CEO Juice ConnectWise Integrations – API Access and Data Flow

Purpose and scope

This document lists every ConnectWise API right the CEO Juice integrations need, and every ConnectWise record they read or change. It is intended to support your security review and audit evidence.

It covers six active integrations between e-automate and ConnectWise PSA, plus ID817 Purchase Order Sync, which is in development:

Integration	Direction	What it does
ID747 Customer Sync	e-automate → ConnectWise	Creates and updates companies and sites from e-automate customers; refreshes ConnectWise reference data the other integrations use
ID964 Agreement Invoice Sync	ConnectWise → e-automate	Brings agreement invoices into e-automate as contract billing; optionally writes the invoice number and payment back
ID965 Service Ticket Sync	ConnectWise → e-automate	Creates e-automate service calls from service tickets or their invoices
ID522 Project Invoice Sync	ConnectWise → e-automate	Creates e-automate service calls from invoiced project tickets
ID912 Moving Calls	e-automate → ConnectWise	Creates ConnectWise service tickets from selected e-automate service calls
ID966 Sales Order Sync	ConnectWise → e-automate	Brings ConnectWise sales orders into e-automate as sales orders
ID817 Purchase Order Sync (in development)	ConnectWise → e-automate	Brings ConnectWise purchase orders into e-automate; can optionally update the purchase order status in ConnectWise

Only the integrations you subscribe to run, with one exception. When the scheduled task is set up for it, ID747 can run ID964, ID965, ID912 or ID522 in a read-only mode, using ID747's API member, even without a subscription. In that mode they only refresh reference data and never write to ConnectWise. Rights tied to an integration you don't use can be left off your security role.

The API calls and rights in this document were verified by test runs against a restricted security role in October 2026.

How the integrations connect

All integrations call the ConnectWise REST API (version 3.0) over HTTPS, using API keys your team creates in ConnectWise. No other connection into ConnectWise is used.

- **Credentials.** You create an API member and a public/private key pair in ConnectWise, then enter the keys on the CEO Juice website, where they are stored encrypted (see Section 6). The member's security role controls what the integrations can do.
- **Where it runs.** The integrations run as a scheduled task on your e-automate server (or your ECI-hosted server), typically every 15–30 minutes. Calls go directly from that server to your ConnectWise instance, whether cloud-hosted (most clients) or on your own server.
- **Audit trail.** Every change appears in ConnectWise as made by your API member (for example, "CEOJuice_API"), so you can review it with ConnectWise's own audit trail.
- **What triggers a sync.** Each ID747 run picks up e-automate customers changed since its previous run, and its Variable 8 (Sync Mode) controls what it does with each one. The other integrations move records only when they meet the criteria you set in their variables — for example, a ticket status (ID965 Variable 8), an invoice status (ID964 Variable 10), or a sales order status (ID966 Variable 1).
- **Deletes.** The integrations never delete ConnectWise records, with one exception: ID747 deletes a site it has just created if it can't record the new site's ConnectWise ID on the matching e-automate customer, so the next run can recreate it cleanly (see Section 4).

Required ConnectWise security role

Set each right below to the level shown and leave everything else at None. Rights marked "only if" can be left at None when that option isn't in use. ConnectWise requires Inquire whenever Add, Edit or Delete is checked, so Inquire is listed with every write right.

Module	Right	Level	Used by	Required when
Companies	Company Maintenance	Add, Edit, Delete, Inquire	ID747 (Inquire: all integrations)	Always
Companies	Configurations	Inquire	ID965	Only if linking ConnectWise configurations to e-automate equipment
Companies	Manage Attachments	Inquire	ID964, ID966	Only if attachments are synced (on by default)
Companies	Team Members	Add, Inquire	ID747	Only if the option to add the sales rep to the company's Team tab is enabled
Companies	Contacts	Inquire	ID747	Always attempted by ID747; needed for ID505

Module	Right	Level	Used by	Required when
Companies	Company/Contact Group Maintenance	Inquire	ID747	Always attempted by ID747; needed for ID505 survey opt-outs
Finance	Agreements	Edit, Inquire	ID964	Always (Edit: contract number written back)
Finance	Invoicing	Edit, Inquire	ID964, ID965, ID522	Always (Edit: invoice status and invoice number updates)
Finance	Accounting Interface	Add, Inquire	ID964	Only if ID964 Variable Z (Mark Invoices Paid) = Yes
Procurement	Products	Inquire	ID964, ID965, ID522, ID966	Always
Procurement	Product Catalog	Inquire	ID964, ID965, ID522, ID966	Always
Procurement	Purchase Orders	Inquire	ID747, ID817	Always attempted by ID747; needed for purchase order reporting and ID817
Procurement	Purchase Orders	Edit, Inquire	ID817 (in development)	Only if using ID817 and it updates purchase order status
Project	Project Headers	Inquire	ID747, ID522	Always
Project	Project Phase	Inquire	ID747	Always
Project	Project Tickets	Inquire	ID522	Always
Sales	Sales Orders	Edit, Inquire	ID966	Always (Edit: status and e-automate status field)
Service Desk	Service Tickets	Add, Inquire	ID912	Always
Service Desk	Service Tickets	Edit, Inquire	ID965	Always (Edit: Only if using the post-sync status update (Variable 6) in completed ticket mode (Variable 4 = No))
Service Desk	Close Service Tickets	Edit, Inquire	ID965	Only if using ID965 in completed ticket mode (Variable 4 = No) with the post-sync status update, and the Variable 6 status is a closed status

