board and hit enter. Click the **Service Board** link and a list of Service Boards should appear.



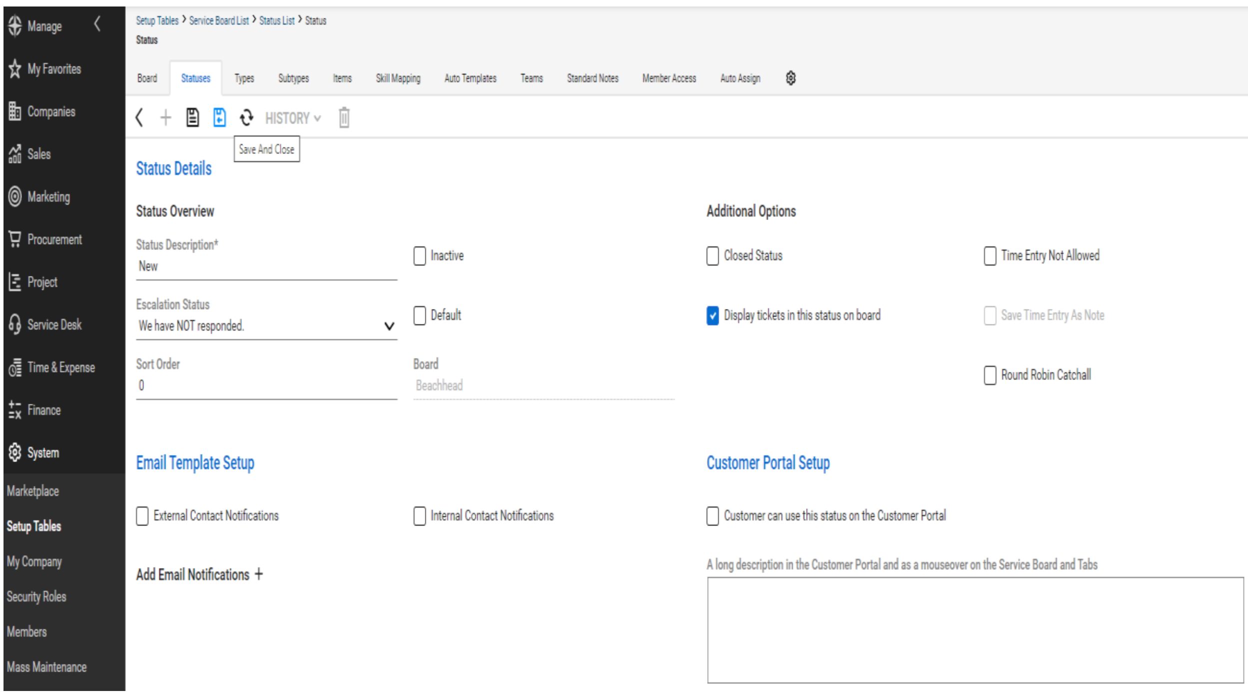
- Click the "+" button to create a new Service Board.



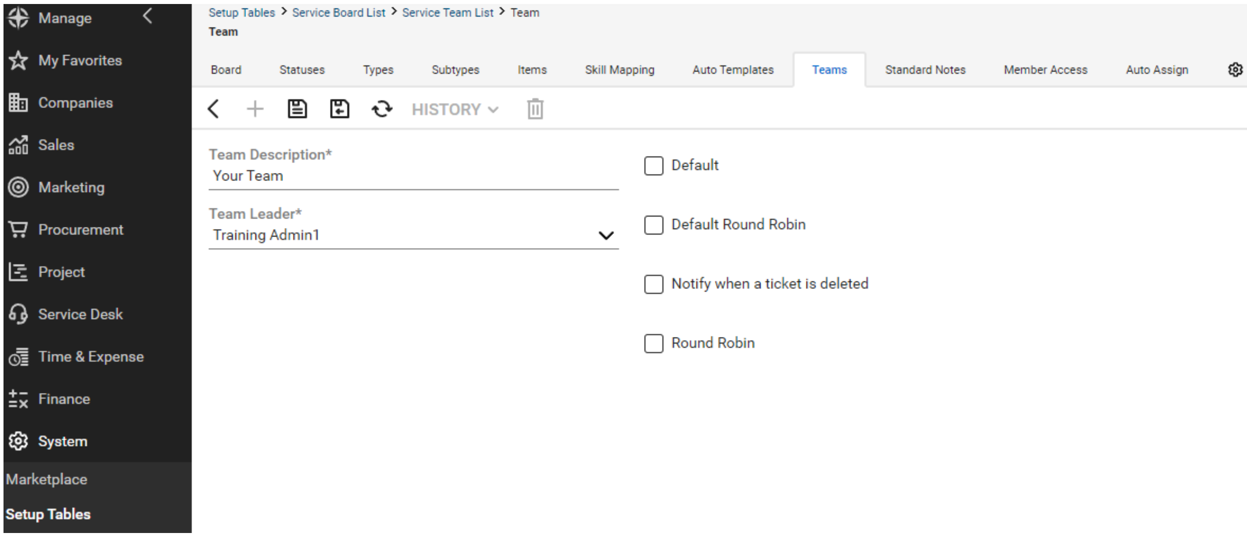
- Under **Board Details** enter a name for the service board, select a location, business unit, and a signoff template.
- Under **Ticket Finance Defaults and Billing Override Options** if you do not want billing incorporated with the service board under **Bill Time** select “Do not Bill” and Under **Billing Expense** select “no default.”
- Select Save.



