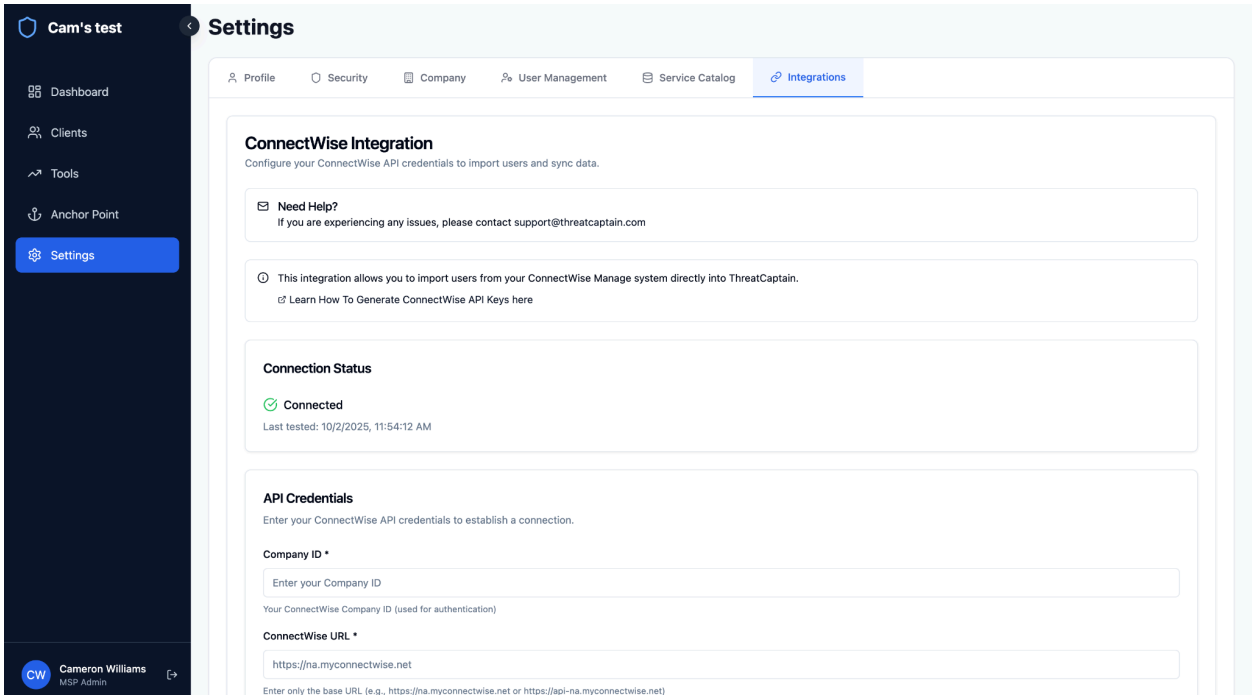
ConnectWise Integration Docs

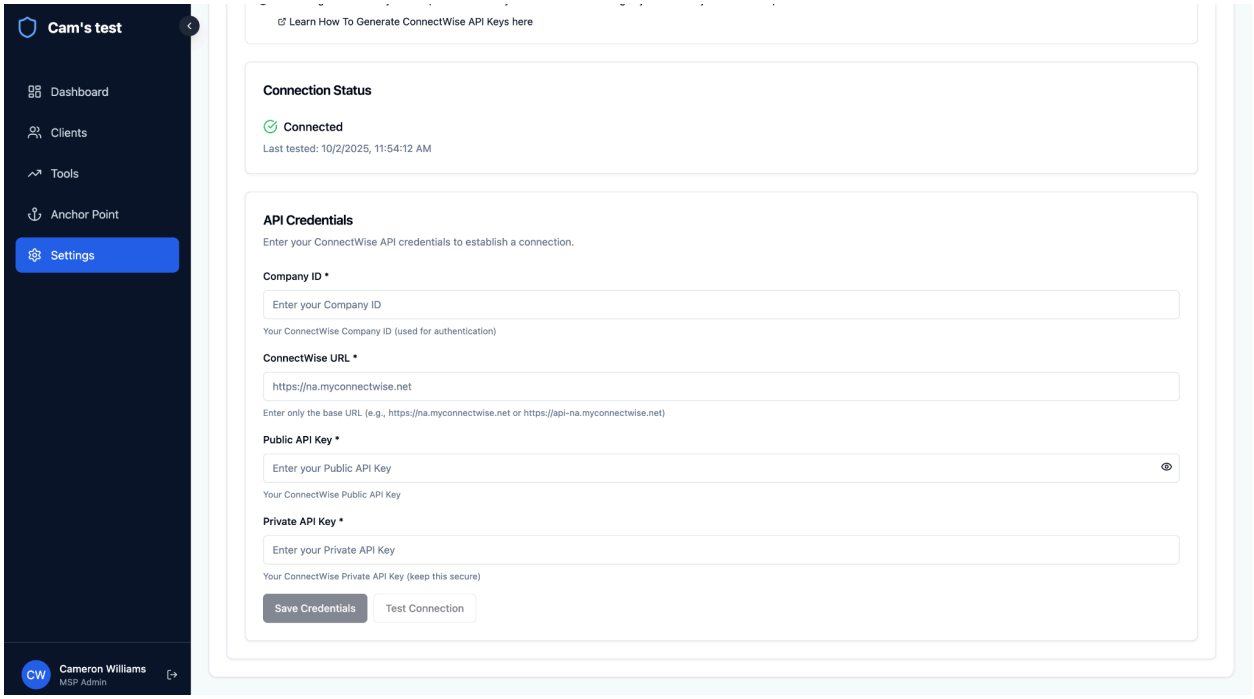
The following is a tutorial on how to connect your ConnectWise account with the ThreatCaptain platform.

The following are the steps to set up your ConnectWise integration on ThreatCaptain:

1. Ensure you have either a User role or Admin role in your settings page. If not please reach out to the support team for assistance.