Module	Right	Level	Used by	Required when
System	API Reports	Inquire	All ConnectWise integrations	Always
System	Table Setup	Inquire	All ConnectWise integrations	Always (also covers ID747's warehouse, warehouse bin and inventory on hand reads)
System	Member Maintenance	Inquire	ID747	Always attempted by ID747; needed for ID505
Time & Expense	Time Entry	Inquire	ID965, ID522	Always

"Always attempted by ID747" means ID747 reads that data on every run to refresh information other integrations use. If the right is left off, ID747 skips that data and keeps running, but the integration that relies on it won't have it.

Data flow by integration

Each table lists the ConnectWise records an integration reads and writes, with the API endpoints it calls. Reads only copy data into e-automate; writes are listed in full in Section 5.

ID747 Customer Sync (e-automate → ConnectWise)

Action	ConnectWise records	Endpoints
Read	Companies, sites, company custom fields, company teams	`company/companies`, `company/companies/{id}/sites`, `company/companies/{id}/teams`
Read	Setup lookups: company statuses, company types, states, locations, billing periods	`company/companies/statuses`, `company/companies/types`, `company/states`, `system/locations`, `system/reports`
Read (every run)	Reference data for other integrations: contacts and their groups, members, purchase orders and line items, warehouses, warehouse bins, inventory on hand, projects, project phases, invoices	`company/contacts`, `system/members`, `procurement/purchaseorders`, `procurement/purchaseorders/{id}/lineitems`, `procurement/warehouses`, `procurement/warehouseBins`, inventory on hand, `project/projects`, `project/projects/{id}/phases`, `finance/invoices`
Write	Create a company (with a default site named "Main"), then set its	`POST company/companies`, `PATCH company/companies/{id}`

Action	ConnectWise records	Endpoints
	custom fields	
Write	Update a company	`PATCH company/companies/{id}`
Write	Create or update a site	`POST company/companies/{id}/sites`, `PATCH company/companies/{id}/sites/{id}`
Write (optional)	Add the sales rep to the company team	`POST company/companies/{id}/teams`
Delete	A site just created, when its ID can't be recorded in e-automate	`DELETE company/companies/{id}/sites/{id}`

ID964 Agreement Invoice Sync (ConnectWise → e-automate)

Action	ConnectWise records	Endpoints
Read	Agreements and additions, agreement invoices and line items, products, catalog items, companies, billing periods, billing statuses	`finance/agreements`, `finance/agreements/{id}/additions`, `finance/invoices`, `procurement/products`, `procurement/catalog`, `company/companies`, `system/reports`, `finance/billingStatuses`
Read (optional)	Invoice attachments	`system/documents`
Write	E-automate contract number on the agreement	`PATCH finance/agreements/{id}`
Write	Post-sync invoice status chosen during setup	`PATCH finance/invoices/{id}`
Write (optional)	E-automate invoice number (Variable X = Yes; Variable Y names the field)	`PATCH finance/invoices/{id}`
Read and write (optional)	Payment when the invoice is paid in e-automate (Variable Z)	`GET` and `POST finance/invoices/{id}/payments`

ID965 Service Ticket Sync (ConnectWise → e-automate)

Action	ConnectWise records	Endpoints
Read	Service tickets, ticket notes (internal	`service/tickets`,

Action	ConnectWise records	Endpoints
	notes excluded by default), time entries, ticket invoices, products, catalog items, companies, countries	`service/tickets/{id}/notes`, `time/entries`, `finance/invoices`, `procurement/products`, `procurement/catalog`, `company/companies`, `company/countries`
Read	System version, company and time zone settings	`system/info`, `system/myCompany`, `system/timeZoneSetups`
Read	Status lookups for Variable 6	`service/boards/{id}/statuses`, `finance/billingStatuses`
Read (optional)	Configurations attached to the ticket (serial number)	`company/configurations`
Write	Ticket status after sync (Variable 4 = No, Variable 6)	`PATCH service/tickets/{id}`
Write	Invoice status after sync (Variable 4 = Yes, Variable 6)	`PATCH finance/invoices/{id}`

ID522 Project Invoice Sync (ConnectWise → e-automate)

Action	ConnectWise records	Endpoints
Read	Project invoices, project tickets and their notes, projects, time entries, products, companies, countries, status lookups	`finance/invoices`, `project/tickets`, `project/tickets/{id}/allNotes`, `project/projects`, `time/entries`, `procurement/products`, `company/companies`, `company/countries`, `service/boards/{id}/statuses`, `finance/billingStatuses`
Write	Invoice status after sync (Variable 6)	`PATCH finance/invoices/{id}`

ID522 only syncs invoiced project tickets, so its post-sync update (Variable 6) changes only the project invoice status. It never changes project ticket status.