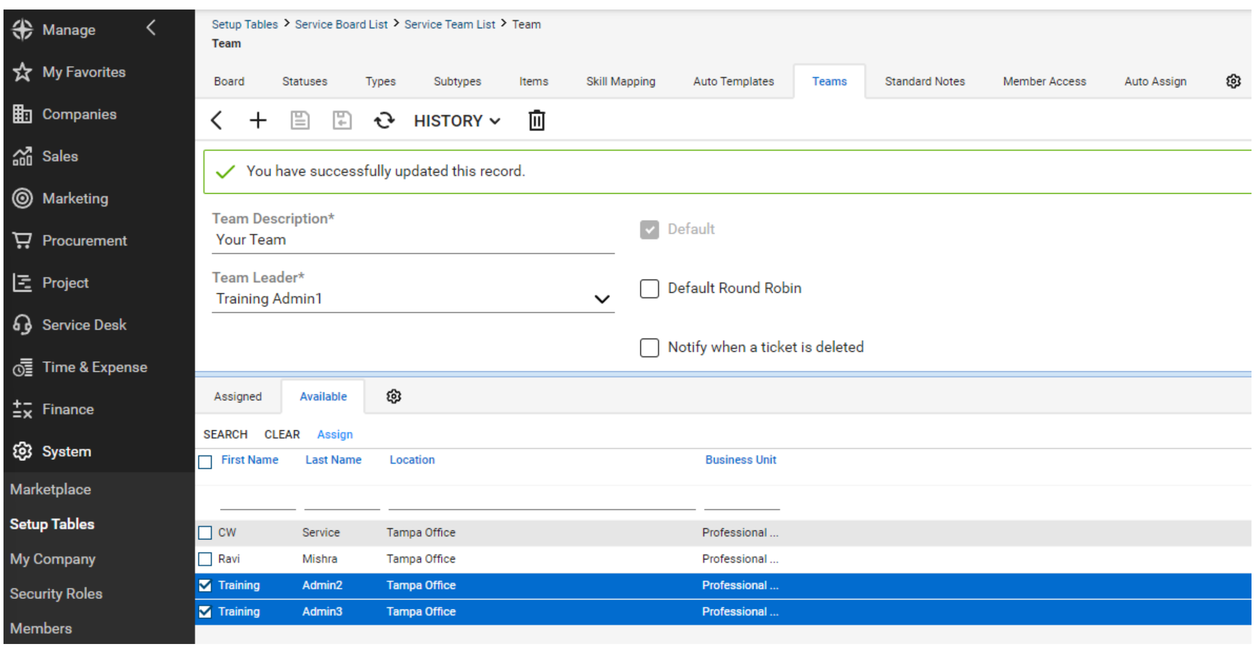
- To properly Setup a service board you will have to create statuses for your tickets and assign a team to the service board.
- First create a status by selecting the **Statuses** tab click the "+" icon to create a new status.
- Enter in a description that you want for the status, Escalation Status, and ensure "Display Tickets in this Status on board" is selected.
- Select Save and Close. Repeat the process to create all the statuses you will need for your service board.



- Then create a team by selecting the **Teams** tab click the “+” icon to create a new team.
- Enter in a description and assign a team leader then click the save icon.
- Once you save you will be able to assign members to the team. Select the **Available** tab.



