



CONTENTS

PREREQUISITE

Create a Security Role in ConnectWise Manage	2
Create API Member in ConnectWise Manage	3
Create an API Key	4
Create a Company	5
Create a Location	6
Create a Business Unit	7
Mapping the Business Unit to Location	7

INSTALL & VERIFICATION

Enter Credentials	8
Enter Company Configurations	8
Install ControlCase Configurations.....	8
Add ControlCase Compliance Hub™ Tab to Companies	9
Enable Pods for Project Tickets	10

First create a **Security Role** and add permissions to the role. These permissions are required for **ControlCase** specific operations.

CREATE A SECURITY ROLE IN CONNECTWISE MANAGE

(Refer to image 1)

1. Signin to **ConnectWise Manage**.
2. Click **System** (menu).
3. Click **Security Roles**.

(Refer to image 2)

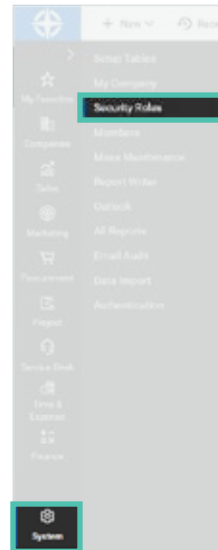
4. Click the **+** to add a new role.

(Refer to image 3)

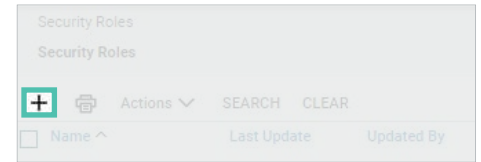
5. Under **Role ID**, select **ControlCase Role**.
6. Click **Save**.

Click on the newly created **ControlCase Role** to give the level wise permissions for Companies, Project, Service Desk, and System as shown in the table below. Then click **Save**.

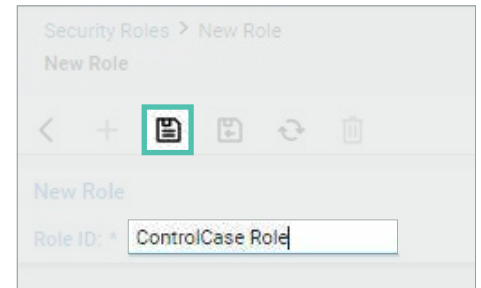
(Image 1)



(Image 2)



(Image 3)



PERMISSION LEVELS				
	ADD LEVEL	EDIT LEVEL	DELETE LEVEL	ENQUIRE LEVEL
COMPANIES				
Company Maintenance	None	None	None	All
Manage Attachments	All	None	All	All
Contacts	None	None	None	All
PROJECT				
Project Headers	All	All	None	All
Project Phase	All	All	All	All
Project Tickets	All	All	All	All
Project Scheduling (customize)	None	All	None	All
SERVICE DESK				
Service Tickets	None	None	None	All
SYSTEM				
My Company	None	None	None	All
Table Setup (customize)	All	None	None	All
Member Maintenance	None	None	None	All
API Reports	None	None	None	All

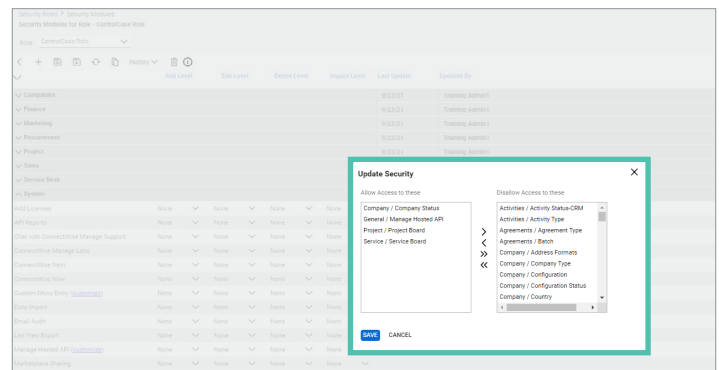
(Refer to image 4)

For the Table Setup permission within **ControlCase Role** expand **System** permission section and click on the **customize** link next to **Table Setup**.

