



Lemhi Compass · Integration Guide

ConnectWise PSA Integration Guide

Push Compass tasks into ConnectWise PSA as service tickets. Set up the connection, map your clients, push and link tasks, and fix what goes wrong.

For MSP admins and vCIOs. Setup takes about 15 minutes with a ConnectWise PSA login with System access and a Lemhi tenant admin login.

Lemhi pushes Compass tasks into ConnectWise PSA as service tickets, so your technicians work them from the queue they already watch. Each pushed task shows its ticket number in Compass and opens the ticket in ConnectWise with one click. This guide covers setup in ConnectWise, connecting it to Lemhi, mapping your clients, and pushing work.

How the integration works

What it does	What it does not do
Creates a ConnectWise service ticket from one Compass task, or from a set of tasks	Create ConnectWise companies. Your companies must already exist in ConnectWise
Files the ticket under the client's ConnectWise company, on the service board you choose	Set the ticket's status, priority, type, assignee, or contact. Those follow your board and ConnectWise defaults
Puts a link back to the Compass task at the top of the ticket, so a technician can act without opening Lemhi	Change or delete your ConnectWise tickets. The one exception: linking an existing ticket adds a single note to it
Shows the ticket number and its current ConnectWise status on the Compass task	Complete the Compass task when the ticket closes. That is coming in a later release. For now, close the Compass task yourself
Links a Compass task to a ticket a technician already opened	Sync notes, time entries, or attachments

The integration works with **ConnectWise PSA** (the classic PSA REST API). ConnectWise Automate and the ConnectWise Asio platform are not part of it.

Which part do you need?

You are	What you do	Sections
The MSP admin setting this up (once)	Create the API member in ConnectWise, connect it in Lemhi, choose a default board, map your clients	Parts 1 to 3
A vCIO or account manager (ongoing)	Push Compass tasks to ConnectWise, link existing tickets, track where work went	Parts 4 to 6
Anyone, when something looks wrong	Find the symptom and the fix	Troubleshooting

Before you start

- ☐ **ConnectWise is turned on for your Lemhi account.** Lemhi turns the integration on for each partner, and it needs Compass. If you do not see an **Integrations** tab in Lemhi Settings, ask your Lemhi contact.
- ☐ **A ConnectWise PSA login with access to the System module** (security roles, members, and setup tables).
- ☐ **A Lemhi login with the Admin role.** Only an Admin can connect ConnectWise, choose the default board, and map clients.
- ☐ **Somewhere safe to hold two 16-character keys for a few minutes.** ConnectWise shows the private key only once.

Time: about 15 minutes for Parts 1 and 2. Part 3 depends on how many clients you have; auto-map does most of it.

Part 1: Prepare ConnectWise

Lemhi connects to your ConnectWise instance as an **API member** with a narrow security role you create. Everything in this part happens in ConnectWise PSA.

Step 1: Create a security role

The role gives Lemhi exactly the access it needs and nothing more.

1. In ConnectWise, go to **System > Security Roles**.
2. Select **+** (New Role).
3. Enter a **Role ID**, for example `Lemhi Compass API`, and save.
4. The role opens on **Security Modules for Role**: nine collapsible modules, where every row has four pickers (**Add Level**, **Edit Level**, **Delete Level**, **Inquire Level**). Every level starts at **None**.
5. Set these four rows. Leave every other row in every module at **None**.

Module	Row	Set these levels
Companies	Company Maintenance	Inquire = All
Service Desk	Service Tickets	Inquire = All, Add = All, Edit = All
System	Table Setup (customize)	Inquire = All
System	Member Maintenance	Inquire = All

6. Save the role.

Security Roles

Security Roles

Actions

SEARCH

CLEAR

☐ Name ^	Last Update	Updated By	Type
	All		Member
☐ Admin	5/12/23	MPX_9428	Member
☐ Engineer	5/12/23	MPX_9428	Member
☐ Executive	5/12/23	MPX_9428	Member
☐ Finance	5/12/23	MPX_9428	Member
☐ Lemhi Compass API	9/14/26	admin3	Member
☐ Manager	5/12/23	MPX_9428	Member
☐ Sales	5/12/23	MPX_9428	Member
☐ Subcontractor	5/12/23	MPX_9428	Member

System > Security Roles, with the new Lemhi Compass API role in the list

Check: The role saves without an error, and the four rows above show the levels you set.

Set Inquire first. ConnectWise never lets a row's Add, Edit, or Delete level sit higher than its Inquire level. If you set Add before Inquire, the save fails with "Add, Edit and/or Delete levels cannot be at a higher access level than the Inquire level." Set Inquire = All on the row, then set Add and Edit.

Company Maintenance offers only None or All for Inquire. There is no My tier on that row. All is the value you want.

Service Tickets is one row, not three. It carries three levels. You are setting four rows in total.

