



ConnectWise™ Integration Guide for Help Desk Services



ConnectWise is the leading provider of Professional Service Automation (PSA) software for the IT services industry. ConnectWise PSA combines help desk, dispatching, service level management, project management and CRM into a single, web-based or SaaS solution, with integrated time-tracking, billing and reporting. Used by over 42,000 IT services users, ConnectWise PSA streamlines daily business workflows and operations built on proven ITIL best practices. For more information about ConnectWise, please visit www.ConnectWise.com or call 813-463-4700.

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Purpose

This guide provides resellers with step-by-step instructions to configure ConnectWise™ PSA software for integration with the Help Desk Services Portal. Both hosted and on-premise versions of ConnectWise are supported.

Overview

Thank you for using Cloud Services Depot Help Desk Services. Cloud Services Depot works with dozens of vendors to provide resellers with deep-level integration to the Help Desk Services Portal. ConnectWise Integration for Help Desk Services allows resellers to leverage the ticketing system in ConnectWise to observe and update Help Desk tickets without having to log into the Cloud Services Depot Help Desk Services Portal.

Resellers can perform the following actions from within ConnectWise:

1. Review details of new and existing Help Desk-related tickets, including general ticket information (e.g. status, priority, etc) as well as the attached notes.
2. Modify existing tickets, including the ability to add ticket notes. All changes are automatically synchronized to the Help Desk Services Portal.

ConnectWise integration is included free of charge for all resellers using Cloud Services Depot Help Desk Services. Resellers with employees that only need to manage Help Desk Services can access tickets directly in the Help Desk Services Portal. Tickets updated in either system will be properly synchronized in real-time.

Requirements

The following tasks must be complete before continuing with this guide:

1. Complete the setup and configuration of your Cloud Services Depot Help Desk account. Follow the tasks shown in the [Help Desk Services Getting Started Guide](#).
2. A ConnectWise account with API access is required. Administrators can limit data access by using the built-in permissions in ConnectWise.

The ConnectWise PSA software must be configured properly:

1. Your ConnectWise account/server must be configured to include access to the API module.



Note: ConnectWise integration policies are set up separately for Help Desk and NOC services. To set up an additional policy for NOC service, please refer to the [NOC Integration guide for ConnectWise](#).

Help Desk Services Portal Setup

The following tasks must be completed in the Help Desk Services Portal. If you have questions or need assistance with the Cloud Services Depot Help Desk Services Portal, please call Technical Support at 866-343-2588 or support@cloudservicesdepot.com.

Create Ticket Integration Policy

In this procedure, you will create a new Ticket Integration Policy in the Cloud Services Depot Help Desk Services Portal. This information will be used to authenticate the data synchronization between Cloud Services Depot and the ConnectWise PSA software.

1. Log into the CSD Help Desk Services Portal. Click on the **Ticket Integration Policies** tab, then click **Create New Ticket Integration Policy**.
2. Choose a policy name and a ConnectWise API username and password according to your preference (you will create the Integrator Login in ConnectWise later; for now use placeholders and record the values). Be sure to use a strong password. Enter your ConnectWise server URL in the **Ticketing System URL** field and your ConnectWise PSA Company Name in the **ConnectWise Company Name** field.



Note: The **Ticketing System API Username** is for an Integrator Login, not for your regular full login.

3. Click Save.

Ticket Integration Policy

Save

Save & New

Cancel

Edit

Information

I = Required Information

Ticket Integration Policy Name

ConnectWise Integration

Record Type

ConnectWise Ticket Integration (API)

Ticketing System API Username

csdhelpdesk

Ticketing System URL

https://test.connectwise.c

Ticketing System API Password

Zkg7oA5S

ConnectWise Company Name

SecureMyCompany

Account

CSD

Save

Save & New

Cancel

Help Desk Services Portal

- After the policy is saved, a **ConnectWise Callback URL** will be generated for use during integration setup in ConnectWise.

