Lemhi

Lemhi Compass · Integration Guide

ConnectWise PSA Integration Guide

Push Compass tasks into ConnectWise PSA as service tickets or project 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.

Prepared for Lemhi MSP partners

Lemhi · November 2026 · Version 1.2

Lemhi pushes Compass tasks into ConnectWise PSA as service tickets, or as project tickets under a project phase, 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** on a service board, or a **project ticket** under a project phase, 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 or project phase you choose	Set the ticket's status, priority, type, assignee, or contact. Those follow your board or project 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. When the ticket closes in ConnectWise, the Compass task completes, and if the ticket is reopened, the task reopens	Create ConnectWise projects or phases. You push to a project and phase that already exist
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.

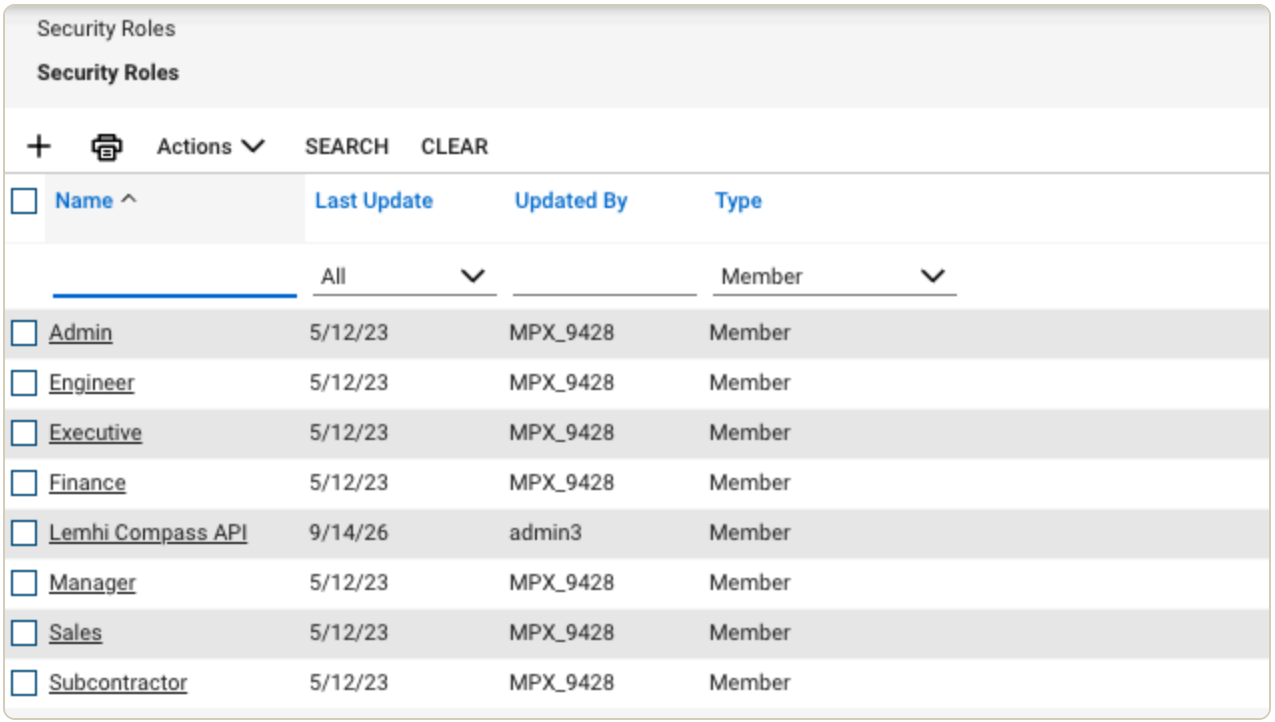
Step 1: Create a security role

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 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, Add = All
System	Member Maintenance	Inquire = All

6. Save the role.



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

Check: The role saves without an error, and the 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.

OPTIONAL: PROJECT PERMISSIONS, TO PUSH TASKS TO CONNECTWISE PROJECTS

Skip this if you only want Compass tasks to become service tickets on a service board. Add these rows if you also want to push tasks to a ConnectWise project and phase. They are all in the **Project** module of the same role. Set Inquire first on each row, then save the role.

Module	Row	Set these levels
Project	Project Headers	Inquire = All
Project	Project Phase	Inquire = All

Module	Row	Set these levels
Project	Project Notes	Inquire = All
Project	Project Tickets	Inquire = All, Add = All, Edit = All

Project Tickets is one row, not three. It carries three levels, like Service Tickets.

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
Table Setup (customize), Inquire	List your service boards and each board's statuses and teams
Table Setup (customize), Add	Register a callback on each board, so a ticket closed or reopened in ConnectWise updates its Compass task within seconds
Member Maintenance, Inquire	Let Lemhi confirm an active API member exists
Project Headers, Inquire	List the open projects of the client's ConnectWise company
Project Phase, Inquire	List each project's phases, so you can choose where the ticket lands
Project Notes, Inquire	Needed alongside Project Tickets for Lemhi to work with project tickets
Project Tickets, Inquire and Add	Create a project ticket and read it back, including its current status
Project Tickets, Edit	Add one note to a project ticket when you link an existing project ticket to a Compass task

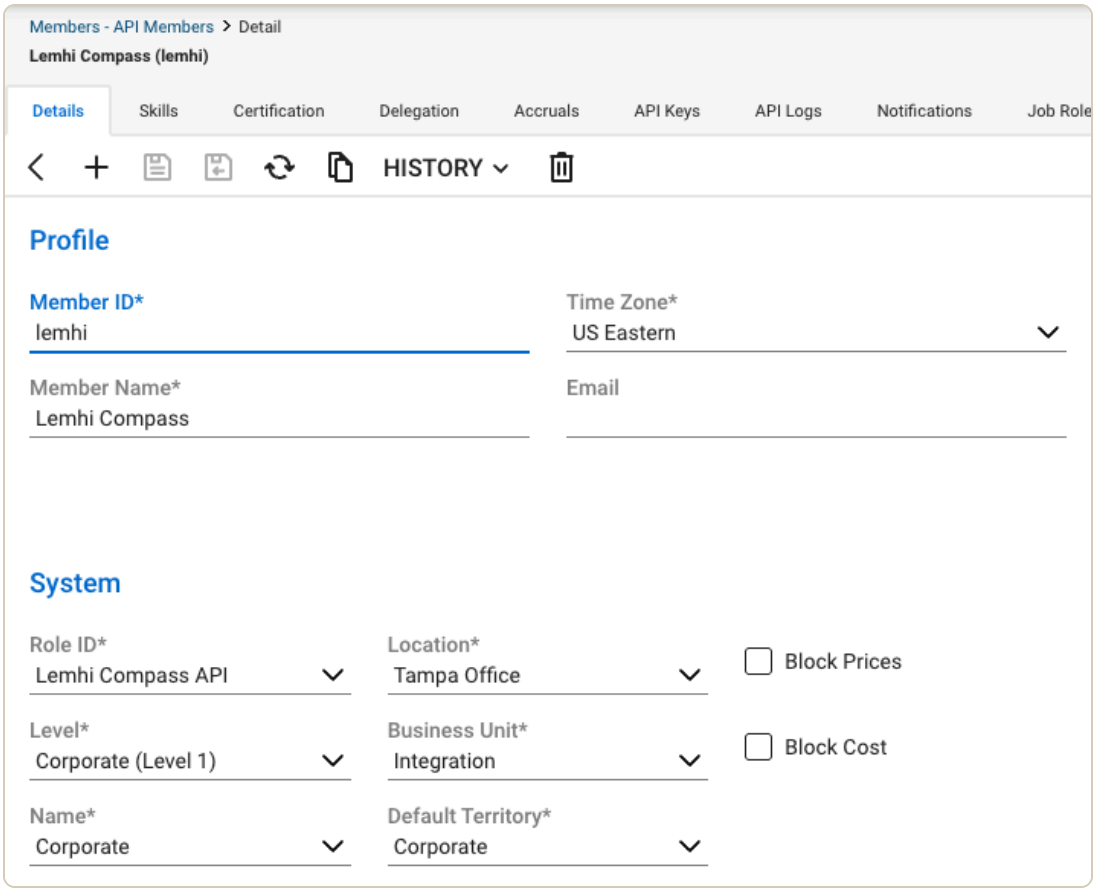
Already connected? Edit the role you created earlier and add the levels you are missing. You do not need to reconnect in Lemhi or create new keys.

