



Install ConnectWise Automate

Overview

Learn all the steps necessary to successfully install ConnectWise Automate. Be sure to have reviewed the [ConnectWise Automate Server Requirements](#) and the [Installation Prerequisites](#) before proceeding with the instructions listed in this document.

In version 2021, MySQL database access using Automate credentials is no longer supported. Please refer to this [supportability statement](#) for more information.

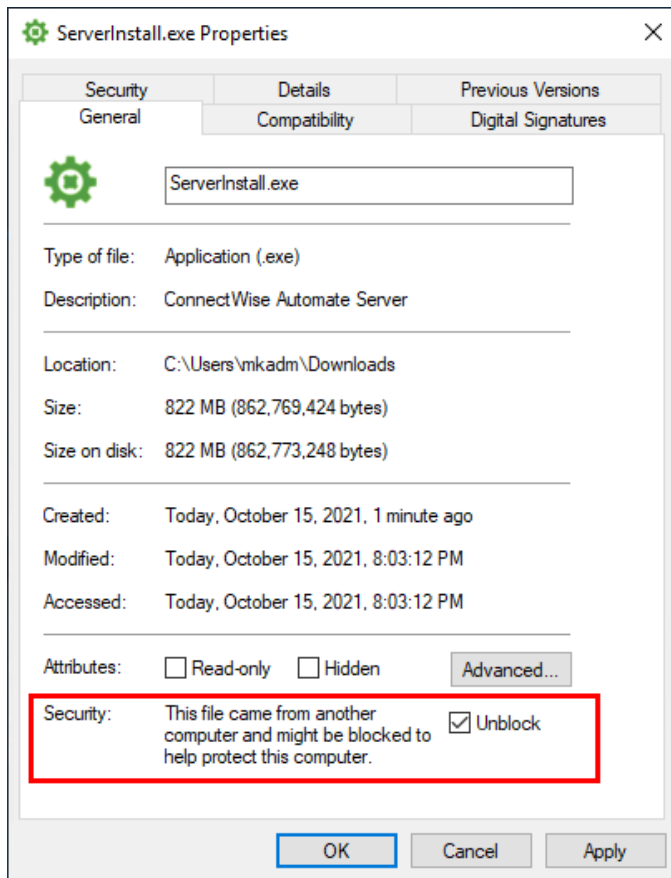
Important: New installs of Automate v2022 require Windows Server 2016, Windows Server 2019, or Windows Server 2022.

Note: Please refer to the [Additional Recommended Configurations](#) article for guidance with backup Internet connections, alternate ports, etc..

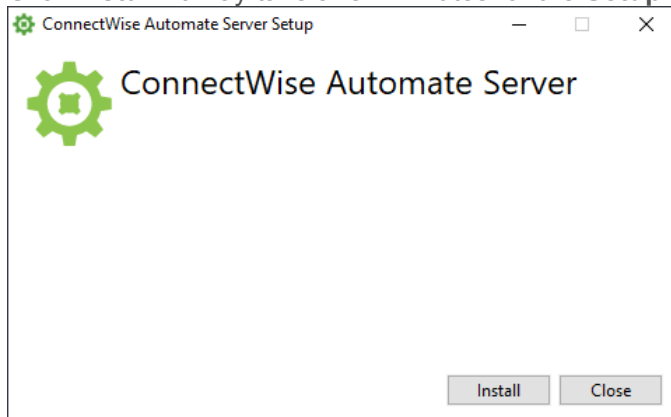
Install Automate

To install Automate:

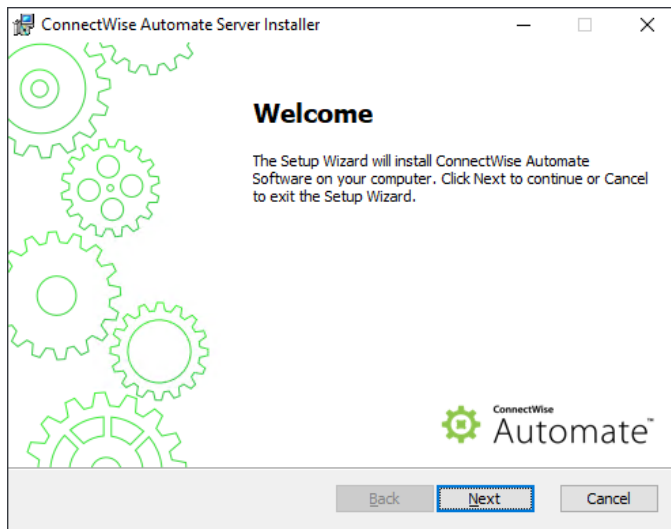
1. Download the ConnectWise Automate installation executable from the [Automate Product Updates](#) page. We recommend you run the installer from a local drive. If run from a network share, you run the risk of the network connection dropping and the installation failing.
Important: If using Internet Explorer, you may receive a **File Download from Internet** warning. Complete steps 2-5 to resolve this message. Failure to complete the following steps, regardless if you received this warning or not, results in a failed upgrade with limited recovery options.
2. Right-click on the file and select **Properties**.
3. Click on the **General** tab, if not already selected.
4. In the **Security** section, click **Unblock**. This removes the downloaded file from the Internet status flag and any warnings or blocks associated with it.



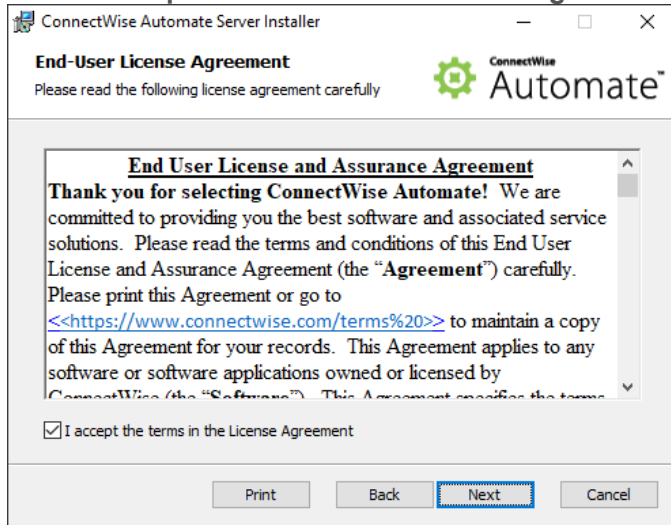
5. Click **OK**.
6. Right-click the Automate icon and select **Run as Administrator**.
7. Click **Install**. It may take a few minutes for the **Setup Wizard** to prepare for installation.



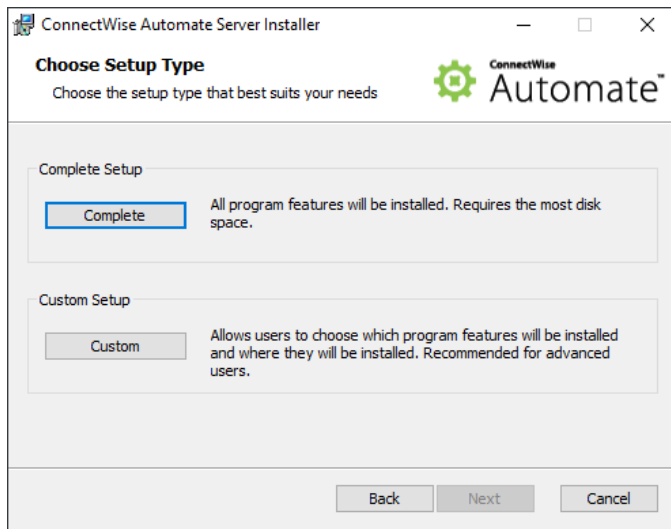
8. Click **Next** to continue.



9. It is important to read the End-User License Agreement before you continue. If you accept the terms, select **I accept the terms in the License Agreement** and click **Next**.



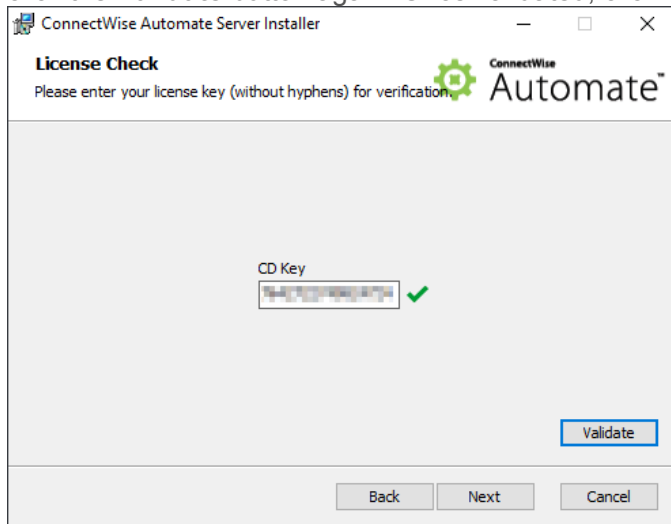
10. You have the option to select **Complete** or **Custom**. Refer to the definitions below before proceeding.
- **Complete** installs all Automate components on one server. If you are installing on one server, proceed to the [Complete Setup](#) section.
 - **Custom** allows you to install a Web Server and Database Server separate from the Automation Server. This distributes the workload among different servers, allowing the system to support a higher number of total agents. We recommend that the database is split from the Automate (Automation) server prior to a web server split. If you are installing on multiple servers, please refer to [Custom Setup](#).



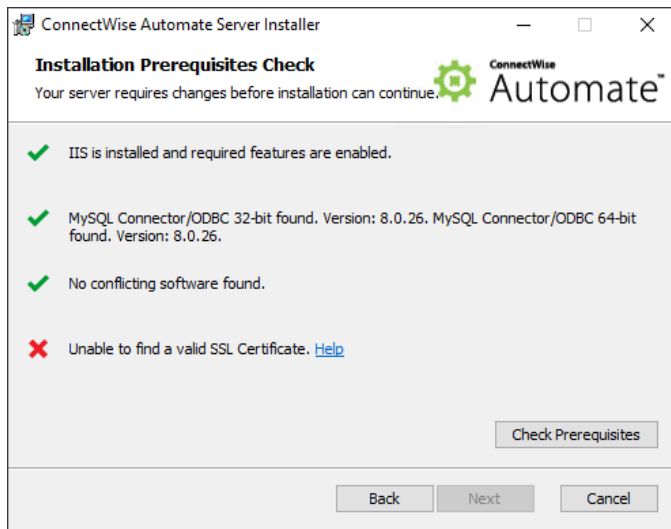
Complete Setup

To install Automate on one server:

1. Click **Complete** > **Next**.
2. Enter your **CD key** (without the dashes) and click **Validate**. The validation may take a few moments. The icon changes from a red x to a green checkmark if the CD key comes back valid. If it is not valid, reenter and click the **Validate** button again. Once validated, click **Next**.



3. The installer does a prerequisite check at this time. If the installer does not find any issues, a green checkmark is displayed before each listed prerequisite. If the [Automate Installation Prerequisites](#) were not completed prior to installing Automate, they are indicated by a red X (see example below). Click on the **Help** links in the installer or refer to the table below to review documentation to resolve each issue. Any issues found must be resolved before the install continues. After the issues have been resolved, click **Check Prerequisites**.

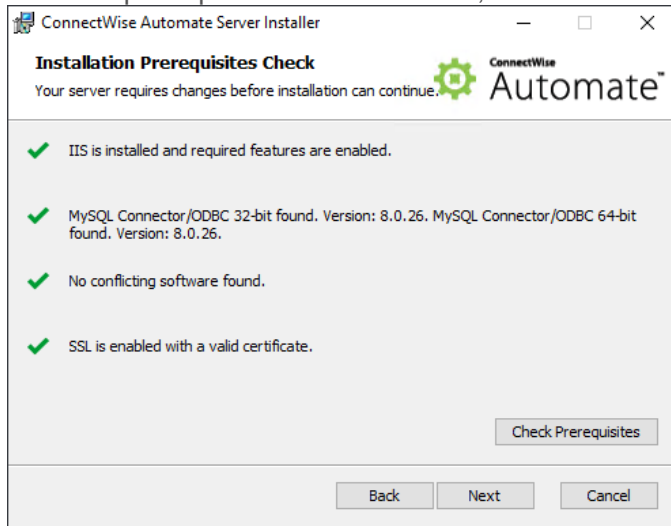


Prerequisite

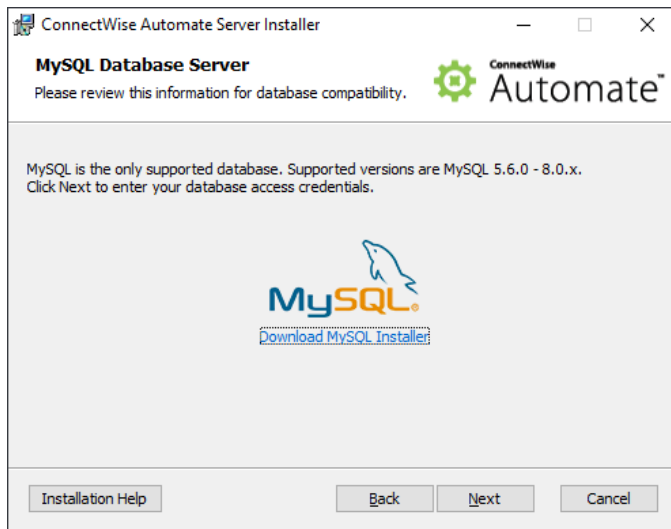
Document

Web Server (IIS) must be enabled and/or IIS (Web Server) must be enabled and/or ASP.NET support for IIS must be enabled.	Windows Server - IIS Features and Roles
MySQL Connector/ODBC Check	Install ODBC Connectors
Conflicting Software	Conflicting Software
MySQL Installer	Install a MySQL Database
Database Configuration (Required for fresh installs only)	Configuring your Database

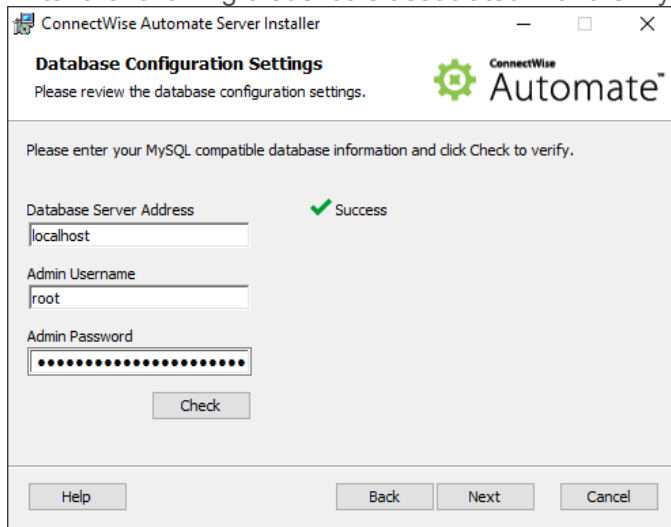
4. When all prerequisites have been met, click **Next**.



