# ConnectWise API Integration Setup & Guide

## Create an API Member and API Key in ConnectWise

The ConnectWise Manage integration requires a ConnectWise API key to retrieve and publish data to and from your GetKambium account. GetKambium only supports using ConnectWise API keys for accessing ConnectWise Manage, we do not support User Impersonation or Cookie Authentication.

This is configured in the ConnectWise Internet Client (available from ConnectWise) and this integration requires both the **Public Key** and **Private Key** elements of the API Key.

### Create a Custom Security Role

GetKambium follows the design principal of 'least privilege'. Do not create a security role with full admin privileges, or privileges above what is requested as the system will not accept the API Key.

1. Go to System > Security Roles
2. Click the plus (+)*New Item* button in the Security Roles section
3. Enter a name for the Role ID
4. Click Save
5. Configure the roles settings in the **Security Modules For Role - <*New Role Name*>**
   Please ensure the permission are set as per the GetKambium ConnectWise Security Role Permissions table.
6. Click Save and Close to apply

| **GetKambium ConnectWise Security Role Permissions** | | | | |
|---|---|---|---|---|
| | Add Level | Edit Level | Delete Level | Inquire Level |
| **Companies** | | | | |
| Company Maintenance | | | | All |
| Configurations | | | | All |
| CRM/Sales Activities | All | | | All |
| **Finance** | | | | |
| Agreements | | | | All |
| **Procurement** | | | | |
| Product Catalog | | | | All |
| **Marketing** | | | | |
| Marketing Management | | | | All |
| **Sales** | | | | |
| Opportunity | All | | | All |
| **Service Desk** | | | | |
| Service Tickets | All | | | All |
| **System** | | | | |
| Member Maintenance | | | | All |

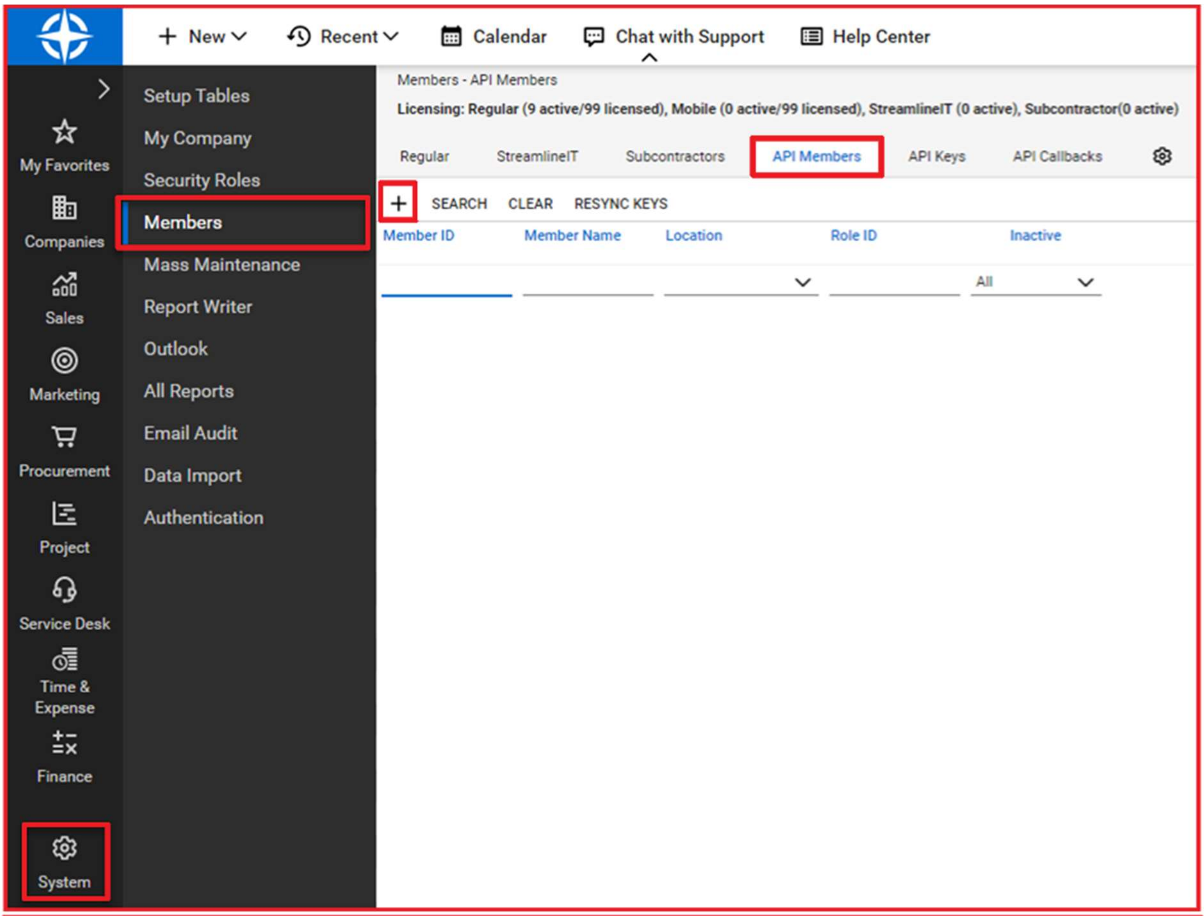
### Create the API Member

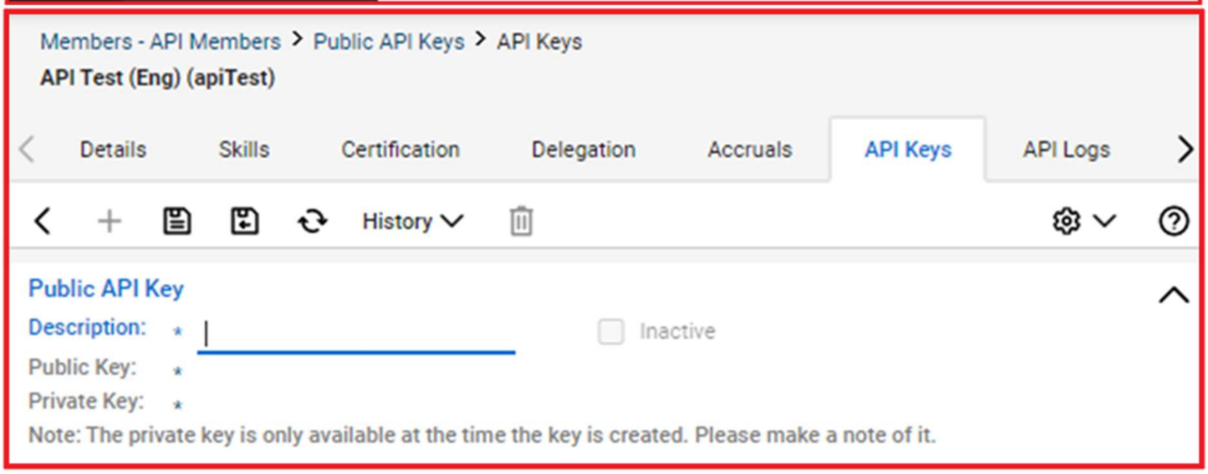
1. Go to System > Members
2. Choose the API Members tab
3. Click the plus (+)*New Item* button in the API Members tab
4. Complete the information in the New Member form
5. Choose your custom security role created above for the Role ID

6. Click **Save and Close** to apply

## Generate the API Key

1. Open the newly created **API Member**
2. Go to **API Keys**
3. Click the plus (**+**) *New Item* button in the **API Keys** tab
4. Enter a **Description** for the API Key
5. Click **Save**
6. This displays the **Public Key** and **Private Key**. Store these in a secure location, they are to be used for the GetKambium integration.