Step 2: Create an API member

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

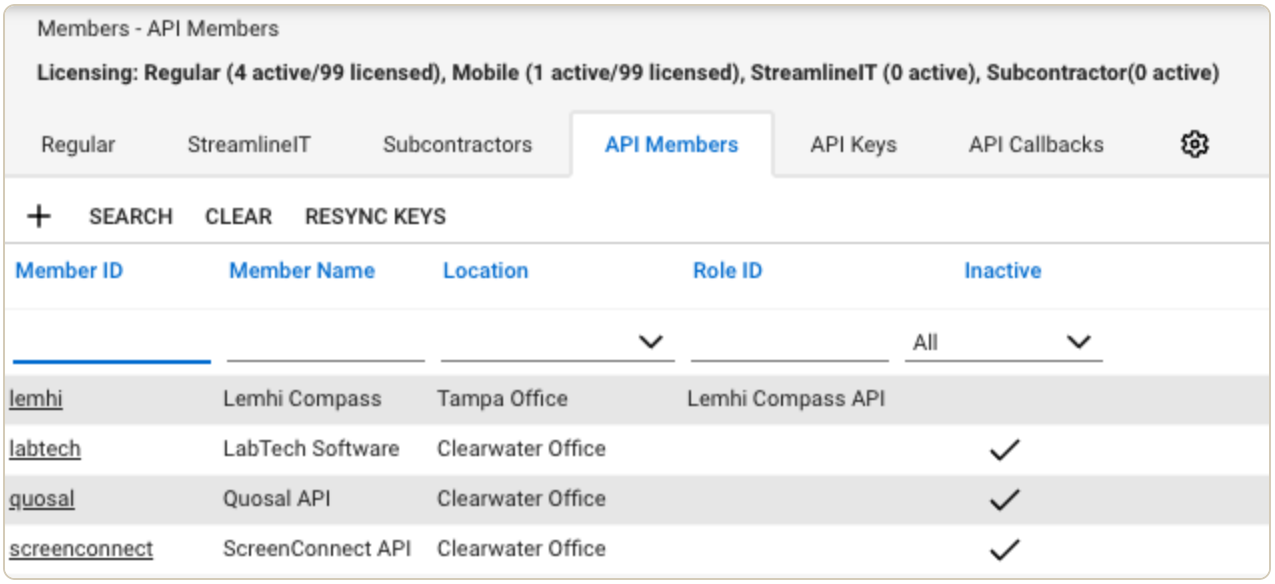
Field	What to enter
Member ID	A short identifier, for example `lemhi`
Member Name	A display name, for example `Lemhi Compass`
Time Zone	Your time zone
Email	Optional
Role ID	The role you created in Step 1
Level, Name, Default Territory	Your choice
Location	A location that has business units
Business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

4. Save the member.



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.

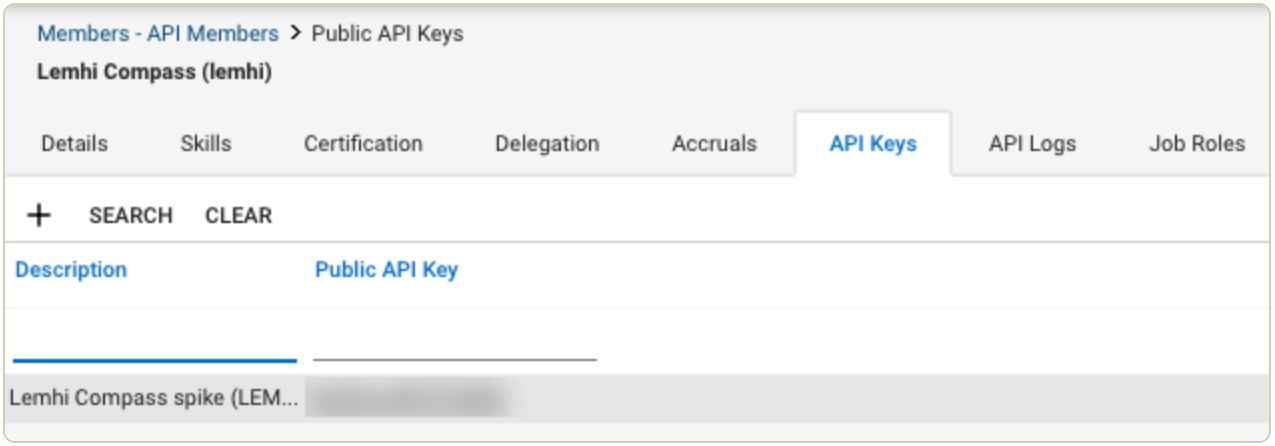


System > Members > API Members, showing the new member and its Role ID

> **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.

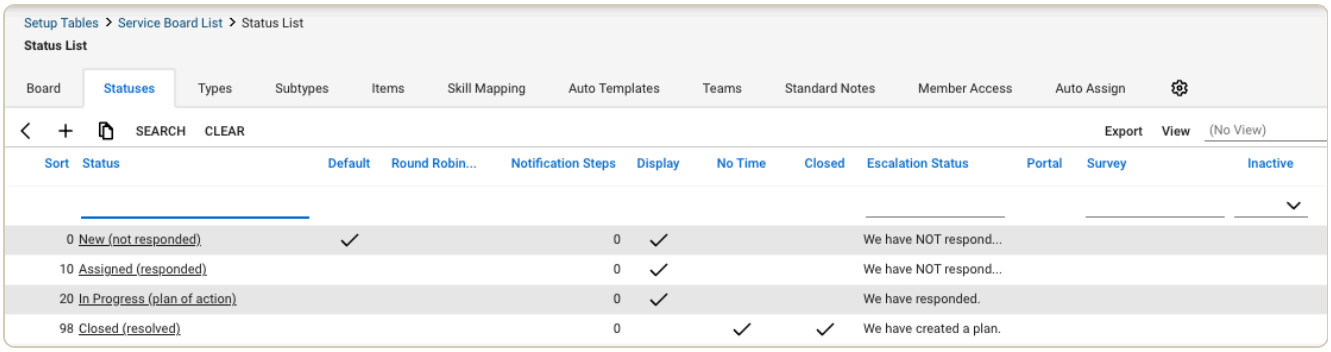
Step 4: Check the service boards you want tickets on

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. The board pickers list only active service boards. To send a ticket to a ConnectWise project instead, you choose the project and phase when you push (Part 4).

