Wrike Integrate Account Setup

Purpose

This deck will take you through the process of setting up a Wrike user necessary for developing and running integration recipes. You must be the **Wrike account owner** or **Administrator with Full Admin Permissions** to be able to carry out this procedure.

Wrike Integrate provisioning

- When you purchase a Wrike Integrate add-on, a separate Wrike Integrate team account is provisioned on your behalf, in the Wrike Integrate portal (which is separate from Wrike). The **Wrike account owner** is designated as a **Wrike Integrate Admin**.
- All existing **Wrike Admins** will also be provisioned in Wrike Integrate as **Analyst(*)**.
- The rest of the deck will take you through the process of completing this set up for you and/or your Wrike consultant.

(*) You can find the description of the various roles here.

Wrike setup

Guidelines

- You should create a Wrike user dedicated to integrations
- This user should not be associated with a person and should not have any password expiration policy applied (or integration recipes will stop working once password expires, forcing you to reconfigure the Wrike connection your recipes use)
- This account is the user whose credentials will be used to by your integration recipes to connect to Wrike
- You will need to share with this user any Wrike content (e.g. folders, tasks, forms, custom fields, etc.) that is within scope of your integration use cases
- Any additional/existing Wrike user can be given access to Wrike Integrate for the purpose of creating and maintaining recipes. However, all recipes should connect to Wrike using the dedicated account credentials
- Any user who needs to access the Wrike Integrate portal must have the following permissions:
    - **Account administrator with the ability to create integration recipes**

Setting up your Wrike consultant

Under most circumstances, your Wrike consultant (if you have engaged Wrike Professional Services) can simply use the integration user account.

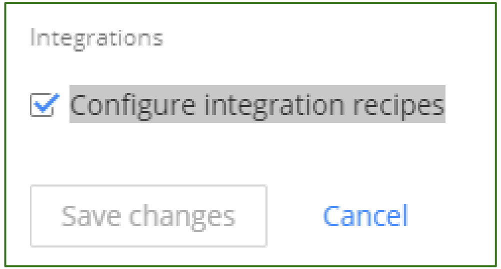
Should you wish or need to create a separate account for your consultant, you will need to set it up in a identical manner to your integration user.

Setting up the integration user in Wrike

1. Invite the user to Wrike. Give it a distinctive name (e.g. "Integration User")
2. Make sure you have provisioned a valid email address in your company and that you have the credentials to access this mailbox
3. Accept the invite to add the user to your Wrike account. Make sure you record the password for safekeeping
4. Share the user credentials with your Wrike consultant (if you have one)
5. Share with this use any Wrike content required for your integration flows

Granting Wrike Integrate access to existing users

1. Log in to Wrike as the **Account Owner**
2. Go to **Account Management** and then **Users**
3. Edit the user's permissions
    a. Elevate it to **Admin**
    b. Grant it **Configure integration recipes**



Remember: Wrike Admins have already been provisioned within Wrike Integrate

Wrike Integrate setup

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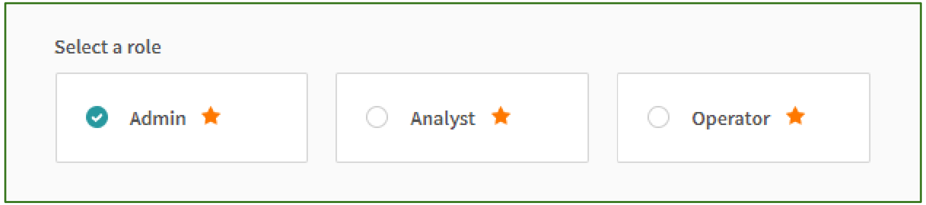
Wrike Integrate has a similar (to Wrike) notion of a team account, users and roles. If you are the **Wrike account owner** you have already been designated as a **Wrike Integrate Admin**. You now need to set up the integration user and/or any other team members as such.

Setting up the integration user in Wrike Integrate

1. Log in to Wrike as the **Account Owner**
2. Click on your profile icon in the top right and go to **Apps & Integration** and then **Integration Recipes**
3. Click on the **Wrike Integrate portal** link
4. Select from the top navigation menu **Tools** and then **Team**
5. Find the name of the integration user(*) on the Team screen and click the pencil icon to edit its role (by default all users except Wrike account owner are set up with an Analyst role)
6. Change the role to Admin



(*) You may see additional names on the screen. This is because all Wrike admins are - by default - set up with a Wrike Integrate account.