

# MSPTech's BitAgent API Integration Guide – ConnectWise PSA

To integrate BitAgent with ConnectWise PSA, you'll need to gather some important account data as the Managed Service Provider (MSP). This data provides our team with the necessary access to connect BitAgent to your instance of ConnectWise.

## Prepare for the integration by collecting the following information:

- **Client ID:** Obtained by submitting an integration request form -- may take a few days for approval in Step A below.
- **API Public and Private Keys:** Created by you within PSA with desired permissions and access levels by following Step B and Step C below.
- **Company ID:** The name you enter when logging into ConnectWise PSA (e.g., the first field on the login form at <https://na.myconnectwise.net/>).
- **Base URL:** The hosted URL for your ConnectWise PSA instance.
- **Service Board:** The name of the service board you'd like to have BitAgent access.
- **Ticket Status(es):** The names of the ticket statuses you'd like BitAgent to update. Typically, this is simply statuses containing "new" (so that BitAgent updates tickets in a new status only).

## Step A: Obtain Your Client ID

1. Visit <https://developer.connectwise.com/ClientID> and sign in with your ConnectWise credentials.
2. Click the "ClientID" button in the header.
3. Scroll down and click "Create New Integration" to access the ClientID Access Request Form.
4. Fill out the form with relevant details and submit. Provide as much information as possible to avoid delays. See example screenshot below.

are designed "out-of-the-box" and apply to all users.

An example would be the Automate to Manage integration. That is an integration that is the same for every user and the clientId would be set up by the third-party integration. Automate controls the Ids around that integration themselves.

### Your clientId(s)

Integration Name \*

BitAgent

Description \*

Custom API access for BitAgent

Integration Type  Public  Private

Technical Contact Email \*

youremail@example.com

Product \*

Manage

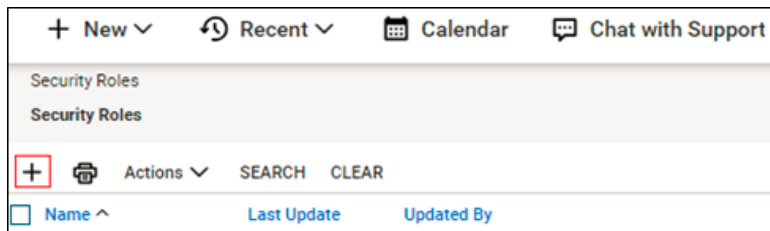
Submit Cancel

Note: Client ID approval may take up to 3 business days, so submit the request a few days before your scheduled data migration.

## Step B: Configure Security Role Permissions

BitAgent performs various tasks using the ConnectWise Manage API, each requiring different permissions. Review the ConnectWise Manage Security Roles Matrix (requires a CW Developer account) for more information. To configure a new ConnectWise Manage security role:

1. From the navigation menu, go to System > Security Roles > then click the + sign.



2. Enter a Role ID (e.g., "BitAgent API") and click Save.
3. Expand and update the relevant modules with applicable permission levels:

Note: All permissions can remain "None" except for the following:

Companies Module	Add Level	Edit Level	Delete Level	Inquire Level
Company Maintenance	None	None	None	All
Service Desk Module	Add Level	Edit Level	Delete Level	Inquire Level
Service Tickets	All	All	None	All

## **Step C: Create API Public and Private Keys**

To create a new ConnectWise Manage integration, you'll need an API Member account:

1. Navigate to System > Members > Api Members in ConnectWise PSA.
2. Create a new API member (e.g., "BitAgent") with the "BitAgent API" Role ID that you created in Step B above,
3. Select your highest Level (e.g. Corporate (Level 1))
4. Provide the required details (Location, Department, Name, Default Territory) as you would for another regular member to have access to the appropriate tickets. See an example in the screenshot below.

