



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:

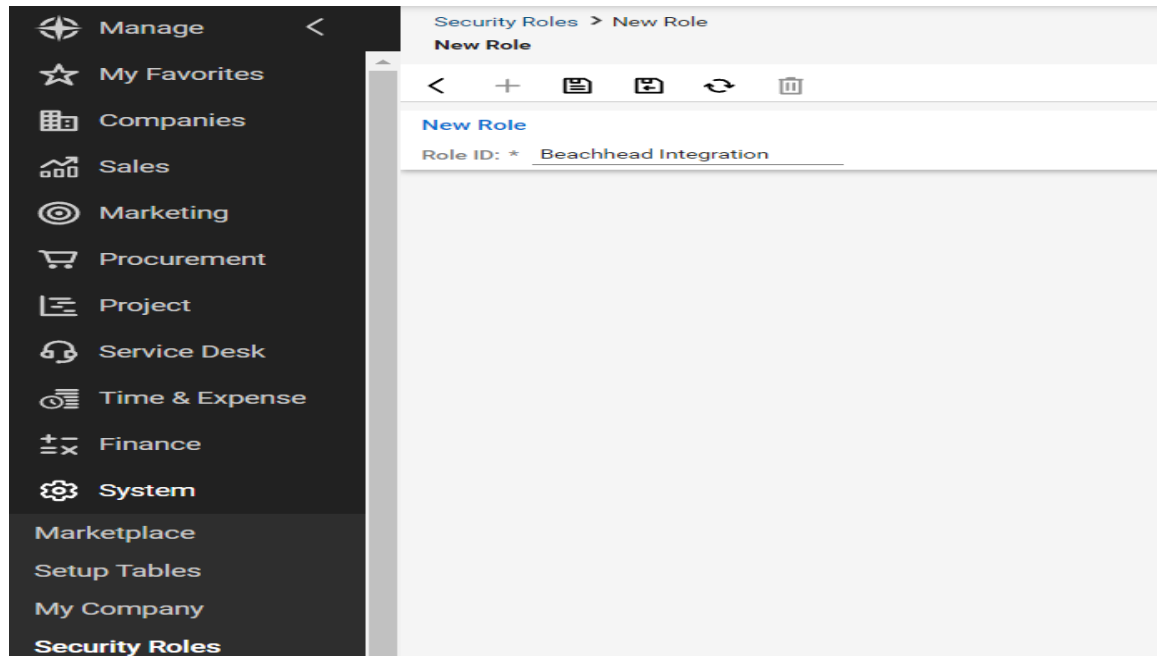
1. **Create a Security Role for Beachhead Solutions Integration.**

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**.

Security Roles			
Security Roles			
	SEARCH	CLEAR	
+	Actions		
☐ Name ^	Last Update	Updated By	Type
	All		Member
☐ Admin	5/12/23	MPX_9428	Member
☐ api	3/20/25	admin1	Member
☐ Engineer	5/12/23	MPX_9428	Member
☐ Executive	5/12/23	MPX_9428	Member
☐ Finance	5/12/23	MPX_9428	Member
☐ Manager	5/12/23	MPX_9428	Member
☐ Sales	5/12/23	MPX_9428	Member
☐ Subcontractor	5/12/23	MPX_9428	Member

- 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**.

<	+				History ▾			
▾		Add Level	Edit Level	Delete Level	Inquire Level			
▾ Companies								
Company Maintenance	None	▾	None	▾	None	▾	All	▾
Company/Contact Group Maintenance	None	▾	None	▾	None	▾	None	▾
Configuration - Display Passwords	None	▾	None	▾	None	▾	None	▾
Configurations (customize)	None	▾	None	▾	None	▾	None	▾
Contacts	None	▾	None	▾	None	▾	None	▾
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	▾	None	▾
Surveys	None	▾	None	▾	None	▾	None	▾
Team Members	None	▾	None	▾	None	▾	None	▾
Tracks	None	▾	None	▾	None	▾	None	▾
UserCentric	None	▾	None	▾	None	▾	None	▾

- 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**.

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

- 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.

✓ You have successfully updated this record.								
▼	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.