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

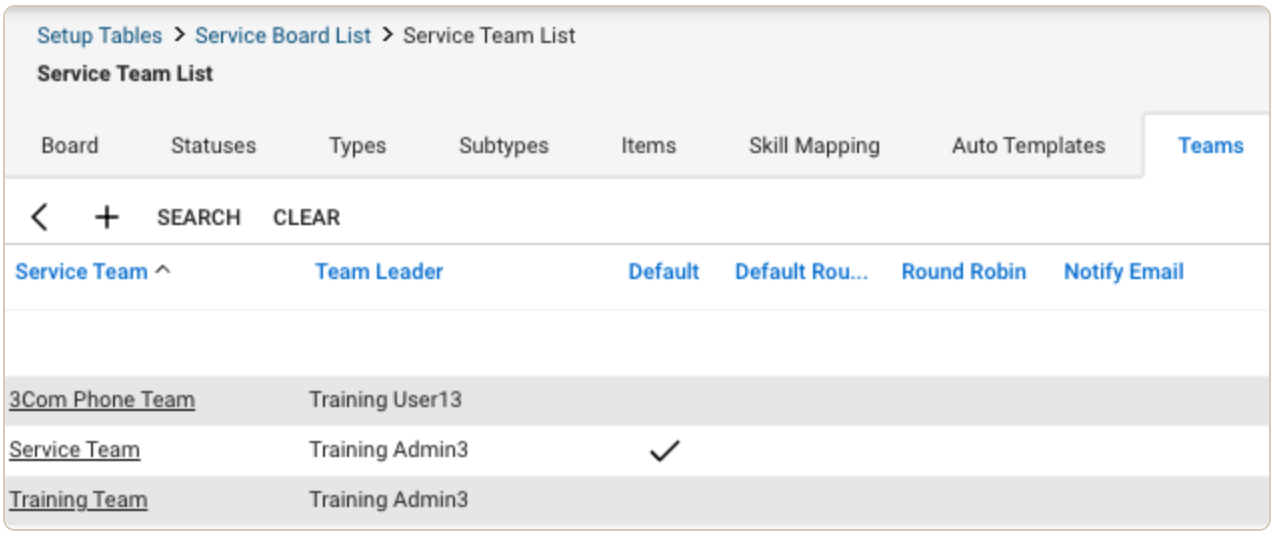
1. Go to **System** > **Setup Tables** and open **Service Board**, then open the board.
2. If you are creating a new board for Compass work, give it a **Location** and a **Department** first.

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 how Lemhi knows a ticket is closed, so Compass can show a check mark and complete the task.



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

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



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

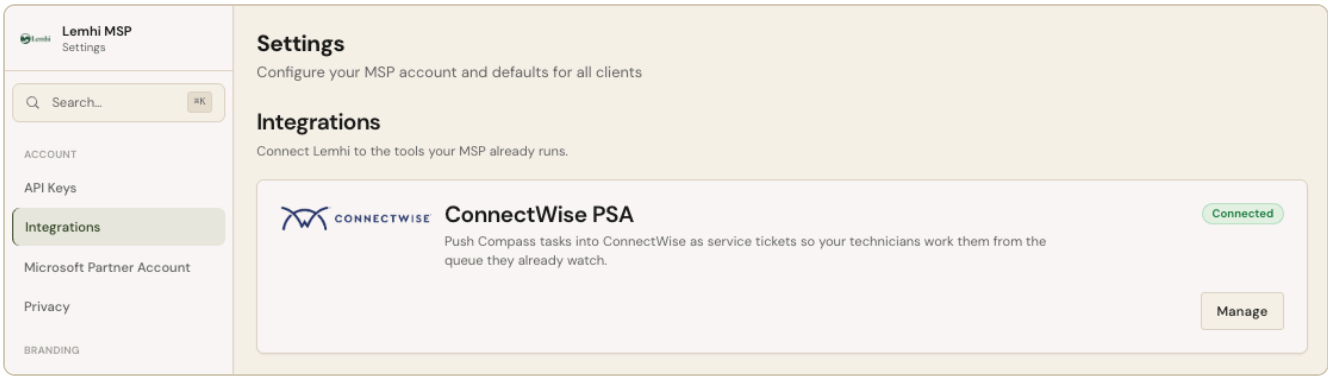
> **Check:** Both tabs show a row with Default checked.

> **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

1. In Lemhi Engage, open **Settings** and select **Integrations** in the Settings menu.
2. 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 `https://na.myconnectwise.net`
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, and checks whether the role has the optional Project rows. It does not create a test ticket, so a missing Service Tickets level in Step 1 first shows up as a failed push.

If the Project rows are missing, the ConnectWise PSA card shows "Project tickets need Project permissions on the API member. Service tickets still work." The connection is still fine, and service tickets push as usual. Add the Project rows (Step 1) only if you want to push to projects, then select **Check connection**.

> **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**.

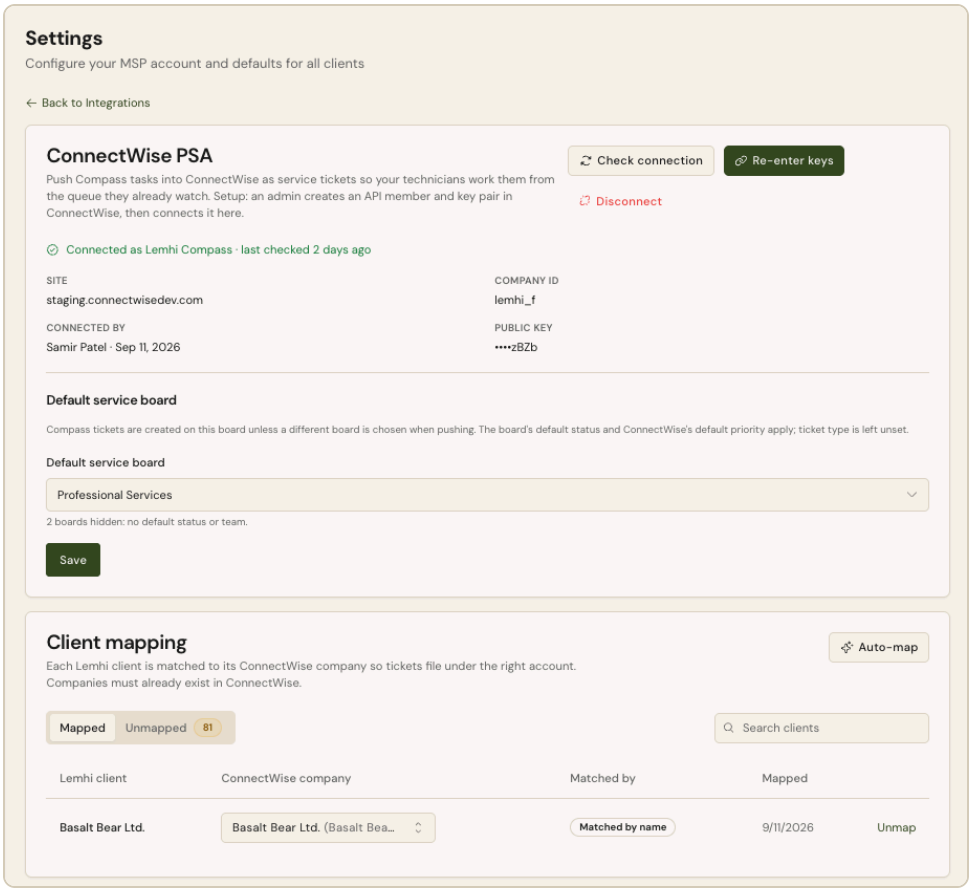
Step 6: Choose the default service board

