



Submit Preferences for ConnectWise Manage Setup:

Once the API keys have been setup and AutoElevate is successfully communicating with your ConnectWise Manage server, AutoElevate will continue with the following steps:

- Setup of AutoElevate service board
- Setup of custom Status' for service board
- Testing of system

For us to continue please send and complete the attached spreadsheet (NewMSPInfoCollection.xlsx) to us at support@autoelevate.com with a subject of "ConnectWise Manage Setup".

Here's the information you'll need to include in the spreadsheet:

1. **Connectwise URL** (i.e. connect.yourcompany.com)
2. **CW Company ID** (i.e. YourCompany ... the Company ID used to login to CW)
3. **Default Tech Resource** (i.e. Bill Gates) – This is the default technician that will be assigned to tickets. (**This value can be changed on the service board at any time after setup. **)
4. **Team Leader for AE Service Board** (i.e. Bill Gates) – This is the technician that will act as the 'Team Leader' for the service board for purposes of escalation. (**This value can be changed on the service board at any time after setup. **)
5. **Connectwise Location** (i.e. Tampa Office)- If your company uses multiple locations in ConnectWise please select which location the AutoElevate service board should belong to. (**This value can be changed on the service board at any time after setup. **)
6. **Connectwise Department/Business Unit** (i.e. Professional Services) – Please select what service category time entries for AutoElevate requests should be applied to. (**This value can be changed on the service board at any time after setup. **)