Members - API Members				
Licensing: Regular (4 active/99 licensed), Mobile (1 active/99 licensed), StreamlineIT (0 active), Subcontractor(0 active)				
Regular	StreamlineIT	Subcontractors	API Members	API Keys API Callbacks 
+ SEARCH CLEAR RESYNC KEYS				
Member ID	Member Name	Location	Role ID	Inactive
				All
BeachheadSecure		Tampa Office	api	
labtech	LabTech Software	Clearwater Office		✓
quosal	Quosal API	Clearwater Office		✓
screenconnect	ScreenConnect API	Clearwater Office		✓

- 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.

Members - API Members > Detail			
New Member			
< +     HISTORY 			
Profile			
Member ID*	Time Zone*		
Beachhead	US Eastern		
Member Name*	Email		
Beachhead Integration			
System			
Role ID*	Location*		
Beachhead Integration	Clearwater Office	☐ Block Prices	
Level*	Business Unit*		
Corporate (Level 1)		☐ Block Cost	
Name*	Default Territory*		
Corporate	Corporate		

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

Members - API Members > Public API Keys > API Keys

New Member

Details Skills Certification Delegation Accruals **API Keys** API Logs Job Roles Notifications Audit Trail ⚙️

< + 📄 📄 ↺ History ▾ 🗑️

Public API Key

Description: * Beachhead ☐ Inactive

Public Key: *

Private Key: *

Note: The private key is only available at the time the key is created. Please make a note of it.

- 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.

Members - API Members > Public API Keys > API Keys

New Member

Details Skills Certification Delegation Accruals **API Keys** API Logs Job Roles Notifications Audit Trail ⚙️

< + 📄 📄 ↺ History ▾ 🗑️

✓ You have successfully updated this record.

Public API Key

Description: * Beachhead ☐ Inactive

Public Key: *

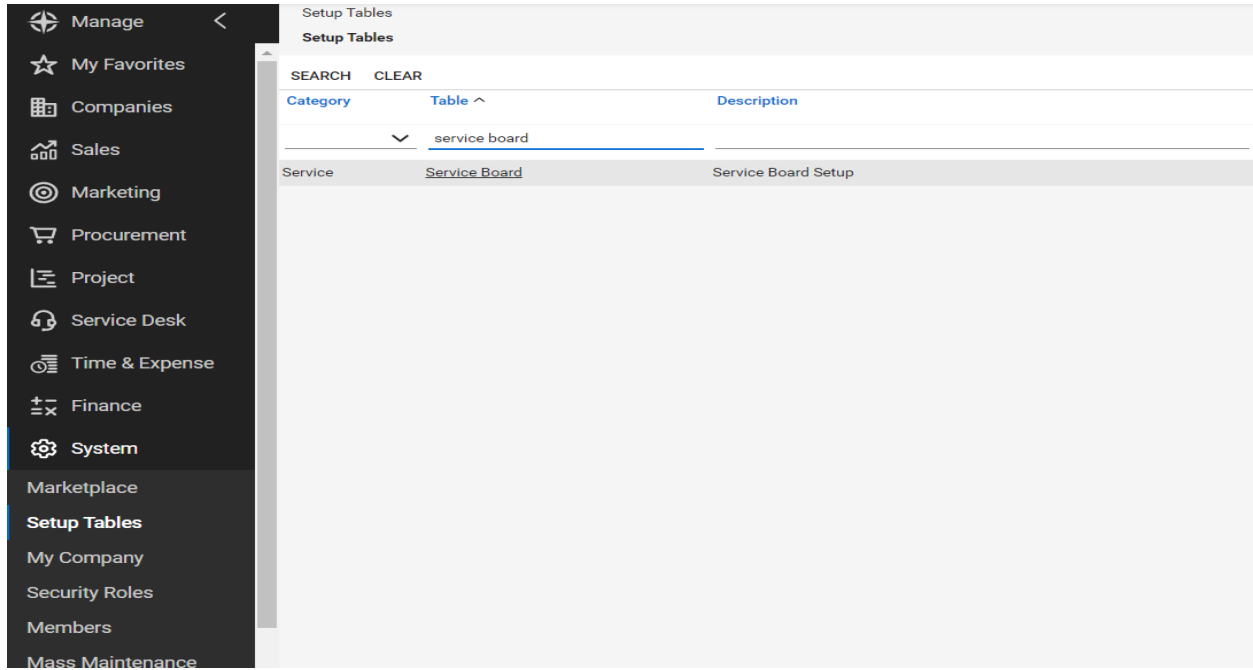
Private Key: *

Note: The private key is only available at the time the key is created. Please make a note of it.