WHAT EACH ROW LETS LEMHI DO

Row	Why Lemhi needs it
Company Maintenance, Inquire	Read your company list, so each Lemhi client can be matched to its ConnectWise company
Service Tickets, Inquire and Add	Create a ticket and read it back, including its current status
Service Tickets, Edit	Add one note to a ticket when you link an existing ticket to a Compass task

Row	Why Lemhi needs it
Table Setup (customize), Inquire	List your service boards and each board's statuses and teams
Member Maintenance, Inquire	Show you which API member Lemhi is connected as

Step 2: Create an API member

1. Go to **System > Members**.
2. Open the **API Members** tab and select +.
3. Fill in the member:

Field	What to enter
Member ID	A short identifier, for example <code>Lemhi</code>
Member Name	A display name, for example <code>Lemhi Compass</code>
Time Zone	Your time zone
Email	Optional
Role ID	The role you created in Step 1
Level, Name, Default Territory	Your choice
Location	A location that has business units
Business Unit	Required. Pick one

4. Save the member.

Members - API Members > Detail
Lemhi Compass (lemhi)

Details Skills Certification Delegation Accruals API Keys API Logs Notifications Job Role

< + [Icons] HISTORY ▾ [Icon]

Profile

Member ID* lemhi Time Zone* US Eastern ▾

Member Name* Lemhi Compass Email

System

Role ID* Lemhi Compass API ▾ Location* Tampa Office ▾ ☐ Block Prices

Level* Corporate (Level 1) ▾ Business Unit* Integration ▾ ☐ Block Cost

Name* Corporate ▾ Default Territory* Corporate ▾

The API member's details. Role ID is the role from Step 1, and Location is set before Business Unit

Check: The member appears on the API Members tab with the Step 1 role as its Role ID.

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 [Settings]

+ SEARCH CLEAR RESYNC KEYS

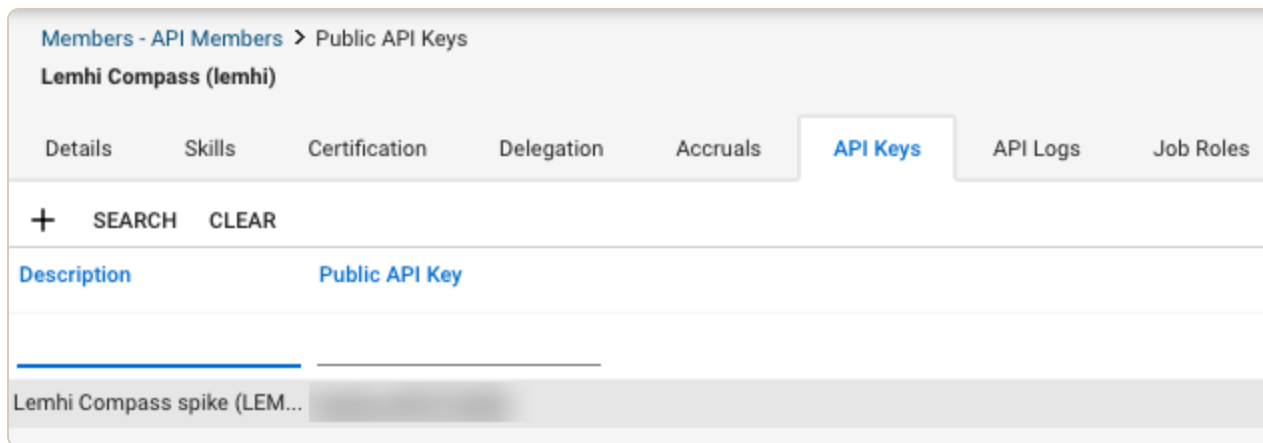
Member ID	Member Name	Location	Role ID	Inactive
<u>lemhi</u>	Lemhi Compass	Tampa Office	Lemhi Compass API	
<u>labtech</u>	LabTech Software	Clearwater Office		✓
<u>quosal</u>	Quosal API	Clearwater Office		✓
<u>screenconnect</u>	ScreenConnect API	Clearwater Office		✓

System > Members > API Members, showing the new member and its Role ID

Set Location before Business Unit. The Business Unit list stays empty until you pick a Location that has business units. An empty list there is not a bug. Choose a Location, then come back to Business Unit.

Step 3: Create the API key pair

1. On the member you just saved, open the **API Keys** tab.
2. Select +, enter a **Description** (for example `Lemhi`), and save.
3. ConnectWise shows a **Public Key** and a **Private Key**. Copy both now.



The API Keys tab on the member. Select + to create the key pair

Check: You have two 16-character keys copied somewhere safe.

The private key is shown only once. ConnectWise says so on the page: "The private key is only available at the time the key is created." If you lose it, delete the key pair and create a new one.

Step 4: Check the service boards you want tickets on

Lemhi creates tickets using each board's own defaults. A board can take Compass tickets only when it has **a default status and a default team**. Lemhi hides any board missing either one from its board pickers. Lemhi also lists only active service boards, not project boards.

Do this for each board you want Compass tickets to land on.

1. Go to **System > Setup Tables** and open **Service Board**, then open the board.
2. If you are creating a new board for Compass work, give it a **Location** and a **Department** first.
3. On the **Statuses** tab, confirm one status shows a check in the **Default** column. While you are there, confirm your closing status shows a check in the **Closed** column. That is what lets Compass show a

check mark once the ticket is closed.