1. Ensure the below list of tables is in **Allow Access to these** (on the left-hand side) column. Remove everything else.
 - Company / Company Status
 - General / Manage Hosted API
 - Project / Project Board
 - Service / Service Board

2. Click **Save**.

(Image 4)



CREATE API MEMBER IN CONNECTWISE MANAGE

(Refer to image 5)

1. In ConnectWise Manage, go to **System** (menu).
2. Click **Members**.

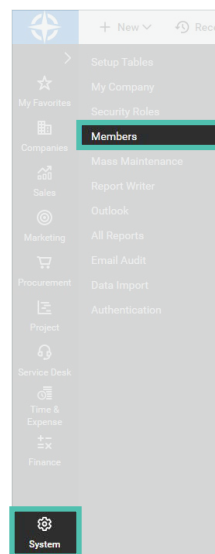
(Refer to image 6)

3. Click on the **API Members** tab.
4. Click the **+** to add a new API Member.

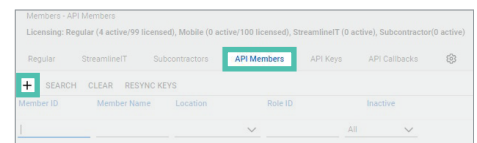
(Refer to image 7)

5. Fill in the below details under **Profile**:
 - **Member ID:** ControlCase.
 - **Member Name:** ControlCase API.
 - **Email (optional):** This should be a valid email address at your company level.
 - **Time Zone:** Use company default
6. Fill in the below details under **System**:
 - **Role ID:** ControlCase Role (created in the previous section).
 - Make sure to select the below fields as per your company defaults.
 - **Location**
 - **Level**
 - **Business Unit**
 - **Name**
 - **Default Territory**
 - Note: In the Service Defaults section you can block the member from accessing certain boards when added into the Restrict Board Access field. So ControlCase will not be able to access ticket details for those restricted boards.
7. Click **Save**.

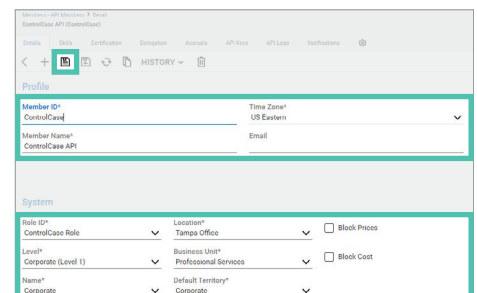
(Image 5)



(Image 6)



(Image 7)



CREATE AN API KEY

(Refer to image 8)

1. Click on the **API Keys** tab.
2. Click the **+** to add a new API Member.

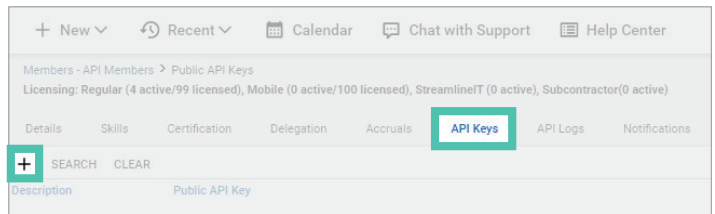
(Refer to image 9)

3. Add **ControlCase** in the **Description** field.
4. Click **Save**.

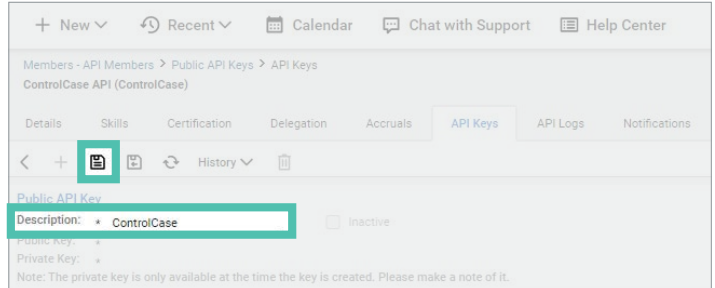
(Refer to image 10)

5. Public Key and Private Key will be generated and shown on the screen. You will need these keys during API connection with ControlCase.
6. Make a note of these keys, as they are only available when created and you won't be able to retrieve them again.