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, or sends the ticket to a project instead. 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." This applies even if you plan to push only to ConnectWise projects.

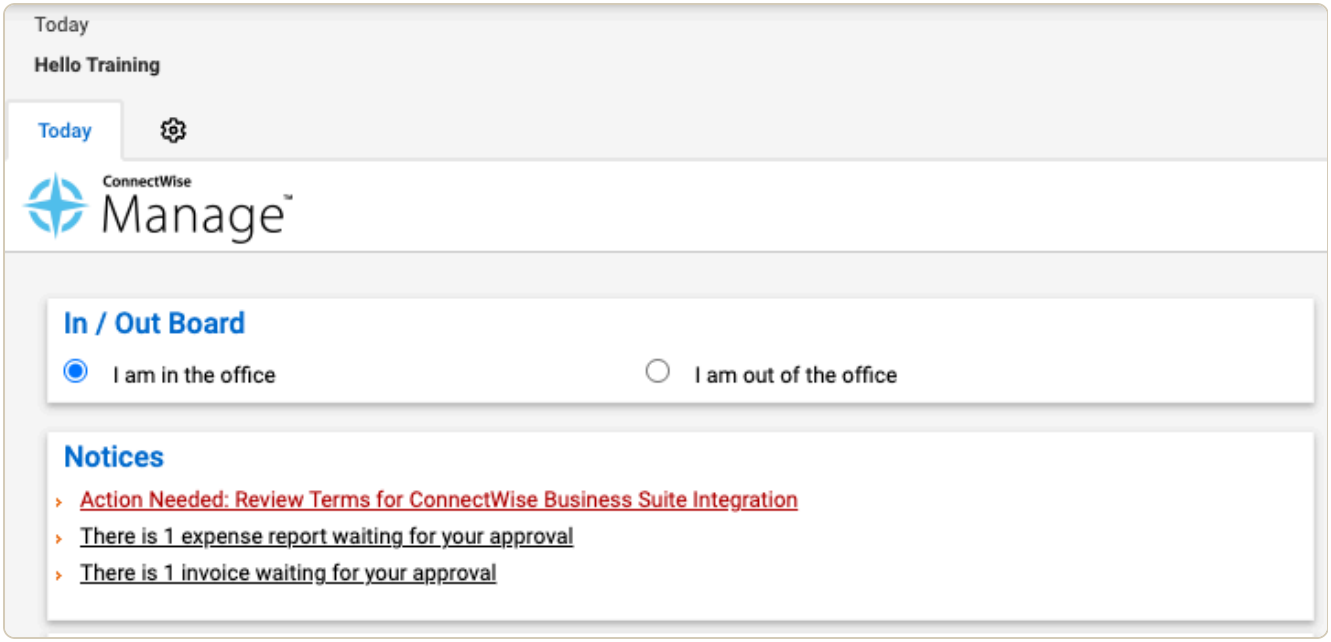


The ConnectWise page after connecting: connection details, the default service board, and client mapping

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.



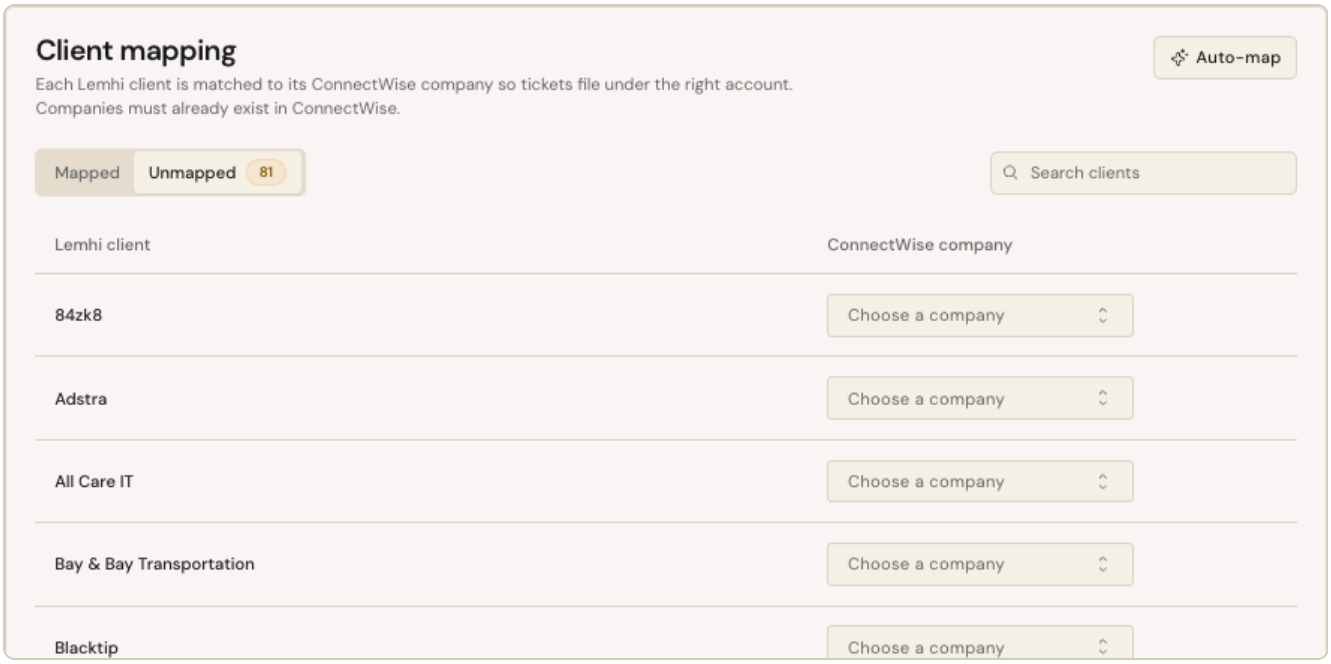
The terms notice on the ConnectWise home page

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.