Setup Tables > Service Board List > Status List											
Status List											
Board	Statuses	Types	Subtypes	Items	Skill Mapping	Auto Templates	Teams	Standard Notes	Member Access	Auto Assign	⚙️
<	+	📄	SEARCH		CLEAR		Export View (No View)				
Sort	Status	Default	Round Robin...	Notification Steps	Display	No Time	Closed	Escalation Status	Portal	Survey	Inactive
0	New (not responded)	✓		0	✓			We have NOT respond...			▼
10	Assigned (responded)			0	✓			We have NOT respond...			
20	In Progress (plan of action)			0	✓			We have responded.			
98	Closed (resolved)			0		✓	✓	We have created a plan.			

The board's Statuses tab: New (not responded) is the default, Closed (resolved) is the closed status

- On the **Teams** tab, confirm at least one team exists and one of them shows a check in the **Default** column.

Setup Tables > Service Board List > Service Team List						
Service Team List						
Board	Statuses	Types	Subtypes	Items	Skill Mapping	Auto Templates
Teams						
<	+	SEARCH		CLEAR		
Service Team ^	Team Leader	Default	Default Rou...	Round Robin	Notify Email	
3Com Phone Team	Training User13					
Service Team	Training Admin3	✓				
Training Team	Training Admin3					

The board's Teams tab: Service Team is the default team

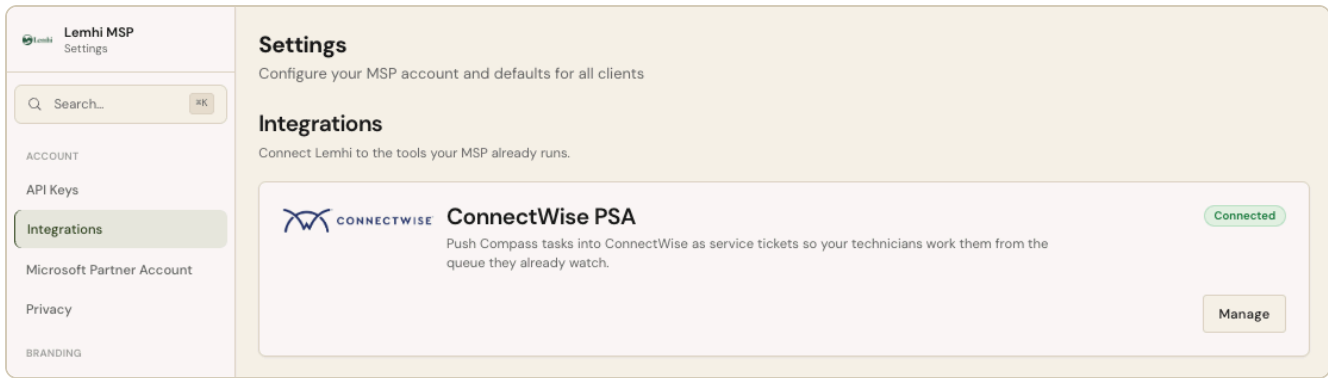
Check: Both tabs show a row with Default checked.

A board with no team at all is common on a board someone created recently. Add a team on the Teams tab and mark it as the default. Lemhi offers the board once both defaults are in place.

Part 2: Connect ConnectWise to Lemhi

Step 5: Enter the connection details

- In Lemhi Engage, open **Settings** and select **Integrations** in the Settings menu.
- On the **ConnectWise PSA** card, select **Connect**. The ConnectWise page opens.



Settings > Integrations. Once connected, the card shows Connected and the button reads Manage

3. Fill in **Connect your ConnectWise PSA:**

Field	What to enter
ConnectWise site address	The address you log in to, for example <code>https://na.myconnectwise.net</code>
Company ID	The value you type in the Company field on the ConnectWise login screen
Public key	From Step 3
Private key	From Step 3

4. Select **Test connection**. When the test passes, select **Save**.

Check: The page shows **Connected as** followed by an API member name from your ConnectWise instance.

The test confirms Lemhi can read your companies and boards. It does not create a test ticket, so a missing Service Tickets level in Step 1 first shows up as a failed push.

Lemhi never shows the private key again. After you save, the page shows the site, company ID, the last four characters of the public key, who connected it, and when it was last checked. To rotate keys later, use **Re-enter keys**.

Step 6: Choose the default service board

1. On the same page, under **Default service board**, choose the board Compass tickets should land on.
2. Select **Save**.

Tickets go to this board unless the person pushing picks a different one. The board's default status and ConnectWise's default priority apply, and ticket type is left unset.

Check: The board you prepared in Step 4 appears in the picker. If you see a line such as "1 board hidden: no default status or team," that board is missing a default. Go back to Step 4 for it.

Until a default board is saved, pushes are blocked with "No service board is set."

The screenshot shows the 'Settings' page for ConnectWise PSA integration. It is divided into three main sections: 'ConnectWise PSA', 'Default service board', and 'Client mapping'.

ConnectWise PSA

Push Compass tasks into ConnectWise as service tickets so your technicians work them from the queue they already watch. Setup: an admin creates an API member and key pair in ConnectWise, then connects it here.

Buttons: Check connection, Re-enter keys, Disconnect.

Status: Connected as Lemhi Compass · last checked 2 days ago

Field	Value
SITE	staging.connectwisedev.com
COMPANY ID	lemhi_f
CONNECTED BY	Samir Patel · Sep 11, 2026
PUBLIC KEY	****zBZb

Default service board

Compass tickets are created on this board unless a different board is chosen when pushing. The board's default status and ConnectWise's default priority apply; ticket type is left unset.