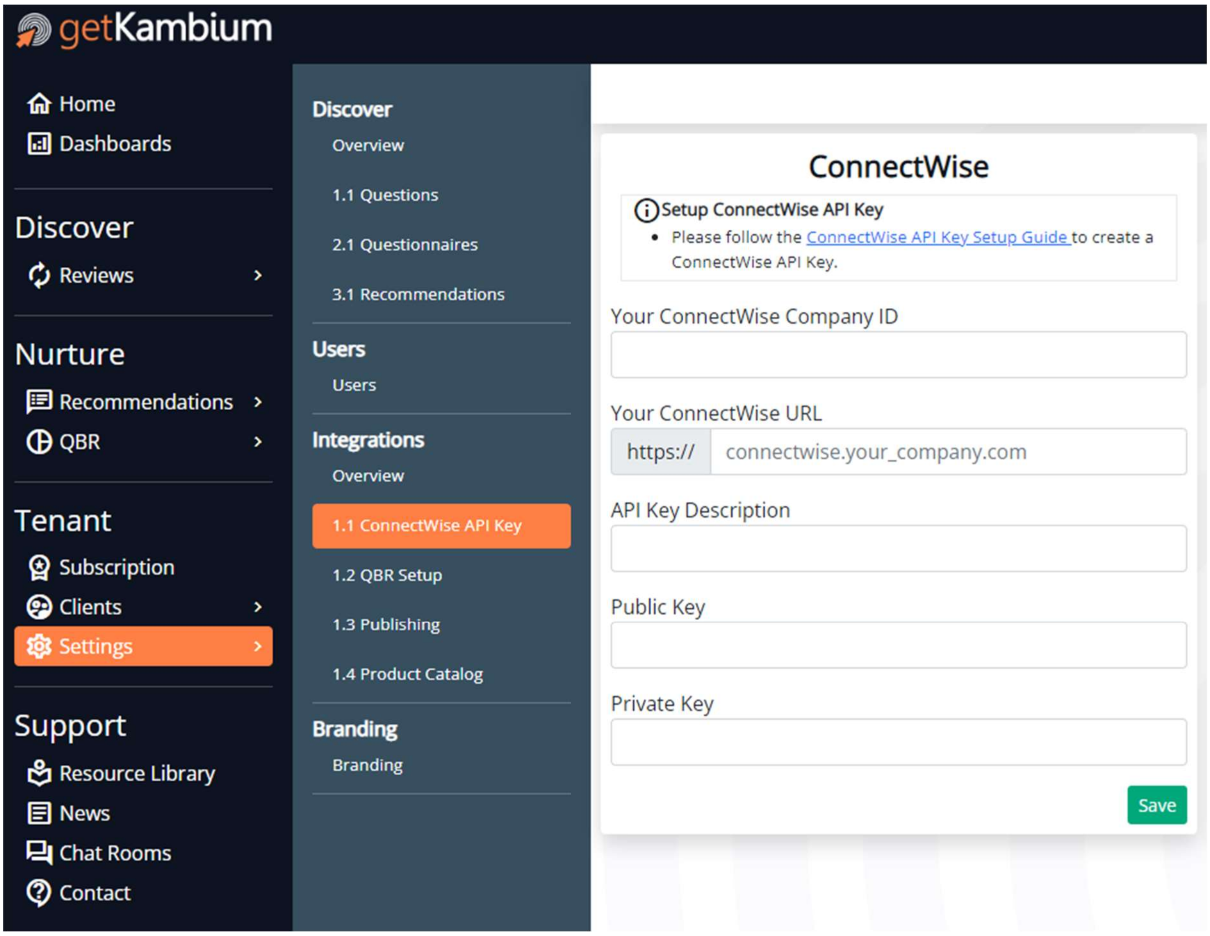




## Save the API Key in GetKambium

1. Navigate to:

a. *Settings – Integrations > 1.1 ConnectWise API Key*

2. Fill in the **ConnectWise** form with the relevant Company ID and ConnectWise URL for your ConnectWise Manage.
3. Use the Role ID or Member Name created above for the API Key Description.
4. Provide the Public and Private Key and click **Save**



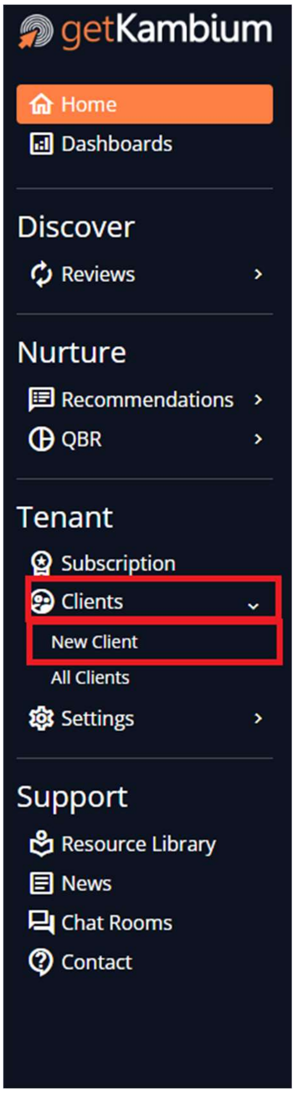
## Client Setup

Clients in GetKambium can be linked to ConnectWise company records for publication of Opportunities and Tickets, and the retrieval of data for presentation in QBRs.

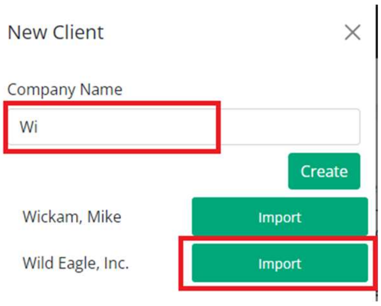
### Single New Client

To import a single Client from ConnectWise

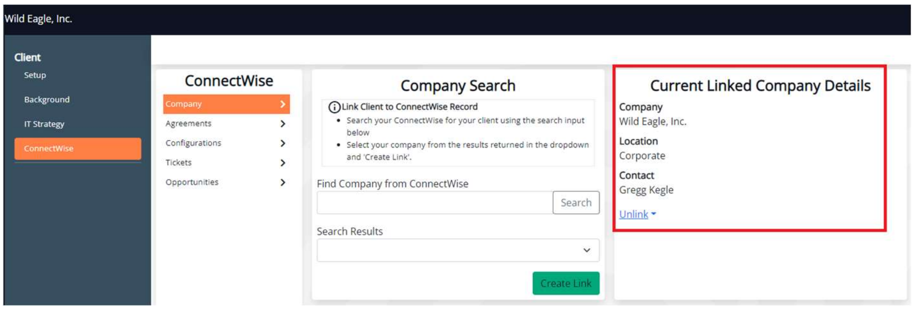
1. Click *Clients – New Client*




2. In the **New Client** form enter the Company Name. GetKambium will search ConnectWise for matching company names and display them below.
    1. Click **Import** on the desired company.