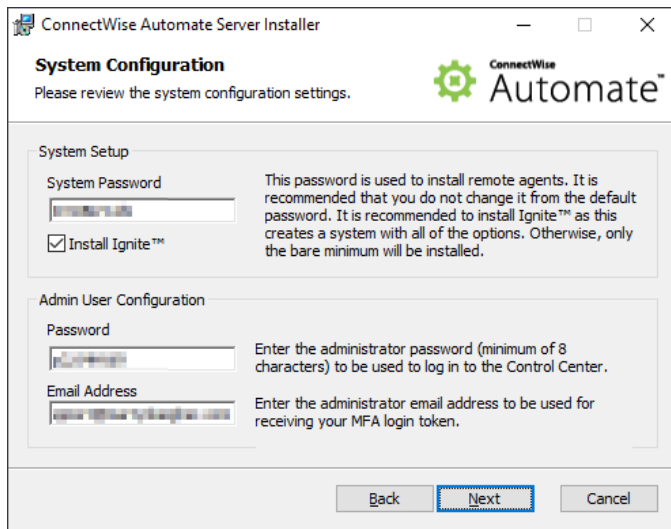
5. The installer allows you to create your database during the install; however, if the database was created while following the [Automate Installation Prerequisites](#), this step is not necessary. Click **Next** to enter your database access credentials. If you have not yet installed a MySQL compatible database, click on the desired database link for installation instructions before continuing.



6. Enter the following credentials associated with the MySQL database that was installed.



- Leave the **Database Server Address** field populated with the localhost because the database resides on the Automation Server.
 - Enter the **Admin Username**.
 - Enter the **Admin Password**.
7. On the System Configuration screen, the **System Password** automatically populates. The system password is used to install remote agents. It is recommended that you leave the system password at the default value.



ConnectWise Automate Server Installer

System Configuration
Please review the system configuration settings.

System Setup

System Password
 This password is used to install remote agents. It is recommended that you do not change it from the default password. It is recommended to install Ignite™ as this creates a system with all of the options. Otherwise, only the bare minimum will be installed.

☒ Install Ignite™

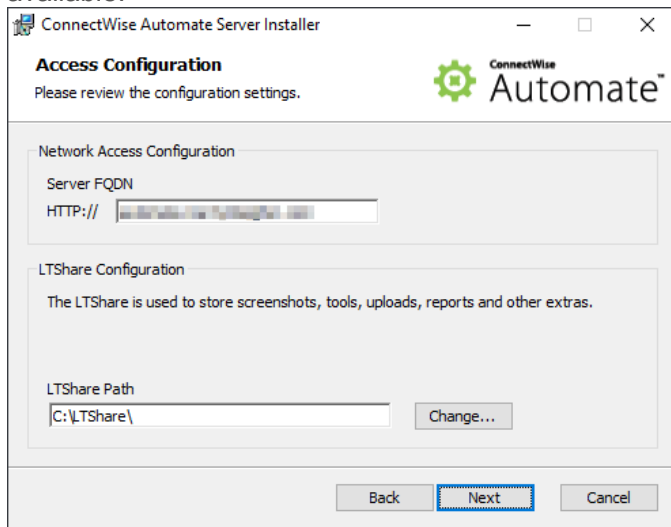
Admin User Configuration

Password
 Enter the administrator password (minimum of 8 characters) to be used to log in to the Control Center.

Email Address
 Enter the administrator email address to be used for receiving your MFA login token.

Back Next Cancel

8. **Install Ignite™** is selected by default. It is recommended to leave this option selected so all options are installed. Otherwise, only the bare minimum is installed.
9. Enter an administrator **Password** to be used to log in to the Automate Control Center. Passwords must be a minimum of eight characters.
10. Enter an administrator **Email Address** to be used to receive your MFA login token.
11. Click **Next**.
12. On the **Access Configuration** screen, the **Server FQDN** and **LTShare Path** fields are automatically populated. Enter the FQDN of the Automate server in the **Server FQDN** field. This address will be the FQDN (URL) that the Automate agents will use to check-in to your server, so be sure that the URL is externally available.



ConnectWise Automate Server Installer

Access Configuration
Please review the configuration settings.

Network Access Configuration

Server FQDN
 HTTP://

LTShare Configuration

The LTShare is used to store screenshots, tools, uploads, reports and other extras.

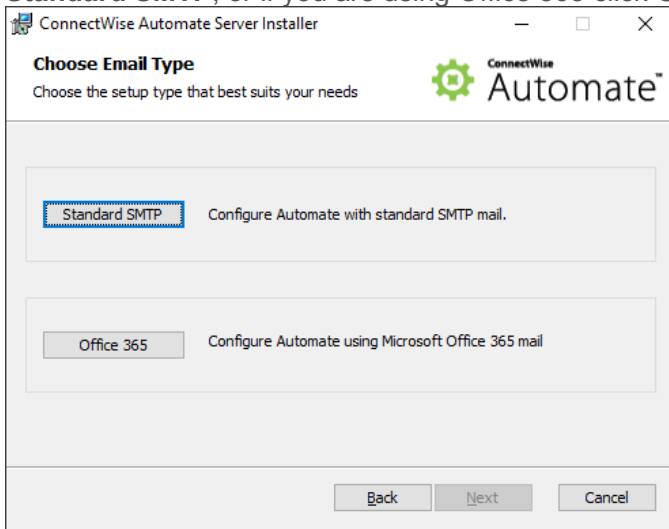
LTShare Path
 C:\LTShare\

Back Next Cancel

13. By default, the **LTShare** is installed on the C: drive of the Automate server. If desired, click on the **Change** button to change the path to a different location.
Important: During the install, the installer checks LTShare folder permissions for the appropriate user groups and attempts to grant permissions if any are missing. The install fails if the installer cannot grant the necessary permissions. If the install fails, ensure that the IIS AppPool\LabTech, IIS AppPool\LabTech WebCC, IIS AppPool\CwaRestApi, and System user groups have Modify, List folder contents, Read & Execute, Read, and Write permissions for the LTShare folder.

The LTShare is used to store screenshots, tools, uploads, reports, etc. The LTShare utilizes a File Service running as a Windows service alongside the database agent. This service primarily impacts split server environments as each Automate server has its own local LTShare. The File Service activates when a remote agent attempts to download a file from the system by requesting that file from the Web Server. The Web Server first checks its local LTShare directory for the file, and if the file is outdated or does not exist, it communicates with the File Service to get a current copy of the file. The Web Server then streams the content of that file back to the entity requesting the download, while simultaneously saving a copy to the LTShare directory on the Web Server. This local copy can then be used to service future requests for that file that come to that Web Server. The Web Server communicates with the File Service via port 12413 and only inside and below the LTShare may be accessed. Refer to [ConnectWise Automate Installation Prerequisites](#) for more information on port requirements.

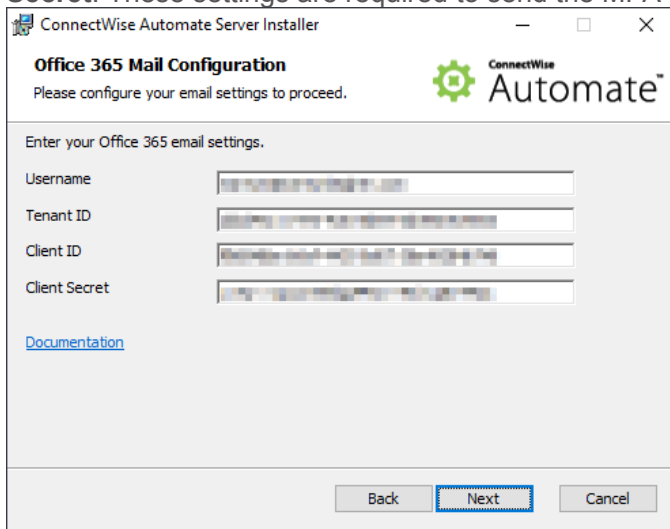
14. Click **Next**.
15. On the **Choose Email Type** screen, if you are using Gmail or another SMTP email configuration click **Standard SMTP**, or if you are using Office 365 click **Office 365**.



16. Click **Next**.
17. Enter your email credentials.
 - If you selected **Standard SMTP**, enter your SMTP mail server settings. These settings are required to send the MFA login tokens.

The screenshot shows the 'Mail Configuration' window of the ConnectWise Automate Server Installer. The window title is 'ConnectWise Automate Server Installer'. The main heading is 'Mail Configuration' with a subtitle 'Please configure your email settings to proceed.'. There are several input fields: 'SMTP Address' (containing 'smtp.gmail.com'), 'SMTP Port' (containing '587'), 'Support Email' (containing a placeholder), 'SMTP Username' (containing a placeholder), and 'SMTP Password' (containing masked characters). There is a 'Test Email' button and a 'Documentation' link. At the bottom, there are three buttons: 'Back', 'Next', and 'Cancel'. A checkbox labeled 'Use SSL' is checked.

- At this time, if you are an Office 365 user, you must [Register the Application](#) before the install can continue. After the steps are complete, enter your **Username**, **Tenant ID**, **Client ID**, and **Client Secret**. These settings are required to send the MFA login tokens.



ConnectWise Automate Server Installer

Office 365 Mail Configuration
Please configure your email settings to proceed.

Enter your Office 365 email settings.

Username:

Tenant ID:

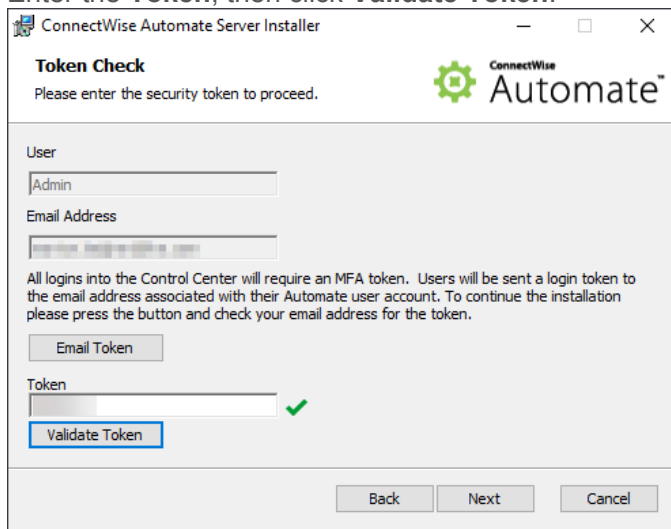
Client ID:

Client Secret:

[Documentation](#)

Back Next Cancel

- Click **Next**.
- Click **Email Token**. An email with your MFA token is sent to the Admin User email address.
- Enter the **Token**, then click **Validate Token**.



ConnectWise Automate Server Installer

Token Check
Please enter the security token to proceed.

User:

Email Address:

All logins into the Control Center will require an MFA token. Users will be sent a login token to the email address associated with their Automate user account. To continue the installation please press the button and check your email address for the token.

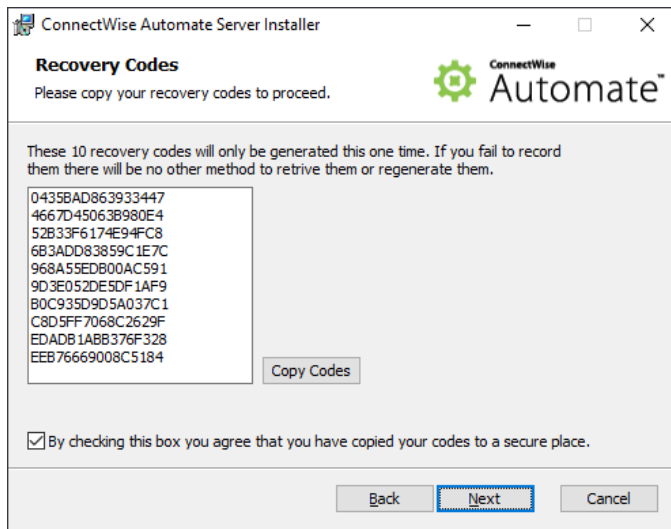
Email Token

Token: ✓

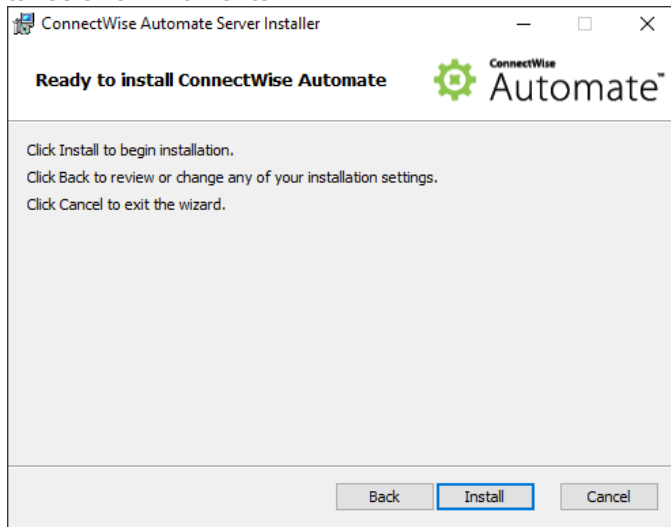
Validate Token

Back Next Cancel

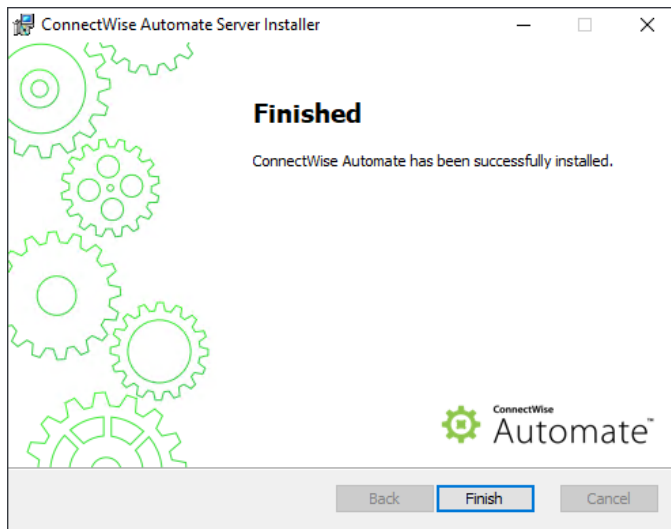
- Click **Next**.
- Ten emergency recovery tokens are generated. These recovery tokens can be used to log in to Automate if the Super Admin cannot access their email. The recovery tokens never expire but can only be used one time each. This is the only time the recovery tokens are displayed, therefore it is essential that you copy and save the recovery tokens.



