



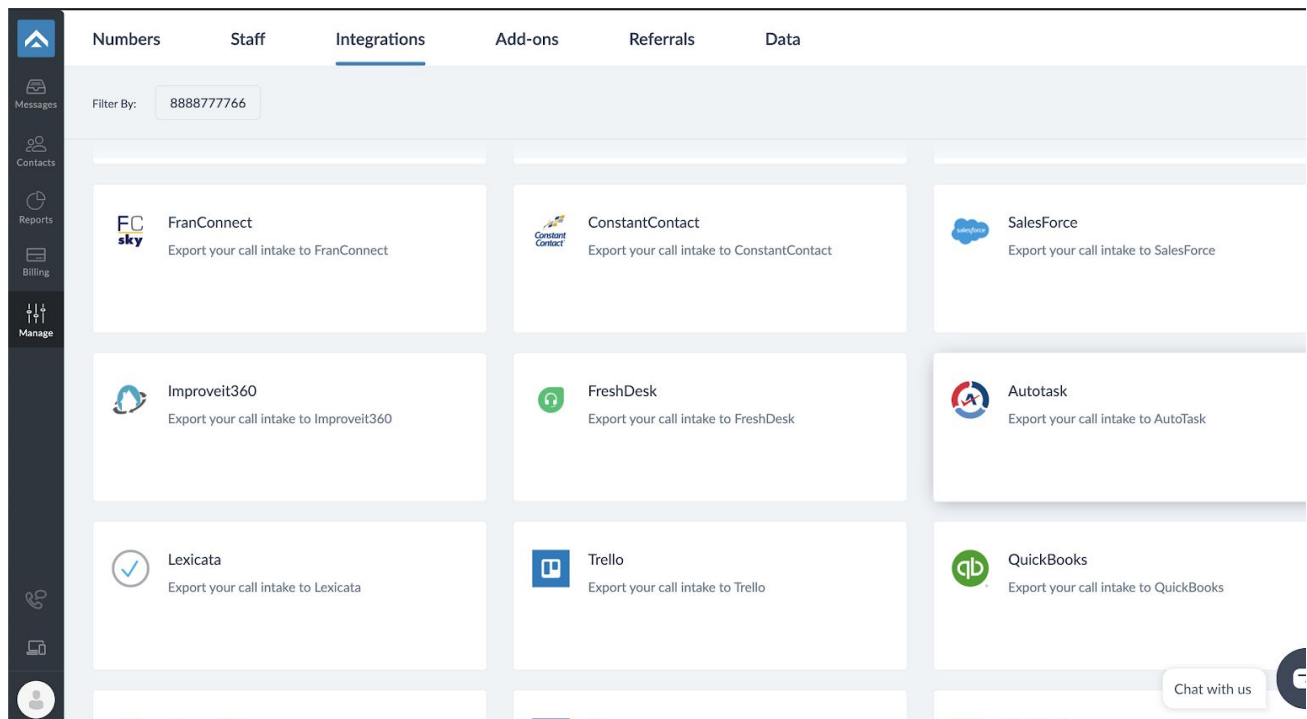
AnswerForce Integration with Autotask

This document explains the process of integrating AnswerForce with Autotask along with screenshots, making the integration easy to perform. Autotask is listed under the Integrations module of AnswerForce.