2. Go to the “Settings” page and select the “Integrations” selection. The user MUST BE a MSP_Admin role in order to set up the integration effort for their whole team.

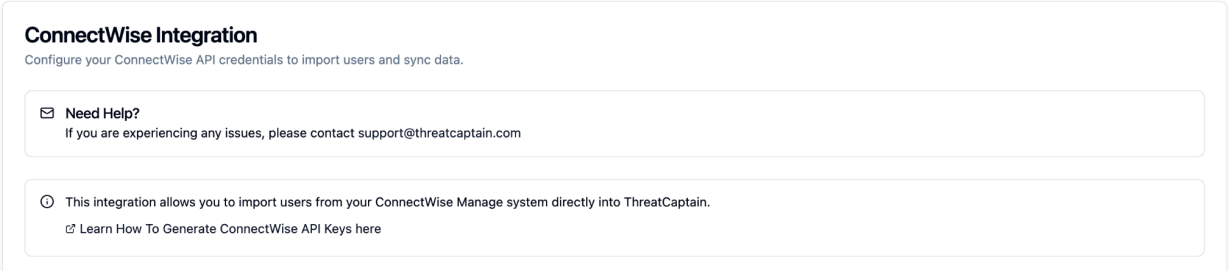


3. In the “Integrations” page fill out the required information (You can also learn how to get your required information using the link we’ve provided in this page under “Learn How to Generate ConnectWise API Keys here”)