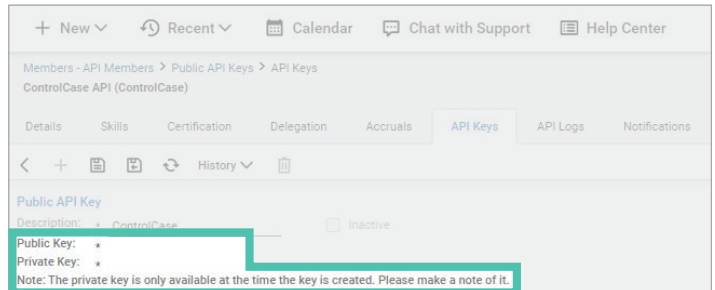
(Image 8)



(Image 9)



(Image 10)



CREATE A COMPANY

(Refer to image 11)

1. In ConnectWise Manage, go to **Companies** (menu)

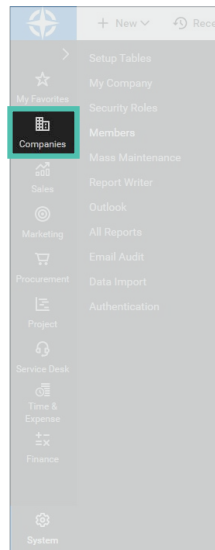
(Refer to image 12)

2. Click on the **Company** tab.
3. Click on **+** to add a new company.

(Refer to image 13)

4. Fill in the required details.
5. Click **Save**.

(Image 11)



This Company will be required further for ControlCase specific operations.

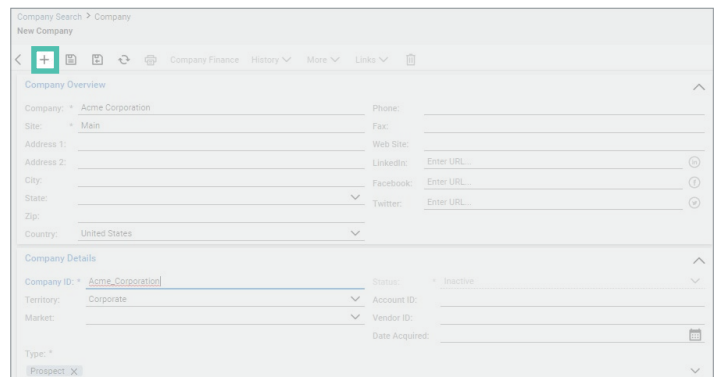
Additionally, we will also require predefined Location & Business Unit entities to carry out the operations. You can find the actual conventions used for Location and Business Unit in your ConnectWise Manage using below steps:

1. In ConnectWise Manage, go to **System** (menu)
2. Click on **My Company**.

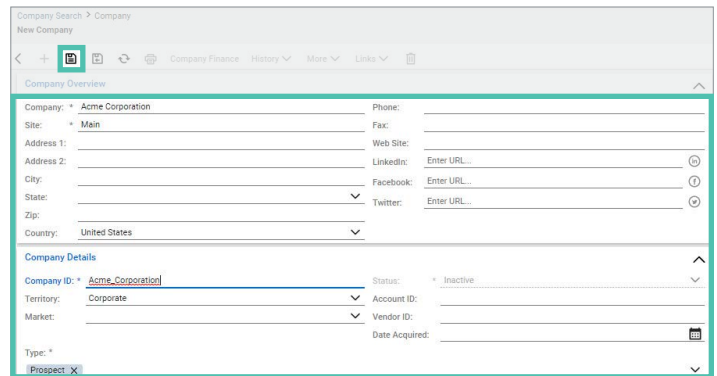
In the Owner tab:

- **Level 2 Name*** Represents your Location
- **Caption for Locations*** Represents your field name for Location
- **Caption for Groups*** Represents your field name for Business Unit

(Image 12)



(Image 13)



CREATE A LOCATION

(Refer to image 14)

