ConnectWise Manage Variable Invoice Integration

This integration gives you the ability to stay in the system you use every day and pass invoice charges from ConnectWise to GreatAmerica through an invoice status. Take advantage of ConnectWise management of variable charges and GreatAmerica's ability to bill and collect on your behalf giving your customer's a one invoice solution.

Note: *Below the instructions, you will find pictures to correlate with the instructions*.

Obtaining your API Keys

All new integration users must set up an API member in order to generate the necessary API Keys. However, you only need to have one GreatAmerica API member to use any of our ConnectWise integrations. Before you create a new one, look to see if you already have a GreatAmerica API member set up. If you do, skip to the next steps section and contact your GreatAmerica Strategic Technology team. integrations@greatamerica.com

Note: *If you have already setup permissions for another integration, you will need to amend the security permissions from this document into your previously created permissions.*

To set up a new API Member, you must first navigate to the System Module and open the Members page. After accessing the Members page, click on the API Members tab. The purpose of filling out this information is to receive the public and private keys that are generated as a result of creating this member.

1. Open **ConnectWise Manage** > Expand **System** > Click **Security Roles** > Click the **+**
2. Name the role GreatAmerica. Click **Save and Back**.
3. Click into the new security role. Assign permissions based on the permissions starting on page 7 down below.
4. Expand **System** > Click **Members** > Click on the **API Members** tab.
5. Click the **+** next to **Search** & **Clear** to create a new **Member ID**. Once filled out, click **Save**.
    a. **Member ID** = GreatAmerica
    b. **Member Name** = GreatAmerica (Does not really matter)
    c. **Role ID** = GreatAmerica (This is the recently created security role)
    d. **Level** = Corporate
    e. **NOTE**: There are more required fields, these are the only ones that we need filled out as described.
6. On the newly created GreatAmerica **Member ID**, click on the **API Keys** tab and hit the **+** to create a new **Public API Key**.
7. Type GreatAmerica into the **Description** field and click **Save**. This will generate your **Public** and **Private Keys**. Do not leave this page. You will need to copy and paste the keys into the **GreatAmerica Integrator Setup Page** in the next section.