Default service board: Professional Services

2 boards hidden: no default status or team.

Save

Client mapping

Each Lemhi client is matched to its ConnectWise company so tickets file under the right account. Companies must already exist in ConnectWise.

Buttons: Auto-map

Mapped: 81 Unmapped

Search clients

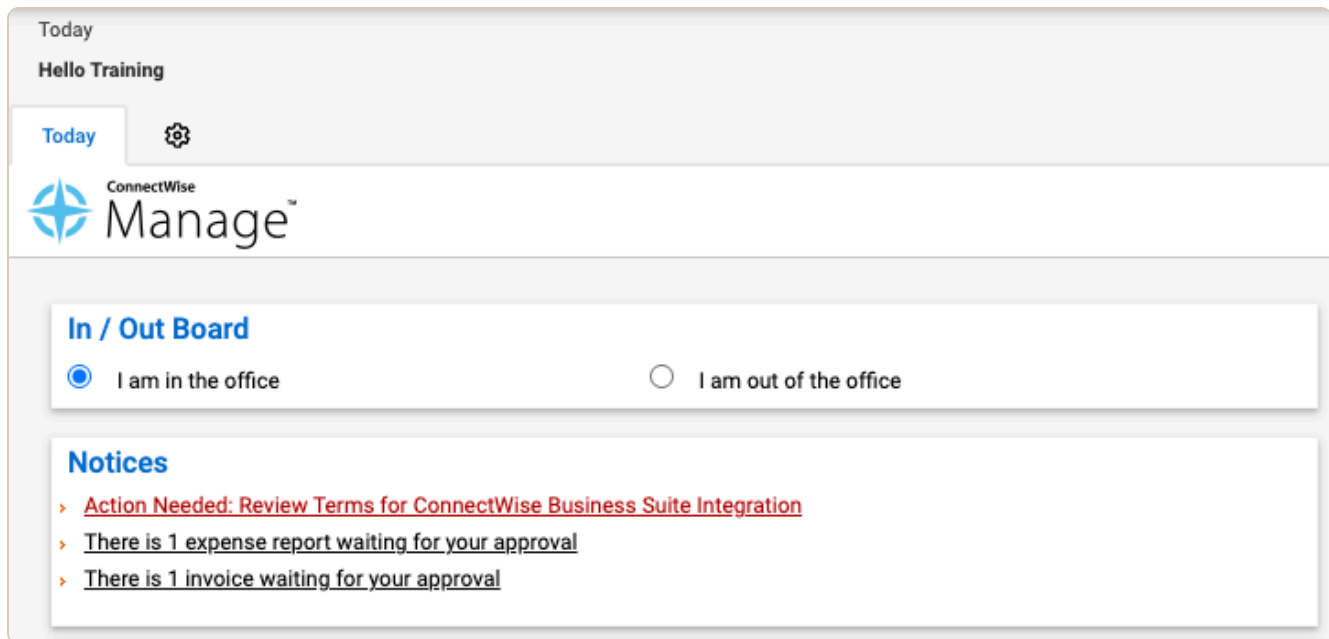
Lemhi client	ConnectWise company	Matched by	Mapped	
Basalt Bear Ltd.	Basalt Bear Ltd. (Basalt Bea...)	Matched by name	9/11/2026	Unmap

The ConnectWise page after connecting: connection details, the default service board, and client mapping

Step 7: Expect a terms prompt on your next ConnectWise login

The next time an admin logs in to ConnectWise after the API member exists, ConnectWise shows a message titled **Action Needed: Review Terms for ConnectWise Business Suite Integration**. It names the API member and its security role, with **PROCEED** or **REMIND ME LATER**.

It also appears under **Notices** on the ConnectWise home page.



The terms notice on the ConnectWise home page

The integration works whether or not you have accepted these terms. Accept them at your convenience.

Part 3: Map clients

Every pushed ticket is filed under a ConnectWise company, so each Lemhi client needs to be matched to one. A client that is not mapped cannot be pushed.

1. On the ConnectWise page (Settings > Integrations > ConnectWise PSA > **Manage**), scroll to **Client mapping**.
2. Select **Auto-map**. Lemhi matches each unmapped client to a ConnectWise company, first by exact company name, then by the client's email domain against the company's website. You see a result such as "Mapped 42 of 50 clients. 8 need your attention."
3. Open the **Unmapped** tab. The badge shows how many clients are left.
4. For each client, select **Choose a company**, search, and pick the ConnectWise company.

Client mapping

Each Lemhi client is matched to its ConnectWise company so tickets file under the right account. Companies must already exist in ConnectWise.

Mapped

Unmapped 81

Search clients

Lemhi client	ConnectWise company
84zk8	Choose a company
Adstra	Choose a company
All Care IT	Choose a company
Bay & Bay Transportation	Choose a company
Blacktip	Choose a company

The Unmapped tab. Choose a company for each client Auto-map could not match

- A client marked **Needs review** matched more than one company. The likely matches are listed first in the picker. Pick the right one.