1. In ConnectWise Manage, go to **System** (menu)
2. Click on **My Company**.

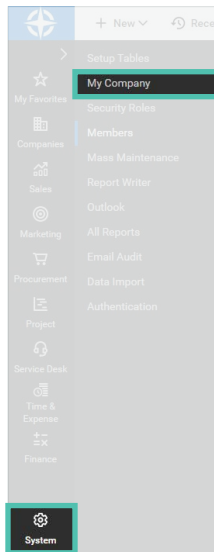
(Refer to image 15)

3. Click on the **Structure** tab.
4. Click on **+** to add a new location.

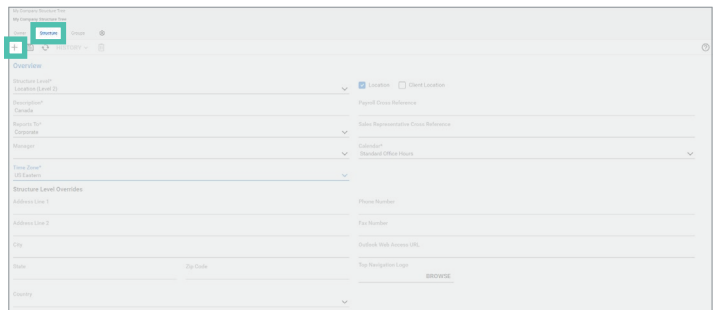
(Refer to image 16)

5. Select **Structure level** as (Level 2) prepended by some custom name.
6. Check the **Location** checkbox.
7. Fill the required fields.
 - **Description***
 - **Reports To***
 - **Calendar***
 - **Time Zone***
8. Click **Save**.

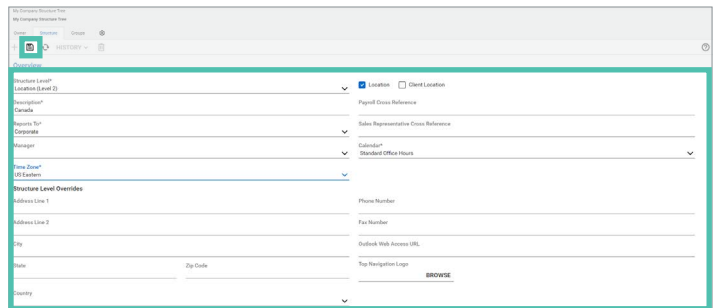
(Image 14)



(Image 15)



(Image 16)



CREATE A BUSINESS UNIT

(Refer to image 17)

1. In ConnectWise Manage, go to **System** (menu)
2. Click on **My Company**.

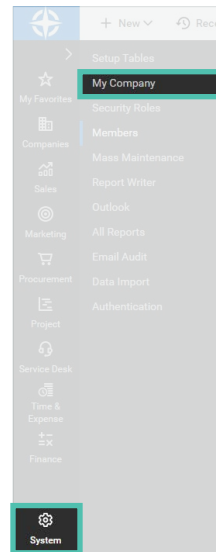
(Refer to image 18)

3. Click on the **Groups** tab.
4. Click on **+** to add a new business unit.

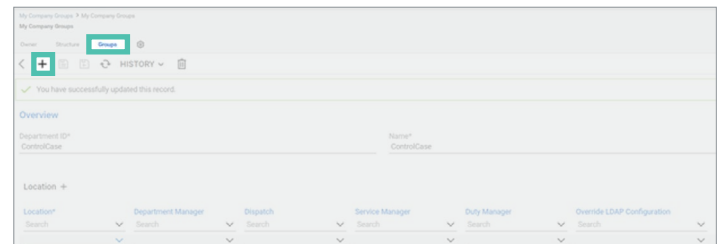
(Refer to image 19)

5. Fill the required fields.
 - **Department ID***
 - **Name***
6. Click **Save**.

(Image 17)

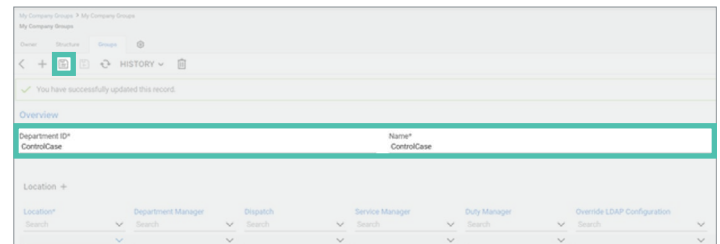


(Image 18)



Note: The selected location and the business unit should be mapped to each other.

