Configure API Keys in ConnectWise for PSA Integration in the Umbrella MSP and MSSP Consoles

Contents

Introduction

This document describes how to create API keys in ConnectWise for PSA Integration in the Umbrella MSP and MSSP consoles.

Overview

Starting in February 2020, all Umbrella MSP and MSSP customers wanting to create a PSA Integration with ConnectWise have to use a public and private key (rather than a username and password, as previously used).

Creating the Keys

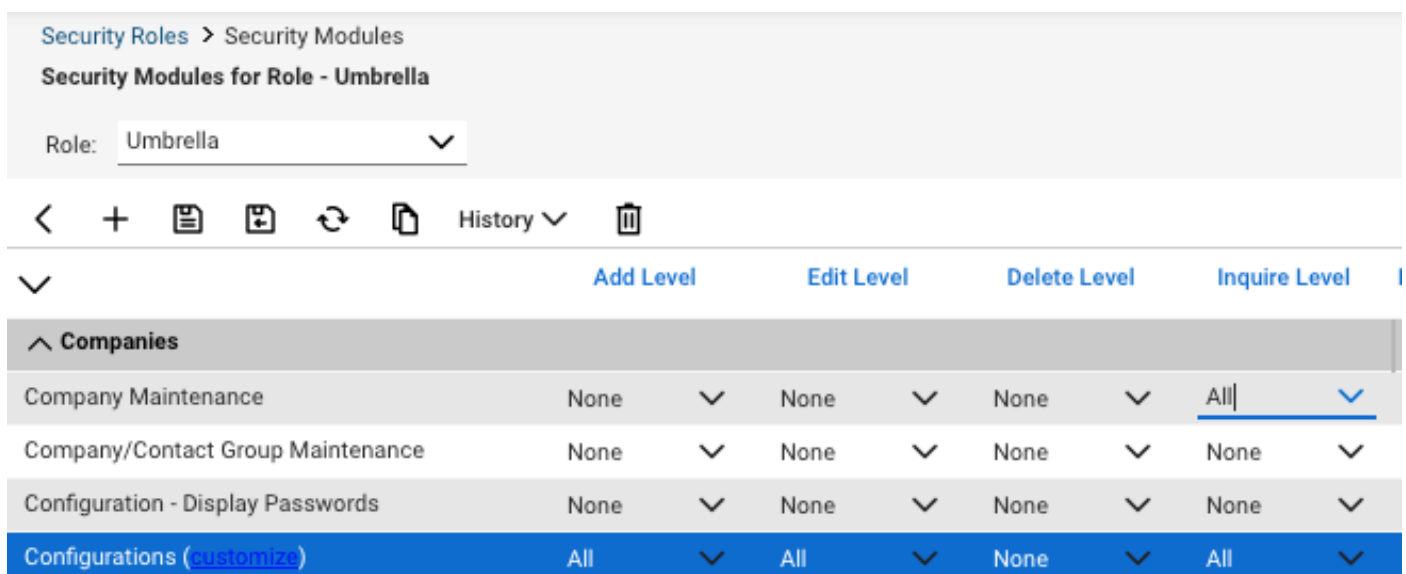To create those keys, please do this in ConnectWise:

