Reputada ConnectWise™ Integration Guide

Reputada – ConnectWise Manage™ integration

Reputada's integration with ConnectWise Manage™ allows for the automated customer feedback requests when service tickets are closed. There are three steps in automating this process.

1. Entering ConnectWise Manage™ server credentials in order to pull tickets into Reputada. Step 1, described below, covers this procedure.

2. Setting channel properties

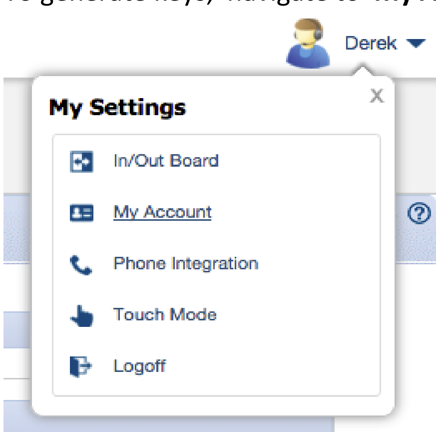
ConnectWise Manage™ integration works through a Reputada feedback channel. A channel is a container that allows you to specify various properties of the integration. You may, for example need to have separate channels, one for each ConnectWise Manage™ service board. You may want to pull in only tickets that are closed. Steps 2 -4 cover the setting of these and other channel properties.

3. Specifying Channel control

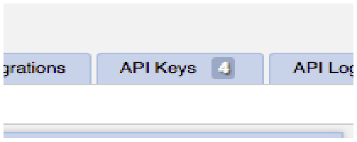
Despite being automated, you want to have control over when feedback requests are sent and to whom. Step 5 covers starting and stopping the channel and specifying exceptions to sending feedback requests to all tickets.

Steps to create ConnectWise Manage™ integration channel in Reputada

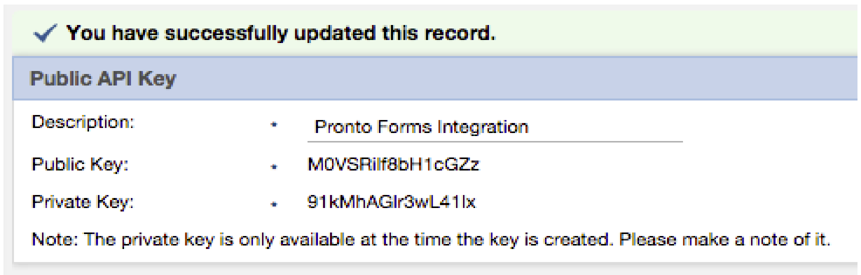
1. Get the company name and public and private keys from ConnectWise Manage™ by logging in.
a. Company name is one of the parameters users use to login and hence is already available to all users.
b. To generate keys, navigate to **My Account**



c. Click on the API Keys tab



d. Click the + icon, enter “Reputada Integration” in Description and then save. The page should refresh and show you a Public and Private key:



e. Copy the public and private keys into Notepad or other application.

2. Log into Reputada
3. Select “Channels” menu and click on the **Add New Channel** button
    a. Enter a name for the channel.
    b. Enter a short description
    c. Most channels are of type “default”. If you want the channel to be seen only by you (and the admin) make the channel private.

4. Under the “Channel Details” tab, select “Automatic requests for feedback”, followed by “Automatically send feedback requests with third party integration.”
    a. In the **Create Integration** dialog menu, select ‘ConnectWise Manage™ ticketing”
    b. In the **integration credentials** dialog enter
        i. The ConnectWise Manage™ application URL
        Note: In some installations you may need to append your url thus: https://api-<rest of your ConnectWise Manage™ url>
        ii. Your Company name as used in ConnectWise Manage™
        iii. The public and private keys that you saved. These keys may be auto filled, if somebody else has already created a ConnectWise Manage™ Integration channel.
    c. In the **Integration properties** dialog select the service board from which you will pull tickets in this channel. The list of boards will appear only if you are properly connected to ConnectWise Manage™. You can select only one board per channel, but you can create as many channels as you need.
    d. You must next select the ticket state on which Reputada will send feedback requests. Ticket states are pulled from ConnectWise Manage™.
    e. You can design your channel to be selective (filtered) in the tickets it pulls from ConnectWise Manage™.

      i. “All tickets “selects all tickets in the chosen ticket state.
      ii. “Companies” selects tickets in the chosen ticket state from one **or more** customer companies from the “Companies” menu.
      iii. “Owners” selects tickets in the chosen ticket state from one or more ticket owners from the “Ticket Owners” list.

   f. In the continuing **Integration properties** dialog ,
      i. Max requests to send per customer is a selection of the minimum delay between feedback requests sent to a customer from this channel.
      For example, a selection of “1 every 3 weeks” means that requests to a customer will be spaced at least 3 weeks apart, irrespective of how many tickets are closed within a 3 week period for the customer.
      ii. Who is the feedback about is a selection of how the feedback is to be interpreted (meaning whom is the feedback about) by Reputada. There are three choices - “ticket owner”, “ticket resources”, or both. If you choose “ticket resources” or both, the feedback will apply equally to all resources assigned to the ticket.
      iii. When to send the request allows you to send the request as soon as the ticket is fetched or after a delay of 24 hours between the fetching of the ticket and sending the request to the customer. A delay of 24 hours allows you to not send the feedback request to a specific customer or change the feedback template.
      iv. Who is making the request selects the person whose name will be in the request email.

   g. In the Feedback Request Template, compose the text of your feedback request. This is a rich text editor and can incorporate text formatting, hyperlinks, and images. You can also use HTML. You can customize your request using template parameters. For example, {{contact_name}} will be replaced by the actual name specified in the ConnectWise Manage™ ticket. You may preview your feedback request. The template has a built-in overall feedback mechanism, which can be seen in the preview. When a customer selects one of the three options, their feedback will be displayed in this channel.

   h. You can also edit the feedback template and other channel selections at any time by clicking on the pen icon in the same section. You can remove the integration by clicking on the garbage icon next to the pen icon.

5. Click the **Update Tickets** button to pull in tickets the first time. You should be able to see all the filtered tickets pulled from ConnectWise Manage™.

a. Subsequent pulls will be automatically made every 15 minutes. Feedback requests are also performed automatically.
b. **Send Requests** sends feedback requests right away for all the tickets you see.
c. You can click the **Stop** button to stop the system. No tickets will be pulled from ConnectWise Manage™ , and no feedback requests will be sent. To resume, click **Update tickets**.
d. Optionally, select the check boxes for those tickets for which you do **not** want feedback. This is one time, but you can create a blocked list as described below.
e. You can also create a list of email addresses of ticket that are blocked; i.e. no feedback request is sent to them ever, by selecting *Add Emails to Blocked List* link. You can add to this list at any time either individually or in a bulk import from a csv file format. You can view, add or delete names from this list from the Integrations tab of the Admin page.
f. You may want to add other members in your organization as channel members. A channel member has visibility into the feedback sent and received. You can make a member the channel admin, if you cannot continue with that responsibility.