(Image 19)



MAPPING THE BUSINESS UNIT TO LOCATION

(Refer to image 17)

1. In ConnectWise Manage, go to **System** (menu)
2. Click on **My Company**.

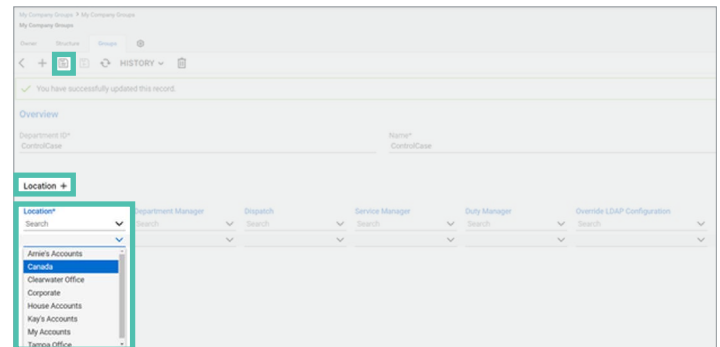
(Refer to image 18)

3. Click on the **Groups** tab.
4. Click on the business unit you have chosen.

(Refer to image 20)

5. Click on **Location +** to map the location to the business unit.
6. Select the **Location**.
7. Click **Save**.

(Image 20)



ENTER CREDENTIALS

1. From the connection details screen, enter the following information:
 - **ConnectWise Manage Host:** The URL you use to login to ConnectWise Manage.
 - **Company ID:** Your ConnectWise Manage company name.
 - **Public Key:** The public API key you generated in ConnectWise Manage.
 - **Private Key:** The private API key you generated in ConnectWise Manage.

ENTER COMPANY CONFIGURATIONS

1. Enter the company you would like to set up the integration for
2. Enter the Location
3. Enter the Business Unit

INSTALL CONTROLCASE CONFIGURATIONS

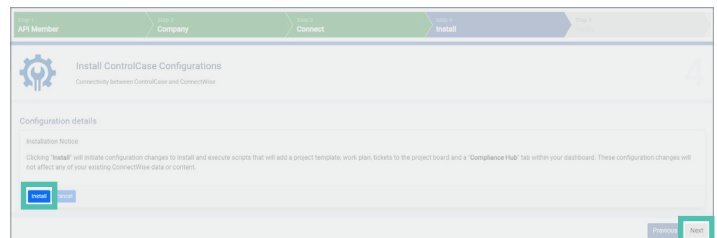
(Refer to image 21)

1. Click on **Install** and it will deploy the required configuration on to ConnectWise Manage.
2. Click **Next**.

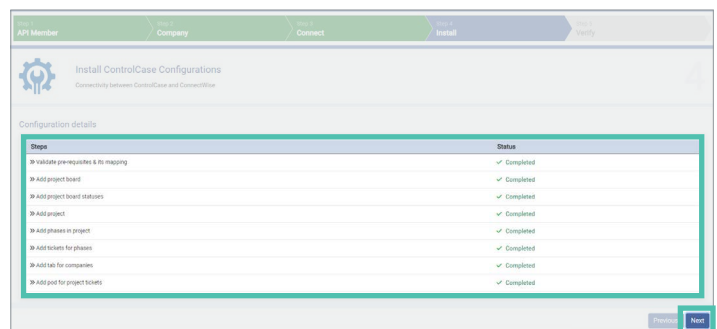
(Refer to image 22)

3. Make sure all steps are completed.
4. Click **Next**.

(Image 21)



(Image 22)



ADD CONTROLCASE “COMPLIANCE HUB™” TAB TO COMPANIES

1. Login to **ConnectWise Manage**.

(Refer to image 23)

2. In ConnectWise Manage, go to **Companies** (menu).

3. Click on **Companies**.

(Refer to image 24)

4. Select the company you have created/selected for ControlCase integration.

5. Click on the **Gear** menu at the top right of the screen. (User may have to scroll to extreme right to see gear icon on tabs ribbon).

