



ConnectWise Workstation Installation Checklist



The ConnectWise Internet Client uses Internet Options settings found in the Control Panel and in Internet Explorer. Even if you don't use Internet Explorer or don't use the browser version of ConnectWise, these settings are still applicable in order to use the Internet Client.



Skipping steps outlined in this document may contribute to errors while using ConnectWise.

When to Use This Document

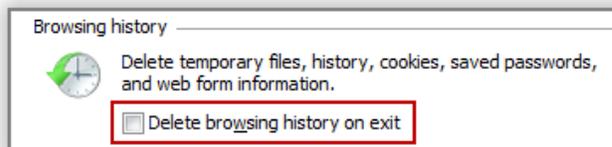
- **Installation** – Use this document as a step by step process when installing the ConnectWise Internet Client or if the ConnectWise Browser version will be used.
- **Errors** – If errors occur while you use ConnectWise, this document will confirm and provide the correct workstation configurations for you to troubleshoot multiple issues.

A. Review the Workstation Requirements

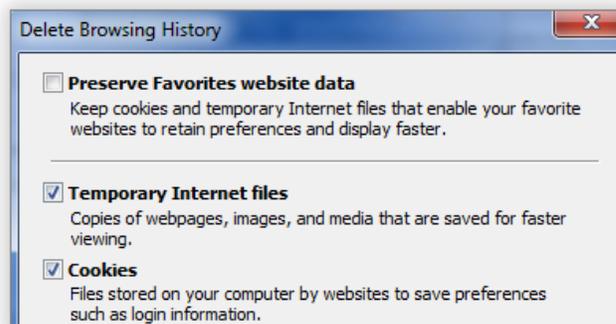
Please visit <http://www.ConnectWise.com/Requirements>

B. Configure Internet Options

1. **Open Internet Options.** You can open Internet Options in two locations:
 - a. In Windows, click **Start > Control Panel > Internet Options.**
 - b. OR open Internet Explorer. Select the **Tools** icon  and select **Internet Options.**
2. **Configure Browsing History.**
 - a. On the **General** tab, in the Browsing history section, ensure the check box for **Delete browsing history on exit** is not selected.



- b. Click the **Delete...** button.
- c. Ensure the **Preserve Favorites website data** check box is not selected.
- d. Select the check boxes for **Temporary Internet files** and **Cookies**.





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- e. Click **Delete**. This will delete previous ConnectWise cookies and save the settings you defined.

If you want to delete ConnectWise cookies only, you can search in your Temporary Internet Files folder for cookies with your ConnectWise URL or part of your URL.

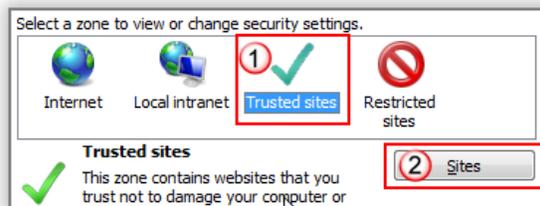


For example, if your URL is "connect.mycompany.com" you would search on "connect" and delete those cookies.

Please see your network administrator more information on gaining access to and deleting from your Temporary Internet Files folder.

3. Configure Trusted Sites

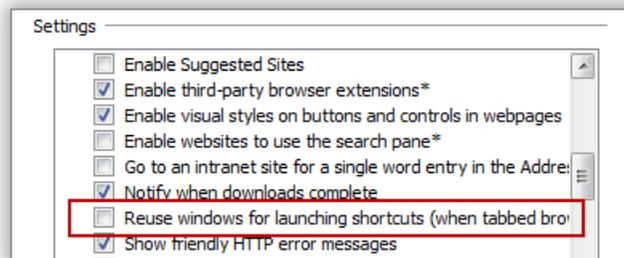
- a. Click on the **Security** tab and then click on the **Trusted Sites** zone icon (1) and then click **Add Sites** or the **Sites** button.



- b. De-select the check box for **Require server verification (https:) for all sites in this zone**.
- c. In the field **Add this website to the zone:** enter your ConnectWise URL as shown in the example below. Do this for **http://** and **https://** then click **Add** after adding each website.
*Example: **http://connectwise.mycompany.com** and **https://connectwise.mycompany.com***
- d. Enter the following trusted sites as well:
 - http://yourcompanyurl
 - https://yourcompanyurl
 - *.connectwise.com
 - http://connectwise.net
 - https://connectwise.net
- e. Click **Close** after you have added all the websites.

