



Autotask INTEGRATION GUIDE

Last Updated January 2015

Autotask Integration Overview

Autotask Pro is the all-in-one web-based Professional Services Automation (PSA) software designed to help MSPs and IT Service providers run their businesses better, more efficiently, and more profitably.

Configuring eFolder with the Autotask API allows you to cross-reference customers in eFolder with their accounts in Autotask and push severity-based backup notifications to Autotask as Tickets.

Process Overview

Autotask integration setup and notification: To complete the Autotask setup, there should be an API-enabled user created in your AutoTask Portal, several eFolder Web Portal account configuration steps, and the Autotask Account ID must be set for each account.

Step 1. One-time Autotask API-enabled user creation:

The following steps to create and assign the appropriate permissions within the AutoTask portal are subject to change. Please refer to AutoTask documentation or contact AutoTask support if there are any questions with this specific series of steps to create or assign API privileges to an AutoTask user.

1. Login to the AutoTask Portal with your administrative credentials.
2. Hover over the main menu (currently a red "A" graphic in the upper left).
3. Add the *Web Services API* to *Security Level*:
 - a. Navigate to Admin > Features & Settings > Resources/Users > Security > Security Levels.
 - b. Right-click on the desired Security Level to edit a security level (or perhaps create a new one if necessary).
 - c. Scroll down and expand *Other* or *Miscellaneous*.
 - d. Look for a checkbox labeled *Can login to Web Services API*.
 - e. Enable this checkbox; then click **Save & Close**.
4. Assign a *Security Level* to the *User*:
 - a. Navigate to Admin > Resources (Users).
 - b. Right-click on the desired user to edit a user (or perhaps create a new one if necessary).

- c. Click the *Security* tab and assign the security level you created or modified earlier to contain Web Services API permissions.
- d. Make a note of the *Username* field along with the corresponding *@domain* label. It should look something like *myapiuser@mydomain.com* (this will be used below in Step 2).
- e. Click **Save & Close**.

Step 2. One-time Autotask integration setup in the eFolder Web Portal:

1. Log in to the eFolder Web Portal with your eFolder partner credentials.
2. Hover over **My Partnership** in the Main Menu and click **Integration Setup**.
3. Check the **Autotask** integration checkbox, enter credentials of the AutoTask user which has API privileges (see Step 1 above), and click **Save Changes** (see Figure 1):

CHOOSE INTEGRATION PROVIDERS

Choose the integration providers that you want to enable and configure:

Autotask

ConnectWise PSA

CONFIGURE AUTOTASK INTEGRATION

This integration provides the ability to automatically open tickets when backups, other services, or appliances fail.

Autotask API Username:

Autotask API Password:

Ticket Subject Prefix:

Figure 1

Step 3. One-time partner notification rules setup:

1. Log in to the eFolder Web Portal with your eFolder partner credentials.
2. Hover over **My Partnership** in the Main Menu and click **Partner Notifications**.
3. Click the **Create a new notification** link.
4. In the *Notification Action* field, select **Open an Autotask ticket** (see Figure 2).
5. In the *Subscribe to OK Events* field, select **No**.
6. Leave the *Subscribe to Warnings* and *Subscribe to Errors* fields as **Yes**.
7. Click **Create**.

Setting	Value
Notification Action	Open an Autotask ticket
Include Sub-Brands	Yes
Subscribe to OK Events	No
Subscribe to Warnings	Yes
Subscribe to Errors	Yes
Subscribe to All Event Types	Yes
Comments	

Figure 2

8. Click the **Create a new notification** link.
9. In the *Notification Action* field, select **Send an email**.
10. In the *Email Addresses* field, enter the email address where you want email notifications to be sent if the Autotask integration fails to open a new ticket properly.
11. In the *Subscribe to All Event Types* field, select **No** (see Figure 3):

Setting	Value
Notification Action	Send an email
Email Addresses	support@mycompany.com
Include Sub-Brands	Yes
Subscribe to OK Events	Yes
Subscribe to Warnings	Yes
Subscribe to Errors	Yes
Subscribe to All Event Types	No

Figure 3

12. After you select **No** in the *Subscribe to All Event Types* field, you will see additional fields. Change both the *Failed to Synchronize Data with External System* and the *Failed to Create or Update External Support Ticket* fields to **Yes** and then click **Create** (see Figure 4):

Failed To Synchronize Data With External System	Yes
Failed To Create Or Update External Support Ticket	Yes

Figure 4

Step 4. Actions to perform for each customer record in the eFolder system:

It is important that eFolder is able to cross-reference an eFolder customer record with an Autotask account. This is accomplished by specifying the **Autotask PSA Account ID** for each eFolder customer that you want to integrate with the PSA. To accomplish this, follow these steps:

1. Log in to the eFolder Web Portal with your partner credentials.
2. Select **Accounts > Account List (Detailed View)** in the Main Menu and complete the following steps for each customer that you have:
 - a. In the Account List, impersonate the account (click the [\[i\]](#) link next to the account number).
 - b. While impersonating the account, select **My Account > Notifications**.
 - c. On the bottom of the screen, enter the **Autotask PSA Account ID** of the Autotask account that you would like to associate with this eFolder customer record, and click **Save Changes** (see Figure 5):

AUTOTASK PSA CROSS REFERENCE


Autotask PSA Account ID: 

Figure 5

Note: The Autotask Account ID can be found on the *Account Details* screen in Autotask and should be a numeric number (for example: the 316965 in Figure 6).

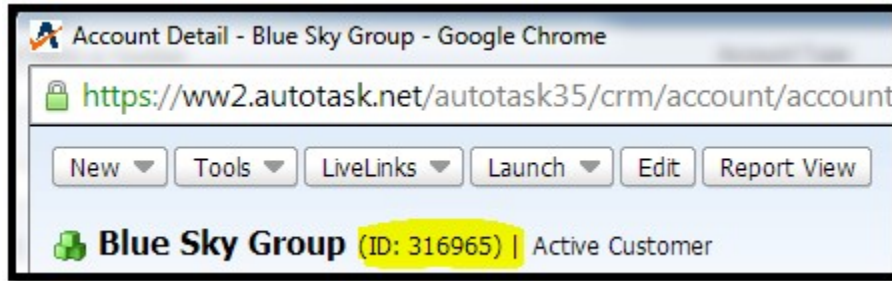


Figure 6

- d. In the eFolder Web Portal, stop impersonating this account (click the Stop Impersonation button in the upper right corner of the window).
- e. Repeat steps a through d for each eFolder customer record that you have setup.

Note: This only has to be done once per customer in the eFolder Web Portal. If there are multiple accounts for a particular customer, just impersonate one of the customer's accounts and make the indicated changes.

Note: This assumes the accounts for the respective customers are grouped under the same "CID" or "Customer ID".

Additional Assistance

We will assist you in any way we can. Please submit questions to support@efolder.net, call us at 800-352-0248, or browse our Knowledgebase at <https://secure.efoldering.com/support/kb/>.