ID912 Moving Calls (e-automate → ConnectWise)

Action	ConnectWise records	Endpoints
Read	Service tickets, ticket notes, time entries, countries	`service/tickets`, `service/tickets/{id}/notes`, `time/entries`, `company/countries`

Action	ConnectWise records	Endpoints
Write	Create a service ticket for the e-automate call	`POST service/tickets`
Write	Add up to two notes (one external, one internal) to the new ticket	`POST service/tickets/{id}/notes`

ID966 Sales Order Sync (ConnectWise → e-automate)

Action	ConnectWise records	Endpoints
Read	Sales orders in the sync status (Variable 1), order lines, catalog items, companies, sites, order statuses	`sales/orders`, `sales/orders/statuses`, `procurement/products`, `procurement/catalog`, `company/companies`, `company/companies/{id}/sites`
Read (optional)	Sales order attachments	`system/documents`
Write	Order status after sync and the ZCJ_EAStatus custom field, in one update per order	`PATCH sales/orders/{id}`

Everything CEO Juice writes to ConnectWise

These are the only changes the integrations make in ConnectWise. Status updates send just the new status. Custom field updates send the record's full custom field list back with only CEO Juice's values changed: one value for ID964 and ID966, and up to four for ID747. The ID747 fields below are the defaults; field mapping can be adjusted per client.

Integration	Record	What changes	Data written
ID747	Company	Created	Identifier, account number, name, address, city, state, zip, phone, fax, website and a default site named "Main"; status, territory and company type only when set in Variables 4, 3 and 1. The custom fields below are then set.
ID747	Company	Updated	Name, address, city, state, zip, phone, fax and website; territory only if configured to update it. Custom fields: customer number, on-hold code, sales rep name and sales rep email. Status and company type are never changed after creation.
ID747	Site	Created or updated	Name (with the location number), address, city, state, zip, phone and fax; country on update. Sites get no custom fields, territory, type or status.

Integration	Record	What changes	Data written
ID747	Company team	Member added (optional)	The sales rep and team role, only if not already on the team
ID747	Site	Deleted (rollback only)	A site just created whose ID couldn't be recorded in e-automate
ID964	Agreement	Custom field updated	E-automate contract number
ID964	Agreement invoice	Status updated	The post-sync invoice status chosen during setup
ID964	Agreement invoice	Custom field updated (Variable X)	E-automate invoice number, in the field named by Variable Y
ID964	Agreement invoice	Payment added or updated (Variable Z)	One payment for the ConnectWise invoice total (amount only), which marks the invoice as paid
ID965	Service ticket	Status updated	Variable 6 status
ID965	Service ticket invoice	Status updated	Variable 6 billing status
ID522	Project invoice	Status updated	Variable 6 billing status
ID912	Service ticket	Created	Summary, board, status, company, site and site name, address, city, state, zip, country, contact name and phone, type, team, priority, service location, source, agreement, severity and impact
ID912	Ticket notes	Up to two notes added, with notifications off	External: e-automate call number, call type and work order number. Internal: the call's notes from e-automate.
ID966	Sales order	Status and custom field updated together	Your post-sync status (for example "Synced, DO NOT EDIT"); e-automate status, detail status, hold code and timestamp in ZCJ_EAStatus

Because custom field updates resend every custom field on the record, an edit made by someone else to a different custom field on the same record, in the fraction of a second between CEO Juice's read and write, could be overwritten. The integrations never change custom fields other than those listed.

Logging and data handling

Data read from ConnectWise is staged in the CEO Juice database on your own SQL server before it is written to e-automate. ConnectWise record data does not pass through CEO Juice-hosted systems; only your integration settings and API keys are stored by CEO Juice.

- **Logfiles.** Each integration writes a logfile on your server and keeps 15 daily archives, about two weeks; older logs are deleted automatically. When the integrations are installed in one folder (the normal setup, and required for ID747 to run the others), they share one logfile, so entries from several integrations can appear together. Logs include record details such as company names, addresses, invoice amounts, and ticket and order details.
- **Logging level.** Normal operation uses Info level. CEO Juice may switch an integration to Trace level temporarily while troubleshooting; Trace logs include the full API requests and responses.
- **Credentials.** Your ConnectWise API keys are stored on the CEO Juice server, encrypted in the CEO Juice database with encryption keys specific to your organization. They are never stored on your server. When an integration runs, it requests the keys from the CEO Juice API server, which identifies your organization by an API key and a client-specific secret key, decrypts the stored values and returns them over HTTPS. In current versions, the integrations do not write your ConnectWise API keys to their logs, and the SQL password is masked.
- **Error notifications.** Sync errors are emailed to the recipients set on your subscription on the CEO Juice website, with the record identifiers and the reason for the error.
- **Access.** Logs and staged data are protected by your server's own access controls.