4. Configure Advanced Settings

- a. Click on the **Advanced** tab.
- b. De-select the check box for **Reuse windows for launching shortcuts**.



- c. Click **OK**.

□ C. Disable User Account Control (UAC)



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1. In Windows 7, click **Start > Control Panel**.
2. Enter **"UAC"** in the Search Control Panel box.
3. Select the option to **Change User Account Control settings**.
4. Move the slider and set it to **"Never Notify."**
5. Click **OK**.

□ D. Configure Regional and Language Options

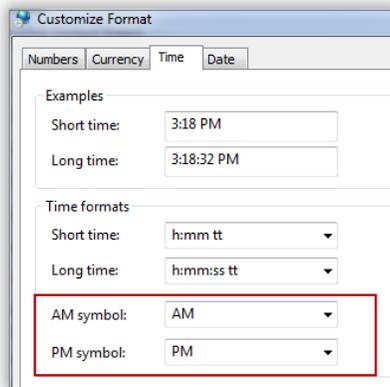


This section primarily applies to partners that are not in the United States or to client installations that are not in the same time zones as the ConnectWise server.

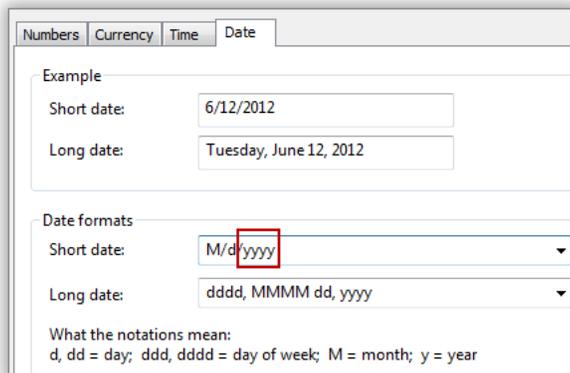
SQL requires time stamps to include the global AM/PM format. If you live in New Zealand or another country where the time in your taskbar appears as "a.m./p.m." you will have to update your regional time settings to use "AM/PM".

To verify the settings:

1. Navigate to **Start > Control Panel > Region and Language**
2. Click on the **Additional Settings...** or **Customize** button (depending on your OS).
3. Click on the **Time** tab.
4. In the fields for **AM symbol** and **PM symbol** select **AM** and **PM**.



5. Click on the **Date** tab and set the **Short Date** to have four characters in the year.

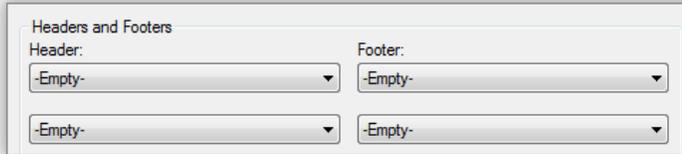


6. Click **OK** to confirm the Time and Date Settings.
7. Click **OK** again on the Region and Language pop up window.



□ E. Configure Internet Explorer Print Settings

1. Open IE.
2. From the Menu bar select **File > Page Setup**. If the Menu Bar is not displayed, right click on the Favorites bar and select the option to display the **Menu bar**.
3. For the **Header** and **Footer** fields, select **-Empty-** as follows:



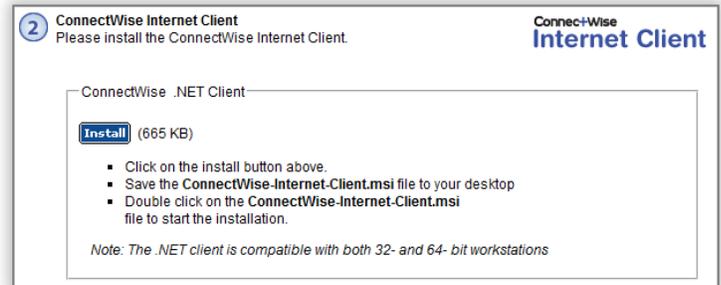
4. Click **OK** when finished.