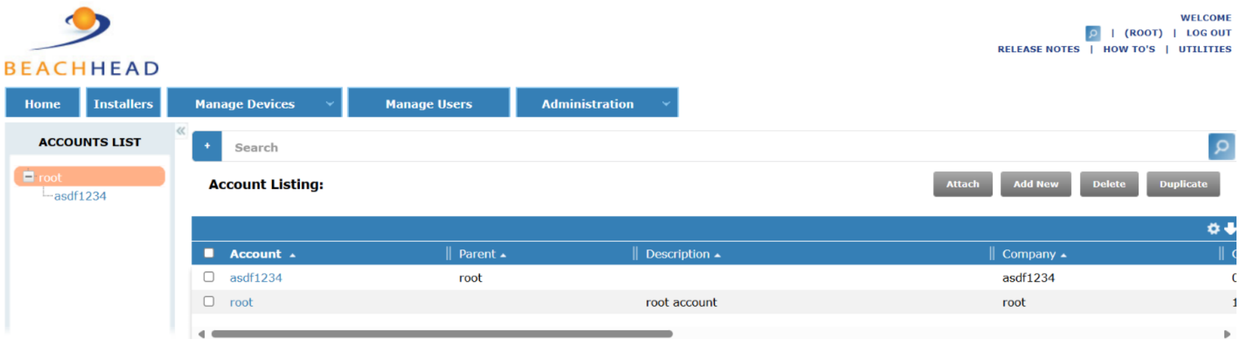
- Then select the members you want to add to the team and click the **Assign button**.
- Select **Save and Close** icon and your service board Setup is complete.



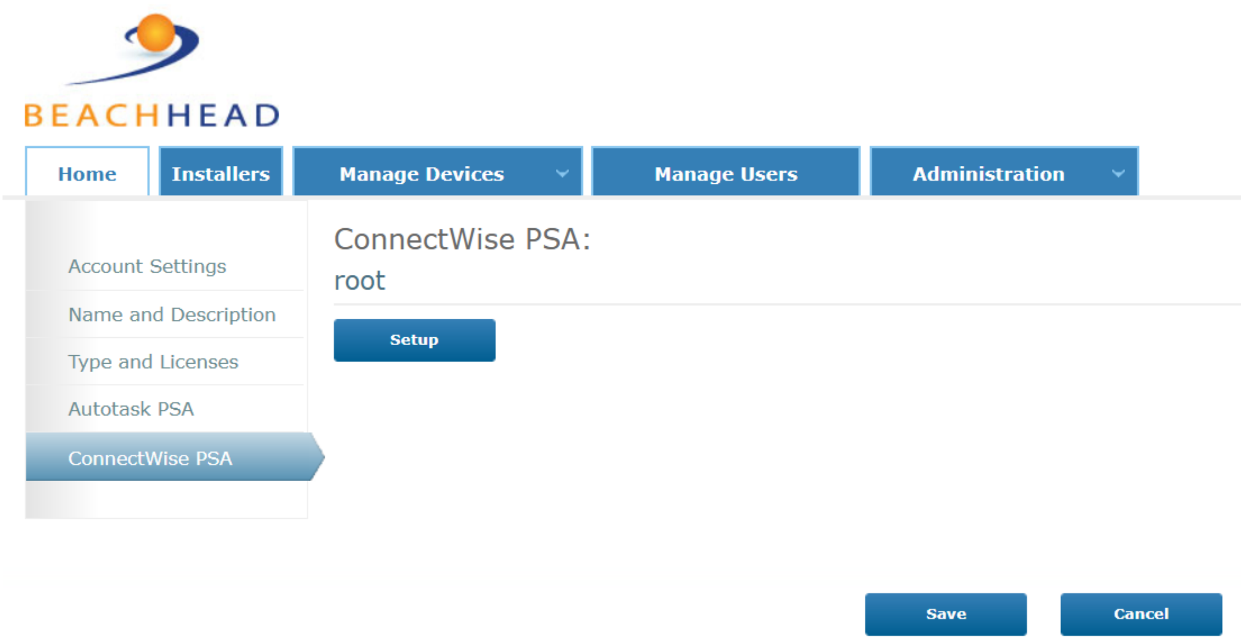
- Now you have all you need to set up the ConnectWise PSA^{TM} Integration on BeachheadSecure.

