Rapid Fire Tools

Run Your IT Business. *FASTER!*

Email2Ticket™ **Connec+Wise™** Users Guide

Contents

Purpose of this Guide

This document is intended for users of ConnectWise setting up the integration between ConnectWise and Email2Ticket.

How Email2Ticket Interfaces with ConnectWise

Email2Ticket connects to either ConnectWise Cloud or the premise-based ConnectWise PSA via the ConnectWise APIs. It does require that you setup an Integrator Login with appropriate permissions.

Setting up a ConnectWise "Integrator Login"

Before you can setup a "Connection" in Email2Ticket, you will need to have a properly configured Integrator Login.

1. Navigate to Setup
2. Click Setup Tables
3. Type "Integrator" into the Table lookup and hit Enter
4. Click the Integrator Login link

Click the "New" Icon to bring up the New Integrator login screen as shown on the right.

Enter and record Username and Password values which you will need later on when configuring a "ConnectWise Connection."

Set the Access Level to "All Records."

Enable the following APIs:

- Company API
- Configuration API
- Contact API
- Member API
- Reporting API
- ServiceTicket API (Select the Service Board for tickets treated by this login)
- System API
- TimeEntry API

Click the Save icon to save this Integrator Login.

(Note: if you already have an Integrator Login, you may use it as long as the above API's are enabled.)
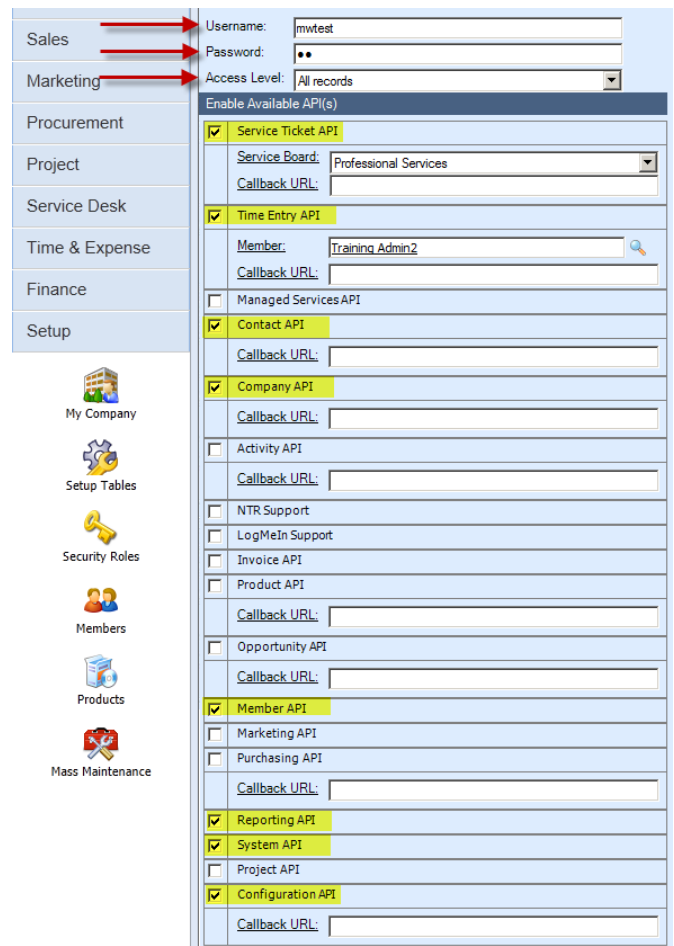
Special Features of Email2Ticket for ConnectWise

Rules

Create Ticket using ConnectWise Web Services

This action will create a ticket in ConnectWise. Note that:

- You can specify Ticket parameters such as Status, Service Type, Source etc.
- You can have Email2Ticket attempt to match a Company based on the Email address of the sender
- You can have Email2Ticket create a contact if it does not exist.

