



## 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 using the instructions contained in the support ticket for your PSA integration (you should have received an email referencing your PSA integration after purchase of the integration).**

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. **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 CANNOT be changed on the service board after setup. \*\*)
5. **Connectwise Department/Business Unit** (i.e. Professional Services) – Please select what service category time entries for AutoElevate requests should be applied to. (\*\*This value CANNOT be changed on the service board after setup. \*\*)