Ticket Integration Policy Detail			
Ticket Integration Policy Name	ConnectWise Integration	Record Type	ConnectWise Ticket Integration (API) [Change]
Ticketing System API Username	csdhelpdesk	Ticketing System URL	https://test.connectwise.com/
Ticketing System API Password	Zkg7oA5S	ConnectWise Company Name	SecureMyCompany
ConnectWise Callback URL	https://data1.msp-host.com/cwcb273194265.asp?tipId=a0V700000053p5V&recId=		
Account	CSD		

Help Desk Services Portal



TIP! Copy the URL from **ConnectWise Callout URL** field to your clipboard. The URL will be required in the following steps.

Assign ConnectWise Companies to Help Desk Client Sites

The next step is to assign the **Ticket Integration Policy** to the **Companies** listed in ConnectWise. This action binds the **Ticket Integration Policy** to the **Client Site** and assigns the **ConnectWise Companies** to the **Client Sites** shown in the Help Desk Portal.

- To map a CSD Help Desk Client Site to a Company in ConnectWise, go to the Client Site and click **Edit**.
- In the Integration Settings section, select the Ticket Integration Policy you made, and for the **PSA Client Identifier** field. Select the desired **Company ID** from ConnectWise.
- Copy the Company ID from ConnectWise** and enter it in the **Help Desk Services Portal**:

Angry Fox, Co.

Updated: 11/8/2007 4:45PM by quickbooks

Company:	Angry Fox, Co.	ID:	AngryFoxCo
Type:	Customer	Status:	Active
Territory:	Sales Territory - Annie's Accounts	Web Site:	www.AngryFox.com
Phone:	813-178-2000	Market:	
Fax:		Date Acquired:	Mon 03/21/2005
Primary Address:	711 N. Franklin St.	Primary Contact	
City:	Detroit	Name:	Robert
State:	MI	Title:	President
Zip:	92344	Type:	
Country:		Relationship:	
		Phone:	813-988-8241
		Extension:	
		Email:	test@test.com