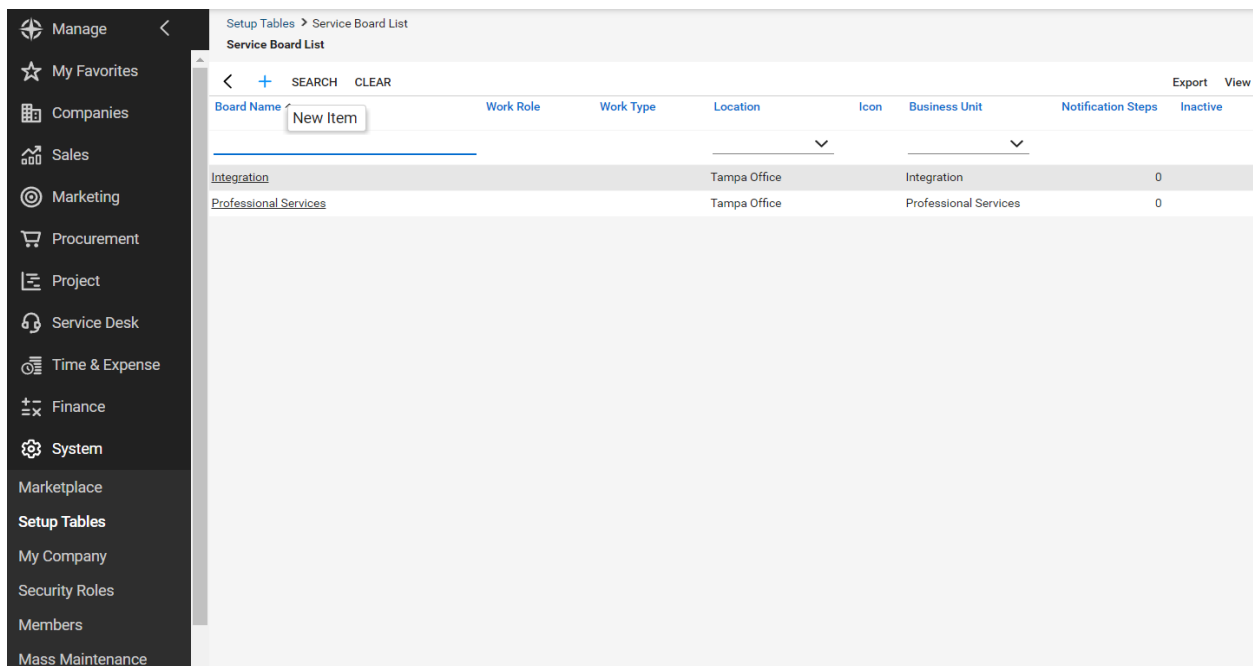
- If you don't already have a service board configured for your tickets, you can add a board by following the instructions below.

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.

Manage

My Favorites

Companies

Sales

Marketing

Procurement

Project

Service Desk

Time & Expense

Finance

System

Marketplace

Setup Tables

My Company

Security Roles

Members

Mass Maintenance

Setup Tables > Service Board List > Service Board

Service Board

<

+

Marketplace

HISTORY

Board Details

Service Overview

Board Name*

Beachhead

☐ Inactive

Location*

☐ Mark first note as Issue

Business Unit*

Sign Off Template*

Default Signoff Template

Service Board Icon

Board Icon

BROWSE

☐ Restrict this Board By Default

Ticket Finance Defaults and Billing Override Options

Work Role

Work Type

Bill Time

Do Not Bill

Bill Expense

No Default

Bill Products

No Default

Billing Override Options

☐ Override Billing Set-up for Board Location

☐ Bill service tickets only after they have been closed

- 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.

Manage

My Favorites

Companies

Sales

Marketing

Procurement

Project

Service Desk

Time & Expense

Finance

System

Marketplace

Setup Tables

My Company

Security Roles

Members

Mass Maintenance

Setup Tables > Service Board List > Status List > Status

Status

Board

Statuses

Types

Subtypes

Items

Skill Mapping

Auto Templates

Teams

Standard Notes

Member Access

Auto Assign

HISTORY

Save And Close

Status Details

Status Overview

Status Description*

New

☐ Inactive

Escalation Status

We have NOT responded.