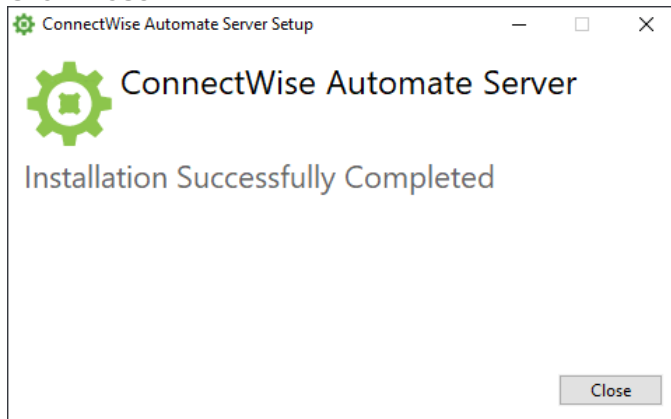
23. Select the checkbox to verify that you have saved the recovery codes.
24. Click **Next**.
25. Click **Install** to begin the installation. Otherwise, click **Back** to review or make any changes. The installation takes a few moments.



26. Click **Finish**.



27. Click **Close**.

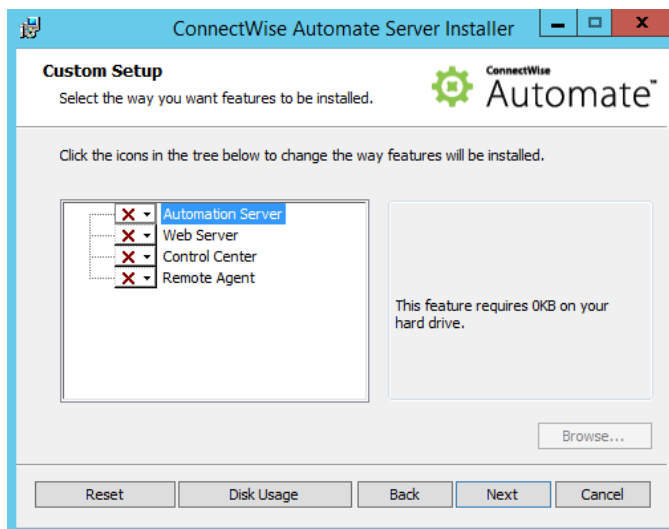


28. Refer to [Logging in to the Control Center](#) for instructions on how to log in.

Custom Setup

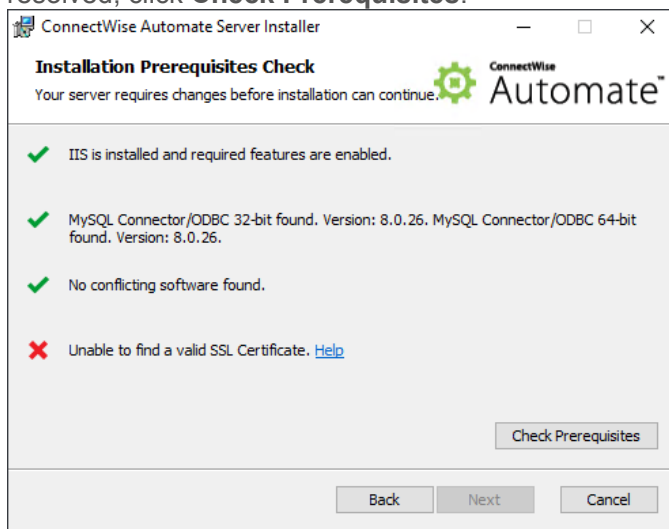
To install Automate on a split server:

1. Click **Custom > Next**.
2. Select the features you want to install. If you want to install the Web Server on a separate server, select **Entire feature will be unavailable** for the **Automate Web Server**. You must run the installer again on the Web Server when you have completed the Automation Server installation.



Note: It is recommended to have both the **Control Center** and the Remote Agent on the Automation Server. The **Control Center** is not necessary on the Web Server and is optional.

- The installer does a prerequisite check at this time. If the installer does not find any issues, a green checkmark is displayed before each listed prerequisite. If the [Automate Installation Prerequisites](#) were not completed prior to installing Automate, they are indicated by a red X (see example below). Click on the **Help** links in the installer or refer to the table below to review documentation to resolve each issue. Any issues found must be resolved before the install continues. After the issues have been resolved, click **Check Prerequisites**.



Prerequisite

Document

Web Server (IIS) must be enabled and/or IIS (Web Server) must be enabled and/or ASP.NET support for IIS must be enabled.	Windows Server - IIS Features and Roles
MySQL Connector/ODBC Check	Install ODBC Connectors
Conflicting Software	Conflicting Software
MySQL Installer	Install a MySQL Database

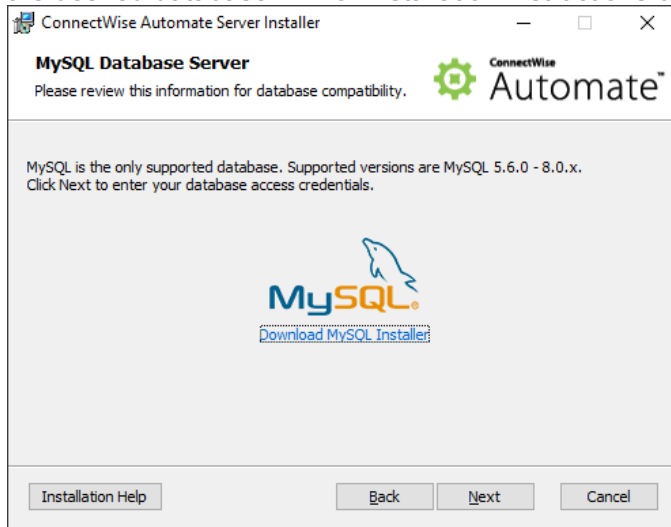
Prerequisite

Document

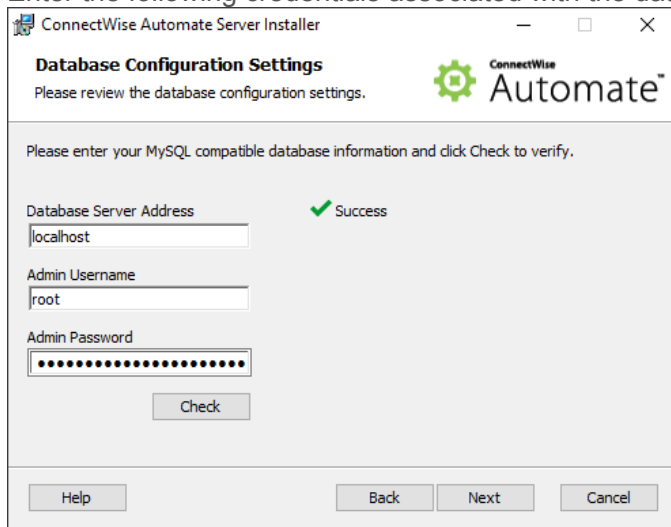
Database Configuration (for FRESH installs only)

[Configuring your Database](#)

4. When all prerequisites have been met, click **Next**.
5. The installer allows you to create your database during the install; however, if the database was created while following the [ConnectWise Automate Installation Prerequisites](#), this step is not necessary. Click **Next** to enter your database access credentials. If you have not installed a MySQL compatible database yet, click on the desired database link for installation instructions before continuing.



6. Enter the following credentials associated with the database that was installed.



- a. Enter the **Database Server Address** because Automate is installed on a split-server.
 - b. Enter the **Admin Username**.
 - c. Enter the **Admin Password**.
7. Click **Check** to verify the configuration and credentials. Errors indicate that settings need to be changed in the *my.ini* file. For steps on modifying your *my.ini* file, refer to [Configure your Database](#). These settings must be updated before you continue. After you have made the changes, click **Check** to verify. When all errors and warnings have been addressed restart the LabMySQL service and click **Check** again. Click **Next** to continue. If you see only warnings, we recommend you review and make the changes before continuing, but

it is not required in order to continue.

- On the **System Configuration** screen, the **System Password** automatically populates. The system password is used to install remote agents. It is recommended that you leave the system password at the default value.

The screenshot shows the 'System Configuration' window of the ConnectWise Automate Server Installer. The window title is 'ConnectWise Automate Server Installer'. The main heading is 'System Configuration' with a subtext 'Please review the system configuration settings.' and the ConnectWise Automate logo. The 'System Setup' section contains a 'System Password' field with a masked password, a checked 'Install Ignite™' checkbox, and a text box explaining that the password is used for remote agents and that Ignite™ is recommended for a full installation. The 'Admin User Configuration' section has a 'Password' field with a masked password and a text box stating it must be at least 8 characters, and an 'Email Address' field with a masked email and a text box stating it is for MFA login tokens. At the bottom are 'Back', 'Next', and 'Cancel' buttons, with 'Next' highlighted.

- Install Ignite™** is selected by default. It is recommended to leave this option selected so all options are installed. Otherwise, only the bare minimum is installed.
- Enter an administrator **Password** to be used to log in to the **Automate Control Center**. Passwords must be a minimum of eight characters.
- Enter an administrator **Email Address** for receiving your MFA login token.
- Click **Next**.
- Enter the FQDN of the Automate server in the **Server FQDN** field.

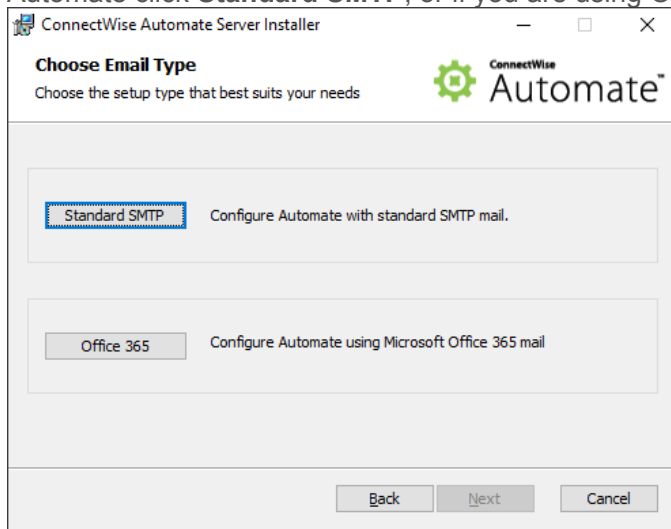
The screenshot shows the 'Access Configuration' window of the ConnectWise Automate Server Installer. The window title is 'ConnectWise Automate Server Installer'. The main heading is 'Access Configuration' with a subtext 'Please review the configuration settings.' and the ConnectWise Automate logo. The 'Network Access Configuration' section has a 'Server FQDN' field with a masked FQDN. The 'LTShare Configuration' section has a text box stating 'The LTShare is used to store screenshots, tools, uploads, reports and other extras.' and an 'LTShare Path' field with the value 'C:\LTShare\' and a 'Change...' button. At the bottom are 'Back', 'Next', and 'Cancel' buttons, with 'Next' highlighted.

- Leave the **Create Network Share (LTShare)** option selected.
Important: The install fails if the LTShare is not created.

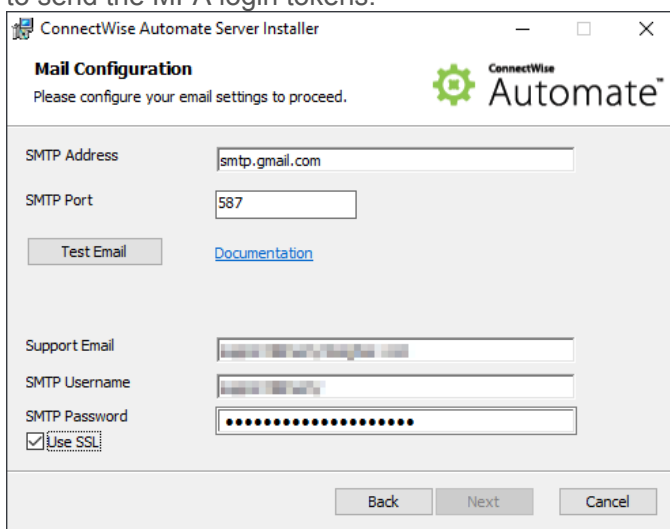
The LTShare is used to store screenshots, tools, uploads, reports, etc. The LTShare utilizes a File Service running as a Windows service alongside the database agent. This service primarily impacts split server environments as each Automate server has its own local LTShare. The File Service activates when a remote

agent attempts to download a file from the system by requesting that file from the Web Server. The Web Server first checks its local LTShare directory for the file, and if the file is outdated or does not exist, it communicates with the File Service to get a current copy of the file. The Web Server then streams the content of that file back to the entity requesting the download, while simultaneously saving a copy to the LTShare directory on the Web Server. This local copy can then be used to service future requests for that file that come to that Web Server. The Web Server communicates with the File Service via port 12413 and only inside and below the LTShare may be accessed. Refer to [ConnectWise Automate Installation Prerequisites](#) for more information on port requirements.

15. By default, the *LTShare* is installed on the C: drive of the Automate server. If desired, click on the **Change** button to change the path to a different location.
16. Click **Next**.
17. On the **Choose Email Type** screen, if you are using Gmail or another SMTP email configuration with Automate click **Standard SMTP**, or if you are using Office 365 click **Office 365**.