□ F. Install ConnectWise Internet Client



The ConnectWise Internet client uses the Internet to communicate with your ConnectWise server. You can install it on as many workstations as you'd like. If you do not want to install the full client, you can use the ConnectWise web version to connect to ConnectWise on any workstation whether or not the Internet Client is installed.

1. Go to the <http://www.ConnectWise.com/Install> and look in the **ConnectWise Internet Client** section.
2. Click the **Install** button.
3. Choose to **Run** the downloaded file.
4. Click **Next**.
5. If desired, change the installation folder and who will be able to use the application. The volume must be the C drive. Click **Next**.
6. Click **Next**.
7. Once the install is complete, click **Close**.
8. Go to your Desktop, right click on the **ConnectWise PSA** shortcut on your desktop, click on **Properties** - > click on the **Compatibility** tab, check **"Run this program as an Administrator"**



□ G. Configure Antivirus Exclusions

The following folders and subfolders should be excluded in your Antivirus software:

- C:\Users\[YourUserName]\AppData\Roaming\connectwise
- C:\Program Files\ConnectWise
- C:\Program Files (x86)\ConnectWise



□ H. Clear Cache

Please refer to the Clear Cache Instructions.

If you experience errors while using ConnectWise, it is suggested to delete the following folder as part of the clear cache process. Replace [username] with your user name.

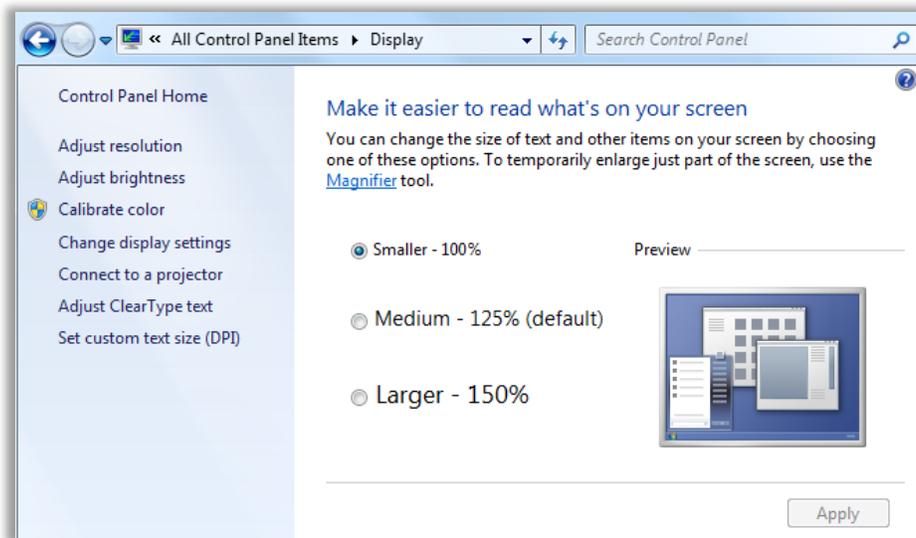
C:\users\[username]\appdata\roaming\connectwise\psa



This folder may be hidden. To unhide it, open My Computer > Organize > Folder and Search Options > View tab > Hidden files and folders. Select to Show hidden files, folders and drives and then click OK.

□ I. Modify Display (DPI) Settings

1. Select **Start > Control Panel**.
2. Type **"DPI"** in the Search Control Panel search box - > drill into **"Make text and other items larger or smaller"**.
3. Select **"Smaller – 100%"**.
4. Click **Apply**.



□ J. Install a ConnectWise PDF Reader on Your Workstation

If you do not already have a PDF reader, please install one of the following PDF readers:

- Adobe – <http://getadobe.com/reader/>
- Foxit – http://www.foxitsoftware.com/Secure_PDF_Reader

□ K. Log In to ConnectWise

1. Open the ConnectWise application.
2. In the **Site** field, enter your ConnectWise URL.



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3. In the **Company ID** field, enter your CompanyID. This is the company name you specified on the Server Installation Checklist.
4. In the **Username** field, enter your MemberID. This is typically your first initial and last name.
5. In the **Password** field, enter your password. The first time, this will be your first name in lower case.
6. Click **Login** to log into the application.