ConnectWise PSA Software

Integration Settings

Ticket Integration Policy

CW

PSA Client Identifier

AngryFoxCo

Help Desk Services Portal

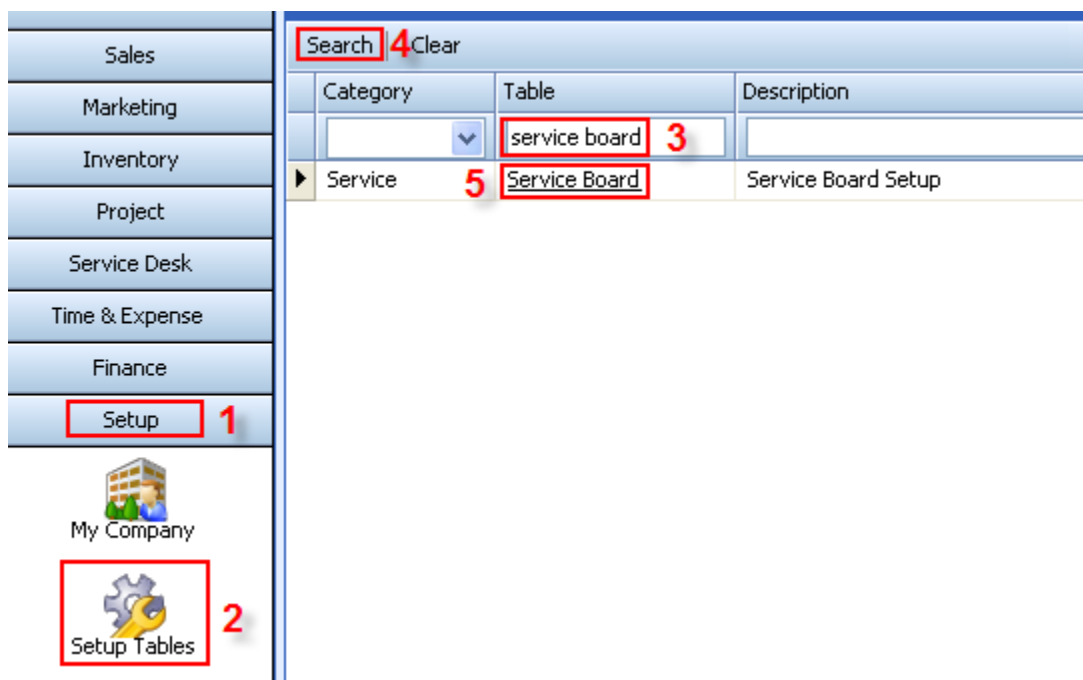
ConnectWise PSA Setup

The following tasks must be completed in the ConnectWise PSA software. If you have any questions or need assistance, please contact Cloud Services Depot Technical Support at 866-343-2588 or support@cloudservicesdepot.com.

Create Service Board

In this procedure, you will create a new Service Board in ConnectWise that will be used exclusively for Help Desk tickets from Cloud Services Depot. In addition, you will be asked to prepare the integrator login and status field mapping in ConnectWise.

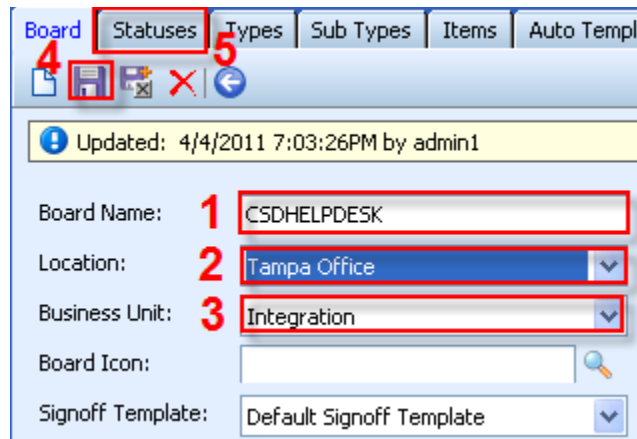
1. Log into ConnectWise and go to **Setup > Setup Tables**. In the **Table** field, search for “service board”, then select **Service Board**.



ConnectWise PSA Software

2. Click on  to create a new Service Board.
3. Fill in the **Board Name** field with the desired name. **Location** and **Business Unit** fields cannot be left blank, however, the selection in these fields is arbitrary and will not affect integration.

4. Click  to save, then click on the **Statuses** tab.



Board | **Statuses** | Types | Sub Types | Items | Auto Templ

Updated: 4/4/2011 7:03:26PM by admin1

Board Name: 1 CSDHELPDESK

Location: 2 Tampa Office

Business Unit: 3 Integration

Board Icon:

Signoff Template: Default Signoff Template

ConnectWise PSA Software

5. Click on the **Board** tab and verify the default order for Resolutions is set to **Descending**. This ensures that the order of Resolutions in ConnectWise matches the order of the Comments in the CSD Help Desk Services Portal and is necessary for proper synchronization.

Setup Tables ► Service Board

Service

Board | Statuses | Types | Sub Types | Items | Auto Templates | Teams | Codes | Auto Assign

Updated: 4/4/2011 7:03:26PM by admin1

Board Name: CSDHELPDESK Inactive ☐ Work Role:

Location: Tampa Office Work Type:

Business Unit: Admin Bill Time? No Default

Board Icon: Browse ☐ Bill Expenses? No Default

Signoff Template: Default Signoff Template Bill Products? Do Not Bill

Override Billing Options? ☐

☐ Bill each service ticket separately.

☐ Bill service tickets only after they have been closed.

☐ Bill unapproved time and expense records.

Allow Email Connector to reopen closed tickets ☐

Set them to status:

☐ Re-open assigned resources

☐ Create new ticket when sender's company doesn't match

☐ Never re-open a ticket more than days old

Automatic Email Options

Sent From:

Closed Loop Options:

☐ Time Entry option cannot be changed

☐ Detail Description cannot be updated directly

Turn on Closed Loop features for the following:

☐ Updates to Detail Description

☐ Updates to Internal Analysis

☐ Updates to Resolution

Default Sort Order for Ticket Additions:

Detail Description: Ascending

Internal Analysis: Ascending

Resolution: Descending

ConnectWise PSA Software

Status Mapping

In this procedure, you will assign each available external integration reference to a status description in ConnectWise. This provides consistency of ticket data definitions across both systems.