☐ Default

Sort Order

0

Board

Beachhead

Additional Options

☐ Closed Status

☐ Time Entry Not Allowed

☒ Display tickets in this status on board

☐ Save Time Entry As Note

☐ Round Robin Catchall

Email Template Setup

☐ External Contact Notifications

☐ Internal Contact Notifications

Add Email Notifications +

Customer Portal Setup

☐ Customer can use this status on the Customer Portal

A long description in the Customer Portal and as a mouseover on the Service Board and Tabs

- 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.

Setup Tables > Service Board List > Service Team List > Team

Team

Board Statuses Types Subtypes Items Skill Mapping Auto Templates **Teams** Standard Notes Member Access Auto Assign

< + [Save] [Cancel] [Refresh] HISTORY [Trash]

Team Description*
Your Team ☐ Default

Team Leader*
Training Admin1 ☐ Default Round Robin

☐ Notify when a ticket is deleted

☐ Round Robin

- 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.

Setup Tables > Service Board List > Service Team List > Team

Team

Board Statuses Types Subtypes Items Skill Mapping Auto Templates **Teams** Standard Notes Member Access Auto Assign

< + [Save] [Cancel] [Refresh] HISTORY [Trash]

✓ You have successfully updated this record.

Team Description*
Your Team ☒ Default

Team Leader*
Training Admin1 ☐ Default Round Robin

☐ Notify when a ticket is deleted

Assigned **Available** [Settings]

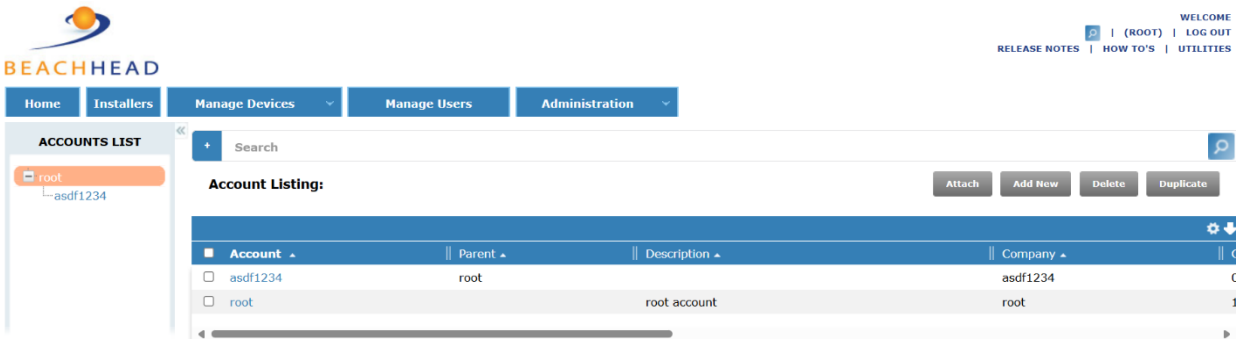
SEARCH CLEAR Assign

☐	First Name	Last Name	Location	Business Unit
☐	CW	Service	Tampa Office	Professional ...
☐	Ravi	Mishra	Tampa Office	Professional ...
☒	Training	Admin2	Tampa Office	Professional ...
☒	Training	Admin3	Tampa Office	Professional ...