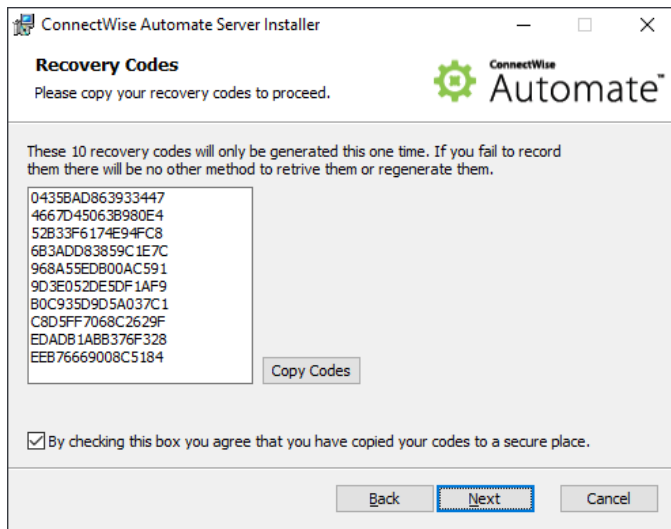
18. Click **Next**.
19. Enter your email credentials.
 - If you selected **Standard SMTP**, enter your SMTP mail server settings. These settings are required to send the MFA login tokens.



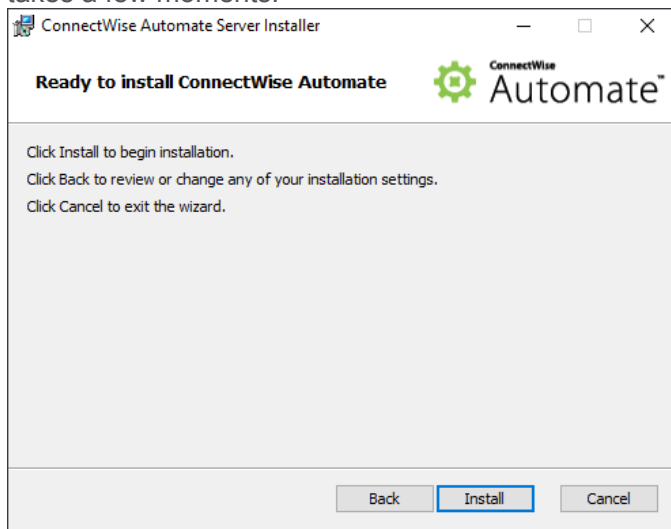
- At this time, if you are an Office 365 user, you must [Register the Application](#) before the install can continue. After the steps are complete, enter your **Username**, **Tenant ID**, **Client ID**, and **Client Secret**. These settings are required to send the MFA login tokens.

- Click **Next**.
- Click **Email Token**. An email with your MFA token is sent to the Admin User email address.
- Enter the **Token**, then click **Validate Token**.

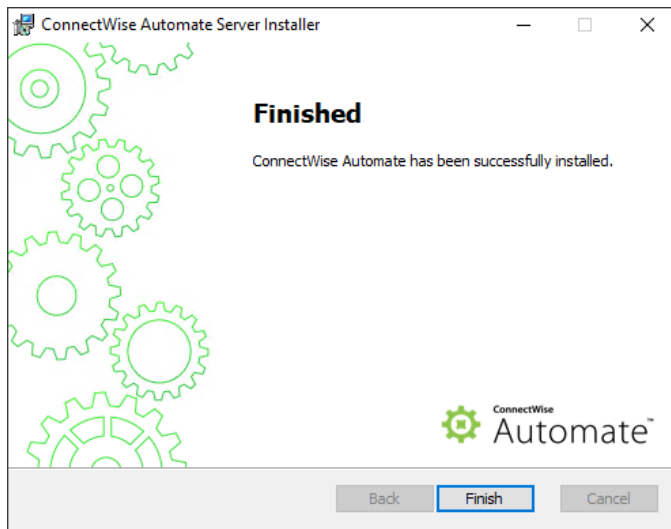
- Click **Next**.
- Ten emergency recovery tokens are generated. These recovery tokens can be used to log in to Automate if the Super Admin cannot access their email. The recovery tokens never expire but can only be used one time each. This is the only time the recovery tokens are displayed, therefore it is essential that you copy and save the recovery tokens.



25. Select the checkbox to verify that you saved the recovery codes.
26. Click **Next**.
27. Click **Install** to begin the installation. Otherwise, click **Back** to review or make any changes. The installation takes a few moments.



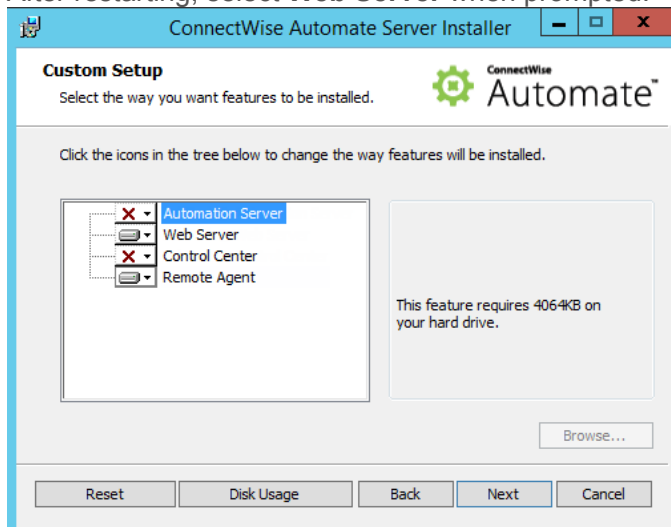
28. You are prompted to restart the computer. Restart.
29. If you chose to install the Web Server on a separate server, skip to [Install Web Server](#) and complete the steps. If you choose to install the Web Server on the same server, click **Finish**.



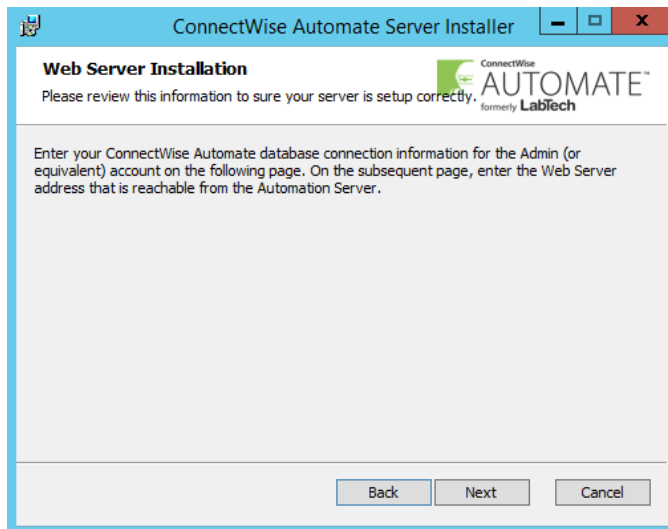
30. Refer to [Logging in to the Control Center](#) for instructions on how to log in.

Install Web Server

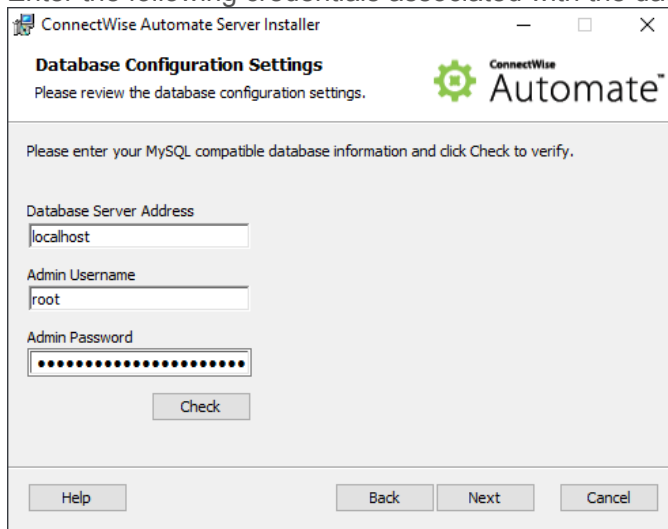
1. After restarting, select **Web Server** when prompted.



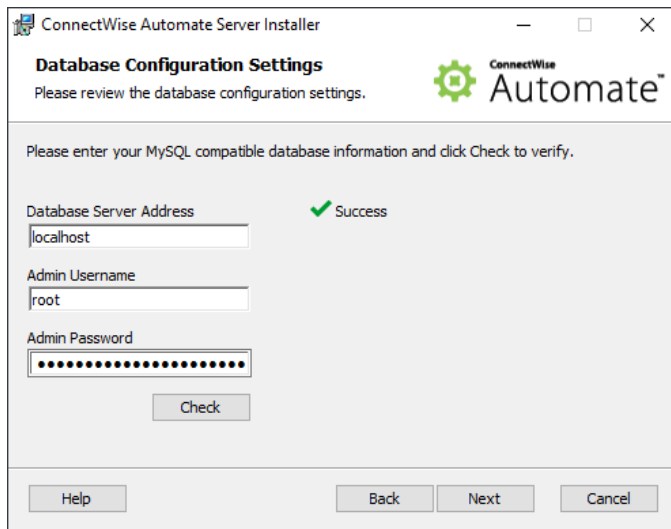
2. Select **Entire feature will be unavailable** for the **Automate Automation Server** and then select **Will be installed on local hard drive** for the **Automate Web Server**. It is recommended to also install the Remote Agent but the Control Center is optional.
3. Click **Next**.



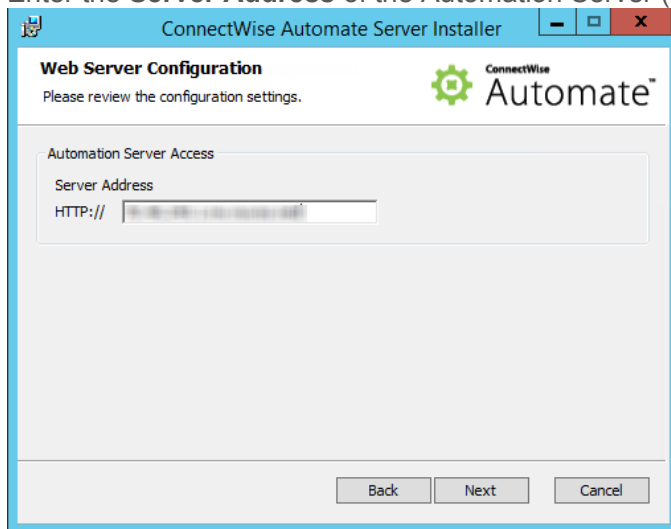
4. Enter the following credentials associated with the database that was installed.



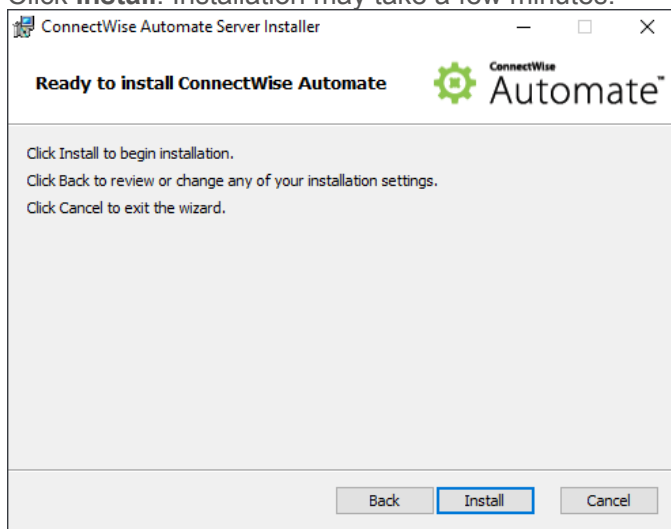
- a. In the **Database Server Address** field, enter your Automation Server if you installed your database on the Database Server.
 - b. Enter the **Admin Username**.
 - c. Enter the **Admin Password**.
5. Click **Check** to verify the configuration and credentials.
6. Once the credentials have been verified and are successful, click **Next**.



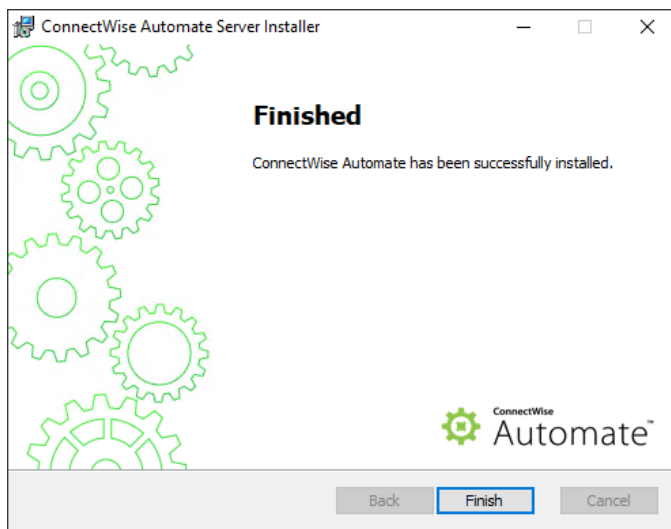
7. Enter the **Server Address** of the Automation Server (e.g., where Automate resides) and click **Next**.



8. Click **Install**. Installation may take a few minutes.



9. Click **Finish** and then **Close**.



10. Copy the mysqldump.exe file from your Database Server Installation path (default path listed below) and place it in C:\Program Files\Labtech on the Automation Server.
 - MySQL Default Path: C:\Program Files\MySQL\MySQL Server 5.X\bin\mysqldump.exe
11. Refer to [Logging in to the Control Center](#) for instructions on how to log in.

Overview

Learn all the steps necessary to successfully install ConnectWise Automate. Be sure to have reviewed the [ConnectWise Automate Requirements](#) and the [Installation Prerequisites](#) before proceeding with the instructions listed in this document.

In version 2021, MySQL database access using Automate credentials is no longer supported. Please refer to this [supportability statement](#) for more information.

Important: New installs of Automate v2021 require Windows Server 2016 or Windows Server 2019, but Server 2019 is recommended.

