



# THREATCAPTAIN

## 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.

The screenshot shows the ThreatCaptain user interface. On the left is a dark sidebar with a menu including 'Dashboard', 'Clients', 'Tools', 'Anchor Point', and 'Settings' (which is highlighted in blue). The top of the main content area is labeled 'Settings' and contains a horizontal navigation bar with tabs for 'Profile', 'Security', 'Company', 'User Management', 'Service Catalog', and 'Integrations' (which is selected). The 'ConnectWise Integration' section is active, showing a 'Need Help?' link, a description of the integration, and a 'Connection Status' section indicating it is 'Connected' with a last test time of 10/2/2025, 11:54:12 AM. Below this is the 'API Credentials' section with input fields for 'Company ID' and 'ConnectWise URL', both containing placeholder text and example values.

**Cam's test** Settings

Profile Security Company User Management Service Catalog **Integrations**

### ConnectWise Integration

Configure your ConnectWise API credentials to import users and sync data.

**Need Help?**  
If you are experiencing any issues, please contact [support@threatcaptain.com](mailto:support@threatcaptain.com)

**Information** This integration allows you to import users from your ConnectWise Manage system directly into ThreatCaptain.  
[Learn How To Generate ConnectWise API Keys here](#)

### Connection Status

**Connected**  
Last tested: 10/2/2025, 11:54:12 AM

### API Credentials

Enter your ConnectWise API credentials to establish a connection.

**Company ID \***  
Enter your Company ID  
Your ConnectWise Company ID (used for authentication)

**ConnectWise URL \***  
<https://na.myconnectwise.net>  
Enter only the base URL (e.g., <https://na.myconnectwise.net> or <https://api-na.myconnectwise.net>)

**Cameron Williams**  
MSP Admin



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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”)

The screenshot shows the ThreatCaptain interface. On the left is a dark sidebar with a menu: 'Cam's test' (with a shield icon), 'Dashboard' (with a grid icon), 'Clients' (with a magnifying glass icon), 'Tools' (with a wrench icon), 'Anchor Point' (with a location pin icon), and 'Settings' (with a gear icon and highlighted in blue). At the bottom of the sidebar is a user profile for 'Cameron Williams' with a 'CW' icon and the title 'MSP Admin'. The main content area has a light blue header with a link 'Learn How To Generate ConnectWise API Keys here'. Below this is a 'Connection Status' section showing a green checkmark and 'Connected', with 'Last tested: 10/2/2025, 11:54:12 AM'. The 'API Credentials' section follows, with the instruction 'Enter your ConnectWise API credentials to establish a connection.' It contains four input fields: 'Company ID \*' (with placeholder 'Enter your Company ID' and subtext 'Your ConnectWise Company ID (used for authentication)'), 'ConnectWise URL \*' (with placeholder 'https://na.myconnectwise.net' and subtext 'Enter only the base URL (e.g., https://na.myconnectwise.net or https://api-na.myconnectwise.net)'), 'Public API Key \*' (with placeholder 'Enter your Public API Key' and subtext 'Your ConnectWise Public API Key'), and 'Private API Key \*' (with placeholder 'Enter your Private API Key' and subtext 'Your ConnectWise Private API Key (keep this secure)'). At the bottom of this section are two buttons: 'Save Credentials' and 'Test Connection'.

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.

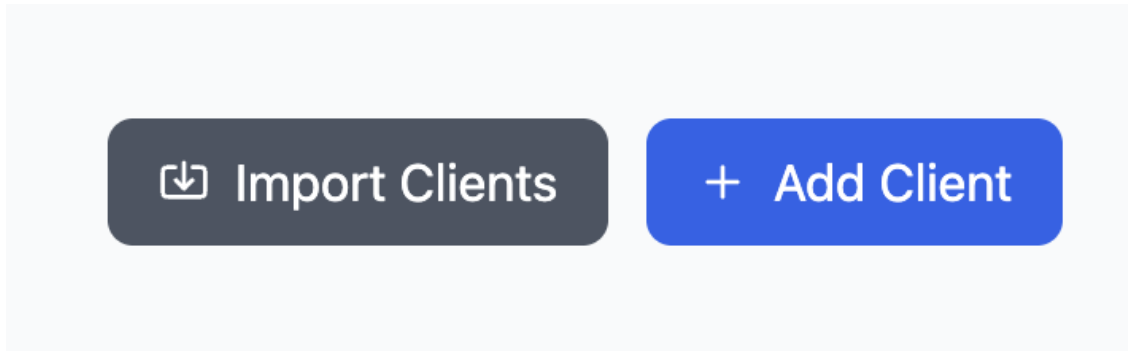
The screenshot shows a 'ConnectWise Integration' section with the subtext 'Configure your ConnectWise API credentials to import users and sync data.' Below this is a 'Need Help?' section with an envelope icon and the text 'If you are experiencing any issues, please contact support@threatcaptain.com'. At the bottom is an information section with an 'i' icon, the text 'This integration allows you to import users from your ConnectWise Manage system directly into ThreatCaptain.', and a link 'Learn How To Generate ConnectWise API Keys here'.