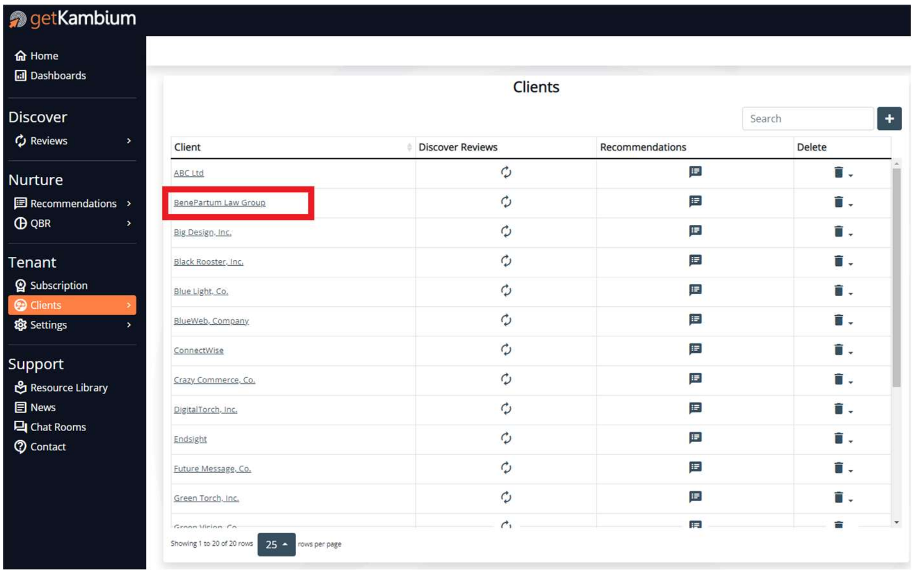
3. Ensure the **Current Linked Company Details** are correct under **Client ConnectWise – Company.**



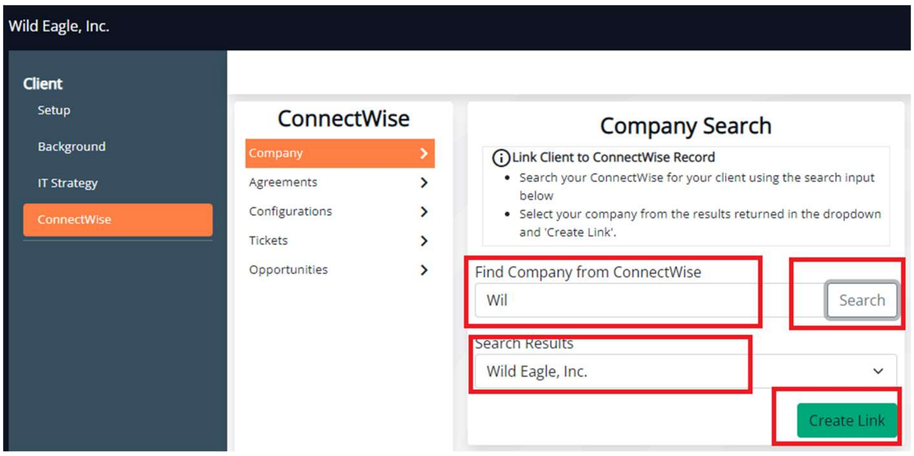

## Single Existing Client

To link a Client that exists in GetKambium to a ConnectWise company.

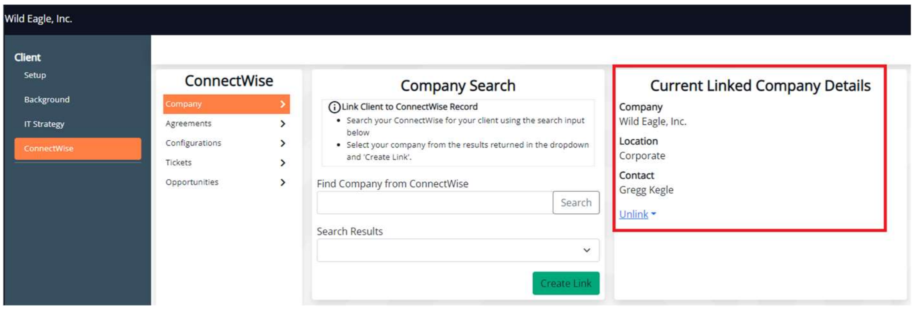
1. Navigate to *Client* > *All Clients*
2. Select the desired Client from the **Clients** table




3. Navigate to *Client ConnectWise – Company*
4. Search for the company in **Find Company from ConnectWise** field and click **Search**.
5. Select the appropriate Client record under **Search Results** and click **Create Link**.



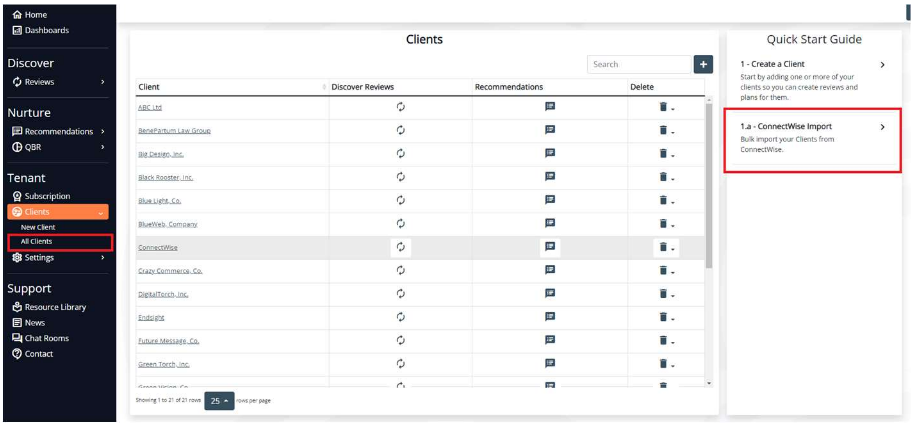
6. Ensure the **Current Linked Company Details** are correct under **Client ConnectWise – Company.**



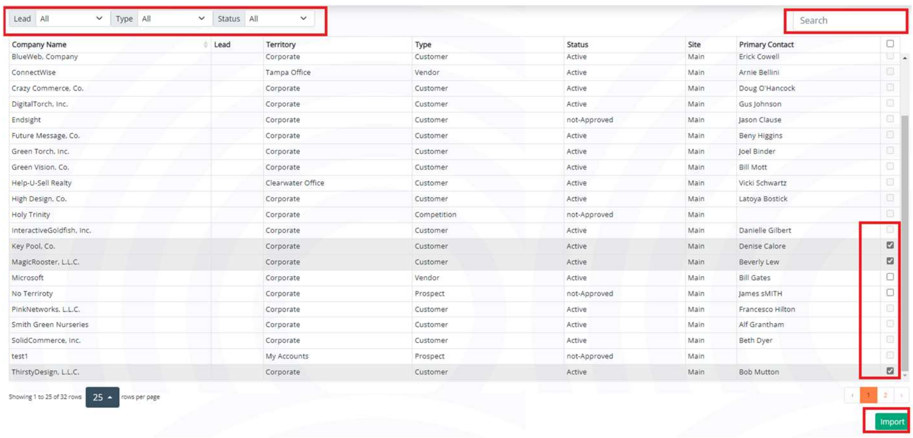

## Multiple Clients

To import multiple Clients from ConnectWise.