4. Set Up the ConnectWise PSA™ Integration on Beachhead Solutions.

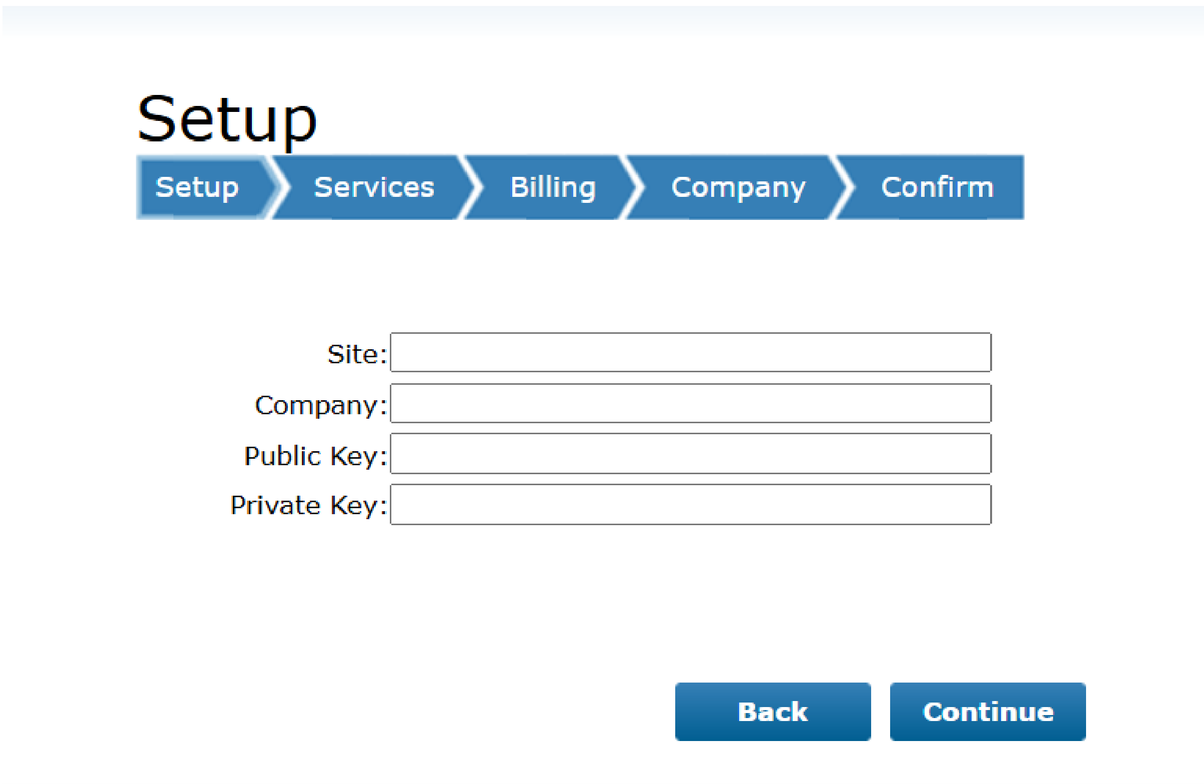
- On Beachhead Solutions navigate to **Administration** > **Accounts**. Click on the root account for your company.



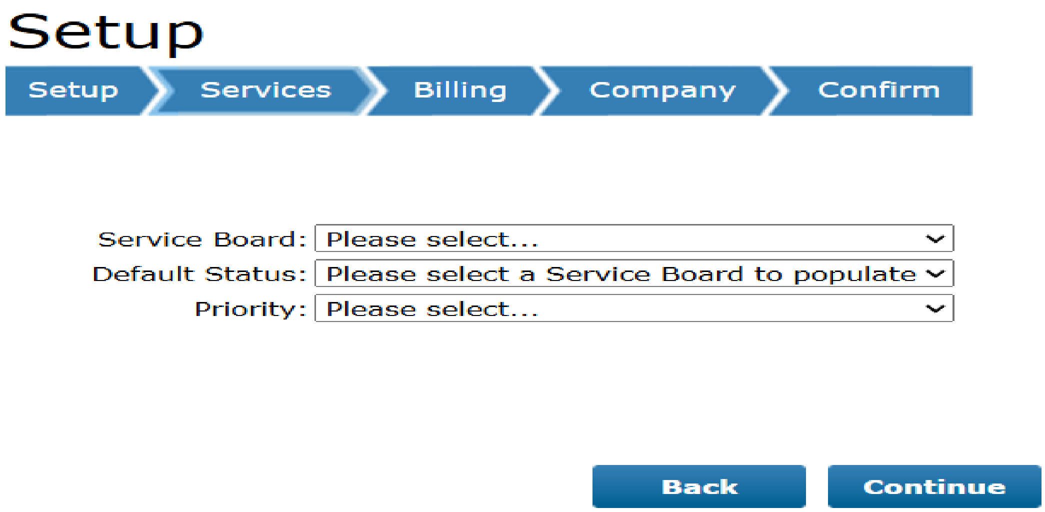
- Select the **ConnectWise PSA** tab then click the **Setup** button.