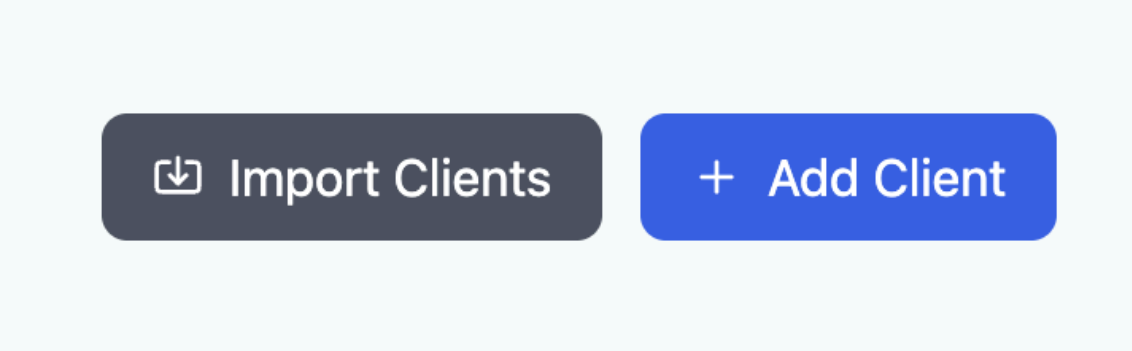
4. Click on the Save Credentials button with the option to test the integration connection.

5. If the user has any questions or is running into issues with their api keys they are able to click the link to the connectwise documentation.