1. Navigate to *Clients* > *All Clients*
    1. Click **ConnectWise Import**




2. Use the table filters or search box to find companies. Check the companies you want to import and click **Import.**

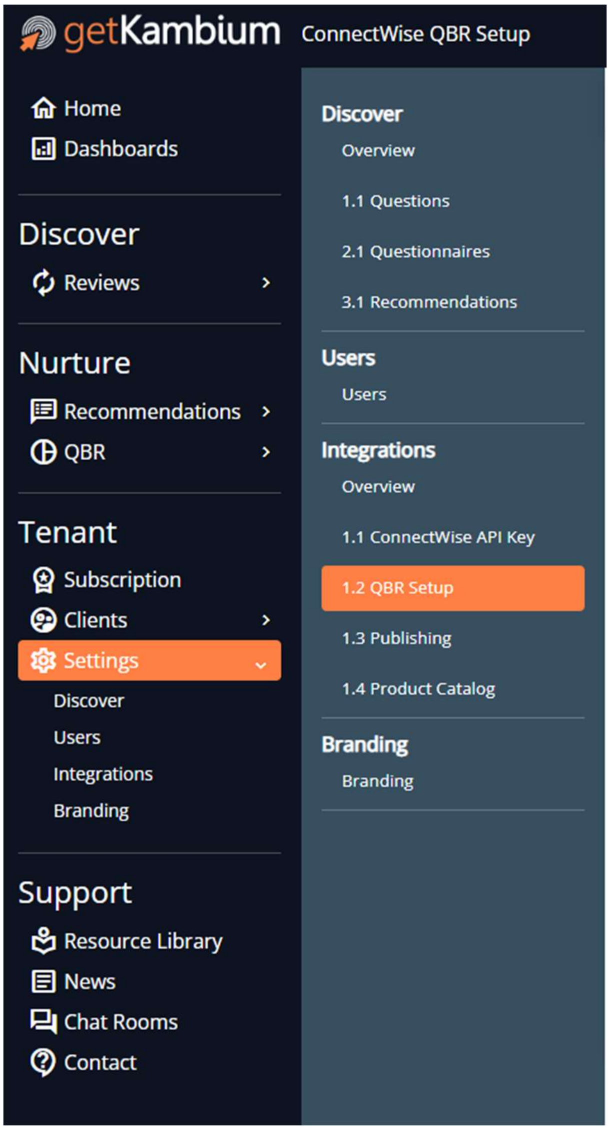


## QBR Setup

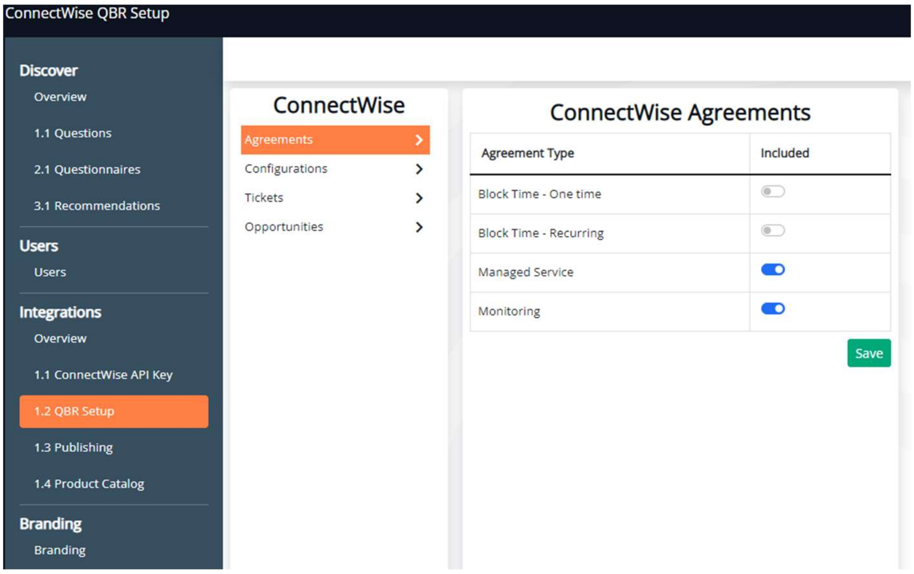
### Tenant-Wide Defaults

To have information pull from ConnectWise into the GetKambium QBR, begin by setting the tenant-wide defaults in GetKambium.

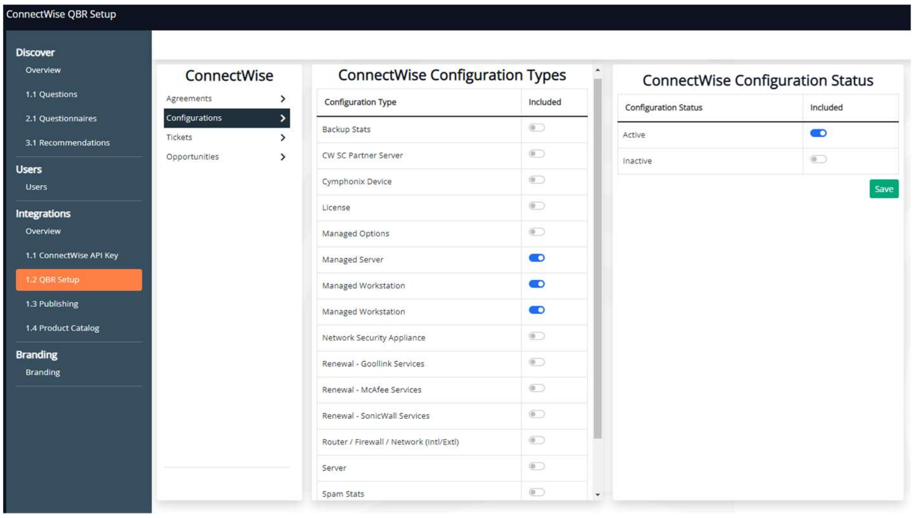
1. Navigate to:
    1. *Settings - Integrations > 1.2 QBR Setup*



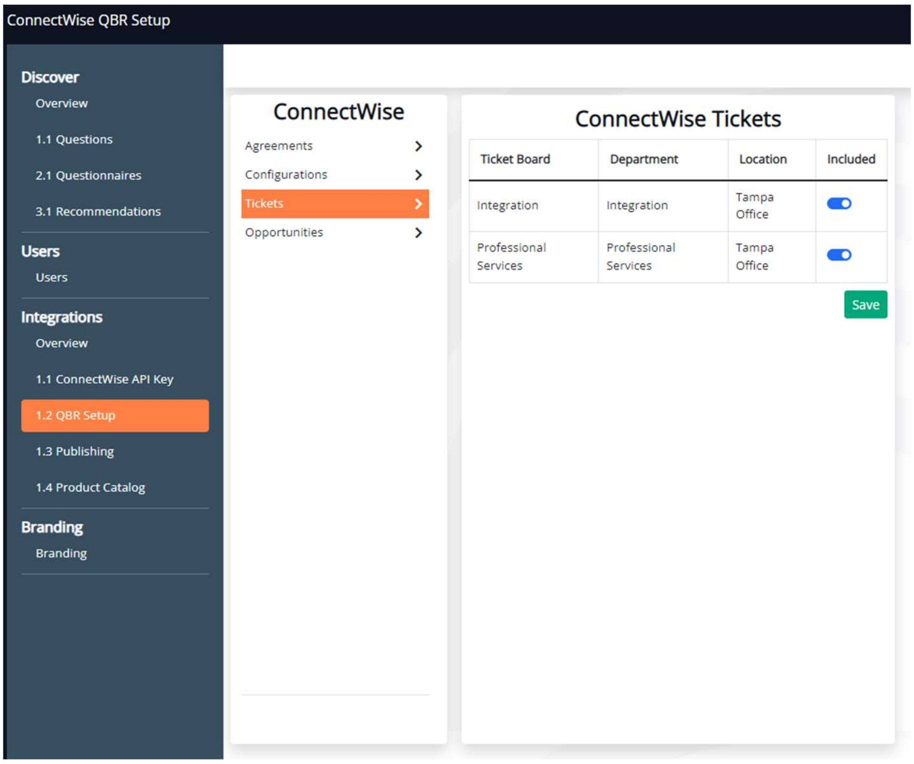

2. In *1.2 QBR Setup - Agreements* **ConnectWise Agreements** toggle on/off the Agreement Types that you want to include in the QBR by default and click **Save**.