Check: The **Mapped** tab lists your clients, each with how it was matched: **Matched by name**, **Matched by domain**, or **Mapped by hand**.

Companies must already exist in ConnectWise, and be active. Lemhi never creates a company, and inactive or deleted companies do not appear. If a client has no company yet, create it in ConnectWise, then map it here.

Changing a mapping later. On the Mapped tab, pick a different company for the client, or select **Unmap**. Neither change touches tickets already pushed. Clients you add to Lemhi later show up on the Unmapped tab; run Auto-map again or map them by hand.

Part 4: Push tasks to tickets

Anyone on your team with the Admin or Member role who has Compass access can push, link, and unlink tickets. Only **active** tasks can be pushed. Completed, ignored, and removed tasks cannot.

Push one task

1. In a client's **Compass > Tasks**, open the task.
2. Select **Push to ConnectWise**.

3. Review the dialog: the **Service board** (prefilled with your default; change it for this ticket if you need to) and a preview of the ticket. The ticket files under the client's mapped ConnectWise company.
4. Select **Create ticket**.

Push to ConnectWise ✕

Creates one service ticket in ConnectWise. Status, priority, and type follow the board's defaults.

Service board

Professional Services ▼

Default from Settings. Change it for this ticket only.

TICKET PREVIEW

Deploy the Copilot app to pilot devices via Intune

Push the Copilot app to pilot devices through Intune so day one starts in the tool, not in an install queue. Where: Intune admin center > Apps > deploy the Copilot app assignment to the pilot device/user group. Done when: a couple of devices per platform confirm the app installed and signs in, before the training session lands.

Cancel Create ticket

Pushing one task. The ticket preview shows what the technician will see

Check: A message confirms the ticket was created, and the task shows a ticket chip with its ConnectWise ticket number, for example **CW #12345**.

Push several tasks at once

1. On the **Tasks** list (Active tab), select two or more tasks.
2. Select **Push to ConnectWise** in the action bar.
3. Under **How to create**, choose:
 - **One ticket per task** (the default). Each task becomes its own ticket.
 - **One ticket for all selected tasks**. One ticket covers the whole set. Lemhi prefills a **Ticket summary** with the client name and task count, plus the playbook or phase name when every task shares one, for example "Rollout & Adoption for Basalt Bear Ltd. (3 tasks)". You can edit it. This suits a batch of small changes a technician can clear in one sitting.
4. Choose a **Service board**. It applies to every ticket in the set.

5. Select **Create N tickets** or **Create 1 ticket**.

Push to ConnectWise

Push the selected tasks to ConnectWise. 1 selected task is already in ConnectWise and is skipped.

How to create

✔

One ticket per task

3 tickets. Each links back to its own Compass task.

○

One ticket for all selected tasks

1 ticket. Good for a batch of small settings changes a technician does in one sitting.

Service board

Professional Services

Applied to every ticket in this set.

WILL BE CREATED

📋 Define the pilot group and the bar it has to clear

📋 Assign Copilot licenses to the pilot via the license group

📋 Run the pilot training, scheduled like it matters

ALREADY IN CONNECTWISE · SKIPPED

CW #5145

Deploy the Copilot app to pilot devices via Intune

Cancel

Create 3 tickets

Pushing several tasks, one ticket per task. A task already in ConnectWise is listed and skipped

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Push to ConnectWise

Push the selected tasks to ConnectWise. 1 selected task is already in ConnectWise and is skipped.

How to create

One ticket per task

3 tickets. Each links back to its own Compass task.

One ticket for all selected tasks

1 ticket. Good for a batch of small settings changes a technician does in one sitting.

Service board

Professional Services

Applied to every ticket in this set.

Ticket summary

Rollout & Adoption for Basalt Bear Ltd. (3 tasks)

You can edit this. Each task appears in the ticket description with its own link.

INCLUDED IN THE TICKET

☒ Define the pilot group and the bar it has to clear

☒ Assign Copilot licenses to the pilot via the license group

☒ Run the pilot training, scheduled like it matters

ALREADY IN CONNECTWISE - SKIPPED

CW #5145

Deploy the Copilot app to pilot devices via Intune

Cancel

Create 1 ticket

Pushing several tasks as one combined ticket, with the editable ticket summary

Check: Each task shows its ticket chip. With one combined ticket, every task shows the same ticket number, and each task's detail names the other tasks the ticket covers.

Tasks already in ConnectWise are listed as **Already in ConnectWise · Skipped**, so a bulk push never creates a duplicate.

What the technician sees on the ticket

Ticket field	What Lemhi puts there
Summary	The task title (shortened to fit ConnectWise's limit), or your summary for a combined ticket
Description	First line: "Opened from Lemhi Compass. Open this task:" with a link to the task. Then the task description and its guided steps as a numbered list. A combined ticket repeats this block for each task
Company	The client's mapped ConnectWise company
Board	The board chosen in the push dialog

Ticket field	What Lemhi puts there
Status, priority	The board's default status and ConnectWise's default priority
Not set by Lemhi	Type, subtype, item, assignee, contact. Your dispatch process fills these in as usual

ConnectWise shows its own default **Source** on the ticket, because Lemhi leaves source unset. ConnectWise may also fill in the company's default contact.