1. Navigate to the **Statuses** tab in ConnectWise.
2. Create the Statuses listed exactly as they appear in the screenshot below.
 - a. Be sure to enable the checkbox for **Display** for the **New** status
 - b. Be sure to enable the **Closed** checkbox for the following statuses: **Closed** and **Closed - Abandoned**.

Setup Tables ▶ Service Board								
Service								
Board	Statutes	Types	Sub Types	Items	Auto Templates	Teams	Codes	Auto Assign
  	Search	Clear	Export			View	Customize	25
Sort	Service Status	Service Board	Default	Workflow S	New	Display	Closed	
▶	0 New	CSDHELPDESK	✓	0	✓	✓		
	0 Closed	CSDHELPDESK		0		✓	✓	
	0 Working	CSDHELPDESK		0		✓		
	0 On Hold	CSDHELPDESK		0		✓		
	0 Waiting on VAR	CSDHELPDESK		0		✓		
	0 Closed - Abandoned	CSDHELPDESK		0		✓		✓
	0 Working (VAR)	CSDHELPDESK		0		✓		

ConnectWise PSA Software

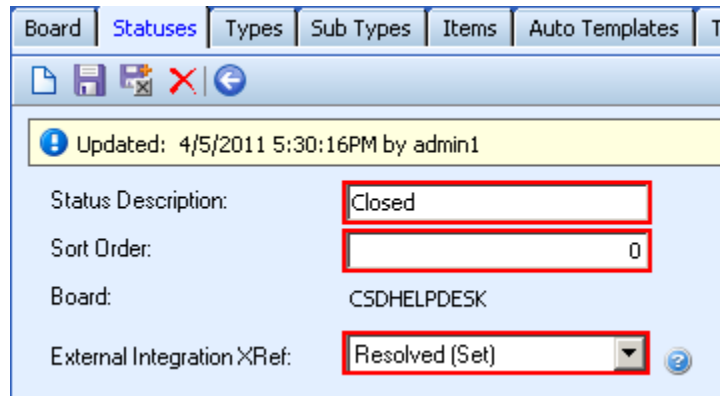
- During the setup process, be sure to select the correct option in the **External Integration XRef** field. Use the table below to properly configure the **External Integration XRef** field.

Status:	External Integration Reference:
New	Not Responded
Closed	Resolved
Working	Plan of Action
On Hold	On Hold
Waiting on VAR	Responded
Closed - Abandoned	Cancelled
Working (VAR)	

Explanation of Help Desk case statuses:

New	The case is currently assigned to the Help Desk team.
Closed	The case has been resolved.
Working	The Help Desk team is currently working on the case
On Hold	The Help Desk team has placed the case on hold and will resume when able.
Waiting on VAR	The Help Desk team has escalated the case to the reseller.
Closed - Abandoned	The case was escalated and remained unchanged for over 48 hours.
Working (VAR)	The reseller can set a case to this state to indicate that they are working on the case and Cloud Services Depot staff should not close it.

Here is an example:



ConnectWise PSA Software

NOTE: The external integration reference names may not match the corresponding status names; these are only used internally by the system and will not affect the integration service.

1. Click  to save and close.
2. Click  to create another status mapping, and repeat until all External Integration XRef options are set.