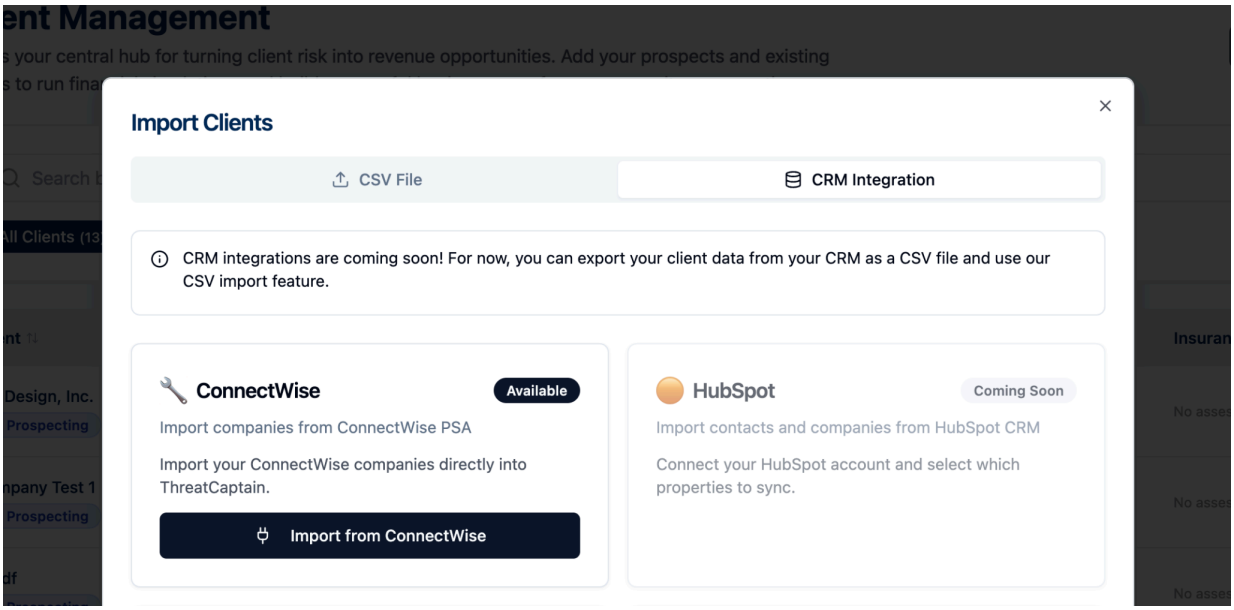


6. Next, using the navigation, go to the Clients tab and you will see two options in the top right

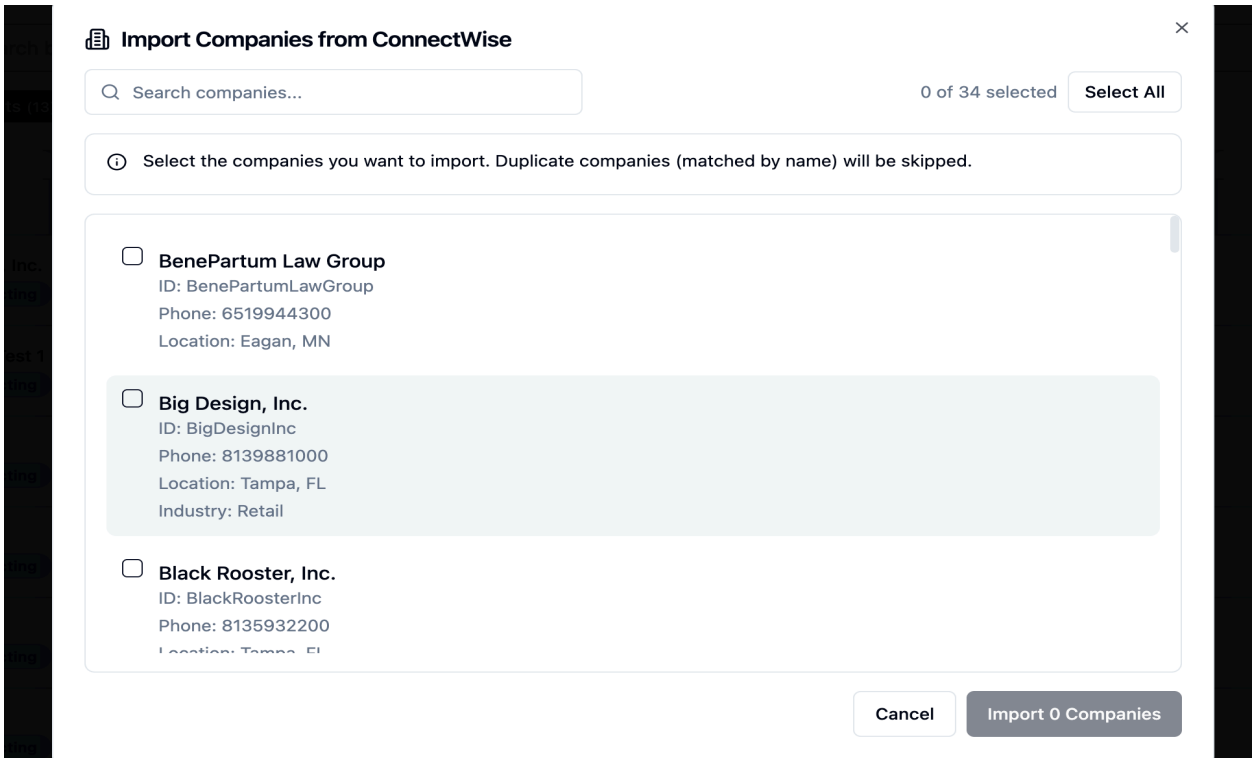
in which you will click “Import Clients”.



7. From there you will click the CRM Integration tab where you will see the connectwise option



8. From there the user will be able to select which clients they would like to import



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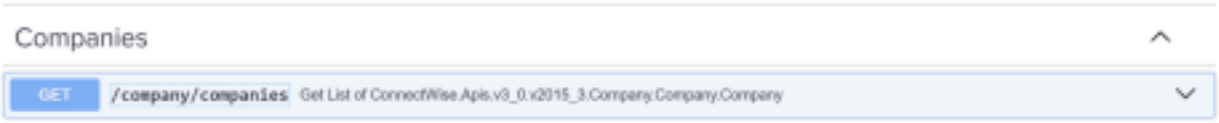
Security Roles

At the moment the MSP Admin is able to add their companies connectwise credentials as well as import clients. MSP Users are able to import clients but they aren't able to view or change any credentials. Any call/request in the site is first authenticated for role specific actions, they are checked as well before allowing the user to make any requests.

This section is for additional details of what behind the scenes what we are doing to gather the data



To fetch all of the user's companies we use the GET Companies call, this returns pretty much all of the required information but it is worth noting that for any info that may not have come over, we do prompt the user to always double check their information.