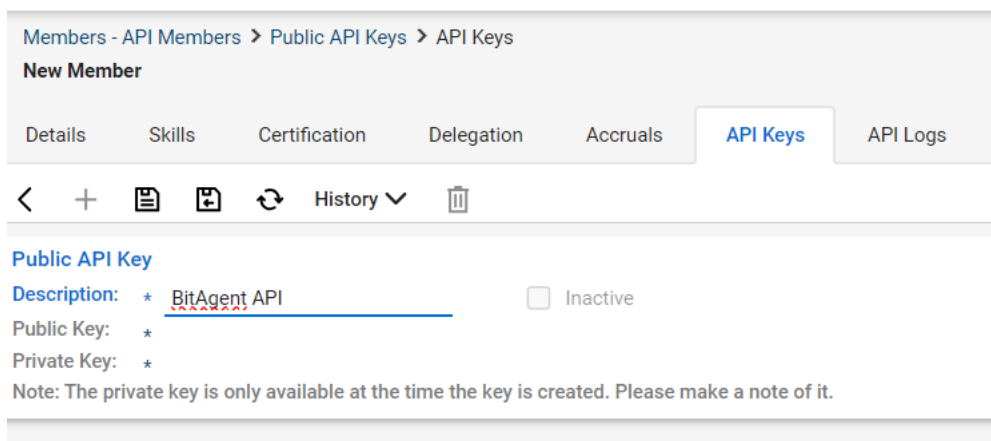
The screenshot shows the 'New Member' form in the ConnectWise Manage interface. The left sidebar contains navigation options: Manage, Project, Service Desk, Time & Expense, Finance, System (highlighted), Setup Tables, My Company, Security Roles, Members (highlighted), Mass Maintenance, Report Writer, All Reports, Email Audit, and Authentication. The main content area is titled 'Members - API Members > Detail' and 'New Member'. It features a toolbar with icons for back, add, print, refresh, history, and delete. The form is divided into two sections: 'Profile' and 'System'. The 'Profile' section includes fields for Member ID\* (BitAgent), Time Zone\* (US Mountain), Member Name\* (BitAgent), and Email. The 'System' section includes fields for Role ID\* (BitAgent API), Location\* (Support), Level\* (Corporate (Level 1)), Business Unit\* (Professional Services), Name\* (Corporate), and Default Territory\* (Support). There are also checkboxes for 'Block Prices' and 'Block Cost'.

Profile	
Member ID*	Time Zone*
BitAgent	US Mountain
Member Name*	Email
BitAgent	

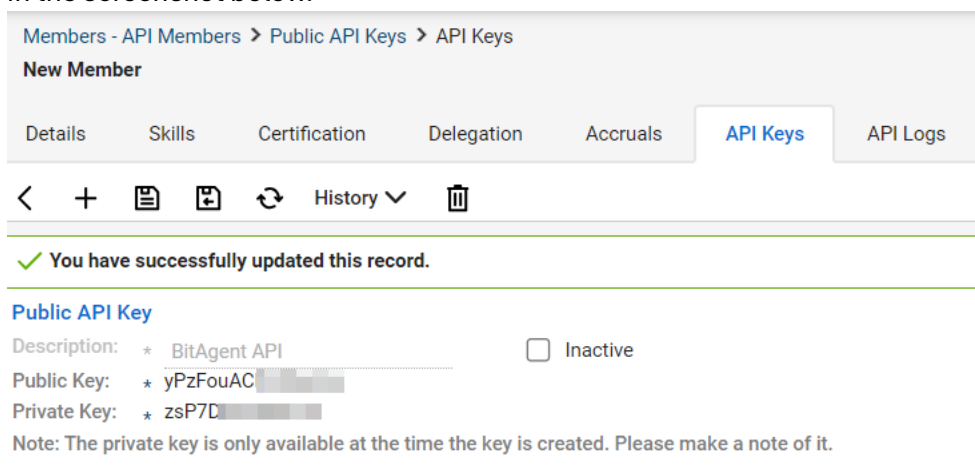
  

System			
Role ID*	Location*	<input type="checkbox"/> Block Prices	
BitAgent API	Support		
Level*	Business Unit*	<input type="checkbox"/> Block Cost	
Corporate (Level 1)	Professional Services		
Name*	Default Territory*		
Corporate	Support		

5. Save the new API member record (save icon at the top).
6. Click API Keys > + to create a new API Key. See an example in the screenshot below.



7. Add a description (e.g., "BitAgent API") and click the save icon at the top.
8. Securely store both the public and private keys (the private key will only be shown once!). See an example in the screenshot below.



After you're done, the values should look similar to the following examples:

**ClientID:** 7a002312-3831-42a6-cff5-8cd2c8d969f1

**API Public Key:** vghjZiwbW3Sunp9V

**API Private Key:** rVdHgPaKX3WPmnh5

**Company ID:** *your\_MSP\_name*

**Base URL:** <https://na.myconnectwise.net>

**Service Board:** Support

**Ticket Statuses:** New, New (Email Connector), New (Portal), \*New, \*New (Email Connector).

By following these steps, you'll have the necessary components to integrate BitAgent with your ConnectWise PSA instance. Once complete, please contact your BitAgent representative for submission instructions and integration timelines.

For additional ConnectWise integration or connection information, you may find help here:

[https://docs.connectwise.com/ConnectWise\\_Access\\_Management\\_Documentation/Integrations/ConnectWise\\_PSA\\_integration](https://docs.connectwise.com/ConnectWise_Access_Management_Documentation/Integrations/ConnectWise_PSA_integration)

*Hyperlinks and data collection instructions current as of 6/15/2024. MSPTech assumes no liability, express or implied, for discrepancies or omissions contained in these instructions.*