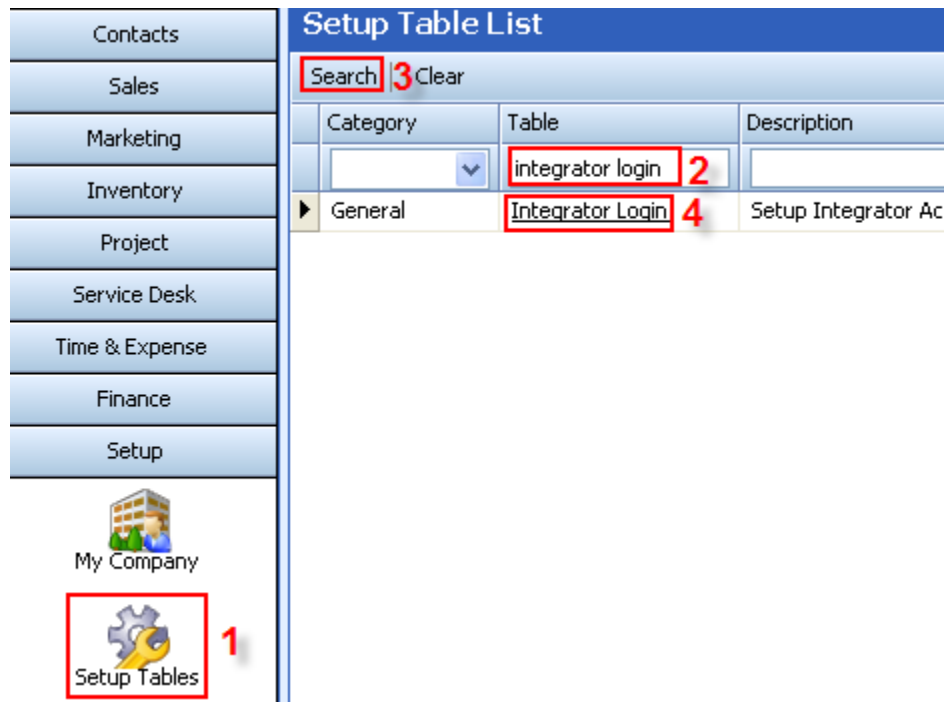


*TIP! Make sure that the selection for the **Board** field dropdown matches the Service Board you just created. Additional options on this screen can be left default or customized according to your preference. Please select the “**Display on Board?**” checkbox for the **New** status and select the “**Closed Status?**” checkbox for the **Closed** and **Closed - Abandoned** statuses.*

Setup Integrator Login

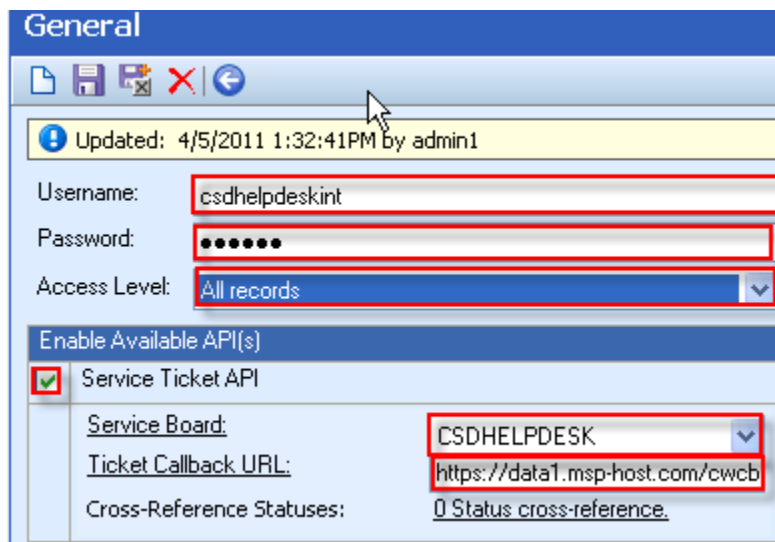
In this procedure, you will create the Integration Login in the ConnectWise PSA software. The Integration Login will be used to synchronize data from ConnectWise to the Cloud Services Depot Help Desk Services Portal.

1. Go to **Setup > Setup Tables**. In the Table field, search for “integrator login”, then select **Integrator Login**.



ConnectWise PSA Software

2. Click  to create a new login.
3. Input the **Ticket System API Username/Password** that you created in the Help Desk Services Portal. Please see the “Create Ticket Integration Policy” section for more information.
4. Verify the following settings:
 - ✓ **Access Level** must be set to **All records**.
 - ✓ **Service Ticket, Company, and Contact APIs** must be enabled.
 - ✓ **Verify** the selected **Services Board** is the same object created earlier.
 - ✓ **Insert** the **ConnectWise Callback URL** from the Help Desk Services Portal in the **Ticket Callback URL**.