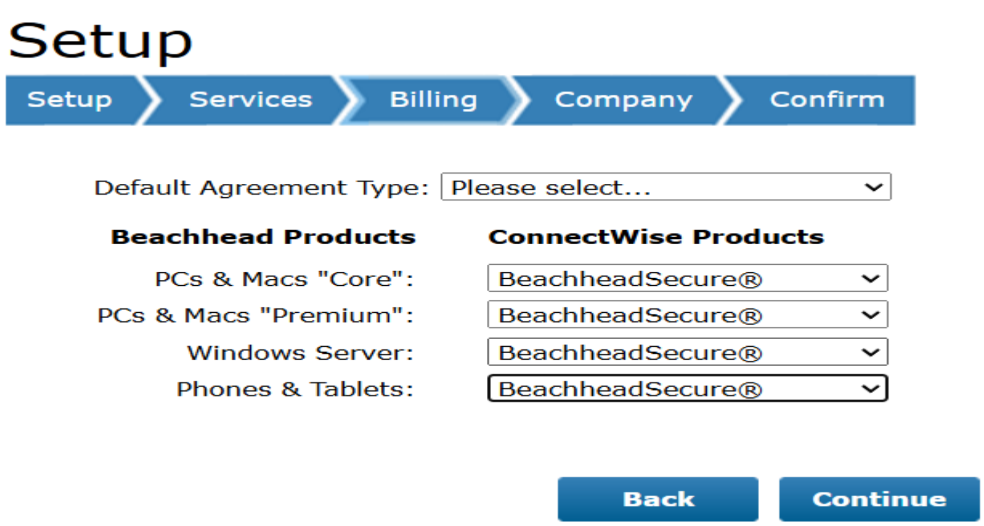
- Enter your ConnectWise PSA™ Site URL, Company ID, Public Key, and Private Key into the respective fields.
- For the Site URL if you are logging in to ConnectWise PSA™ through this link https://na.myconnectwise.net/, enter "https://na.myconnectwise.net" in the Site field.
- Click the continue button, this will test the connection. If any information is inaccurate an error message will display in red and you will not be able to continue until you fill in the correct information. Ensure your information is correct and click continue again to proceed to the Services section of the setup.



- Select the **Service Board**, a **Default Status**, and a **Priority** that your company will be using for the integration.
- The Default Status and Priority will be the status and priority applied to new tickets in the selected Service Board.For more information on setting up a service board visit [ConnectWise University]