1. Click System -> Security Roles -> "+" icon to create a New Role.
2. Enter a Role ID name such as "Umbrella".
3. Click the Save icon.
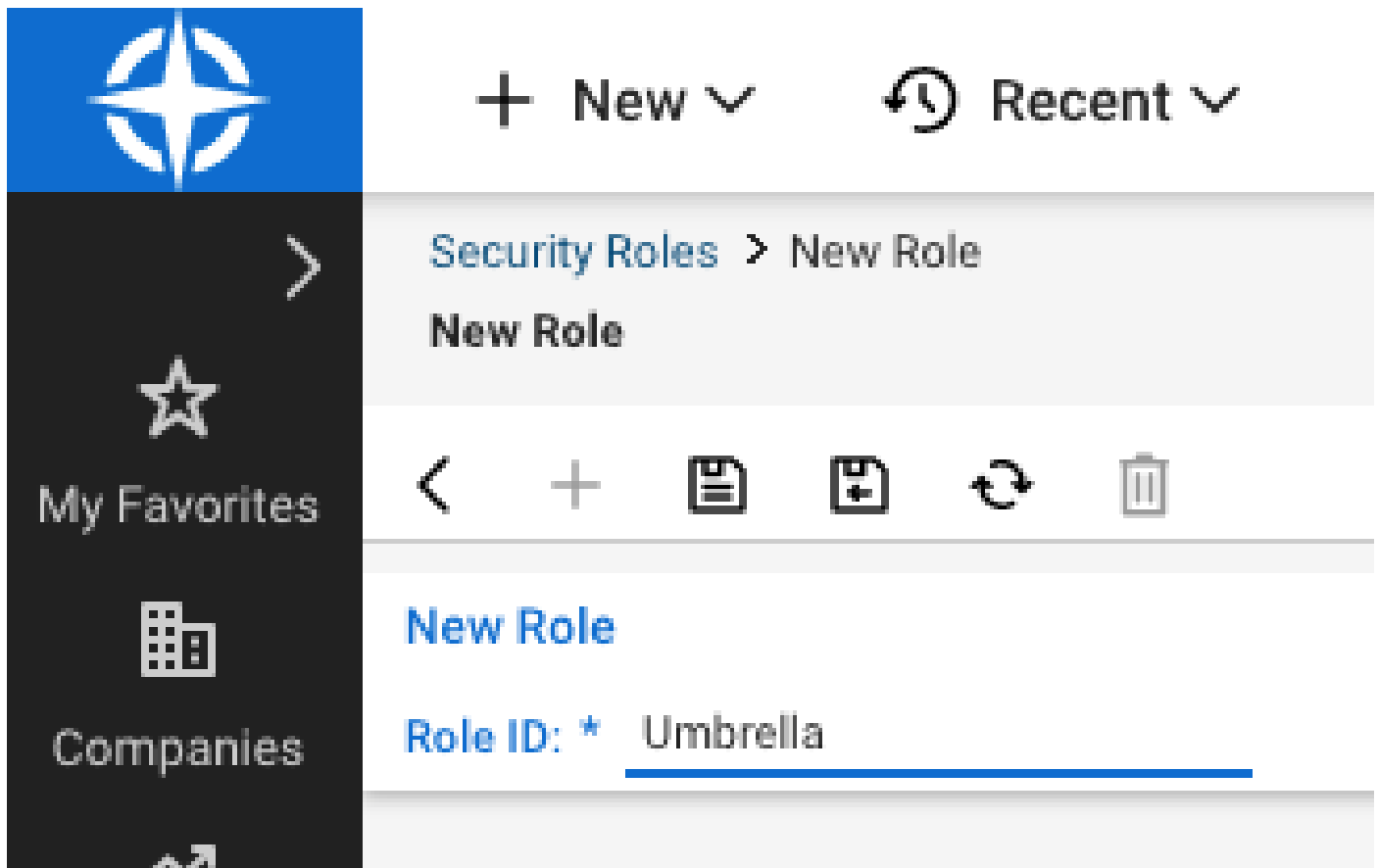
newrole.png

4. Configure these Security Modules for the newly added Role:

- Companies -> Company Maintenance: Inquire Level: All.
- Companies -> Configurations: Add Level: All; Edit Level: All; Inquire Level: All.

companies.png

- Service Desk -> Service Tickets: Add Level: All; Edit Level: All; Inquire Level: All.

Service Desk								
Agile Board	None	∨	None	∨	None	∨	None	∨
Change Approvals	None	∨	None	∨	None	∨	None	∨
ChangeManagement	None	∨	None	∨	None	∨	None	∨
Close Service Tickets	None	∨	None	∨	None	∨	None	∨
CloudConsole	None	∨	None	∨	None	∨	None	∨
ConnectWise Chat	None	∨	None	∨	None	∨	None	∨
ConnectWise Control	None	∨	None	∨	None	∨	None	∨
ConnectWise Manage Network	None	∨	None	∨	None	∨	None	∨
ITBoost	None	∨	None	∨	None	∨	None	∨
Knowledge Base Approver	None	∨	None	∨	None	∨	None	∨
Knowledge Base Creator	None	∨	None	∨	None	∨	None	∨
Launch Remote Access	None	∨	None	∨	None	∨	None	∨
Merge Tickets	None	∨	None	∨	None	∨	None	∨
Print Service Signoff	None	∨	None	∨	None	∨	None	∨
Reports (customize)	None	∨	None	∨	None	∨	None	∨
Resource Scheduling (customize)	None	∨	None	∨	None	∨	None	∨
Service Dashboard	None	∨	None	∨	None	∨	None	∨
Service Ticket - Dependencies	None	∨	None	∨	None	∨	None	∨
Service Tickets	All	∨	All	∨	None	∨	All	∨
Service Tickets - Finance	None	∨	None	∨	None	∨	None	∨
SLA Dashboard	None	∨	None	∨	None	∨	None	∨
Ticket Templates	None	∨	None	∨	None	∨	None	∨