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.

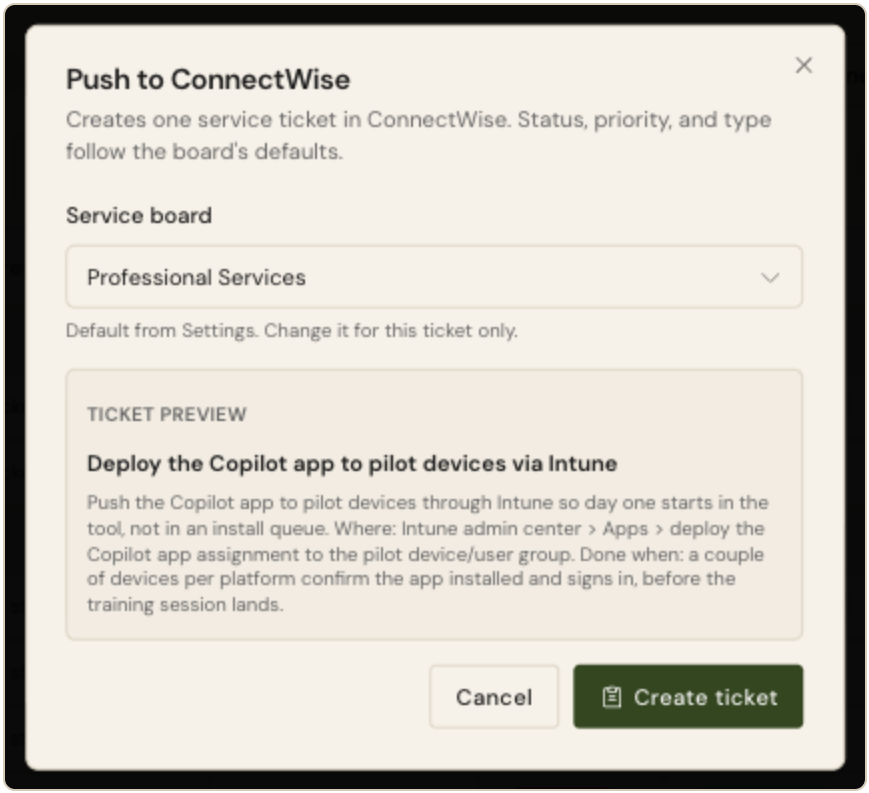
Part 4: Push tasks to tickets

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. Under **Send to**, choose where the ticket goes:
    - **Service board** (the default). Creates a service ticket on a board. Pick the **Service board**, prefilled with your default; change it for this ticket if you need to.
    - **Project**. Creates a project ticket under a phase. The board picker is replaced by a **Project** picker, which lists the open projects of the client's mapped ConnectWise company, and a **Phase** picker. Choose both. Phase is required.
4. Review the preview of the ticket. The ticket files under the client's mapped ConnectWise company.
5. Select **Create ticket**. With **Project** chosen, it stays disabled until you pick both a project and a phase.



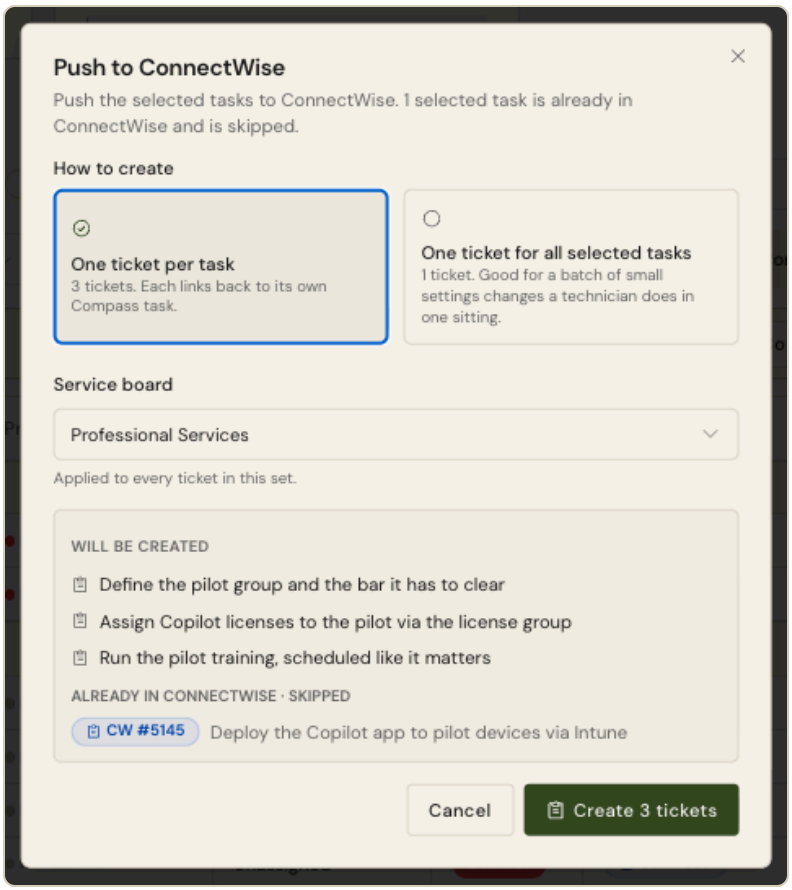
Pushing one task to a service board. The ticket preview shows what the technician will see

> **No projects or phases to pick?** If the client's company has no open projects, the dialog says "No open projects for [company] in ConnectWise." If the project you picked has no phases, it says "This project has no phases in ConnectWise." Lemhi never creates projects or phases. Add them in ConnectWise, then push again.
>
> **Project option disabled?** The role is missing the optional Project rows, and the option shows "Project tickets need Project permissions on the API member. Service tickets still work." Add the Project rows (Step 1), then select **Check connection**.

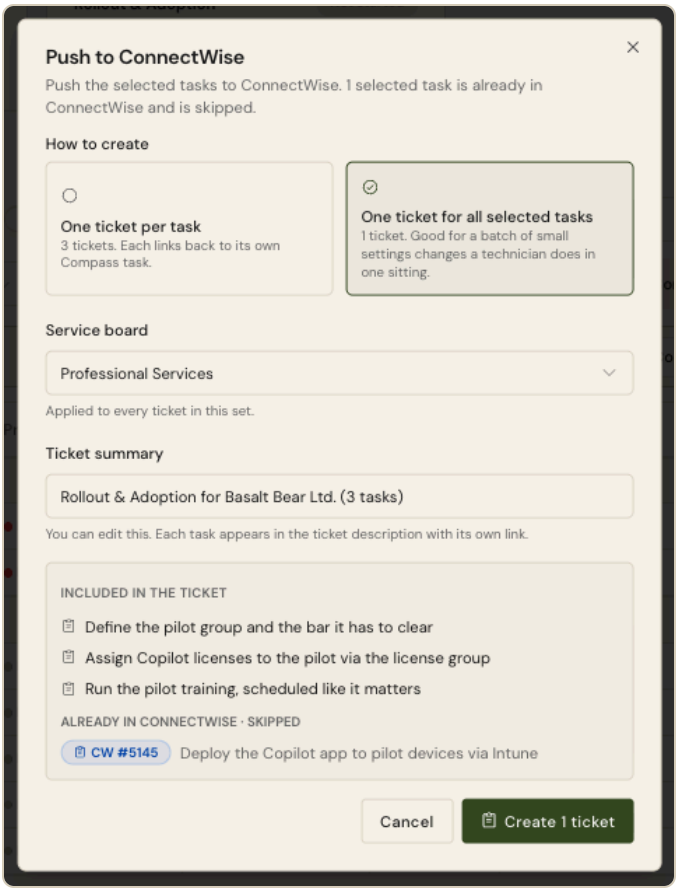
> **Check:** A message confirms the ticket was created, and the task shows a ticket chip with its ConnectWise ticket number, for example **CW #12345**.