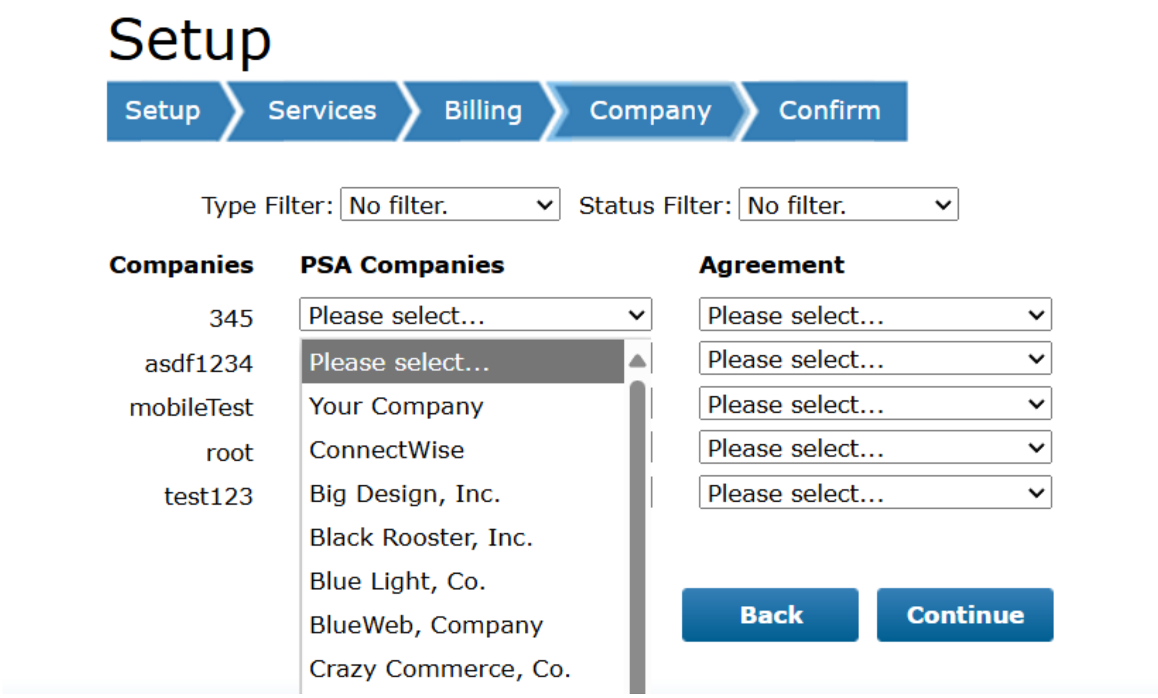


- Select the **Default Agreement Type** of your company's Agreement within ConnectWise PSA™.
- Select the **ConnectWise PSA™ Products** that you desire for the respective Beachhead Licenses. These products will be added as an addition to your agreement that Beachhead will update the Agreement Monthly with ConnectWise PSA™.
- Once you have mapped your Beachhead Licenses to the ConnectWise PSA™ Products click continue to head to the Company Mapping.

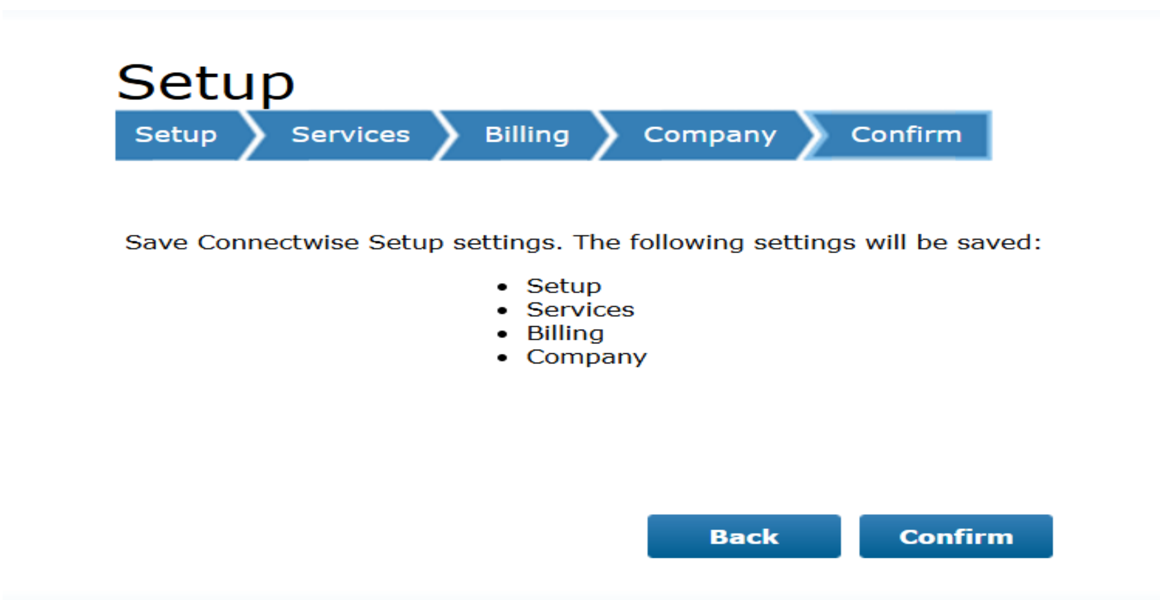


- There is a Type Filter and Status Filter that will filter the PSA companies to help you find the company.

- For each of your accounts in Beachhead select the respective ConnectWise PSA™ Company.
- For each account select the Agreement associated with the ConnectWise PSA™ Company selected.
- Select continue to head to the confirm tab.



- Select Confirm to complete the ConnectWise PSA™ Integration setup.



- Confirm all settings were saved and select “ok”. Setup Complete.