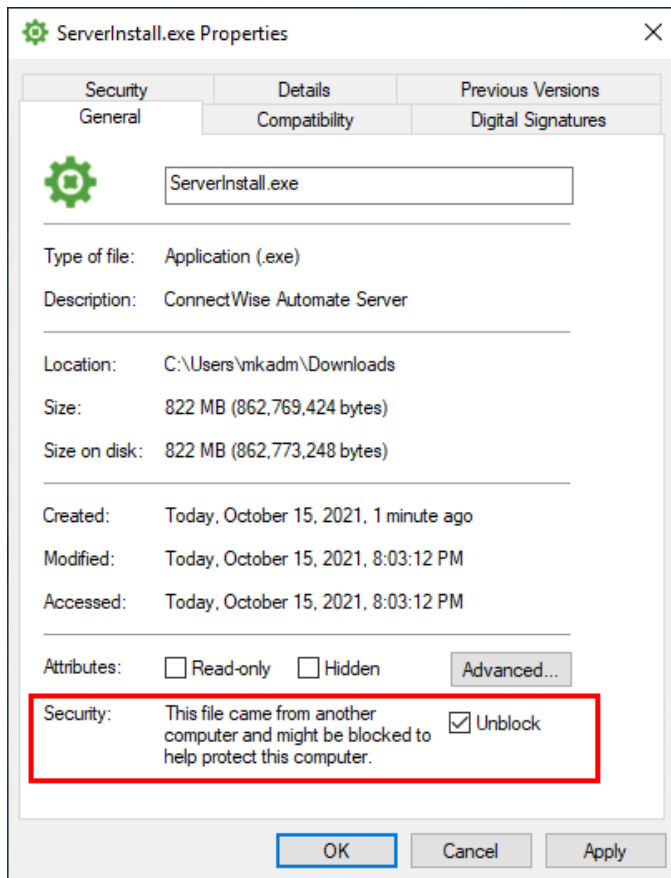
Note: Please refer to the [Additional Recommended Configurations](#) article for guidance with backup Internet connections, alternate ports, etc..

Install Automate

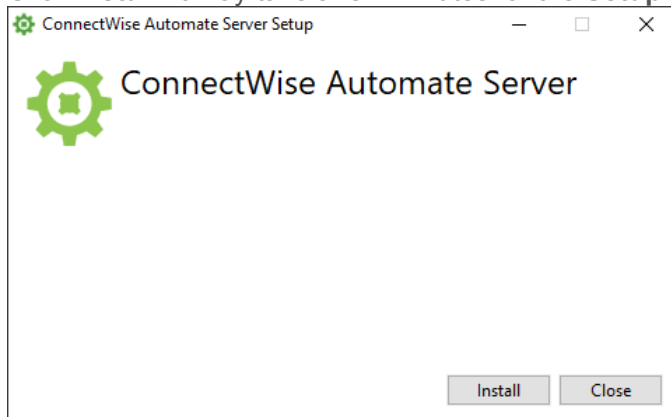
To install Automate:

1. Download the ConnectWise Automate installation executable from the [Products and Updates](#) page. We recommend you run the installer from a local drive. If run from a network share, you run the risk of the network connection dropping and the installation failing.

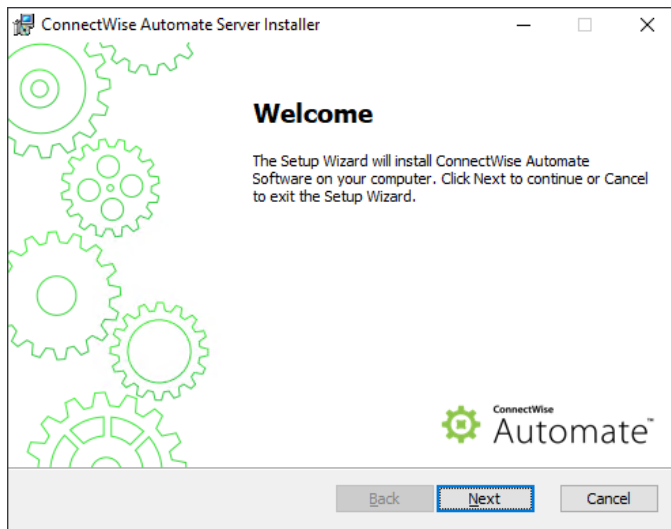
Important: If using Internet Explorer, you may receive a **File Download from Internet** warning. Complete steps 2-5 to resolve this message. Failure to complete the following steps, regardless if you received this warning or not, results in a failed upgrade with limited recovery options.
2. Right-click on the file and select **Properties**.
3. Click on the **General** tab, if not already selected.
4. In the **Security** section, click **Unblock**. This removes the downloaded file from the Internet status flag and any warnings or blocks associated with it.



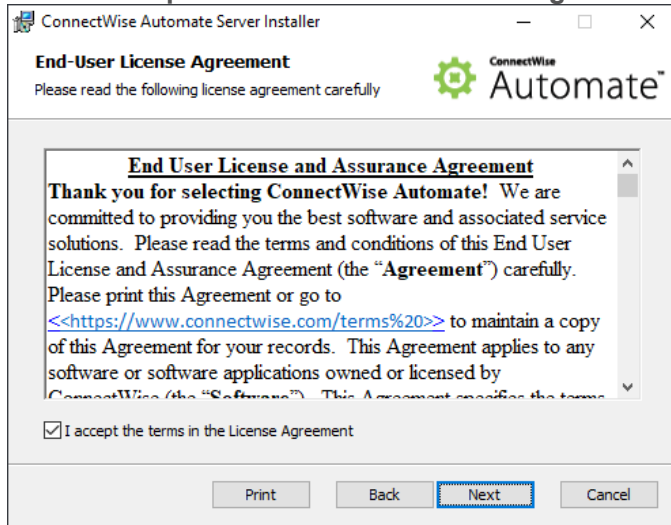
5. Click **OK**.
6. Right-click the Automate icon and select **Run as Administrator**.
7. Click **Install**. It may take a few minutes for the **Setup Wizard** to prepare for installation.



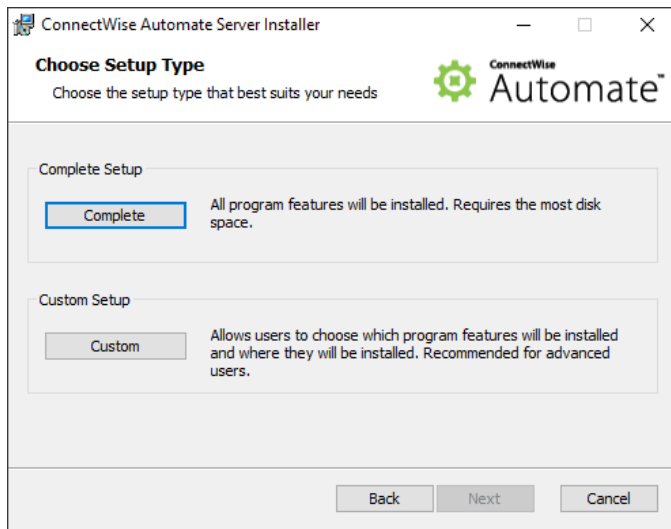
8. Click **Next** to continue.



9. It is important to read the End-User License Agreement before you continue. If you accept the terms, select **I accept the terms in the License Agreement** and click **Next**.



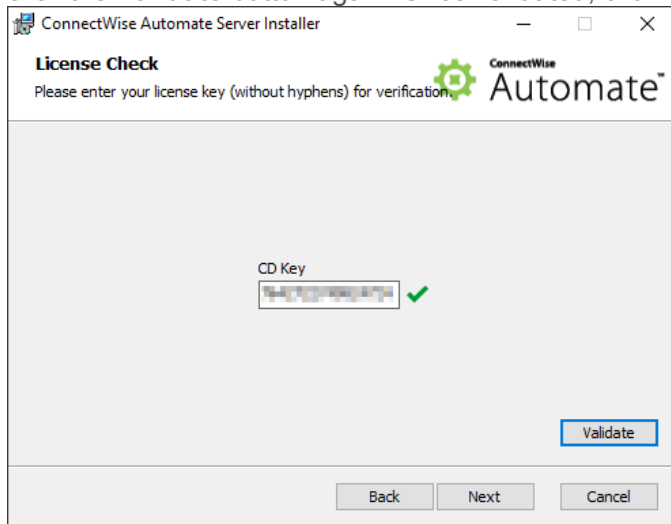
10. You have the option to select **Complete** or **Custom**. Refer to the definitions below before proceeding.
- **Complete** installs all Automate components on one server. If you are installing on one server, proceed to the [Complete Setup](#) section.
 - **Custom** allows you to install a Web Server and Database Server separate from the Automation Server. This distributes the workload among different servers, allowing the system to support a higher number of total agents. We recommend that the database is split from the Automate (Automation) server prior to a web server split. If you are installing on multiple servers, please refer to [Custom Setup](#).



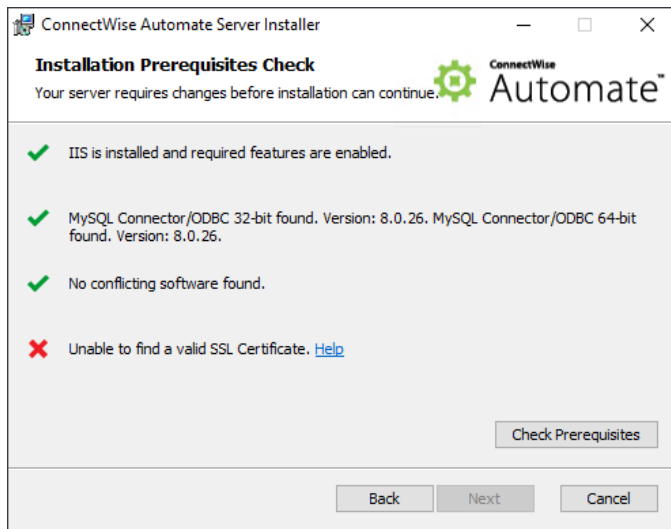
Complete Setup

To install Automate on one server:

1. Click **Complete** > **Next**.
2. Enter your **CD key** (without the dashes) and click **Validate**. The validation may take a few moments. The icon changes from a red x to a green checkmark if the CD key comes back valid. If it is not valid, reenter and click the **Validate** button again. Once validated, click **Next**.



3. The installer does a prerequisite check at this time. If the installer does not find any issues, a green checkmark is displayed before each listed prerequisite. If the [Automate Installation Prerequisites](#) were not completed prior to installing Automate, they are indicated by a red X (see example below). Click on the **Help** links in the installer or refer to the table below to review documentation to resolve each issue. Any issues found must be resolved before the install continues. After the issues have been resolved, click **Check Prerequisites**.

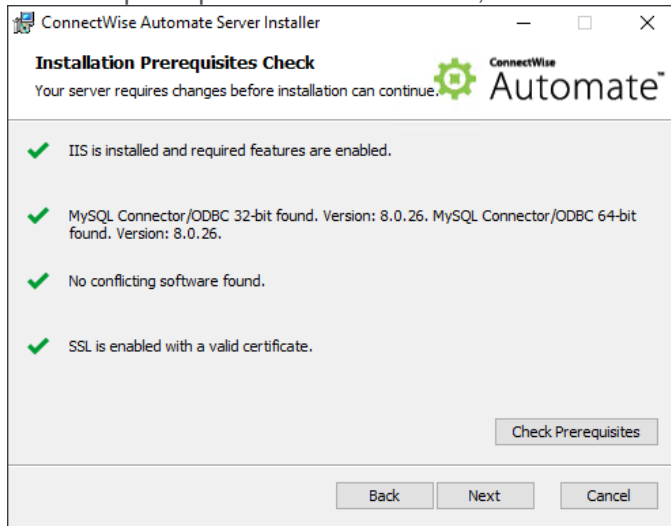


Prerequisite

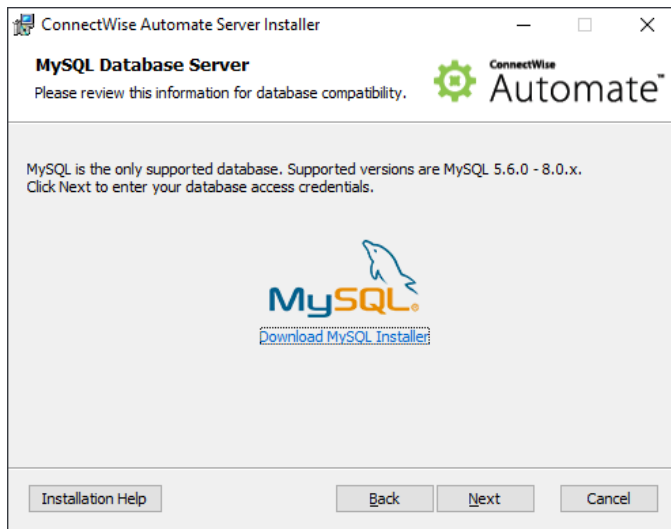
Document

Web Server (IIS) must be enabled and/or IIS (Web Server) must be enabled and/or ASP.NET support for IIS must be enabled.	Windows Server - IIS Features and Roles
MySQL Connector/ODBC Check	Install ODBC Connectors
Conflicting Software	Conflicting Software
MySQL Installer	Install a MySQL Database
Database Configuration (Required for fresh installs only)	Configuring your Database

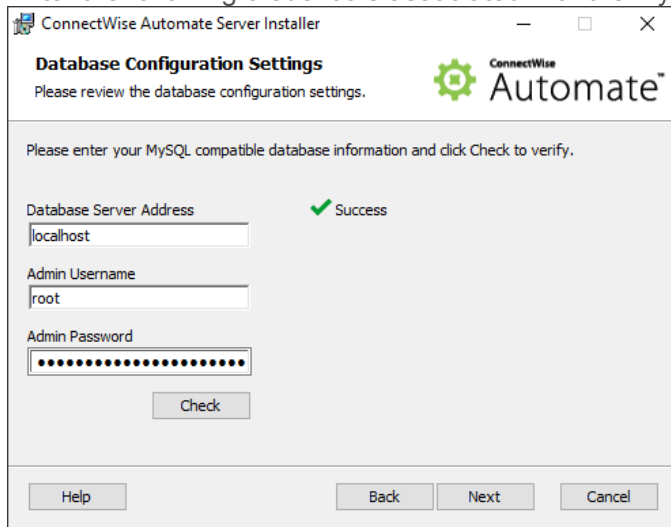
4. When all prerequisites have been met, click **Next**.



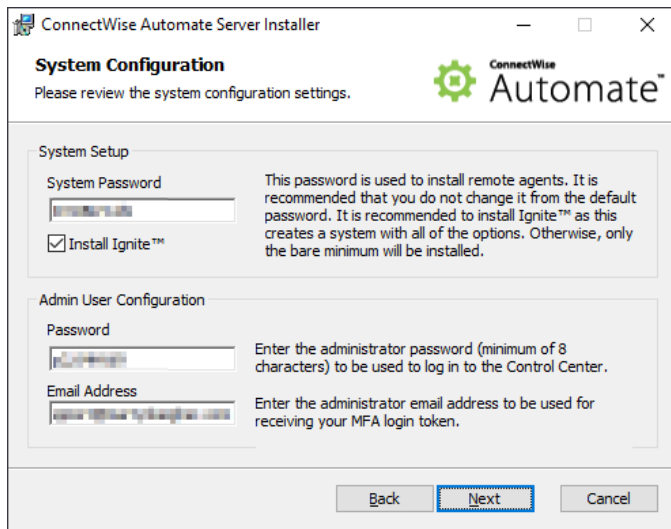
5. The installer allows you to create your database during the install; however, if the database was created while following the [Automate Installation Prerequisites](#), this step is not necessary. Click **Next** to enter your database access credentials. If you have not yet installed a MySQL compatible database, click on the desired database link for installation instructions before continuing.