Manage__Security_Roles_servicedesk.png

- System -> Table Setup -> click "customize" and set "Allow Access to these" to "Company / Configuration" and "Service / Priority" and "Service / Service Board", then click Save.

Update Security

Allow Access to these

Company / Configuration
Service / Priority
Service / Service Board

Disallow Access to these

Activities / Activity Status-CRM
Activities / Activity Type
Agreements / Agreement Type
Agreements / Batch
Company / Address Formats
Company / Company Status
Company / Company Type
Company / Configuration Status
Company / Country

SAVE   **CANCEL**

Manage__Security_Roles.png

- System -> Table Setup -> Add Level: All; Edit Level: All; Inquire Level: All.

System								
Add Licenses	None	⌄	None	⌄	None	⌄	None	⌄
API Reports	None	⌄	None	⌄	None	⌄	None	⌄
Chat with ConnectWise Manage Support	None	⌄	None	⌄	None	⌄	None	⌄
ConnectWise Manage Labs	None	⌄	None	⌄	None	⌄	None	⌄
ConnectWise Next	None	⌄	None	⌄	None	⌄	None	⌄
ConnectWise Now	None	⌄	None	⌄	None	⌄	None	⌄
Custom Menu Entry (customize)	None	⌄	None	⌄	None	⌄	None	⌄
Data Import	None	⌄	None	⌄	None	⌄	None	⌄
Email Audit	None	⌄	None	⌄	None	⌄	None	⌄
Health Dashboard	None	⌄	None	⌄	None	⌄	None	⌄
List View Export	None	⌄	None	⌄	None	⌄	None	⌄
Manage Hosted API (customize)	None	⌄	None	⌄	None	⌄	None	⌄
Marketplace Sharing	None	⌄	None	⌄	None	⌄	None	⌄
Mass Maintenance (customize)	None	⌄	None	⌄	None	⌄	None	⌄
Member Maintenance	None	⌄	None	⌄	None	⌄	None	⌄
My Account (customize)	None	⌄	None	⌄	None	⌄	None	⌄
My Company	None	⌄	None	⌄	None	⌄	None	⌄
Report Writer	None	⌄	None	⌄	None	⌄	None	⌄
Security Roles	None	⌄	None	⌄	None	⌄	None	⌄
System Reports (customize)	None	⌄	None	⌄	None	⌄	None	⌄
Table Setup (customize)	All	⌄	All	⌄	None	⌄	All	⌄

tablesetup.png

5. Click the Save And Close icon.
6. Click System -> Members -> API Members -> "+" icon to create a new item.
7. Set Role ID to the newly created Role (named "Umbrella" in step 2 above). Fill in the other values as desired, then click the Save icon.

System

Role ID*

Umbrella ⌄

roleid.png

8. Click API Keys -> "+" icon to create a new item.
9. Enter a Description, then click the Save icon.
10. Copy down the API Public Key and Private Key values for use in the Umbrella MSP or MSSP

console. Note: The private key is only available at the time the key is created. Please make a note of it.

Members - API Members > Public API Keys > API Keys
Umbrella (Umbrella)

| Details | **API Keys** | API Logs | ⚙ |

‹   +   🖫   🖫   ↻   History ⌄   🗑

✓ **You have successfully updated this record.**

Public API Key

Description: ✶   Umbrella PSA Integration
Public Key: ✶   Ri6UgO8viXTtwgTs
Private Key: ✶   1gKhIHW8dekHqlEu

Note: The private key is only available at the time the key is created. Please make a note of it.

apikeysecret.png

If you have an existing PSA integration with ConnectWise, enter the API key values in the Umbrella MSP (or MSSP) console --> MSP (or MSSP) Settings --> PSA Integration Details --> Enabled [beneath Credentials] --> fill in the "Public API Key" and "Private API Key" values --> Save.