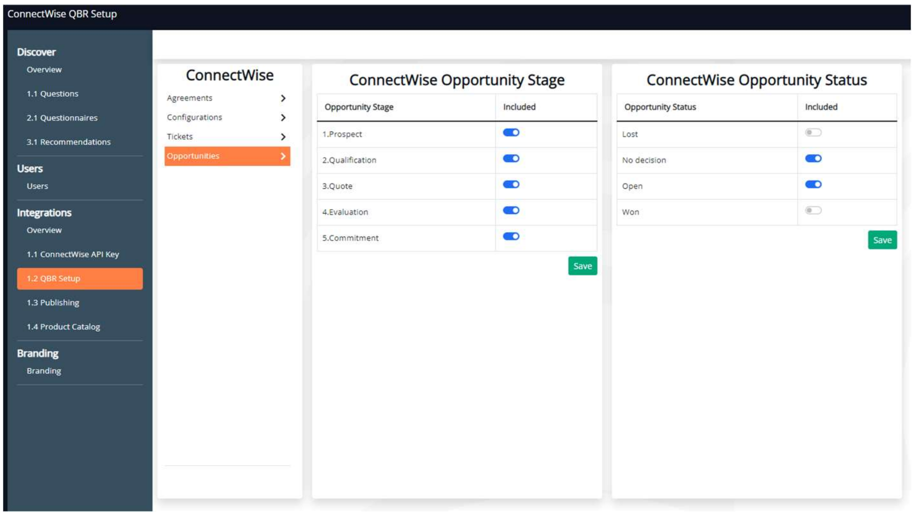

3. In *1.2 QBR Setup - Configurations* **ConnectWise Configuration Types** and **ConnectWise Configuration Status** toggle on/off the Configuration Types and the Configuration Statuses that correspond to Client Device Assets that you want to include in the QBR by default and click **Save** for each pod.




4. In *1.2 QBR Setup - Tickets* **ConnectWise Tickets** toggle on/off the Ticket Boards that you want to include in the QBR by default and click **Save**.



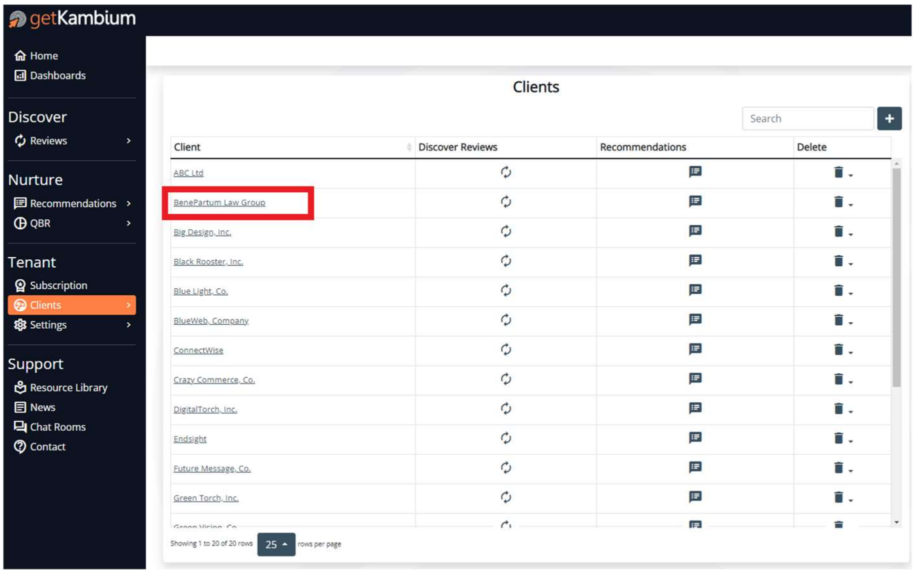

5. In *1.2 QBR Setup - Opportunities* **ConnectWise Opportunity** Stage and **ConnectWise Opportunity Status** toggle on/off the Opportunity Stages and Opportunity Statuses that you want to include in the QBR by default and click **Save** for each pod.



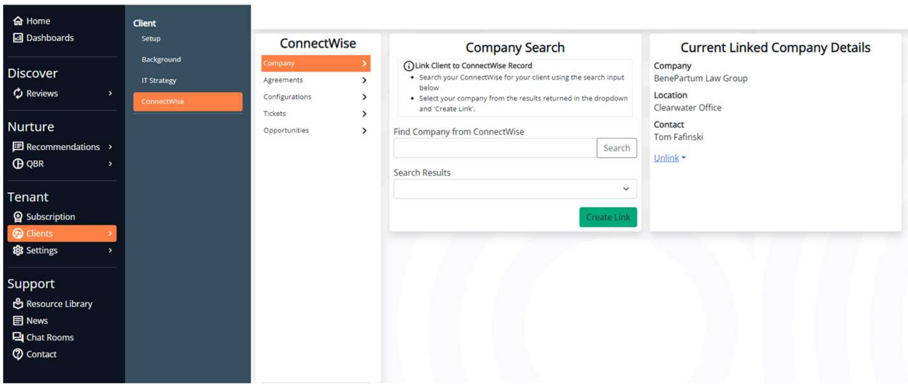

## Client-Specific Setup

The QBR Tenant-wide defaults can be over-ridden for individual clients.

1. Begin by navigating to:
    1. *Clients > All Clients*
2. Select a Client from the **Clients** table

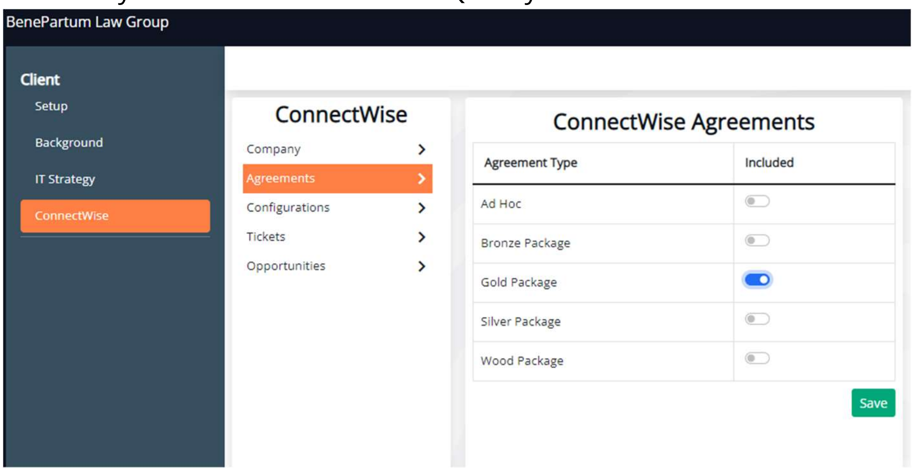



3. Navigate to *Client – ConnectWise*

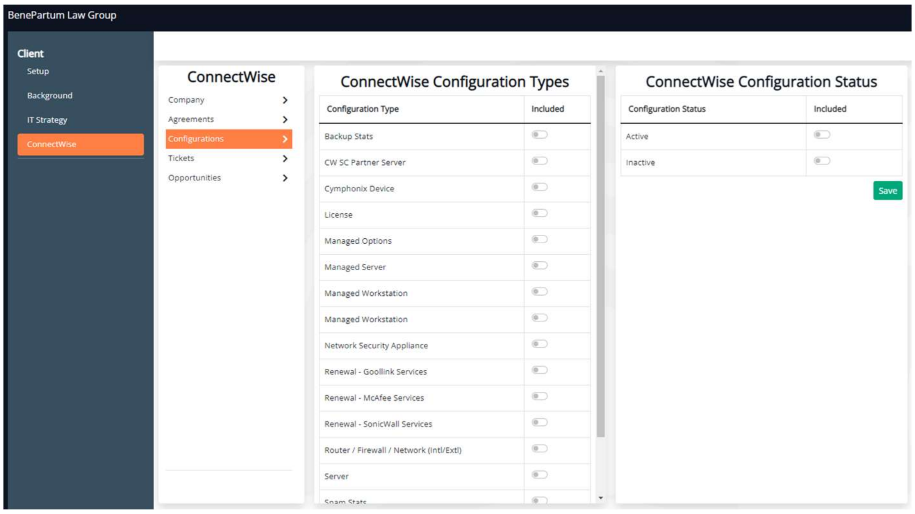



   1. If the Client has no record under **Current Linked Company Details** please follow the steps under **Linking a Company To ConnectWise.**