6. Enter the following credentials associated with the MySQL database that was installed.



- Leave the **Database Server Address** field populated with the localhost because the database resides on the Automation Server.
 - Enter the **Admin Username**.
 - Enter the **Admin Password**.
7. On the System Configuration screen, the **System Password** automatically populates. The system password is used to install remote agents. It is recommended that you leave the system password at the default value.



ConnectWise Automate Server Installer

System Configuration
Please review the system configuration settings.

System Setup

System Password
 This password is used to install remote agents. It is recommended that you do not change it from the default password. It is recommended to install Ignite™ as this creates a system with all of the options. Otherwise, only the bare minimum will be installed.

☒ Install Ignite™

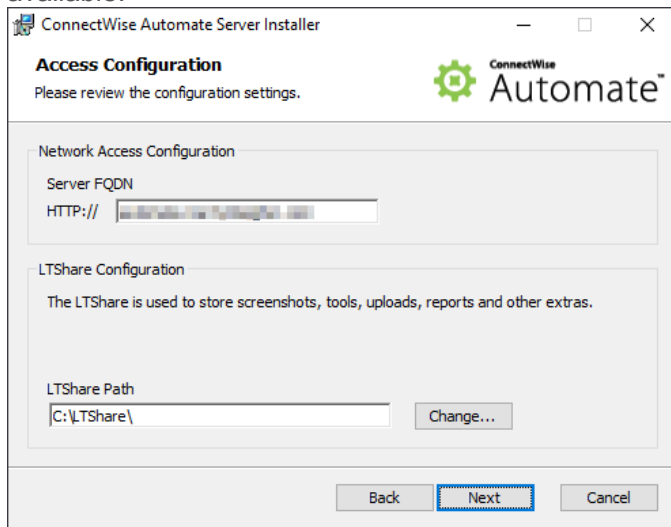
Admin User Configuration

Password
 Enter the administrator password (minimum of 8 characters) to be used to log in to the Control Center.

Email Address
 Enter the administrator email address to be used for receiving your MFA login token.

Back Next Cancel

8. **Install Ignite™** is selected by default. It is recommended to leave this option selected so all options are installed. Otherwise, only the bare minimum is installed.
9. Enter an administrator **Password** to be used to log in to the Automate Control Center. Passwords must be a minimum of eight characters.
10. Enter an administrator **Email Address** to be used to receive your MFA login token.
11. Click **Next**.
12. On the **Access Configuration** screen, the **Server FQDN** and **LTShare Path** fields are automatically populated. Enter the FQDN of the Automate server in the **Server FQDN** field. This address will be the FQDN (URL) that the Automate agents will use to check-in to your server, so be sure that the URL is externally available.



ConnectWise Automate Server Installer

Access Configuration
Please review the configuration settings.

Network Access Configuration

Server FQDN
 HTTP://

LTShare Configuration

The LTShare is used to store screenshots, tools, uploads, reports and other extras.

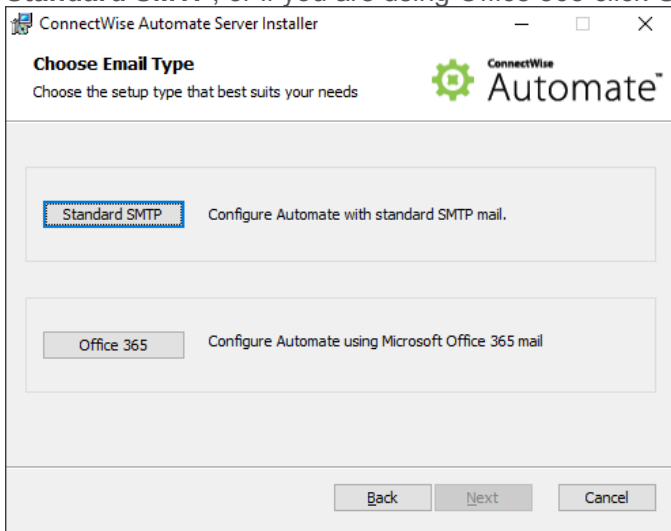
LTShare Path
 C:\LTShare\

Back Next Cancel

13. By default, the **LTShare** is installed on the C: drive of the Automate server. If desired, click on the **Change** button to change the path to a different location.
Important: During the install, the installer checks LTShare folder permissions for the appropriate user groups and attempts to grant permissions if any are missing. The install fails if the installer cannot grant the necessary permissions. If the install fails, ensure that the IIS AppPool\LabTech, IIS AppPool\LabTech WebCC, IIS AppPool\CwaRestApi, and System user groups have Modify, List folder contents, Read & Execute, Read, and Write permissions for the LTShare folder.

The LTShare is used to store screenshots, tools, uploads, reports, etc. The LTShare utilizes a File Service running as a Windows service alongside the database agent. This service primarily impacts split server environments as each Automate server has its own local LTShare. The File Service activates when a remote agent attempts to download a file from the system by requesting that file from the Web Server. The Web Server first checks its local LTShare directory for the file, and if the file is outdated or does not exist, it communicates with the File Service to get a current copy of the file. The Web Server then streams the content of that file back to the entity requesting the download, while simultaneously saving a copy to the LTShare directory on the Web Server. This local copy can then be used to service future requests for that file that come to that Web Server. The Web Server communicates with the File Service via port 12413 and only inside and below the LTShare may be accessed. Refer to [ConnectWise Automate Installation Prerequisites](#) for more information on port requirements.

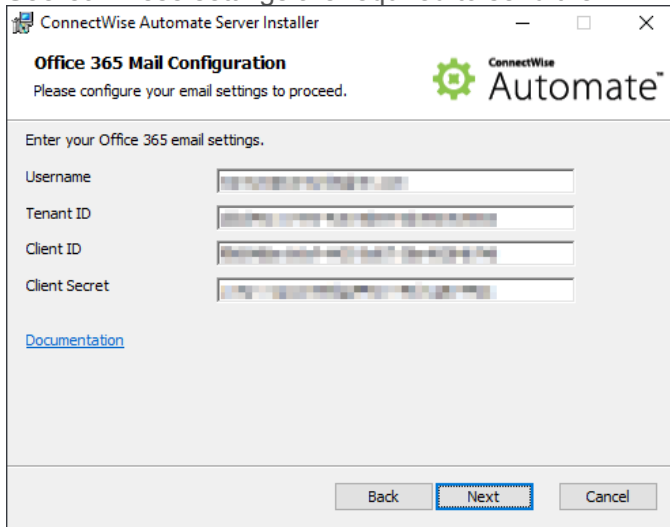
14. Click **Next**.
15. On the **Choose Email Type** screen, if you are using Gmail or another SMTP email configuration click **Standard SMTP**, or if you are using Office 365 click **Office 365**.



16. Click **Next**.
17. Enter your email credentials.
 - If you selected **Standard SMTP**, enter your SMTP mail server settings. These settings are required to send the MFA login tokens.

The screenshot shows the 'Mail Configuration' window of the ConnectWise Automate Server Installer. The window title is 'ConnectWise Automate Server Installer'. The main heading is 'Mail Configuration' with a subtitle 'Please configure your email settings to proceed.'. There are several input fields: 'SMTP Address' (containing 'smtp.gmail.com'), 'SMTP Port' (containing '587'), 'Support Email' (containing a placeholder), 'SMTP Username' (containing a placeholder), and 'SMTP Password' (containing masked characters). There is a 'Test Email' button and a 'Documentation' link. At the bottom, there are three buttons: 'Back', 'Next', and 'Cancel'. A checkbox labeled 'Use SSL' is checked.

- At this time, if you are an Office 365 user, you must [Register the Application](#) before the install can continue. After the steps are complete, enter your **Username**, **Tenant ID**, **Client ID**, and **Client Secret**. These settings are required to send the MFA login tokens.



ConnectWise Automate Server Installer

Office 365 Mail Configuration

Please configure your email settings to proceed.

Enter your Office 365 email settings.

Username:

Tenant ID:

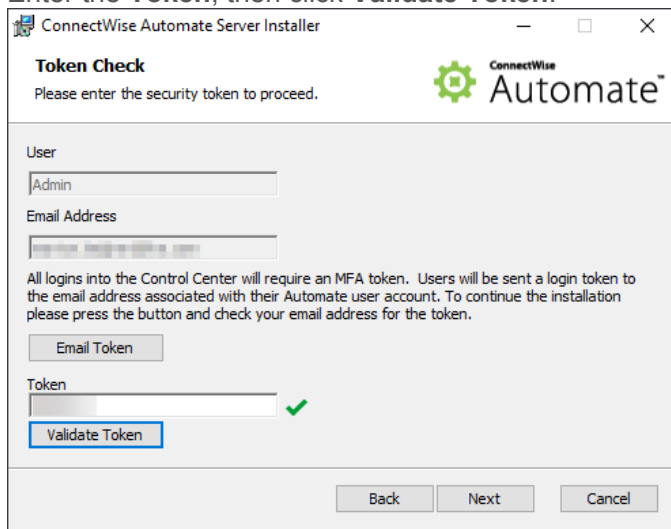
Client ID:

Client Secret:

[Documentation](#)

Back Next Cancel

- Click **Next**.
- Click **Email Token**. An email with your MFA token is sent to the Admin User email address.
- Enter the **Token**, then click **Validate Token**.



ConnectWise Automate Server Installer

Token Check

Please enter the security token to proceed.

User:

Email Address:

All logins into the Control Center will require an MFA token. Users will be sent a login token to the email address associated with their Automate user account. To continue the installation please press the button and check your email address for the token.

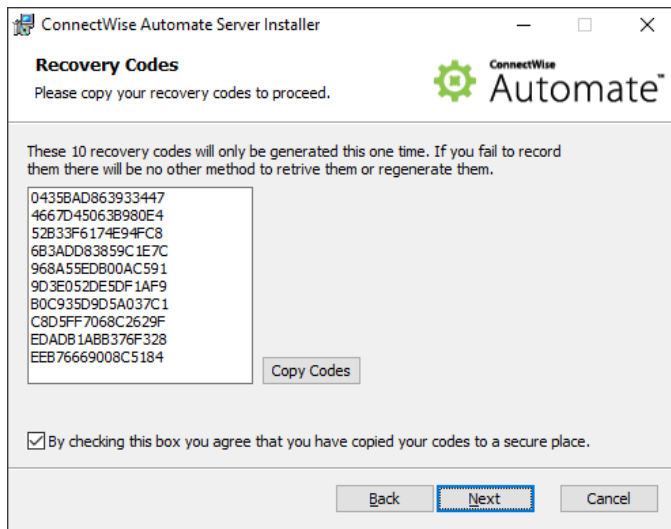
Email Token

Token: ✓

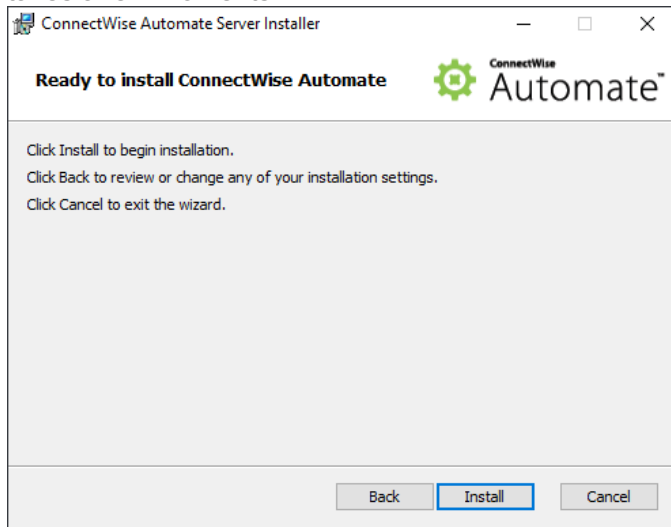
Validate Token

Back Next Cancel

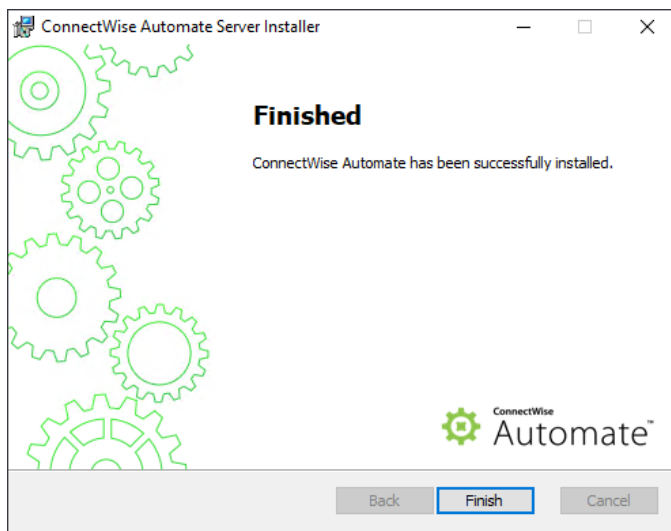
- Click **Next**.
- Ten emergency recovery tokens are generated. These recovery tokens can be used to log in to Automate if the Super Admin cannot access their email. The recovery tokens never expire but can only be used one time each. This is the only time the recovery tokens are displayed, therefore it is essential that you copy and save the recovery tokens.



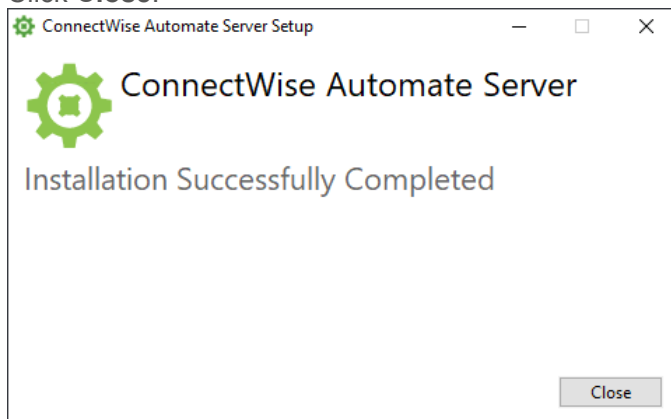
23. Select the checkbox to verify that you have saved the recovery codes.
24. Click **Next**.
25. Click **Install** to begin the installation. Otherwise, click **Back** to review or make any changes. The installation takes a few moments.