Service Ticket

Service Ticket #5146 - Rollout & Adoption for Basalt Bear Ltd. (3 tasks)

Ticket

Tasks 0

Configurations 0

Products 0

Activities 0

Time 0

Expenses 0

Schedule 0

Attachments 0

00:00:00

More

Links

Share

History

Summary: * Rollout & Adoption for Basalt Bear Ltd. (3 tasks)

Age: 1m

SCREENCONNECT SESSION

LAUNCH VIEW

FOLLOW

Company: Basalt Bear Ltd.

Company: * Basalt Bear Ltd.

Site: Main

Contact: Tom Fafinski

Address 1: 860 Blue Gentian Road

Ticket (651) 994-4300

Address 2: Suite 295

Email: mshriver@benepartum.com

City: Eagan

State: MN

Zip: 55121

Country:

Ticket #5146

Board: * Professional Services

SLA: Standard SLA

Status: * New (not responded)

Agreement:

Type:

Predecessor:

Subtype:

Estimated Start Date:

Item:

Due Date:

Ticket Owner: (Unassigned)

Duration:

Impact/Urgency: Medium/Medium

Priority: Priority 3 - Normal Response

SLA Status: Respond by Thu 10/8/2026 2:28 pm (UTC-...

A combined ticket in ConnectWise: company, board, and the board's default status and priority

Initial Description

...

Lemhi Compass

10/8/2026 10:28 AM

LC

Define the pilot group and the bar it has to clear

Opened from Lemhi Compass. Open this task: <https://engage-dev.lemhi.ai/tenant/b9eceb44-bd8c-4dbc-972c-8415e95e67f3/client/6e71c9da-fc8c-4cc6-881f-072c803b0050/compass/tasks?task=dc55f1b9-464e-4040-9c8a-19f8f4eaf2b8>

Pick the trial group and write the success bar before anyone gets a license.

The group: 5 to 8 people across two roles at most clients; a larger client (roughly 50+ seats) can run 10 to 25. Pick it with intent: a couple of enthusiasts for energy, plus one or two known skeptics; at a 30-person company that can literally be the office manager who hates new software. Skeptics surface the real objections while the group is small and things are fixable; volunteers-only groups produce false-positive results every time.

The bar: two or three numbers, for example "most of the group active weekly by week 3" and "10 documented time-savings wins," pulled from the measures agreed in the strategy plan.

Done when: the group is named (including at least one skeptic), everyone agreed to what's being asked of them (feedback, surveys, a mid-pilot conversation), and the written bar exists. A trial without a written bar always "passes" and proves nothing.

The ticket description: the Compass link first, then the task description and its steps

When a push fails

The task shows **Push failed** with the reason, and nothing else on the task changes.

- Select **Retry** to try again. You can also retry from the row in the task list.
- If retrying will not help (for example, the board can no longer take tickets), select **Discard**. Nothing was created in ConnectWise, so discarding just clears the failed push. Then push again to a different board, or link an existing ticket.

Part 5: Link a task to an existing ticket

Use this when a technician already opened a ticket for the work, so you do not create a second one.

1. Open the task and select **Link existing ticket**.
2. Enter the ticket number, or paste the ticket's ConnectWise link, and select **Look up**.
3. Lemhi shows the ticket's number, summary, board, company, and current status. Select **Link ticket**.

Link existing ticket

×

Attach this task to a ticket a technician already opened in ConnectWise. No new ticket is created.

Ticket number or ConnectWise link

5147

Look up

FOUND IN CONNECTWISE

CW #5147

Set up Teams channel for Copilot questions

BOARD

COMPANY

STATUS

Professional Services

Basalt Bear Ltd.

New (not responded)

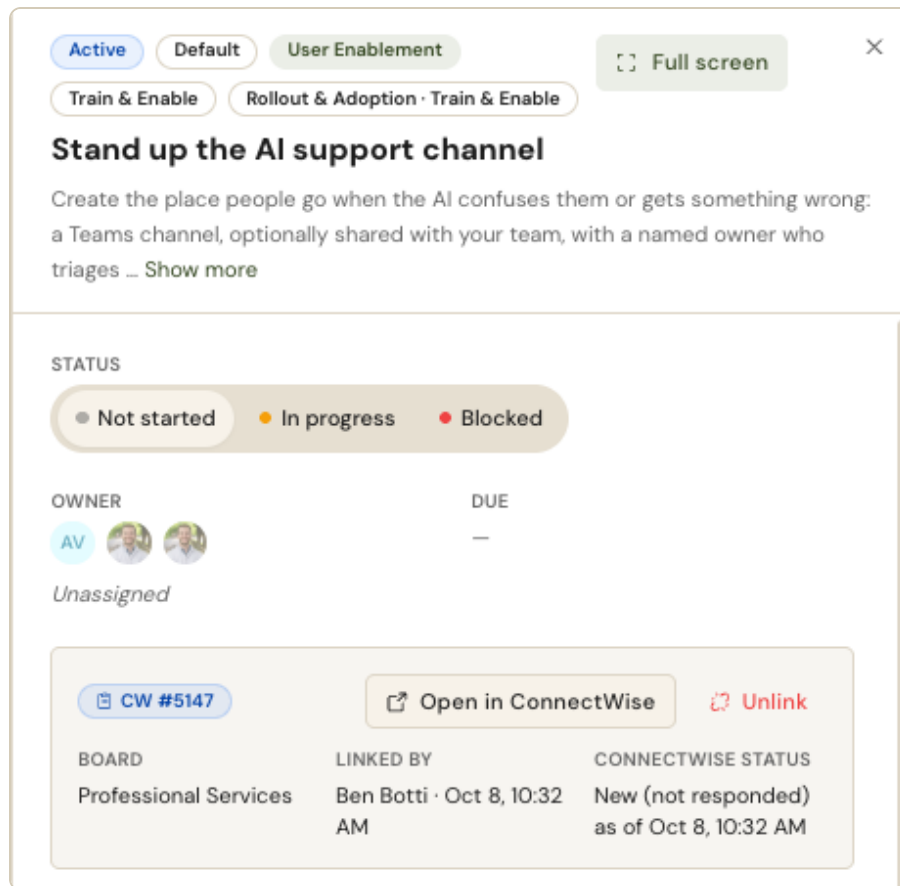
Lemhi adds one note to the ticket with a link back to this task so your technicians see the connection too.