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

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

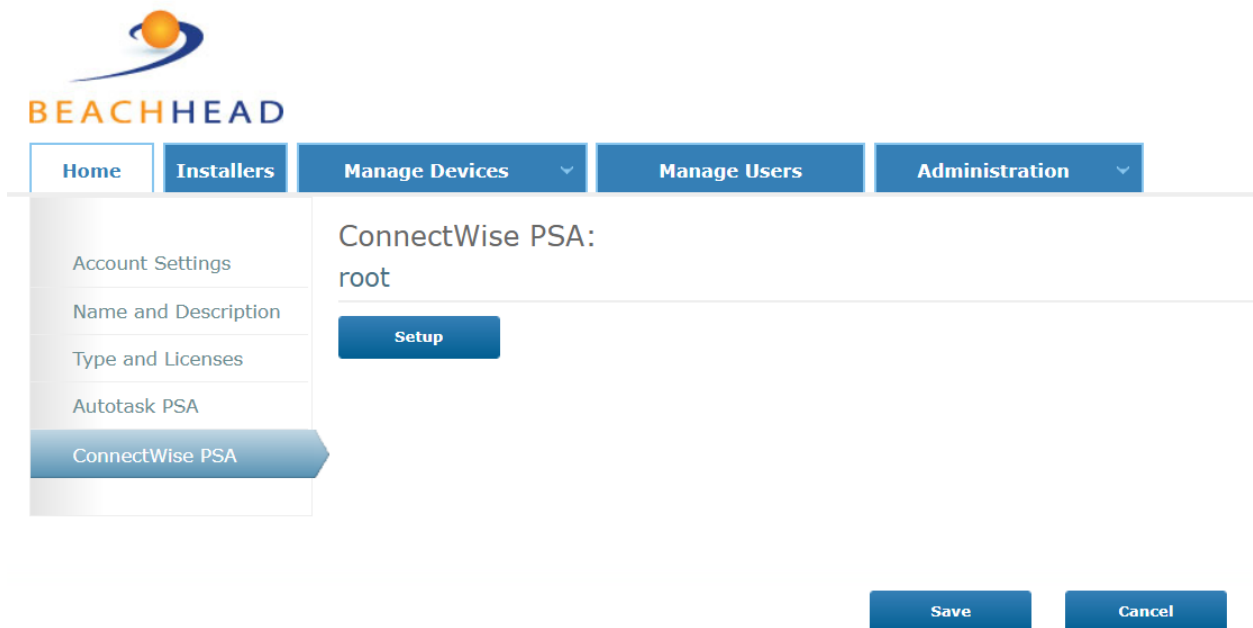
- On Beachhead Solutions navigate to **Administration > Accounts**. Click on the root account for your company.



The screenshot shows the Beachhead web application interface. The top navigation bar includes the Beachhead logo, a user profile icon, and links for (ROOT), LOG OUT, RELEASE NOTES, HOW TO'S, and UTILITIES. Below the navigation bar are tabs for Home, Installers, Manage Devices, Manage Users, and Administration. The left sidebar shows the ACCOUNTS LIST with a tree view containing 'root' and 'asdf1234'. The main content area displays the 'Account Listing' table with columns for Account, Parent, Description, and Company. The table lists two accounts: 'asdf1234' (parent: root, company: asdf1234) and 'root' (parent: root, company: root). Action buttons (Attach, Add New, Delete, Duplicate) are visible above the table.

Account	Parent	Description	Company
asdf1234	root		asdf1234
root	root	root account	root

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



The screenshot shows the Beachhead web application interface with the 'Administration' tab selected. The left sidebar shows a list of settings: Account Settings, Name and Description, Type and Licenses, Autotask PSA, and ConnectWise PSA (which is highlighted). The main content area displays the 'ConnectWise PSA' setup page for the 'root' account. A 'Setup' button is visible. At the bottom right, there are 'Save' and 'Cancel' buttons.

ConnectWise PSA:
root

Setup

Save Cancel

- 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.

Setup

Setup

Services

Billing

Company

Confirm

Site:

Company:

Public Key:

Private Key:

Back

Continue

- 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](#)

Setup



Service Board:

Default Status:

Priority:



- 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.

Setup



Default Agreement Type:

Beachhead Products	ConnectWise Products
PCs & Macs "Core":	BeachheadSecure@
PCs & Macs "Premium":	BeachheadSecure@
Windows Server:	BeachheadSecure@
Phones & Tablets:	BeachheadSecure@



- 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.

Setup

Setup

Services

Billing

Company

Confirm

Type Filter: Status Filter:

Companies	PSA Companies	Agreement
345	Please select...	Please select...
asdf1234	Please select...	Please select...
mobileTest	Your Company	Please select...
root	ConnectWise	Please select...
test123	Big Design, Inc.	Please select...
	Black Rooster, Inc.	
	Blue Light, Co.	
	BlueWeb, Company	
	Crazy Commerce, Co.	

Back

Continue

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

Setup

Setup

Services

Billing

Company

Confirm

Save Connectwise Setup settings. The following settings will be saved:

- Setup
- Services
- Billing
- Company

Back

Confirm

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

ConnectWise PSA Setup Complete:

All settings were successfully saved.

ok