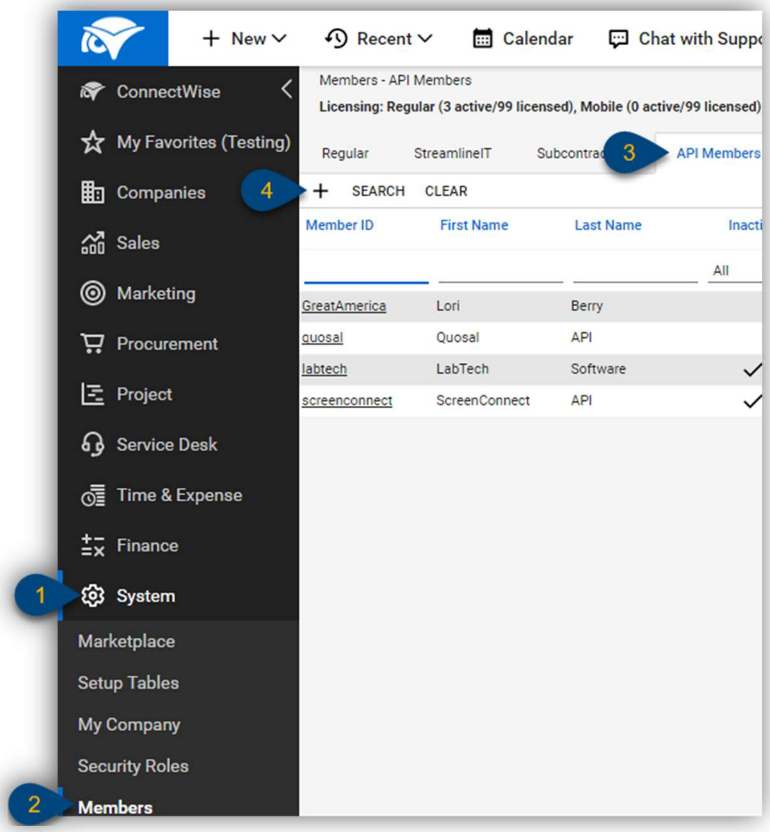
GreatAmerica Integrator Setup

1. Go to the **GreatAmerica Integrator Setup Page** here: https://www.info-zone.com/_layouts/InfoZone.Open/cwadmin.aspx
2. Fill out your company information to connect the integration.
    a. Check the **Cloud-Based** box if you're using the cloud version of ConnectWise. The **Site URL** for the cloud can be found in the browser's address bar. If you're using the on-premise version of ConnectWise, the URL can be found in the ConnectWise login screen.
    b. Enter your ConnectWise **Company** Name and copy and paste your **Public** and **Private Keys** from ConnectWise.
    c. Click on **Test Connection**
    d. Once you've confirmed the connection is successful, provide the names and contact information for two of your team members that we can work with regarding this integration.
3. Check the box under **Invoice,** select the Invoice Status Name you created for GreatAmerica to pull from. Next, select a charge type or how you want the charges to appear on the invoice. Line Item Detail will show each line item that would show on your ConnectWise invoice. Single will bundle into a single line item. If single is chosen, you will also need to fill in what you want that bundled line item to have as a description for your customers. Lastly, click **Submit Settings**.

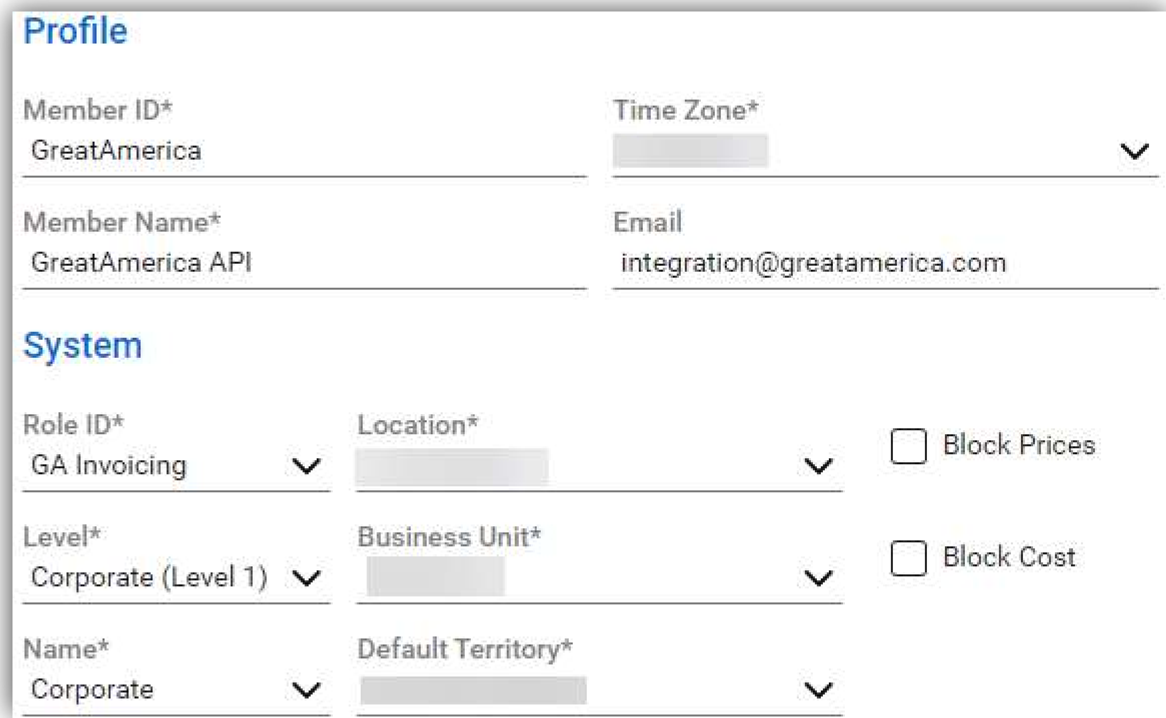
Congratulations! Next Steps to Expect:

You're almost done with the setup! GreatAmerica will get back to you shortly with a list of your contracts and instructions on where to enter the application ID, as well as ongoing use of the integration and best practices.