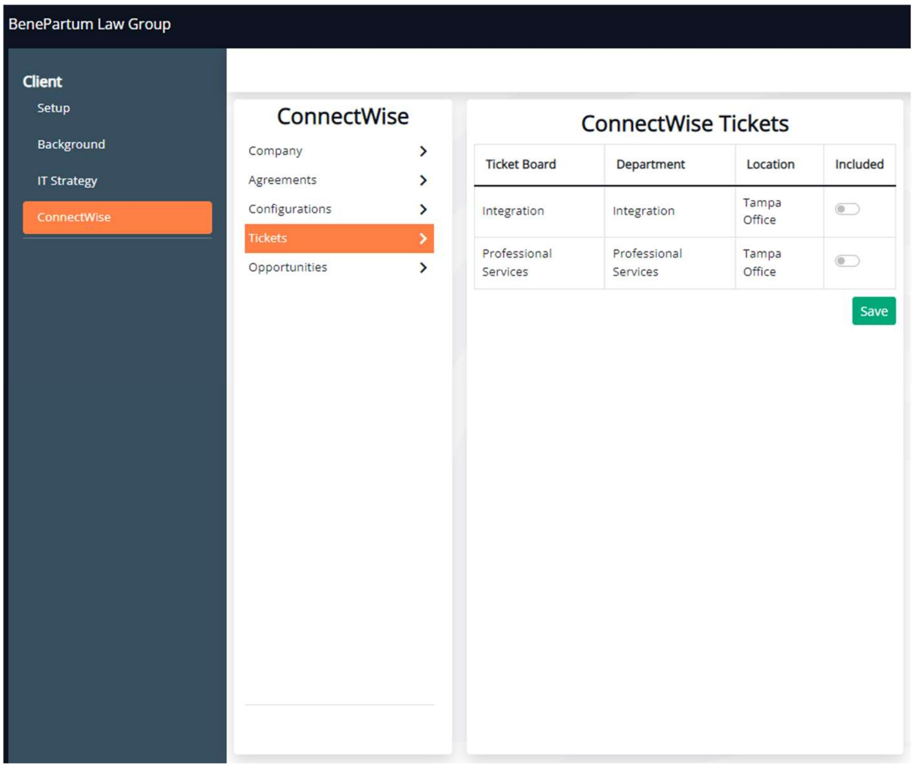
4. In *Client ConnectWise* > *Agreements* **ConnectWise Agreements** toggle on/off the active Agreements that you want to include in the QBR by default and click **Save**.



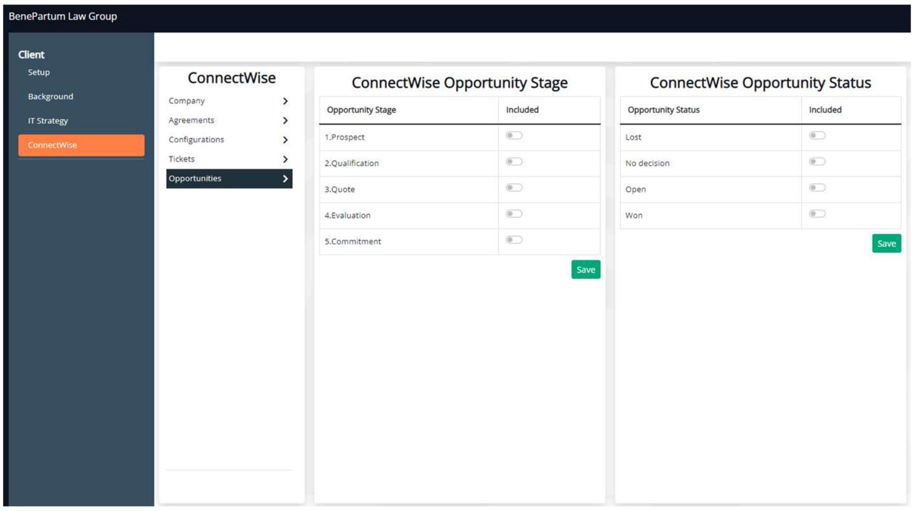

5. In *Client ConnectWise* > *Configurations* **ConnectWise Configuration Types** and **ConnectWise Configuration Status** toggle on/off the Configuration Types and the Configuration Statuses that correspond to Client Device Assets that you want to include in the QBR by default and click **Save** for each pod.




6. In *Client ConnectWise* > *Tickets* **ConnectWise Tickets** toggle on/off the Ticket Boards that you want to include in the QBR by default and click **Save**.




7. In *Client ConnectWise* > *Opportunities* **ConnectWise Opportunity Stage** and **ConnectWise Opportunity Status** toggle on/off the Opportunity Stages and Opportunity Statuses that you want to include in the QBR by default and click **Save** for each pod.




**NOTE:** If all toggles are set to off/exclude at the Client ConnectWise level, the default settings at the Tenant-Wide level will be used. If any of the toggles are switched to on/included they will override the Tenant-wide settings.

Agreement data is presented under section **3. Client Agreements** in the QBR.

Configuration data is presented under section **4. Client Assets** in the QBR.

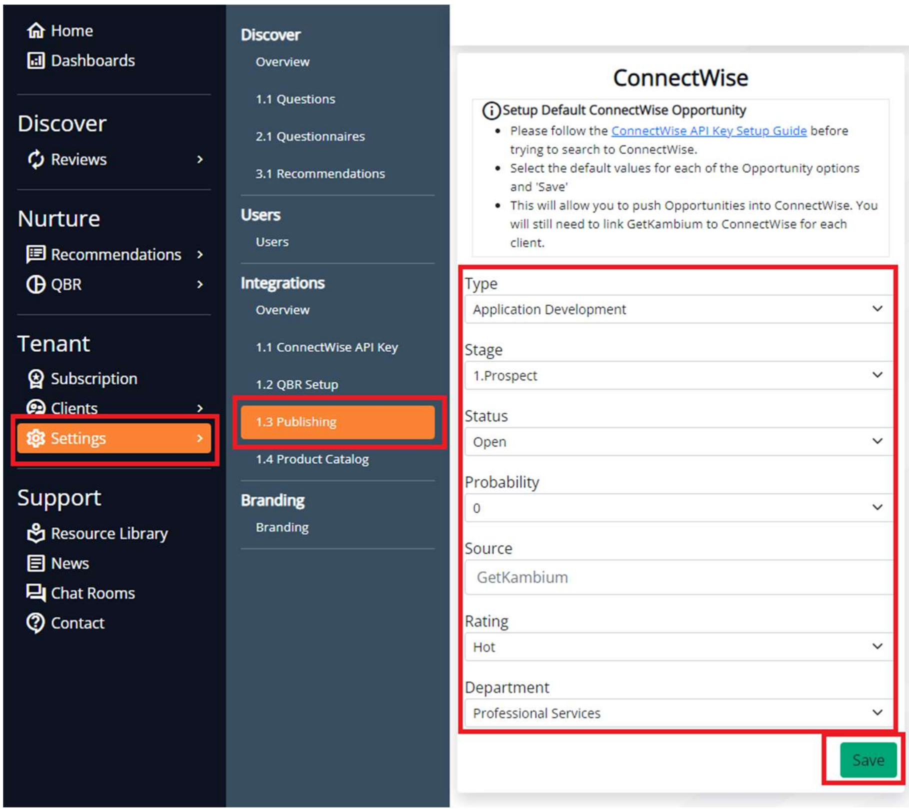
Service Ticket data is presented under section **6. Ticket Management** in the QBR.