ConnectWise PSA Software

5. Click  to save and close.

ConnectWise Ticket Integration Capability and Usage

Assuming that the ConnectWise integration was properly configured in the Help Desk Services Portal and ConnectWise per the instructions given above, the following is a description of the expected behavior from the interaction of the two systems.



Note: It is not possible for tickets initially created in ConnectWise to synchronize with the CSD Help Desk portal at this time due to a ConnectWise API limitation. Therefore, all new VAR-generated tickets must be created through the CSD Help Desk portal.

Create Ticket

If a case is created in the CSD Help Desk portal, it will generate a corresponding Service Ticket in ConnectWise assigned to the Service Board defined for the CSD Help Desk during setup. Only the Status, Summary, and Detail Description fields will be populated in the new ticket. Upon successful ticket creation, the PSA Ticket Id field in the CSD Help Desk portal case is populated with the ConnectWise service ticket ID.

Created in CSD Help Desk portal:

Case Detail

Close Case

Case Number

00027615 [\[View Hierarchy\]](#)

Account Name

CSD

Client Site

[Megamax Recycling](#)

PSA Ticket ID

444

Description Information

Subject

Test case 001

Description

description 0001

Synchronized to ConnectWise:

Display	Ticket#	!	Age	Status	Summary Description
All					test
Open	<u>444</u>		0	new	<u>Test case 001</u>

Update Ticket

Status and Subject fields synchronize from the Help Desk Services Portal to the corresponding ConnectWise Status and Summary fields. The status field synchronizes from ConnectWise to the Help Desk Services Portal.

Note: Fields that are described in this document are not synchronized between ConnectWise and the Cloud Services Depot Help Desk Services Portal.

Connectwise Ticket with Sample Comment:

Company:	Angry Fox, Co.	Service Board:	Professional Services
Contact:	Robert Storts	Status:	
Phone:	Ticket 813-988-8241	Service Type:	
Email:	test@test.com	Service Sub Type:	
Site Name:		Service Item:	
Address:		Source:	Phone
City:		Where:	
State:		Team:	
Zip:		Severity:	Medium
Country:		Impact:	Medium
Agreement:	Managed Service/Server Maintainer	Priority:	
Opportunity:		Actual Hours:	0.00
Reqd Date:		Remaining:	0.00
SLA:	Standard SLA	Budget Hours:	0
Summary:	Sample Help Desk Case		

ConnectWise PSA Software

Same Ticket Shown in the Help Desk Services Portal:

Case Detail			
Case Number	00069708	Case Record Type	CSD Help Desk Cases
Phone Line	Test Production Phone Line 001	Status	New
Client Site	Megamax Recycling	Priority	High
PSA Ticket ID	456	Type	Technical Issue
Help Desk User	Ed Brinkley	Date/Time Opened	4/1/2011 6:04 PM
Support Minutes Used	2	Date/Time Closed	
Description Information			
Subject	Sample Help Desk Case		
Description	Sample Help Desk Case Description.		

Help Desk Services Portal

Newly entered comments will synchronize from the CSD Help Desk portal to ConnectWise.

CSD Help Desk portal **Comment:**

Case Details

Subject

Laptop charger replacement

Description

Customer's charger caught fire

Comment Details

Comment

This is a comment originating in Salesforce.

Save

Cancel

Replicated in ConnectWise:

Resolution

Sat 5/29/2010 7:23 pm / zSys Admin-

This is a comment originating in Salesforce.

To synchronize a Comment from ConnectWise to the CSD Help Desk portal, it must be entered as a new **Ticket Resolution**.

Resolution

Ticket Notes -- Webpage Dialog

Enter notes

Display note to:

☐ Ticket Detail Description

☐ Ticket Internal Analysis

2

☒ Ticket Resolution

I am entering this text in ConnectWise.

3

Replicated in the CSD Help Desk portal:

Case Comments

Add Comment

Comment

Created By: CSD NOC Ticketing Integration (5/29/2010 5:00 PM)

I am entering this text in ConnectWise.