26. Click **Finish**.



27. Click **Close**.

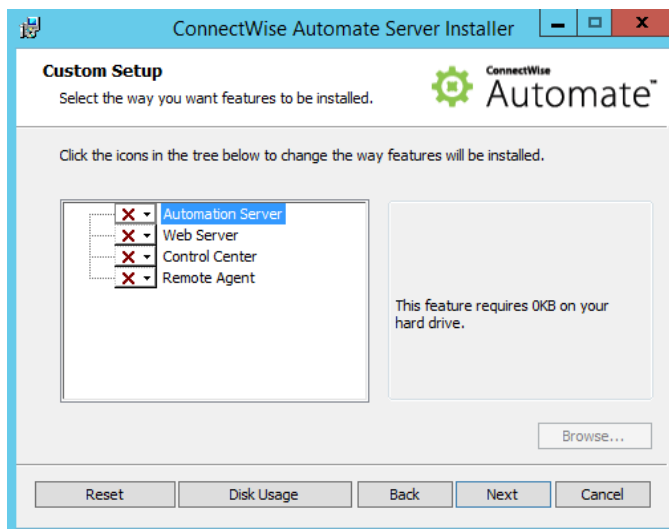


28. Refer to [Logging in to the Control Center](#) for instructions on how to log in.

Custom Setup

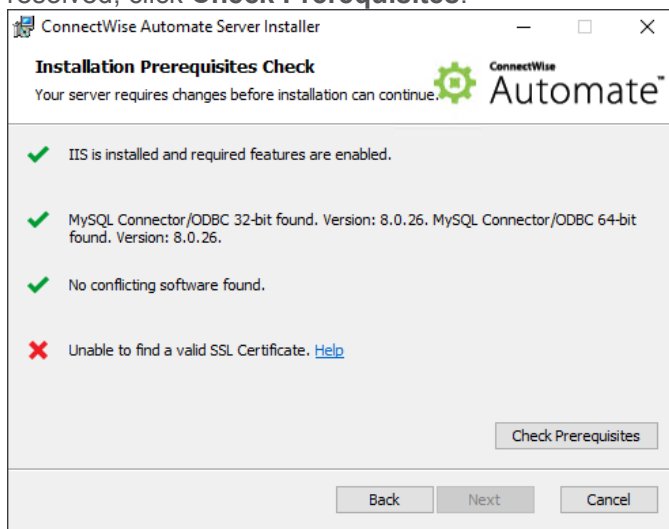
To install Automate on a split server:

1. Click **Custom > Next**.
2. Select the features you want to install. If you want to install the Web Server on a separate server, select **Entire feature will be unavailable** for the **Automate Web Server**. You must run the installer again on the Web Server when you have completed the Automation Server installation.



Note: It is recommended to have both the **Control Center** and the Remote Agent on the Automation Server. The **Control Center** is not necessary on the Web Server and is optional.

- The installer does a prerequisite check at this time. If the installer does not find any issues, a green checkmark is displayed before each listed prerequisite. If the [Automate Installation Prerequisites](#) were not completed prior to installing Automate, they are indicated by a red X (see example below). Click on the **Help** links in the installer or refer to the table below to review documentation to resolve each issue. Any issues found must be resolved before the install continues. After the issues have been resolved, click **Check Prerequisites**.



Prerequisite

Document

Web Server (IIS) must be enabled and/or IIS (Web Server) must be enabled and/or ASP.NET support for IIS must be enabled.	Windows Server - IIS Features and Roles
MySQL Connector/ODBC Check	Install ODBC Connectors
Conflicting Software	Conflicting Software
MySQL Installer	Install a MySQL Database

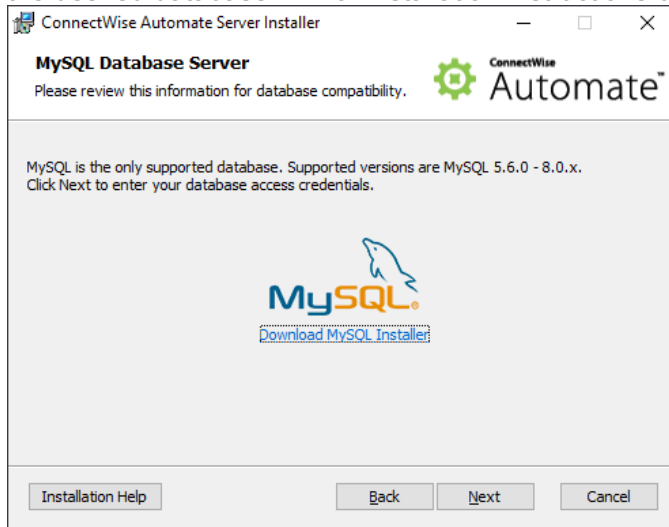
Prerequisite

Document

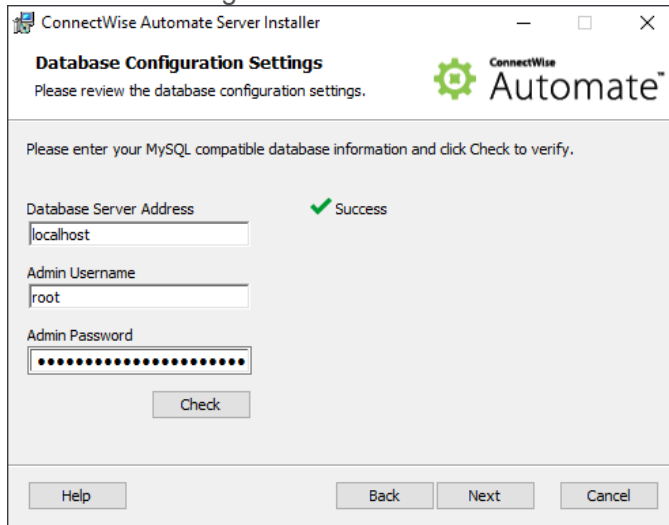
Database Configuration (for FRESH installs only)

[Configuring your Database](#)

4. When all prerequisites have been met, click **Next**.
5. The installer allows you to create your database during the install; however, if the database was created while following the [ConnectWise Automate Installation Prerequisites](#), this step is not necessary. Click **Next** to enter your database access credentials. If you have not installed a MySQL compatible database yet, click on the desired database link for installation instructions before continuing.



6. Enter the following credentials associated with the database that was installed.



- a. Enter the **Database Server Address** because Automate is installed on a split-server.
 - b. Enter the **Admin Username**.
 - c. Enter the **Admin Password**.
7. Click **Check** to verify the configuration and credentials. Errors indicate that settings need to be changed in the *my.ini* file. For steps on modifying your *my.ini* file, refer to [Configure your Database](#). These settings must be updated before you continue. After you have made the changes, click **Check** to verify. When all errors and warnings have been addressed restart the LabMySQL service and click **Check** again. Click **Next** to continue. If you see only warnings, we recommend you review and make the changes before continuing, but

it is not required in order to continue.

- On the **System Configuration** screen, the **System Password** automatically populates. The system password is used to install remote agents. It is recommended that you leave the system password at the default value.

The screenshot shows the 'System Configuration' window of the ConnectWise Automate Server Installer. The window title is 'ConnectWise Automate Server Installer'. The main heading is 'System Configuration' with a subtext 'Please review the system configuration settings.' and the ConnectWise Automate logo. The 'System Setup' section contains a 'System Password' field with a default value, a checkbox for 'Install Ignite™' which is checked, and a text box explaining that the password is used for remote agents and that Ignite™ is recommended for a full installation. The 'Admin User Configuration' section has a 'Password' field with a minimum of 8 characters requirement, an 'Email Address' field for MFA login tokens, and a 'Next' button highlighted with a blue border. 'Back' and 'Cancel' buttons are also present.

- Install Ignite™** is selected by default. It is recommended to leave this option selected so all options are installed. Otherwise, only the bare minimum is installed.
- Enter an administrator **Password** to be used to log in to the **Automate Control Center**. Passwords must be a minimum of eight characters.
- Enter an administrator **Email Address** for receiving your MFA login token.
- Click **Next**.
- Enter the FQDN of the Automate server in the **Server FQDN** field.

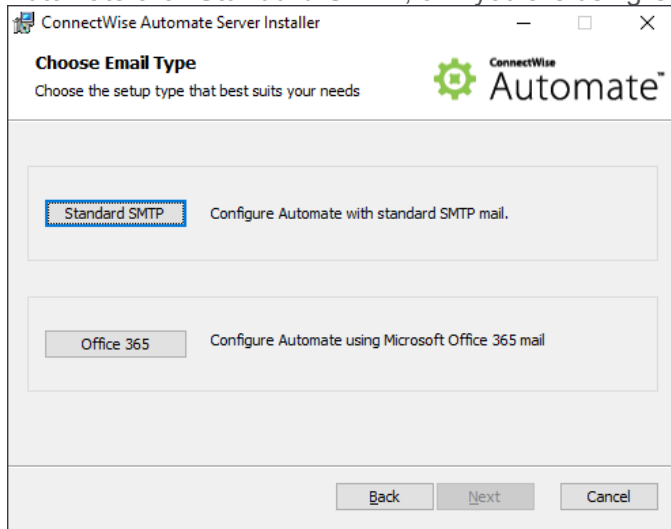
The screenshot shows the 'Access Configuration' window of the ConnectWise Automate Server Installer. The window title is 'ConnectWise Automate Server Installer'. The main heading is 'Access Configuration' with a subtext 'Please review the configuration settings.' and the ConnectWise Automate logo. The 'Network Access Configuration' section has a 'Server FQDN' field with a default value. The 'LTShare Configuration' section has a text box stating 'The LTShare is used to store screenshots, tools, uploads, reports and other extras.' and an 'LTShare Path' field with a default value 'C:\LTShare\' and a 'Change...' button. A 'Next' button is highlighted with a blue border. 'Back' and 'Cancel' buttons are also present.

- Leave the **Create Network Share (LTShare)** option selected.
Important: The install fails if the LTShare is not created.

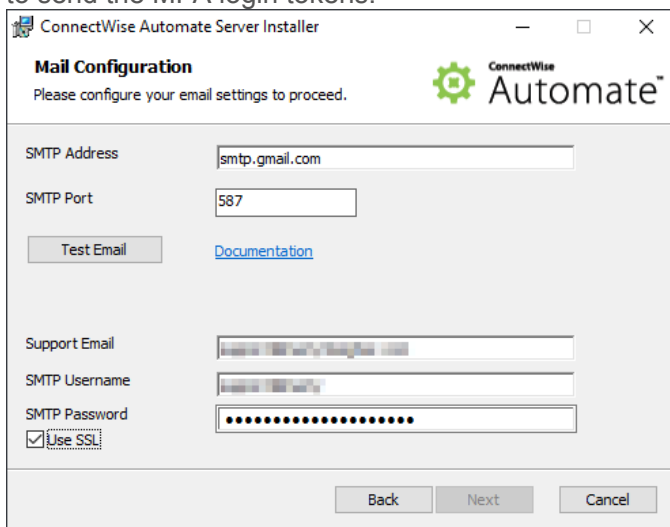
The LTShare is used to store screenshots, tools, uploads, reports, etc. The LTShare utilizes a File Service running as a Windows service alongside the database agent. This service primarily impacts split server environments as each Automate server has its own local LTShare. The File Service activates when a remote

agent attempts to download a file from the system by requesting that file from the Web Server. The Web Server first checks its local LTShare directory for the file, and if the file is outdated or does not exist, it communicates with the File Service to get a current copy of the file. The Web Server then streams the content of that file back to the entity requesting the download, while simultaneously saving a copy to the LTShare directory on the Web Server. This local copy can then be used to service future requests for that file that come to that Web Server. The Web Server communicates with the File Service via port 12413 and only inside and below the LTShare may be accessed. Refer to [ConnectWise Automate Installation Prerequisites](#) for more information on port requirements.

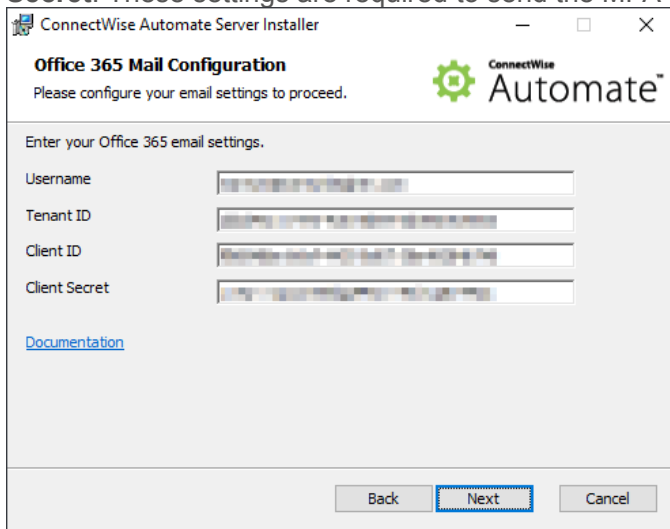
15. By default, the *LTShare* is installed on the C: drive of the Automate server. If desired, click on the **Change** button to change the path to a different location.
16. Click **Next**.
17. On the **Choose Email Type** screen, if you are using Gmail or another SMTP email configuration with Automate click **Standard SMTP**, or if you are using Office 365 click **Office 365**.



18. Click **Next**.
19. Enter your email credentials.
 - If you selected **Standard SMTP**, enter your SMTP mail server settings. These settings are required to send the MFA login tokens.



- At this time, if you are an Office 365 user, you must [Register the Application](#) before the install can continue. After the steps are complete, enter your **Username**, **Tenant ID**, **Client ID**, and **Client Secret**. These settings are required to send the MFA login tokens.



ConnectWise Automate Server Installer

Office 365 Mail Configuration

Please configure your email settings to proceed.

Enter your Office 365 email settings.