Sales Opportunities data is presented under section **9.2 Initiatives** in the QBR.

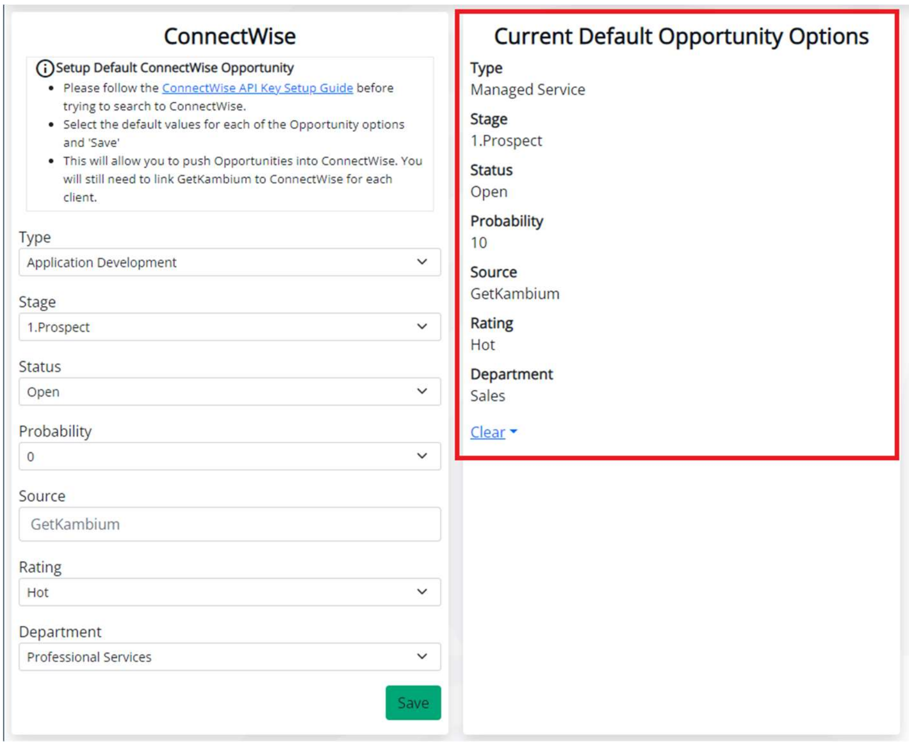
## Opportunity Setup

GetKambium can create Sales Opportunities from Recommendations. To publish Opportunities, the default values need to be setup.

1. Begin by navigating to:
   a. *Settings – Integrations > 1.3 Publishing*
   b. If you have not saved an API Key in GetKambium follow the instructions under 'Create an API Key and API Member in ConnectWise'
2. Under each of the dropdowns for Type, Stage, Status, Probability, Rating and Department select an option to be the default value when publishing an Opportunity.
3. In the Source field provide a text label to identify Opportunities coming from GetKambium
4. Click **Save**.



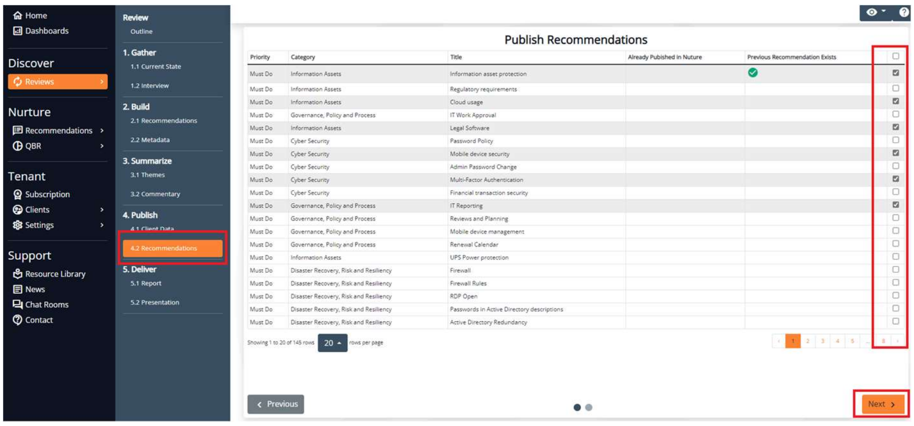

Ensure the default options are saved correctly in the **Current Default Opportunity Options**.



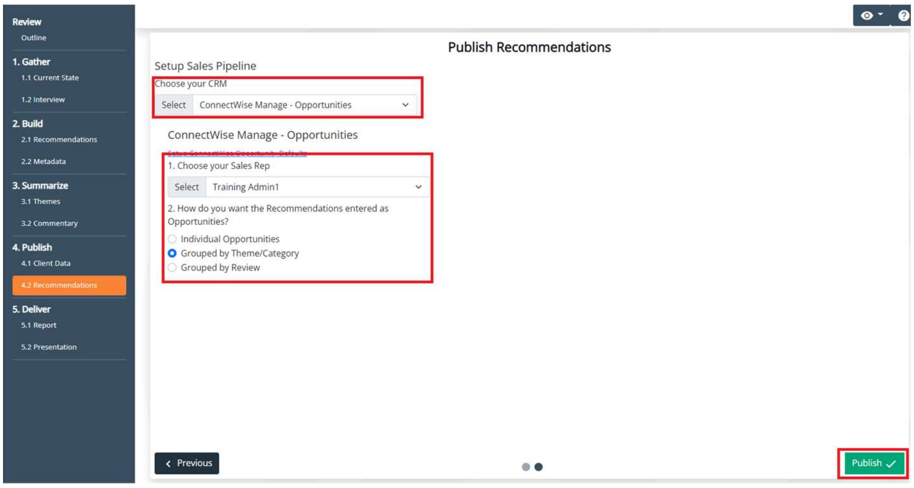

## Publishing a Recommendation to Opportunities

### From Discover Review

1. Within your Discover Review navigate to step *4.2 Recommendations*
2. Using the check boxes, select the Recommendations you want to publish as an Opportunity.
    a. Click **Next.**

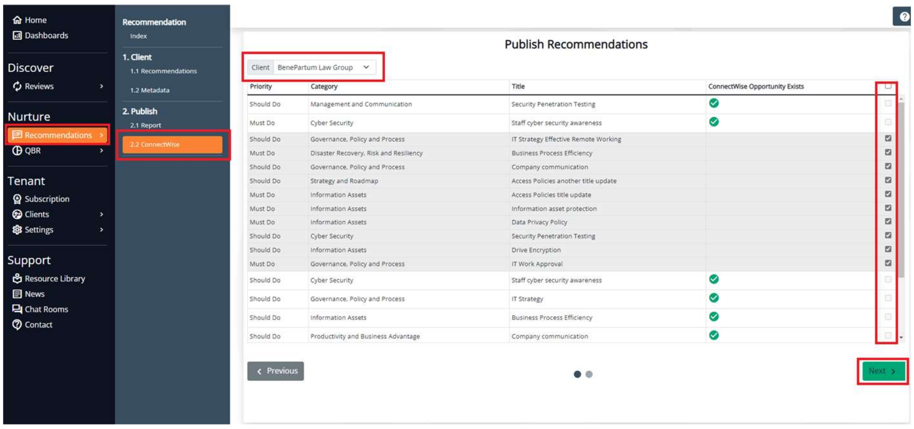



3. From the **Choose Your CRM** dropdown select **ConnectWise Manage – Opportunities**
4. Select the Sales Rep that the Opportunities should be published under.
5. Choose if you want Recommendations publishing individually, grouped by their category/theme or as one opportunity for the whole Review.
6. Click **Publish**