Created By: Nick Smyrnos (5/29/2010 4:23 PM)

This is a comment originating in Salesforce.

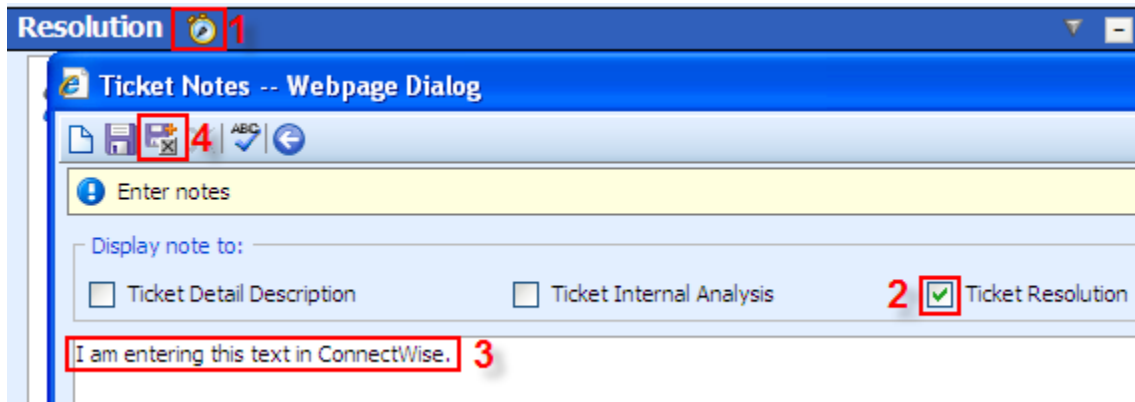
Note: You must click  to save the ConnectWise case after submitting a resolution entry in order for that entry to synchronize to the CSD Help Desk portal as a Comment.

Delete Ticket

Deleting a ticket in ConnectWise will erase the **PSA Ticket ID** field in the Help Desk Services Portal but leave the CSD Help Desk Services Portal ticket. Deleting the case in the CSD Help Desk Services Portal will orphan the ConnectWise ticket.

Add Comment/Resolution in ConnectWise

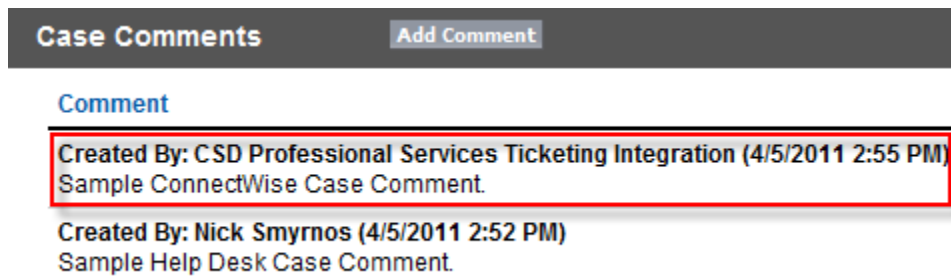
New comments will synchronize from the Cloud Services Depot Help Desk Services Portal to the ConnectWise PSA software. To create a new **Comment** in ConnectWise and synchronize it to the Help Desk Services Portal, the **Comment** must be entered as a new **Ticket Resolution**. See example below:



The screenshot shows the 'Resolution' window in ConnectWise PSA Software. The window title is 'Resolution' with a clock icon and the number '1'. Below the title bar is a 'Ticket Notes -- Webpage Dialog' toolbar with icons for file operations and a text input field. The text input field contains the text 'I am entering this text in ConnectWise.' and is labeled with a red box and the number '3'. Below the text input field are three checkboxes: 'Ticket Detail Description', 'Ticket Internal Analysis', and 'Ticket Resolution'. The 'Ticket Resolution' checkbox is checked and labeled with a red box and the number '2'. The 'Enter notes' button is also visible.