Obtaining your API Keys - Pictures

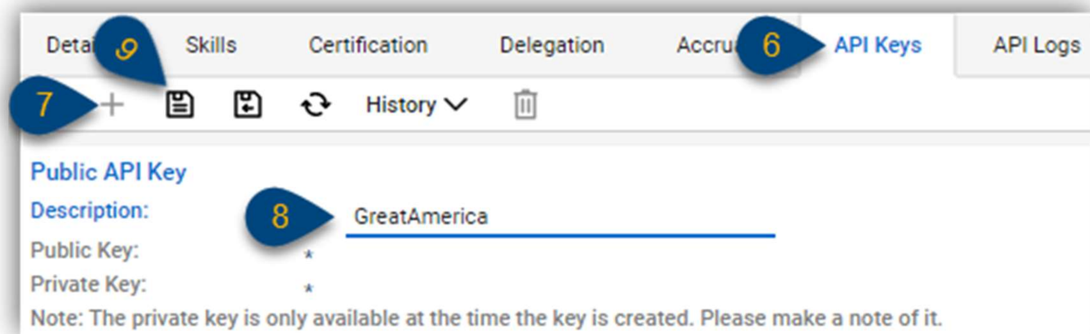


1. With **ConnectWise Manage** open, click **System**
2. Click **Members**
3. Click the **API Members** tab
4. Click the **+** to create a new API Member



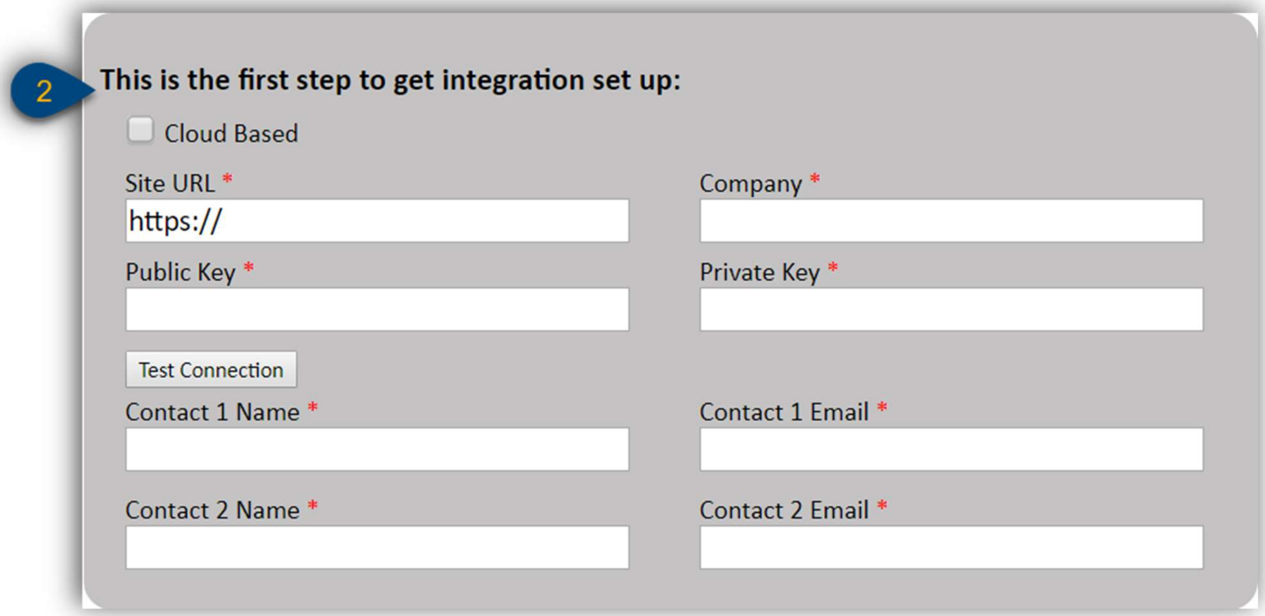
- **Member ID** = GreatAmerica
- **Member Name** = GreatAmerica API
- **Role ID** = GA Invoicing
- **Level** = Corporate