Connection. Use the drop down to select a Connection or use Manage Connections to create a Connection to be used to connect via the Web Services.
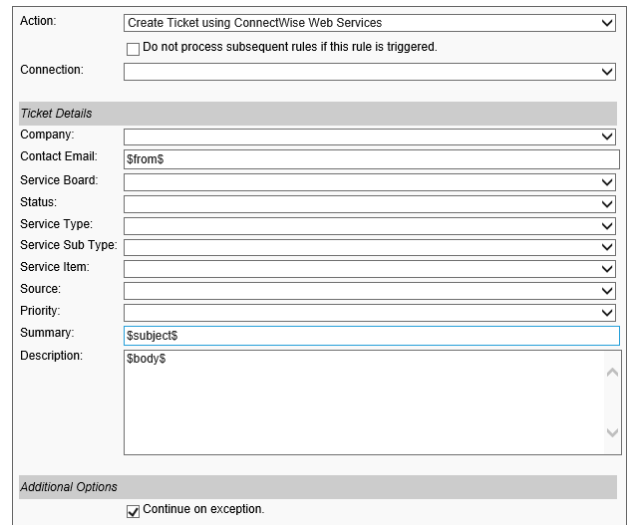
Company. Specify a Company for this action. You can have rules for specific companies.

You can also use "Derive from Email Address" which will cause Email2Ticket to use the Company associated with the contact. If a contact is not matched, Email2Ticket will attempt to match an Account based on the email domain in the Configuration Email2Ticket Domains. (Note: Email2Ticket will create a Configuration Type called Email2Ticket Domains. You will need to create a Configuration your accounts containing the email domains to match using the format: "@domain1.com,@domain2.com" without the quotes. While it is optional to create the Configurations, doing so enables this very valuable feature.)

Contact Email. Typically leave as *$from$* or other substring / variable.

Be sure to complete any other desired fields for tickets created by this rule.

Enable **Continue on exception** if you want Email2Ticket to continue processing rules if there is an error when trying to create the Ticket. This takes precedence over "Do not process subsequent rules…" Our best practices suggest that this should be enabled, and you should have a Catch-all rule (which is a default best-practice rule) following this to ensure that a ticket request from your clients is never lost or overlooked.

How Create Ticket with ConnectWise Web Services Works

1. Email2Ticket will first attempt to find a Contact in your ConnectWise database with an email address that matches the **Contact Email**.

2. If no Contact match is found, and if an **Account** is specified, it will create the Ticket in that Account. If **Auto Create Contact** is enabled, it will create a Contact and create/assign the Ticket, otherwise it will create the Ticket with no Contact.

3. If Account = "Derive from Email Address," Email2Ticket will use the domain of the **Contact Email** to try to find a matching Account searching the Configuration Email2Ticket Domains. If an Account matched, it will create the Ticket in that Account. If **Auto Create Contact** is enabled, it will create a Contact and create/assign the Ticket, otherwise it will create the Ticket in the Catchall Company with no Contact.

Add Ticket Note using ConnectWise Web Services

This action will allow you to add a note to an existing ticket. Typically, you will extract the Ticket Number from the subject using:

$subject_textbetween("Ticket#","/")$

to pull the ticket number from the subject.

Note that typically you will enable "Do not process subsequent rules…" It is a good idea to also enable the Continue on Exception which will override the "subsequent rule" checkbox in case of error.

Add Time Entry Using ConnectWise Web Services

This action will allow you to create a time entry in ConnectWise from an email!

The email will need to specify an existing ticket that Email2Ticket will match, and you should use

$subject_textbetween("Ticket#","/")$

by default.

Member Email is the technician at your company that is adding the time entry. You can specify the work role and set/change ticket status and work type.

By default, Email2Ticket uses the first line of the email as the number of minutes, and uses line 2 through the end of the email as the note for the time entry.

Action:	Add Time Entry using ConnectWise Web Services ⌄
	☐ Do not process subsequent rules if this rule is triggered.
Connection:	⌄
Ticket Number:	$subject_textbetween("Ticket#","/")$
Member Email:	$from$
Work Role:	⌄
Ticket Status:	⌄

Note: If the status for the ticket does not exist in the ticket's Service Board, the status will not be changed. Leave blank to not update the status.

☑ Ticket Detail Description

☐ Ticket Internal Analysis

☐ Ticket Resolution

Work Type:	⌄
Total Minutes:	$body_line(1)$

* will put 0 minutes if not parseable

Notes:	$body_lines(2)$
Internal Note:	
Email Address:	$from$

☐ Customer has updated

☑ Continue on exception.

You can have Email2Ticket send a confirmation email as well.