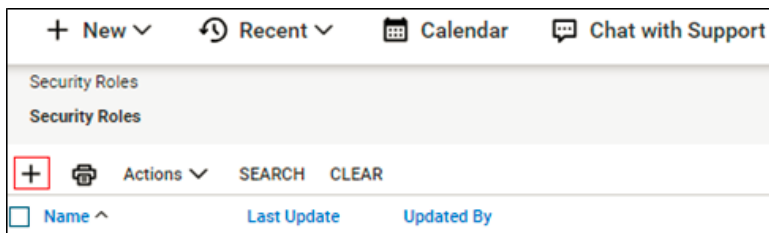


Task 1. Configuring New ConnectWise Manage Security Role

<https://campus.barracuda.com/doc/96025464/>

To configuring the new ConnectWise Manage security role perform the following steps.

1. From the ConnectWise navigation menu, click **System**, select **Security Roles**, then click the + sign.



2. Enter (i.e. BarracudaMSP) API for the Role ID.
3. Click **Save**.
4. Click to expand and update the following modules with the applicable levels.

Companies Module	Add Level	Edit Level	Delete Level	Inquire Level
Company Maintenance	None	All	None	All
Company/Contact Group Maintenance	None	None	None	All
Configuration – Display Passwords	None	All	None	All
Configurations	All	All	None	All
Contacts	None	None	None	All
CRM/Sales Activities	None	All	None	All
Import Contacts	None	None	None	None
Manage Attachments	None	None	None	None
Management	None	None	None	All
Notes	None	None	None	None
Reports	None	None	None	None
Surveys	None	None	None	None
Teams Members	None	None	None	None
Tracks	None	None	None	None
User Scenarios	None	None	None	None

Finance Module	Add Level	Edit Level	Delete Level	Inquire Level
Accounting Interface	All	All	None	All
Agreement Invoicing	All	All	None	All
Agreement Sales	All	All	None	All
Agreements	All	All	None	All

Billing Rate Maintenance	All	All	None	All
Billing Reconciliation	None	None	None	None
Billing View Time	All	All	None	All
Company Finance	None	None	None	All
Expense Reimbursement	None	None	None	None
Financial Dashboard	All	All	None	All
Invoice Approval	All	All	None	All
Invoicing	All	All	None	All
Reports	All	All	None	All

Project Module	Add Level	Edit Level	Delete Level	Inquire Level
Close Project Tickets	None	All	None	All
Close Project	None	None	None	None
Project Contacts	None	None	None	None
Project Finance	None	None	None	None
Project Headers	None	All	None	All
Project Management	None	None	None	None
Project Notes	None	None	None	None
Project Phase	None	None	None	All
Project Product	None	None	None	None
Project Reports	None	None	None	None
Project Scheduling	All	All	All	All
Project Teams	None	None	None	All
Project Templates	None	None	None	None
Project Ticket - Dependencies	None	None	None	None
Project Ticket - Tasks	None	None	None	None
Project Tickets	None	All	None	All

Sales Module	Add Level	Edit Level	Delete Level	Inquire Level
Closed Opportunity	None	All	None	All
Opportunity	None	All	None	All
Opportunity Finance	None	None	None	None
Reports	None	None	None	None
Sales Dashboard	None	None	None	None
Sales Funnel	None	None	None	None
Sales Order Finance	None	None	None	None
Sales Orders	None	None	None	None

Service Desk Module	Add Level	Edit Level	Delete Level	Inquire Level
Change Approvals	None	None	None	None
Change Management	None	None	None	None
Close Service Tickets	None	All	None	All
Cloud Console	None	None	None	None
ConnectWise Chat	None	None	None	None
ConnectWise Control	None	None	None	None
IT Boost	None	None	None	None
Knowledge Base Approver	None	None	None	None
Knowledge Base Creator	None	None	None	None
Launch Remote Access	None	None	None	None
Merge Tickets	None	None	None	None
Print Service Signoff	None	None	None	None
Reports	None	None	None	None
Resource Scheduling	All	All	All	All
Service Tickets - Dependencies	All	None	None	All
Service Tickets	All	All	None	All
Service Tickets - Finance	None	None	None	None
SLA Dashboard	None	None	None	None

System Module	Add Level	Edit Level	Delete Level	Inquire Level
Add Licenses	None	None	None	None
API Reports	All	All	None	All
Chat with ConnectWise Management Support	None	None	None	None
ConnectWise Manage lab	None	None	None	None
ConnectWise Next	None	None	None	None
ConnectWise Now	None	None	None	None
Custom Menu Entry	None	None	None	None
Data Import	None	None	None	None
Email Audit	None	None	None	None
List View Export	None	None	None	None
Manage Hosted API	None	None	None	None
Marketplace Sharing	None	None	None	None
Mass Maintenance	None	None	None	None
Member Maintenance	None	None	None	All
Member Maintenance - Finance	None	None	None	None
My Account	None	None	None	None

System Module	Add Level	Edit Level	Delete Level	Inquire Level
My Company	None	None	None	All
Report Writer	None	None	None	None
Security Roles	None	None	None	None
System Reports	None	None	None	All
Table Setup	All	None	None	All
Today Links	None	None	None	None

Time & Expense	Add Level	Edit Level	Delete Level	Inquire Level
Expense Approvals	All	None	None	All
Expense Billable Option	All	All	None	All
Expense Report Entry	None	None	None	None
Reports	All	All	None	All
Stopwatch	None	None	None	None
Time Approval	None	None	None	None
Time Entry	All	All	None	All
Time Entry Billable Option	None	None	None	None

5. Click **Save**.

Go to [Task 2. Creating the New ConnectWise Manage API Member](#).

Figures

1. image2022-1-5 12:14:22.png

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