(Refer to image 25)

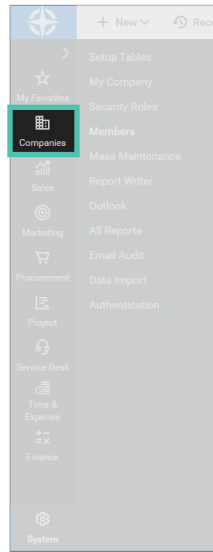
6. This will open the **Tab Configuration** window.

7. Locate **Compliance Hub** in the left side (**Not Displayed** column) and move it to right side (**Displayed** column).

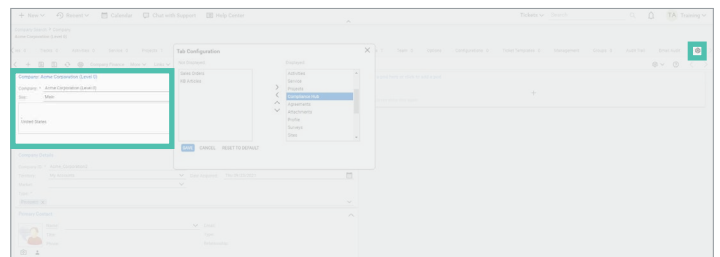
- You can change the order of the **Displayed** items as per your requirement by using up and down arrow buttons on the screen.

8. Click **Save**.

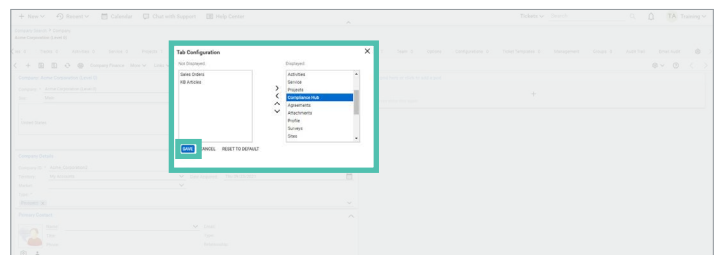
(Image 23)



(Image 24)



(Image 25)



ENABLE POD FOR PROJECT TICKETS

1. Login to **ConnectWise Manage**.

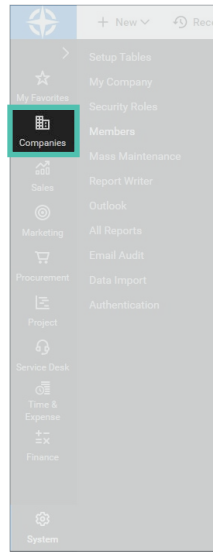
(Refer to image 26)

2. In ConnectWise Manage, go to **Companies** (menu).
3. Click on **Companies**.

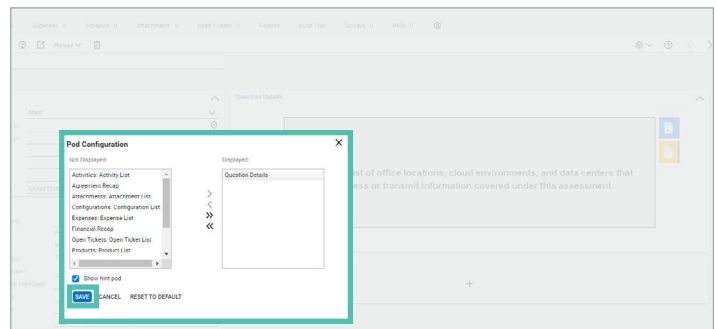
(Refer to image 27)

4. Select the company you have created/selected for ControlCase integration.
5. Click the **Project** tab and click on newly created project name which will open the **Project** view.
6. Click the **Work Plan** tab and click on **Ticket ID** with summary **Q1**.
7. In the ticket window, click on the **Gear** menu at the top right of the screen.
8. This will open the **Pod Configuration** window.
9. Locate the **Question Details** pod on the left side (**Not Displayed** column) and move it to the right side (**Displayed** column).
10. Click **Save**.

(Image 26)



(Image 27)





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