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

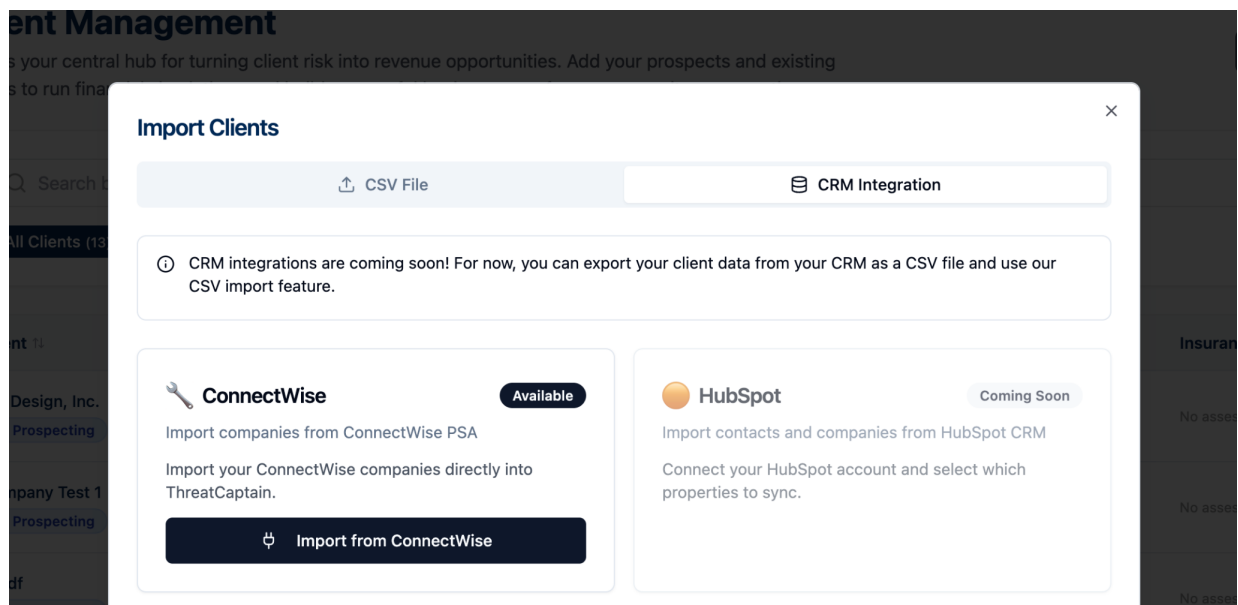


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in which you will click “Import Clients”.



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





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

Import Companies from ConnectWise

Search companies...

0 of 34 selected

Select All

Select the companies you want to import. Duplicate companies (matched by name) will be skipped.

☐ BenePartum Law Group

ID: BenePartumLawGroup

Phone: 6519944300

Location: Eagan, MN

☐ Big Design, Inc.

ID: BigDesignInc

Phone: 8139881000

Location: Tampa, FL

Industry: Retail

☐ Black Rooster, Inc.

ID: BlackRoosterInc

Phone: 8135932200

Location: Tampa, FL

Cancel

Import 0 Companies

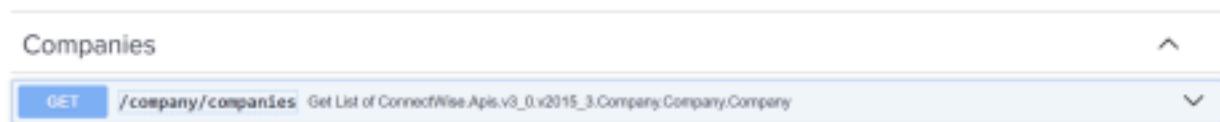


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## Security Roles

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.