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. Under **Send to**, choose **Service board** and pick the board, or choose **Project** and pick the project and phase. Your choice applies to every ticket in the set, with either way of creating tickets.
5. Select **Create N tickets** or **Create 1 ticket**.



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



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.

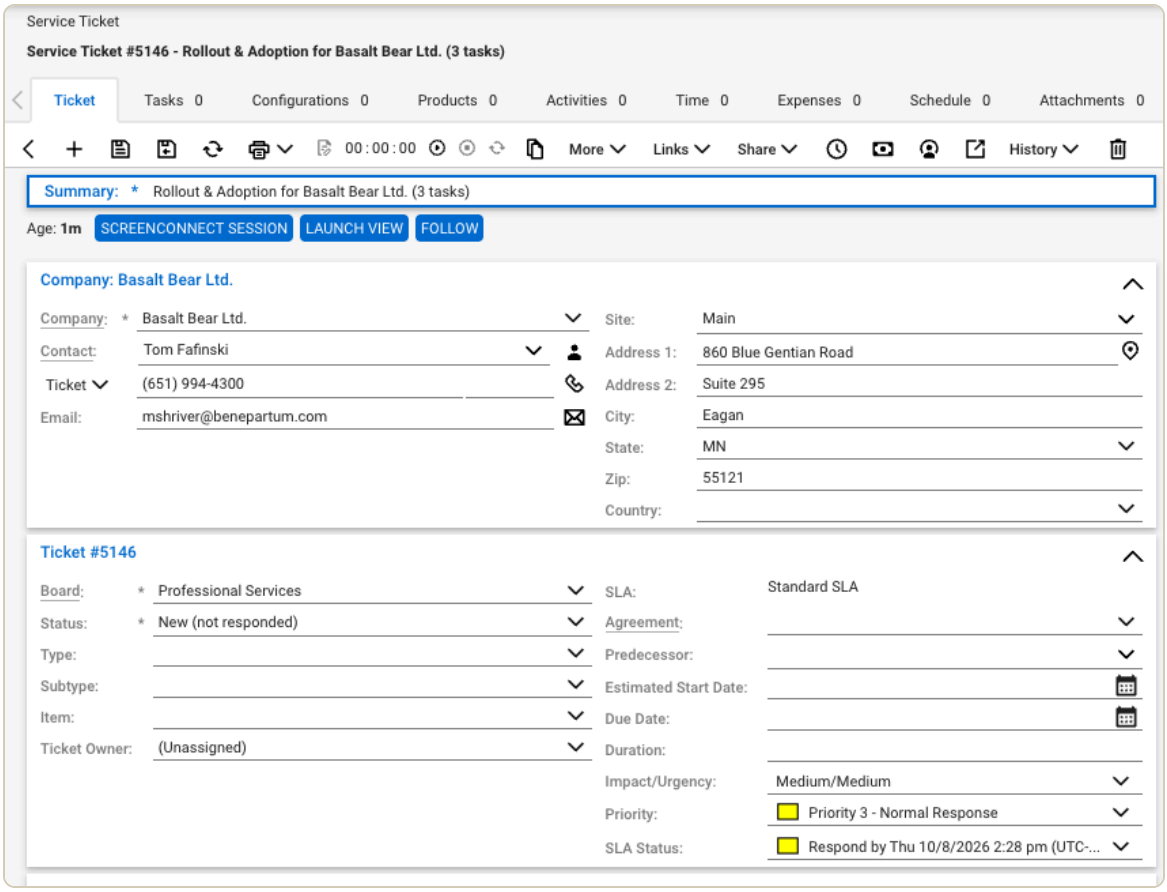
What the technician sees on the ticket

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, or the project's board for a project ticket

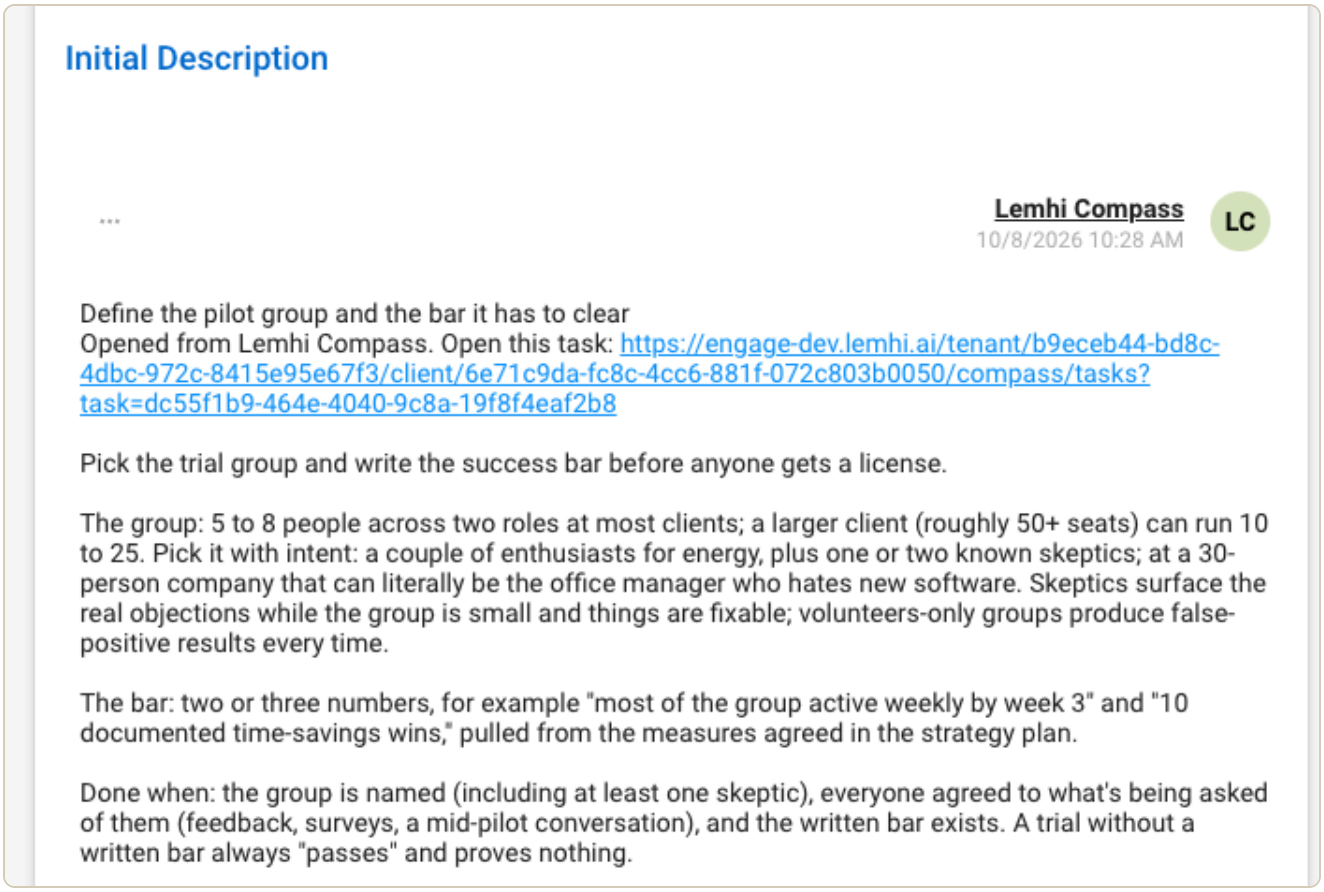
Ticket field	What Lemhi puts there
Status, priority	The board's default status and ConnectWise's default priority. A project ticket takes its status from the project
Not set by Lemhi	Type, subtype, item, assignee, contact. Your dispatch process fills these in as usual