Cancel

Link ticket

Looking up an existing ticket before linking it

Check: The task shows the same ticket chip as a pushed task, and its ticket section shows **Linked by** with who linked it and when.



A linked ticket on the task, with Open in ConnectWise and Unlink

Lemhi adds one note to the ConnectWise ticket, "Linked to Lemhi Compass task:" with a link to the task, so technicians see the connection from their side too.

Ticket under a different company? If the ticket belongs to a different ConnectWise company than the client is mapped to, Lemhi warns you before you link. You can still link it on purpose.

To remove a link, open the ticket section on the task and select **Unlink**. The ConnectWise ticket itself is not changed.

Part 6: Track pushed work

- **Ticket chip.** Each pushed or linked task shows its ticket number in the task list and in task detail. The chip shows a check mark once the ticket reaches a closed status on its board.
- **Ticket section.** In task detail you see the ticket number, the board, **ConnectWise status** as of when you opened the task, who pushed or linked it and when, and **Open in ConnectWise**, which opens the ticket in a new tab.

- **Filter.** Use the **In ConnectWise: yes / no** filter on the task list to see what has and has not gone to ConnectWise.
- **Status refresh.** Lemhi reads the ticket's status each time you open the task. If ConnectWise cannot be reached, you see the last known status with "Could not refresh from ConnectWise," and the rest of the task works normally.

Closing the ticket does not complete the Compass task yet. Automatic completion is coming in a later release. For now, the check mark on the chip tells you the technician is done, and you complete the task in Compass.

Dashboard > Basalt Bear Ltd. > Tasks

Tasks

Basalt Bear Ltd. · basalt-bear-ltd-5pwo.example

Apply playbook

+ Add task

Starter

Applied Jul 9, 2026

0 of 2 tasks done · 0%

Rollout & Adoption

Applied Oct 8, 2026

0 of 28 tasks done · 0%

Active

Completed

Ignored

All

Group: Due date

Rollout & Adopti...

All assignees

All categories

In ConnectWise...

Search by name

Clear all

Comfortable

Compact

☐	Task	Progress	Owner	Due	ConnectWise	Repeat
No due date (28)						
☐	Enable the Copilot Dashbo...	Not started	Unassigned	—	—	—
☐	Expand Copilot licensing in...	Not started	Unassigned	—	—	—
☐	Define the pilot group and ...	Not started	Unassigned	—	CW #5146	—
☐	Stand up the adoption co...	Not started	Unassigned	—	—	—
☐	Develop role-specific what...	Not started	Unassigned	—	—	—
☐	Set the Copilot adoption-n...	Not started	Unassigned	—	—	—
☐	Assign Copilot licenses to t...	Not started	Unassigned	—	CW #5146	—
☐	Enable Copilot Academy a...	Not started	Unassigned	—	—	—
☐	Facilitate the My Work / WI...	Not started	Unassigned	—	—	—
☐	Baseline AI seats and activ...	Not started	Unassigned	—	—	—
☐	Deploy the Copilot app to ...	Not started	Unassigned	—	CW #5145	—
☐	Create the voice guide and...	Not started	Unassigned	—	—	—
☐	Deploy go-live support dur...	Not started	Unassigned	—	—	—
☐	Publish the company AI FA...	Not started	Unassigned	—	—	—

The task list with ConnectWise ticket chips. Tasks on a combined ticket share its number

Active

Default

User Enablement

Pilot

Full screen

Rollout & Adoption - Pilot

Define the pilot group and the bar it has to clear

Pick the trial group and write the success bar before anyone gets a license. The group: 5 to 8 people across two roles at most clients; a larger client (roughl...

Show more

STATUS

Not started

In progress

Blocked

OWNER

AV

Unassigned

DUE

—

CW #5146

Open in ConnectWise

BOARD	PUSHED BY	CONNECTWISE STATUS
Professional Services	Ben Botti · Oct 8, 10:28 AM	New (not responded) as of Oct 8, 10:28 AM

This ticket also covers

Assign Copilot licenses to the pilot via the license group.

Run the pilot training, scheduled like it matters.