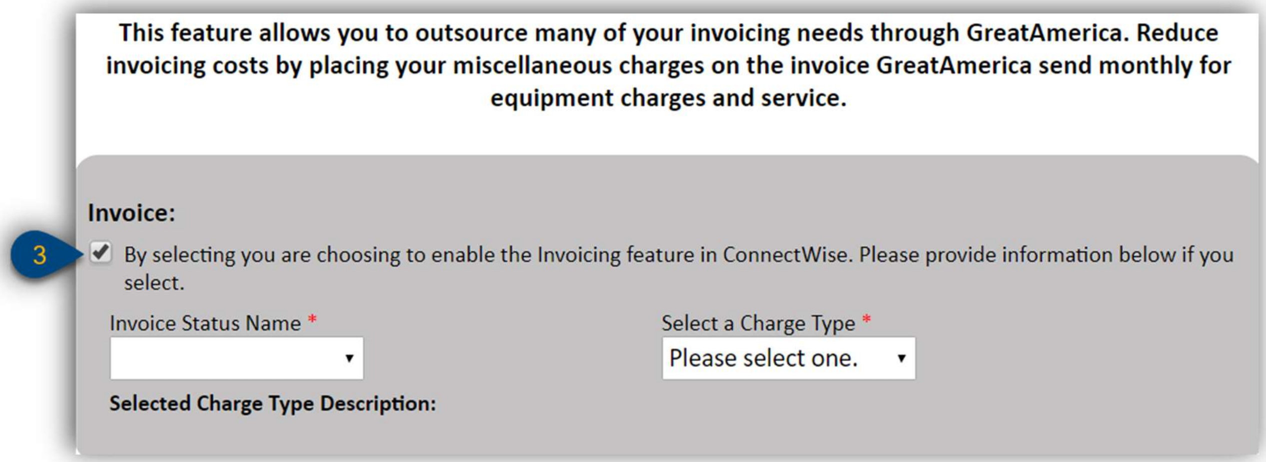
5. Click **Save**



6. Click the **API Keys** tab
7. Click the **+** to create a new API Key
8. Type GreatAmerica into the **Description** field
9. Click **Save**
10. **Stay on this screen while you follow the next page**

GreatAmerica Integrator Setup – Pictures





1. Go to the **GreatAmerica Integrator Setup Page** here: https://www.info-zone.com/_layouts/InfoZone.Open/cwadmin.aspx
2. Fill out your company information to connect the integration.
    a. Make sure you test the connection
3. Check the box under **Invoice**
    a. Select the **Invoice Status Name**
    b. Select a **Charge Type**

Security Modules for Role – GreatAmerica

Companies				
Company Maintenance	None	None	None	All
Contacts	None	None	None	All
Manage Attachments	None	None	None	All
Reports (customize)	None	None	None	All

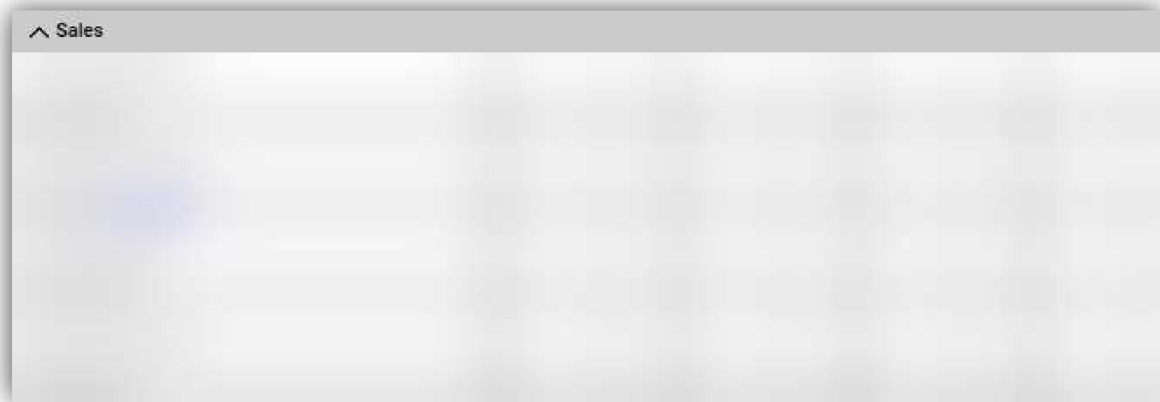
Finance				
Agreement Invoicing	None	None	None	All
Agreements (customize)	All	All	All	All
Company Finance	None	None	None	All
Invoicing	None	None	None	All
Reports (customize)	None	None	None	All