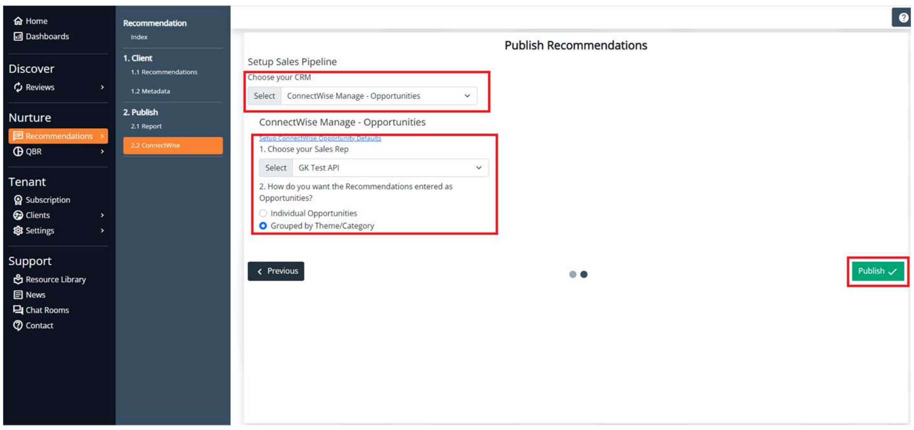



## From Nurture Recommendations

1. From *Nurture Recommendations – Client* navigate to *2. Publish – 2.2 ConnectWise.*
2. Select the client from the **Client** dropdown.
3. Using the checkboxes, select the Recommendations you want to publish as an Opportunity.
    a. Click **Next**.



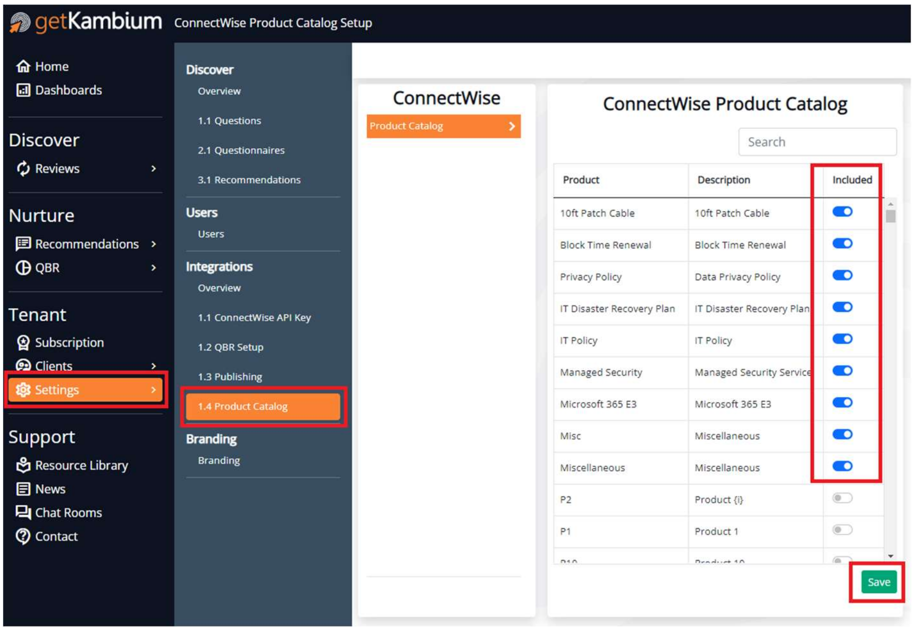

4. From the **Choose Your CRM** dropdown select **ConnectWise Manage – Opportunities**
5. Select the Sales Rep that the Opportunities should be published under.
6. Choose if you want Recommendations publishing individually, grouped by their category/theme.
7. Click **Publish**



## Product Catalog Setup

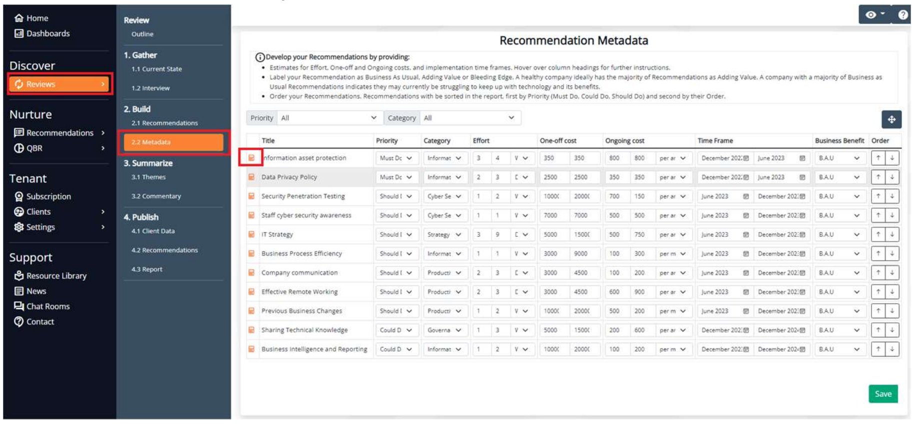
GetKambium can link to your Product Catalog to assist in quoting Recommendation costs.

1. To begin Navigate to
    a. *Settings – Integrations > 1.4 Product Catalog.*
2. Select the Products that you want to be available when quoting via the toggles and click **Save**.

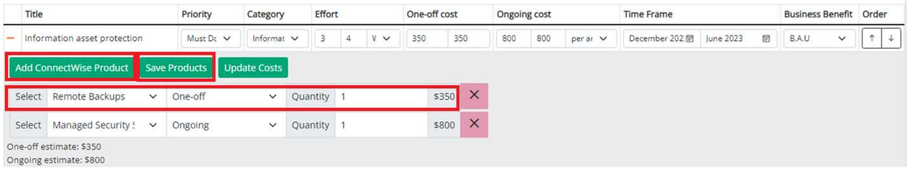



To use the Product Catalog when quoting a Recommendation.

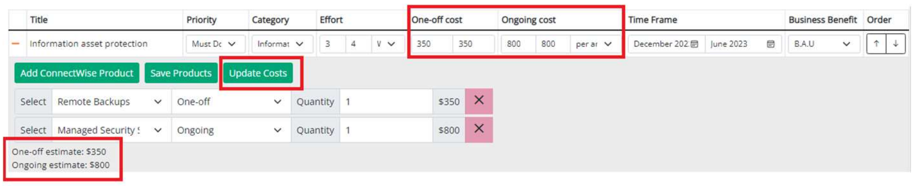
1. Navigate to step *2.2 Metadata* in your Discover Review.
2. Click on the **Calculator** (calculator icon at the start of the row) for the respective Recommendation to open the ConnectWise Product Calculator.




3. Click **Add ConnectWise Product** and select the Product from the Dropdown, if the Product cost is One-off or ongoing, and provide a quantity. Repeat for as many product lines are applicable for the Recommendation.
4. Click **Save Products.**




5. The Calculator will then provide an estimate for one-off and ongoing cost. Click **Update Costs** to change the Recommendation One-off and Ongoing costs to the estimate based on the ConnectWise Products.




6. To Remove a Product Line, click the **X** in the red box and click **Save Products.**