The ticket section on a task: board, who pushed it, current ConnectWise status, and the other tasks on the same ticket

If a ticket was deleted in ConnectWise, the task says "This ticket no longer exists in ConnectWise." Select **Unlink** to clear it, then push a new ticket or link another one.

Managing the connection

To do this	Do this on the ConnectWise page (Settings > Integrations > ConnectWise PSA > Manage)
Confirm the connection still works	Select Check connection
Rotate keys, or replace a deleted key pair	Create a new key pair in ConnectWise (Step 3), then select Re-enter keys
Change where tickets land by default	Pick a new Default service board and save. Tickets already created stay where they are

To do this	Do this on the ConnectWise page (Settings > Integrations > ConnectWise PSA > Manage)
Stop using the integration	Select Disconnect . Compass can no longer push to ConnectWise. Ticket numbers already on tasks stay visible as history. Disconnecting also clears your client mappings and default board, so after reconnecting, run Auto-map and choose the board again

Team members who are not Admins see "Ask a tenant admin to set it up." on the card, or the settings read-only with "Ask a tenant admin to change these settings."

What Lemhi can and cannot access in ConnectWise

Lemhi works only through the API member and security role you created in Part 1, so you control its reach. With the four rows in Step 1, Lemhi can read companies, service boards and their statuses and teams, and member names; create service tickets; read tickets; and add a note to a ticket you link. It never creates companies, never deletes tickets, and never changes a ticket after creating it, apart from the single note on a link.

Lemhi stores your private key encrypted and never shows it again after you save. To cut off access at any time, delete the key pair or the API member in ConnectWise, or select **Disconnect** in Lemhi.

Troubleshooting

What you see	What it means	What to do
"ConnectWise rejected the key pair" when testing or saving	The public or private key is wrong, or the key pair was deleted in ConnectWise	Create a new key pair (Step 3) and enter both keys again
"Site address not reachable"	The site address is mistyped, or is not the address you log in to	Copy the address from your browser when logged in to ConnectWise, for example <code>https://na.myconnectwise.net</code>
"This API member cannot read companies or create service tickets"	A security role row is missing or set too low	Re-check all four rows in Step 1, then select Check connection on the card
The connection succeeds, but no companies or no boards load	A security role row is missing	Re-check all four rows in Step 1, then select Check connection
One board is missing from the picker, or the picker says "boards hidden"	That board has no default status, no default team, or neither	Check both tabs for that board (Step 4)
"Lemhi could not reach ConnectWise. Contact Lemhi support."	A problem on Lemhi's side, not your keys	Contact your Lemhi contact. Do not create new keys
The card says "Connection needs attention" and pushes are paused	Lemhi's last check of your saved keys failed, usually because the key pair was deleted or a role row changed	Fix the cause in ConnectWise, then select Check connection . If the keys were deleted, use Re-enter keys
ConnectWise will not save the role	An Add, Edit, or Delete level is higher than that row's Inquire level	Set Inquire = All on that row first
The Business Unit list is empty when creating the API member	No Location is selected yet, or the Location has no business units	Pick a Location that has business units, then pick a Business Unit
Push is blocked: "This client is not mapped to a ConnectWise company"	The client has no company in Client mapping	A tenant admin maps the client (Part 3)
Push is blocked: "No service board is set"	No default board has been saved	A tenant admin chooses one (Step 6)

What you see	What it means	What to do
Link fails: "No ticket #N found in ConnectWise."	The number is wrong, or the ticket is on a board the API member cannot see	Check the number in ConnectWise and try again
Link fails: "This ticket number already has a Lemhi link under another client."	Another client's task is already linked to that ticket	Unlink it from the other task first, or push a new ticket
"Could not find an API member for this key pair."	The keys do not belong to an active API member	Check the member in Step 2 is active, then create a new key pair
"The default board cannot take new tickets. Choose another board."	The default board lost its default status or team in ConnectWise	Pick another board for this push, and have an admin fix the board (Step 4)
A task shows Push failed with "ConnectWise rejected the ticket"	ConnectWise refused the ticket, usually because of a board setting or a missing Service Tickets level in the role	Select Discard , then push to a different board, or fix the board in ConnectWise and select Retry
"Only active tasks can be pushed to ConnectWise."	The task was completed, ignored, or removed	Push only active tasks. If the work still needs doing, create or restore an active task for it in Compass
Push to ConnectWise is missing from a task	The task already has a ticket, or the integration is not connected	Use the ticket chip and Open in ConnectWise, or connect the integration (Part 2)

Still stuck? Send your Lemhi contact the client name, the task, and the exact message you see.

Quick reference

Item	Value
Security role	System > Security Roles
API member and keys	System > Members > API Members tab
Board defaults	System > Setup Tables > Service Board (Statuses and Teams tabs, Default column)
Lemhi settings	Settings > Integrations > ConnectWise PSA > Connect (or Manage)

Item	Value
Role rows	Company Maintenance (Inquire); Service Tickets (Inquire, Add, Edit); Table Setup (customize) (Inquire); Member Maintenance (Inquire)
Keys	16 characters each. The private key is shown once
Auto-map order	Exact company name, then email domain against company website
Coming later	Closing a ticket in ConnectWise completes the Compass task

Lemhi, October 2026