Username:

Tenant ID:

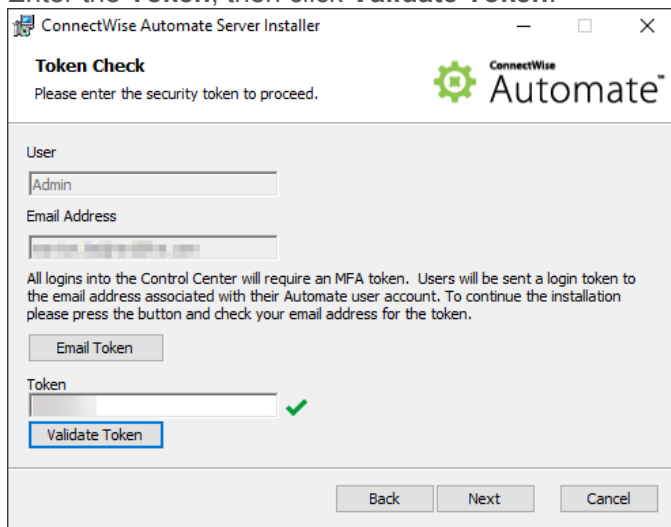
Client ID:

Client Secret:

[Documentation](#)

Back Next Cancel

- Click **Next**.
- Click **Email Token**. An email with your MFA token is sent to the Admin User email address.
- Enter the **Token**, then click **Validate Token**.



ConnectWise Automate Server Installer

Token Check

Please enter the security token to proceed.

User:

Email Address:

All logins into the Control Center will require an MFA token. Users will be sent a login token to the email address associated with their Automate user account. To continue the installation please press the button and check your email address for the token.

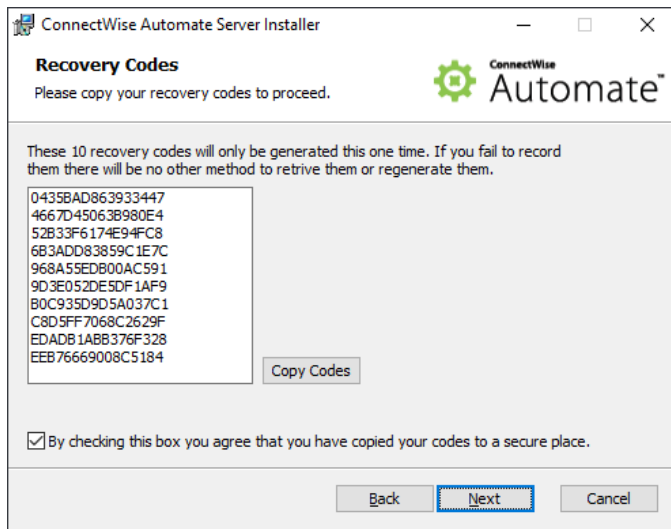
Email Token

Token:

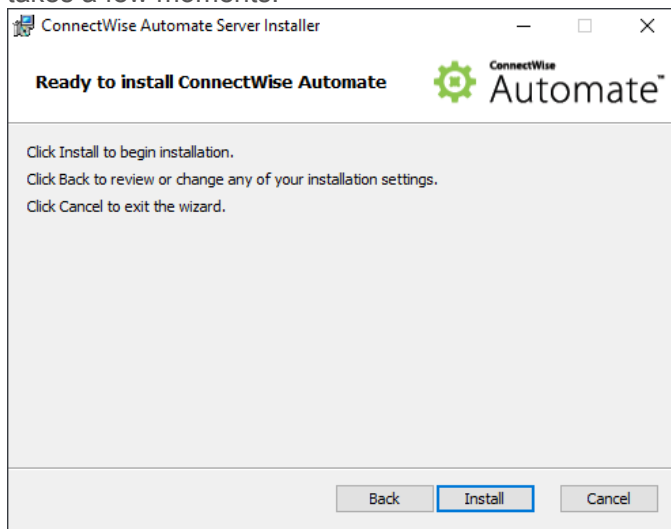
Validate Token

Back Next Cancel

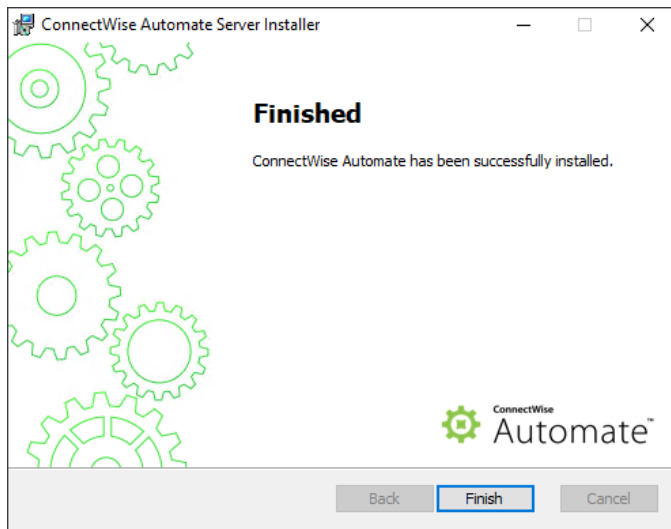
- Click **Next**.
- Ten emergency recovery tokens are generated. These recovery tokens can be used to log in to Automate if the Super Admin cannot access their email. The recovery tokens never expire but can only be used one time each. This is the only time the recovery tokens are displayed, therefore it is essential that you copy and save the recovery tokens.



25. Select the checkbox to verify that you saved the recovery codes.
26. Click **Next**.
27. Click **Install** to begin the installation. Otherwise, click **Back** to review or make any changes. The installation takes a few moments.



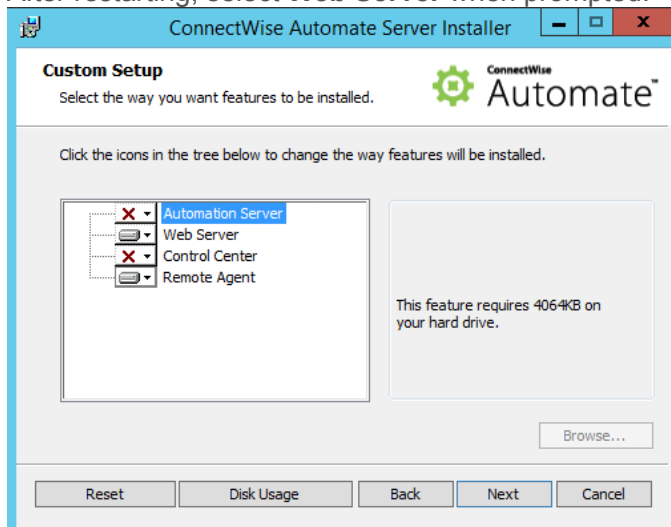
28. You are prompted to restart the computer. Restart.
29. If you chose to install the Web Server on a separate server, skip to [Install Web Server](#) and complete the steps. If you choose to install the Web Server on the same server, click **Finish**.



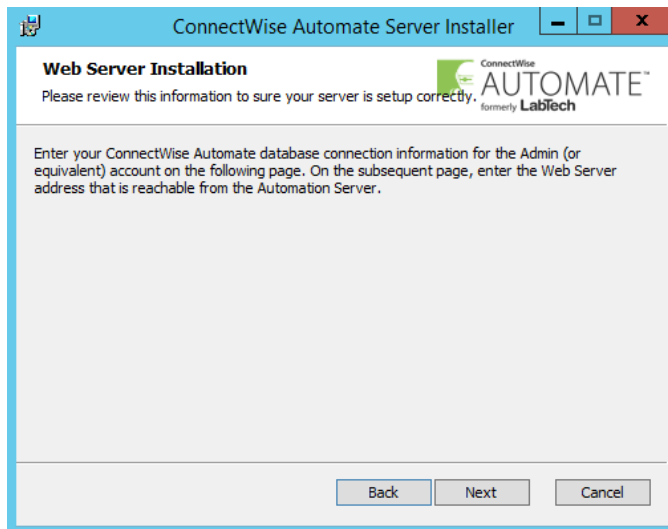
30. Refer to [Logging in to the Control Center](#) for instructions on how to log in.

Install Web Server

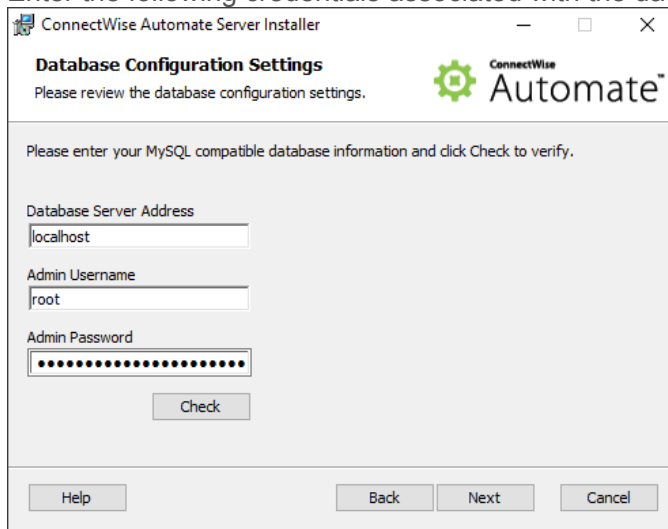
1. After restarting, select **Web Server** when prompted.



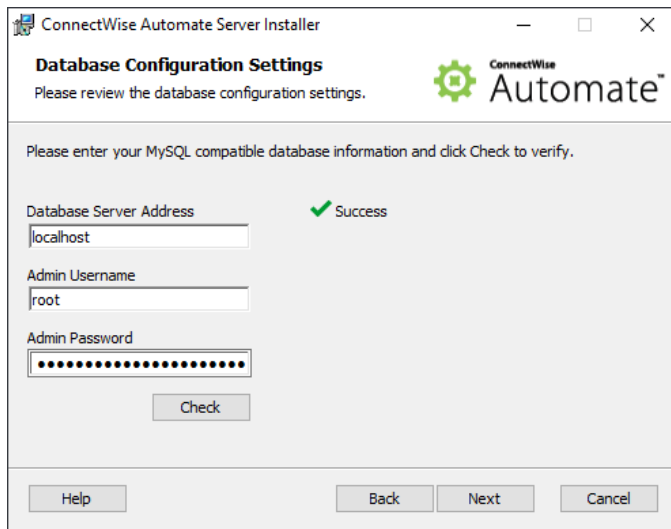
2. Select **Entire feature will be unavailable** for the **Automate Automation Server** and then select **Will be installed on local hard drive** for the **Automate Web Server**. It is recommended to also install the Remote Agent but the Control Center is optional.
3. Click **Next**.



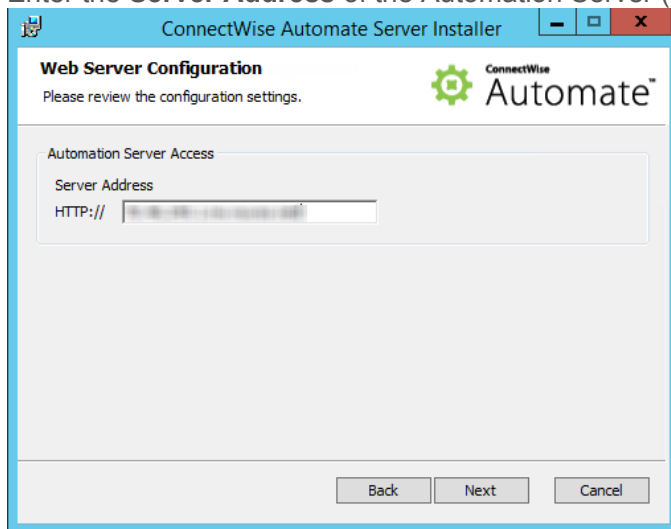
4. Enter the following credentials associated with the database that was installed.



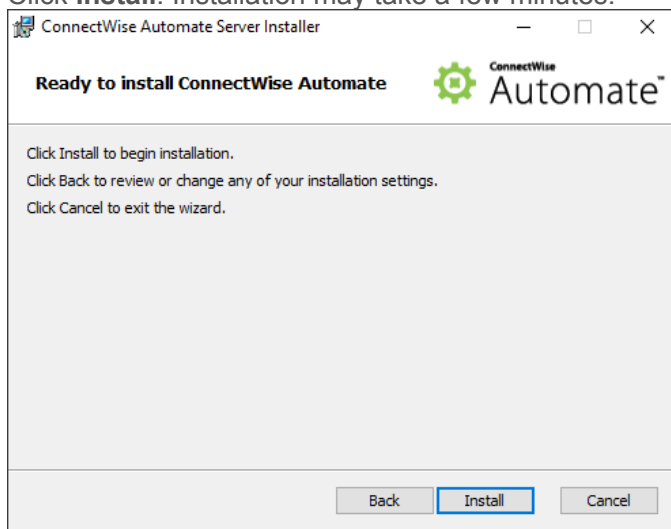
- a. In the **Database Server Address** field, enter your Automation Server if you installed your database on the Database Server.
 - b. Enter the **Admin Username**.
 - c. Enter the **Admin Password**.
5. Click **Check** to verify the configuration and credentials.
 6. Once the credentials have been verified and are successful, click **Next**.



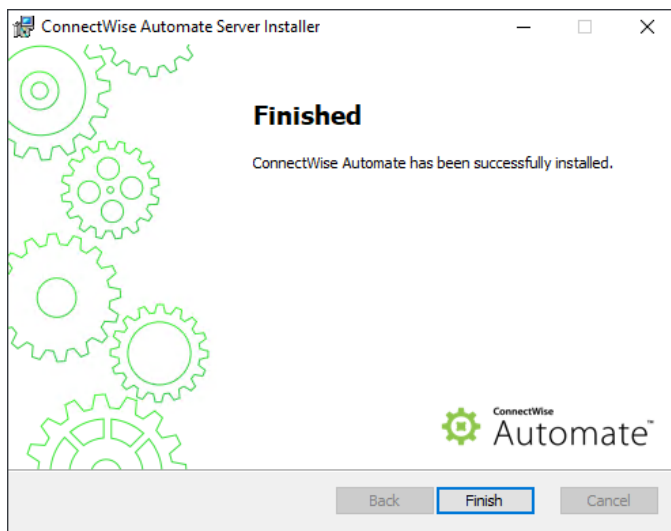
7. Enter the **Server Address** of the Automation Server (e.g., where Automate resides) and click **Next**.



8. Click **Install**. Installation may take a few minutes.



9. Click **Finish** and then **Close**.



10. Copy the mysqldump.exe file from your Database Server Installation path (default path listed below) and place it in C:\Program Files\Labtech on the Automation Server.
 - MySQL Default Path: C:\Program Files\MySQL\MySQL Server 5.X\bin\mysqldump.exe
11. Refer to [Logging in to the Control Center](#) for instructions on how to log in.