On a project ticket, the company, board, and status come from the project, and the ticket sits under the project and phase you chose. The summary, description, and link back to Compass are the same as on a service ticket.

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



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



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

When a push fails

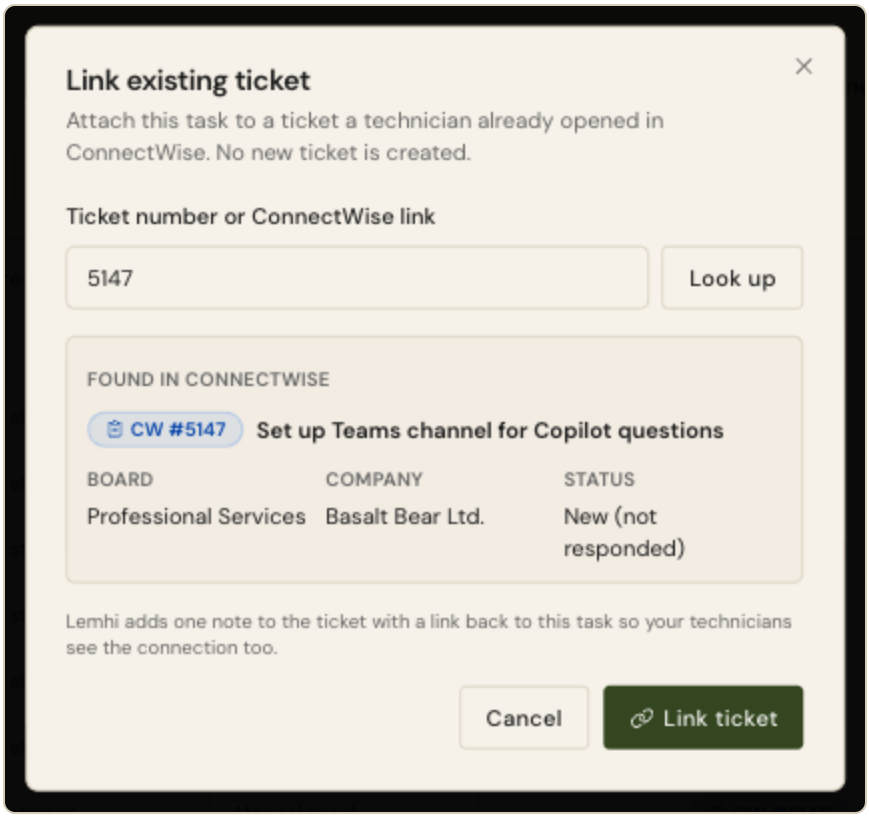
The task shows **Push failed** with the reason, and nothing else on the task changes.

- 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

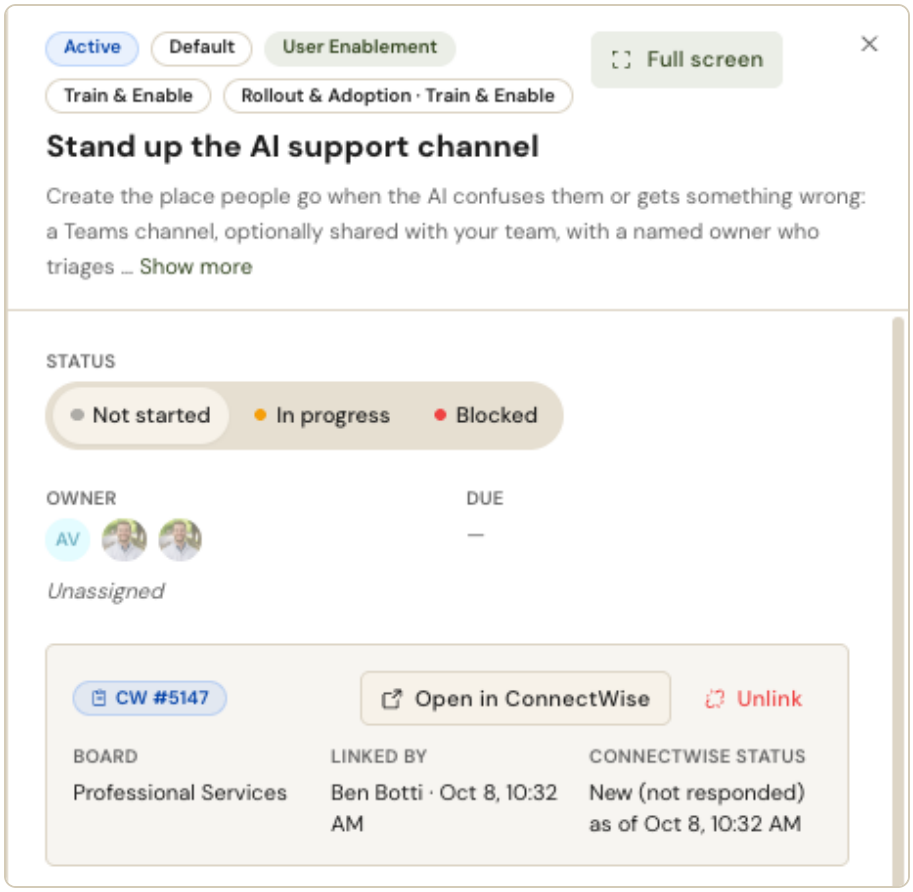
Use this when a technician already opened a ticket for the work, so you do not create a second one.

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**. Lemhi looks for a service ticket with that number first, then a project ticket.
3. Lemhi shows the ticket's number, summary, board, company, and current status. For a project ticket, it shows the project and phase in place of the board. Select **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.