ConnectWise PSA Software

Comment replicated in the Help Desk Services Portal:



The screenshot shows the 'Case Comments' section in the Help Desk Services Portal. It includes an 'Add Comment' button. Below the button, there is a 'Comment' section with two entries. The first entry is 'Created By: CSD Professional Services Ticketing Integration (4/5/2011 2:55 PM)' and 'Sample ConnectWise Case Comment.' This entry is highlighted with a red box. The second entry is 'Created By: Nick Smyrnos (4/5/2011 2:52 PM)' and 'Sample Help Desk Case Comment.'

Help Desk Services Portal

Modify Ticket Comment/Resolution in ConnectWise

Modifying an existing comment in either system is not recommended. If an existing comment is modified in the Help Desk Services Portal, the comment will not update in ConnectWise.

If the most recent Resolution in ConnectWise is modified, it will be added to the CSD Help Desk Services Portal as a new comment. Modifications to older Resolutions will not be synchronized.

Delete Comment/Resolution in ConnectWise

Comment deletion in the Help Desk Services Portal will not synchronize to ConnectWise, but if the most recent Resolution entry is deleted from ConnectWise, it will result in a duplicate Comment from ConnectWise to the Help Desk Services Portal during a subsequent synchronization event.

If the most recent Resolution is deleted from ConnectWise, the next most recent Resolution will synchronize again over to the Help Desk Services Portal as a new Comment.



Note: Due to limitations imposed by the ConnectWise API, modifications of any ticket field(s) in ConnectWise on the tickets assigned to the Help Desk Service Board other than the fields described in this document is not supported. The data in these fields will be lost during synchronization events.

Examples of unsupported fields include: Priority, Service Type, Site Name, Address, State, Zip, Req'd Date, and Budget Hours.

The Help Desk Services Portal integration leverages a separate ConnectWise Service Board, so the above field restrictions do not apply to, and will NOT affect existing or new ConnectWise tickets that are unrelated to the Cloud Services Depot Help Desk Services.



Note: A short delay may be experienced during synchronization events. For example, after changing the status on a ConnectWise ticket, the change will be reflected in the Help Desk Services Portal 30 seconds later. This behavior is by design and will not affect the quality of service.

User Importation

Once integration has been set up, it is possible to import Contacts from ConnectWise as Help Desk Users. To perform a user import, navigate to the desired Client Site and click the **Import Help Desk Users** button.

Client Site Detail

Edit

Client Site Name	Megamax Recycling	Site Status	Pre-Setup
Time Zone	GMT-8	Record Type	CSD Help Desk Client Site
Owner	Nick Smyrnos [Change]	Supported Help Desk User Count	10

Help Desk Policies

Notification Policy	Management - Steve	Phone Line	Test Production Phone Line 001
Ticket Integration Policy	CW	PSA Client Identifier	AngryFoxCo
Created By	Nick CSD Professional Services Portal User - 501114, 4/23/2010 3:52 PM	Auto-Import Help Desk Users from PSA?	☒
		Last Modified By	CSD Help Desk User Import, 9/21 5:16 PM

Edit

Help Desk Users

New Help Desk User

Import Help Desk Users

Action	Helpdesk User Name	Email Address	Phone Number	Support Status
Edit	Robert	test@test.com	8139888249	Supported
Edit	New Guy	new@quv.com		Not Supported

To have user records updated once per day, check the **Auto-Import Help Desk Users from PSA?** box.

Phone Line	Test Production Phone Line 001
PSA Client Identifier	AngryFoxCo
Auto-Import Help Desk Users from PSA?	☒

Notes:

- If the Client Site is on a per-user Phone Line, newly imported users that are not Inactive will automatically be enrolled in the service.
- If a Contact's Inactive checkbox is toggled in ConnectWise and then the import is run again, the status of the Help Desk user in the Help Desk portal will change to Not Supported when the Inactive box is checked, and Supported when the Inactive box is unchecked.
- If a Contact in ConnectWise is deleted, it will not be automatically deleted in the Help Desk portal on the next user import.
- If the values in the Contact's fields in ConnectWise are changed and the Contact has already been imported to the Help Desk portal, the changes will be synchronized to the Help Desk portal on the next import.