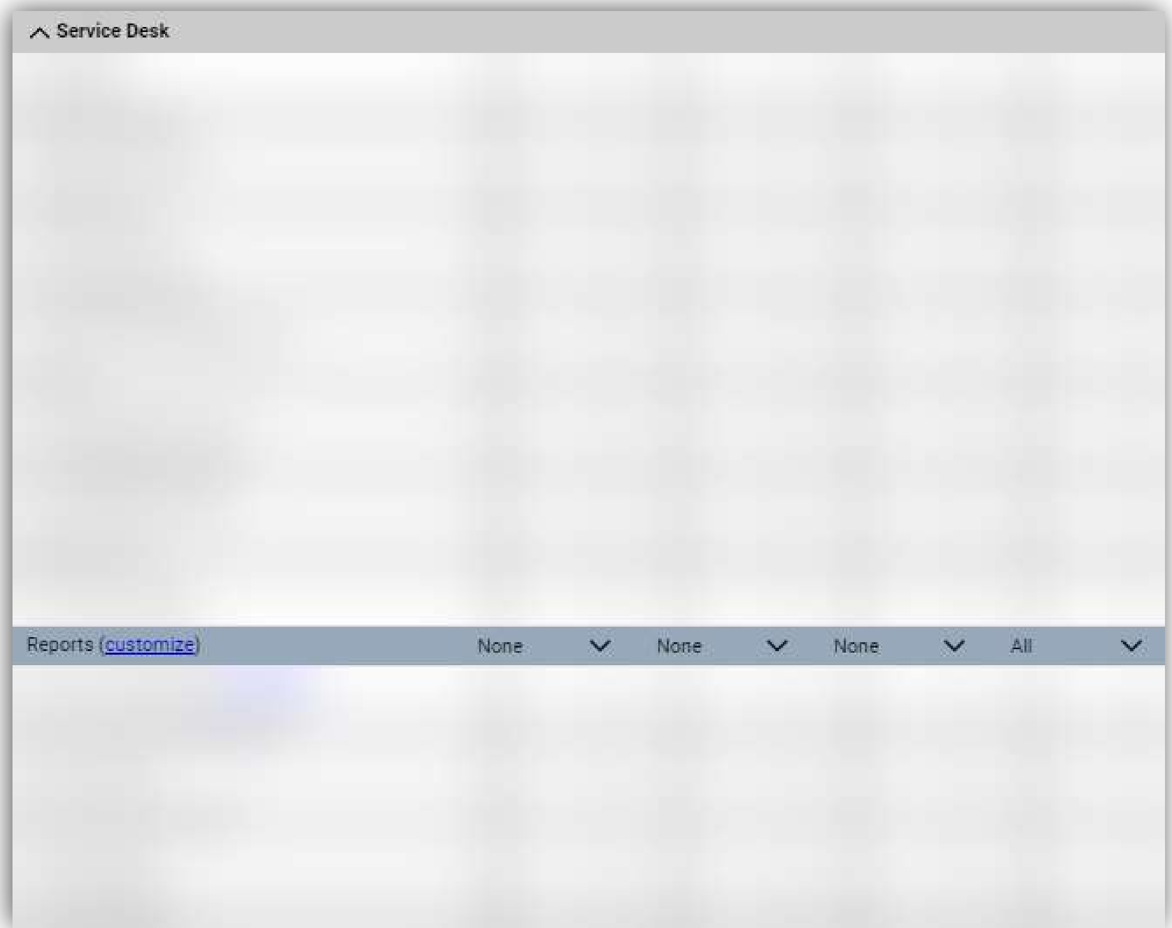
^ Marketing

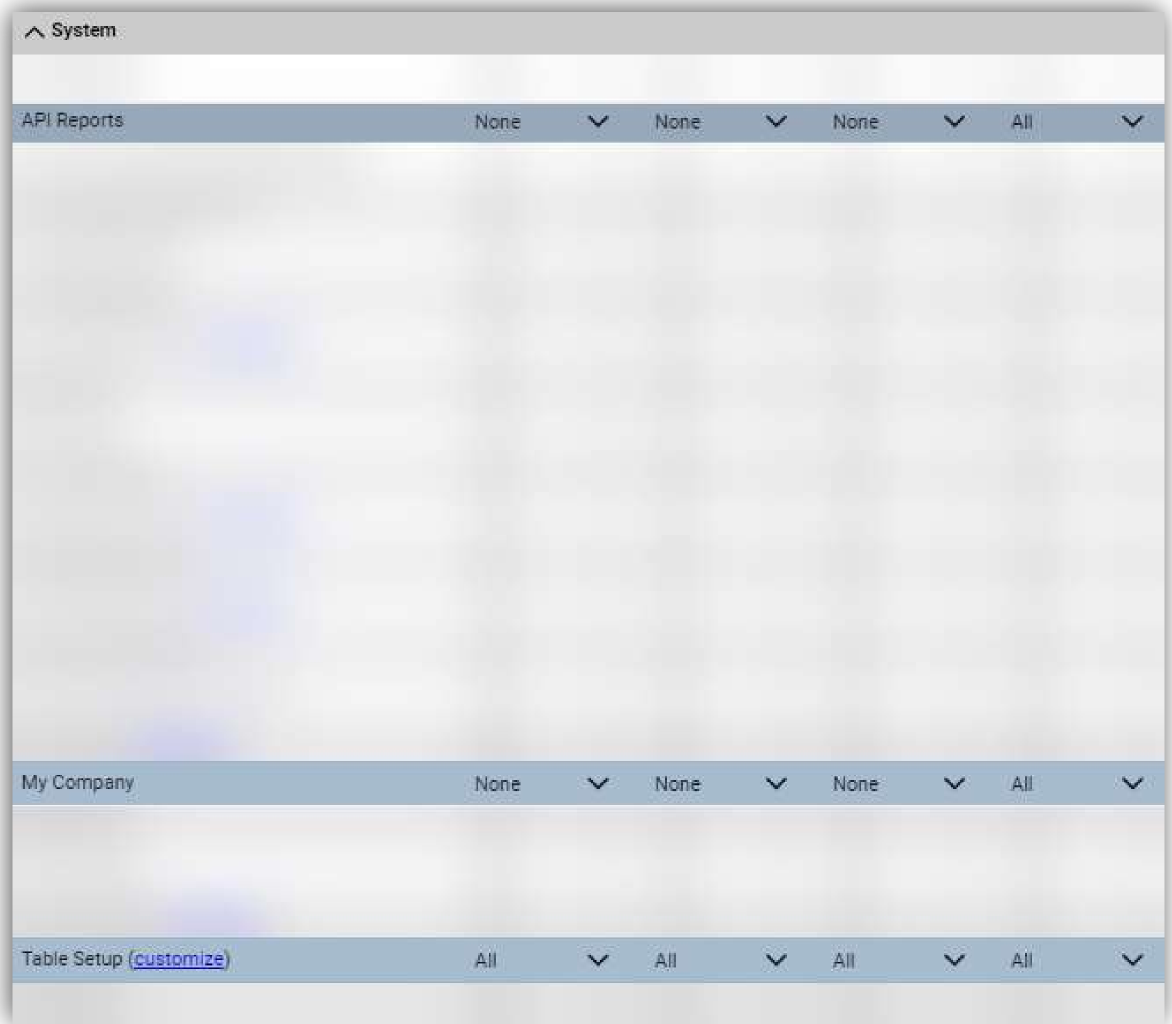
^ Procurement

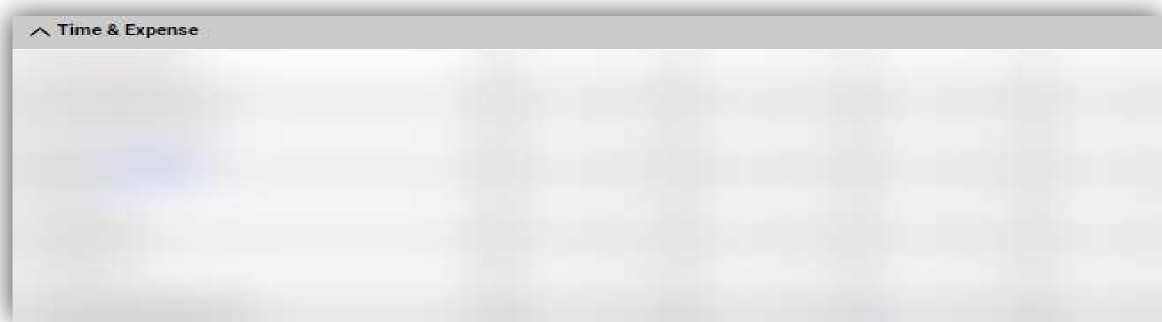
Product Catalog	None	None	None	All
Products	None	None	None	All
Reports (customize)	None	None	None	All

^ Project


Sales


Service Desk
Reports (customize)
None
None
None
All


System
API Reports None None None All
My Company None None None All
Table Setup (customize) All All All All


Time & Expense