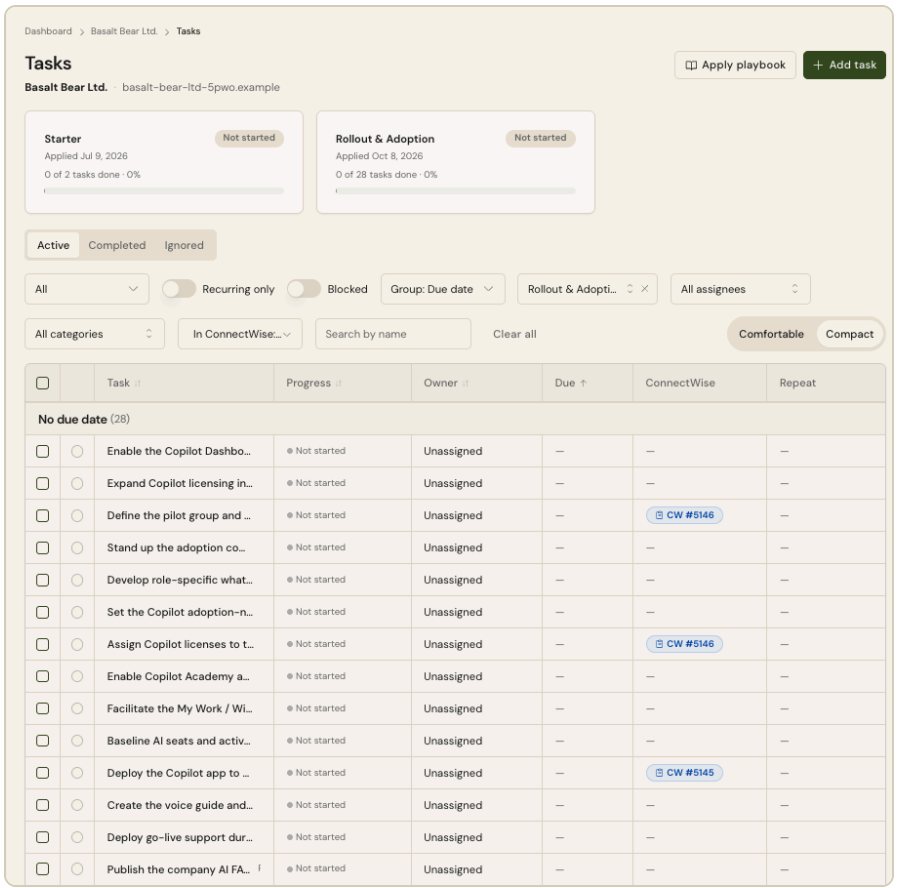
To remove a link, open the ticket section on the task and select **Unlink**. The ConnectWise ticket itself is not changed.

Part 6: Track pushed work

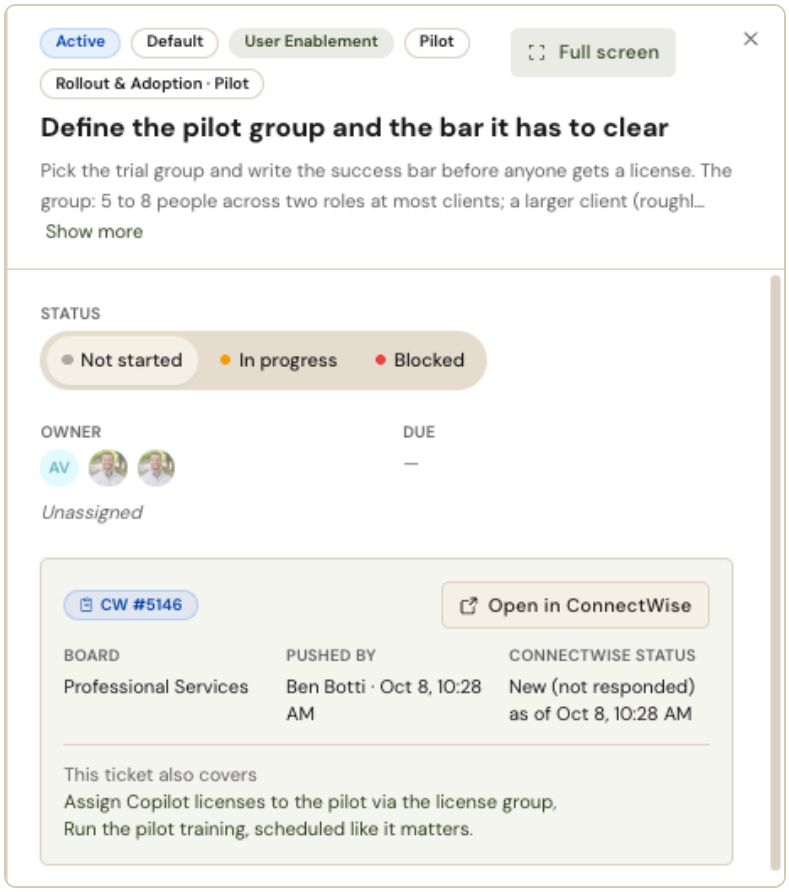
- **Ticket chip.** Each pushed or linked task shows its ticket number in the task list and in task detail. The chip shows a check mark once the ticket reaches a closed status on its board.
- **Ticket section.** In task detail you see the ticket number, the board (or the project and phase, for a project ticket), **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.** When a ticket closes or reopens in ConnectWise, Lemhi hears about it within seconds. Lemhi also 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 completes the Compass task.** When a technician closes the ticket in ConnectWise, the Compass task completes within seconds. If the ticket is reopened, the task reopens. This relies on Table Setup (customize) Add = All in the role (Step 1). Without it, tickets are still created, but the task only updates when someone opens it in Compass.



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



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 base rows in Step 1, Lemhi can read companies, service boards and their statuses and teams, and member names; create service tickets; read tickets; add a note to a ticket you link; and register a callback on each service board so it hears when a ticket closes or reopens. With the optional Project rows, it can also read open projects and their phases, and create and read project tickets. It never creates companies, projects, or phases, 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 `https://na.myconnectwise.net`
"This API member cannot read companies or create service tickets"	A security role row is missing or set too low	Re-check the base role 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 the base role 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
Tickets are created, but closing or reopening a ticket in ConnectWise only updates its Compass task when someone opens the task	The security role has no Add level on Table Setup (customize), so ConnectWise refused the board callback	Set Table Setup (customize) Add = All (Inquire first). You do not need to reconnect: the next push, link, or task open registers the callback
"Project tickets need Project permissions on the API member. Service tickets still work."	The security role has no Project rows, or they are set too low	Add the Project rows in Step 1, then select **Check connection**

What you see	What it means	What to do
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)
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)
Role rows	Company Maintenance (Inquire); Service Tickets (Inquire, Add, Edit); Table Setup (customize) (Inquire, Add); Member Maintenance (Inquire). For project tickets also: Project Headers, Project Phase, Project Notes (Inquire); Project Tickets (Inquire, Add, Edit)
Keys	16 characters each. The private key is shown once
Auto-map order	Exact company name, then email domain against company website
Ticket closed in ConnectWise	The Compass task completes within seconds. Reopening the ticket reopens the task

Lemhi, November 2026