Here is the image of listing -

Step 1 -

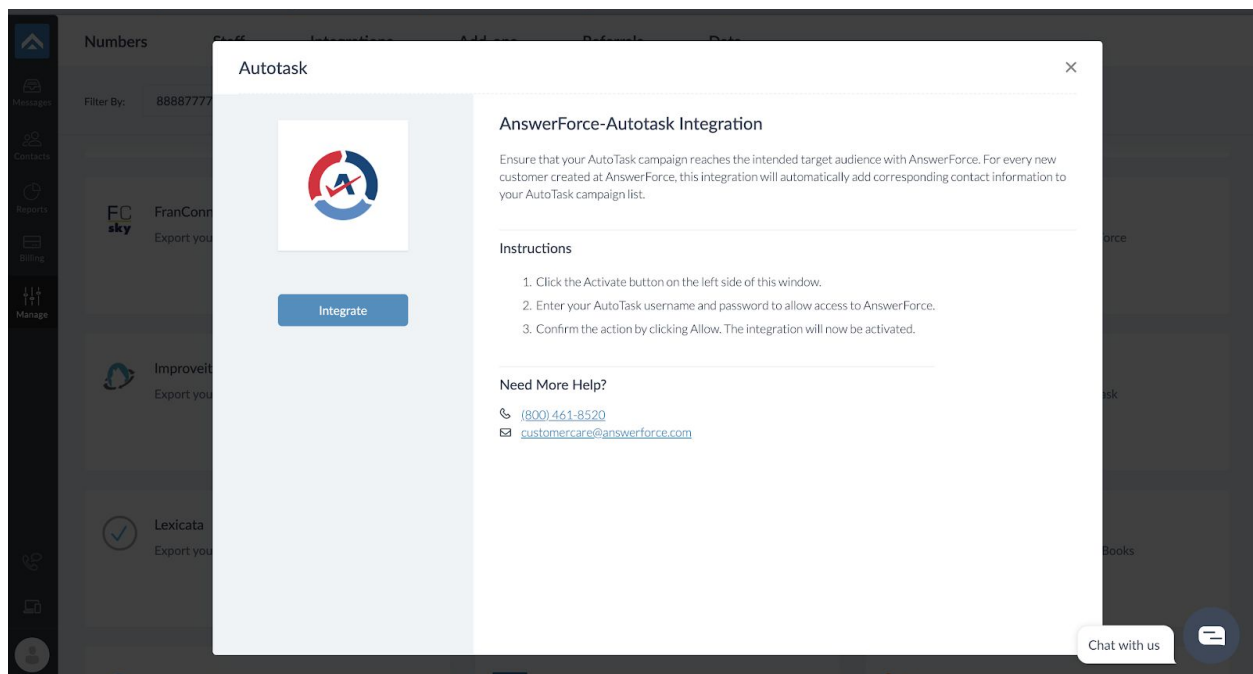
Select 'Autotask' from the integration options.





Step 2 -

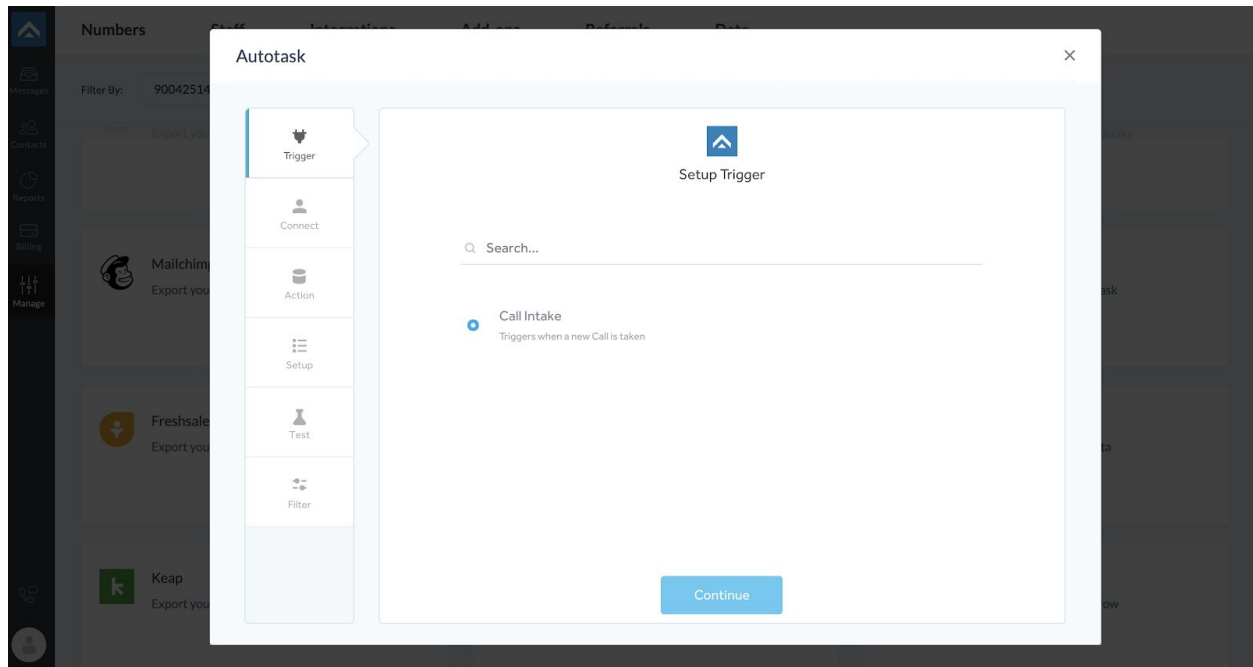
On Selecting Autotask, you will see this screen. Click on the 'Integrate' button on the left.





Step 3 -

This is a Trigger Selection Step. Select the most suitable option, and click continue.





Step 4 -

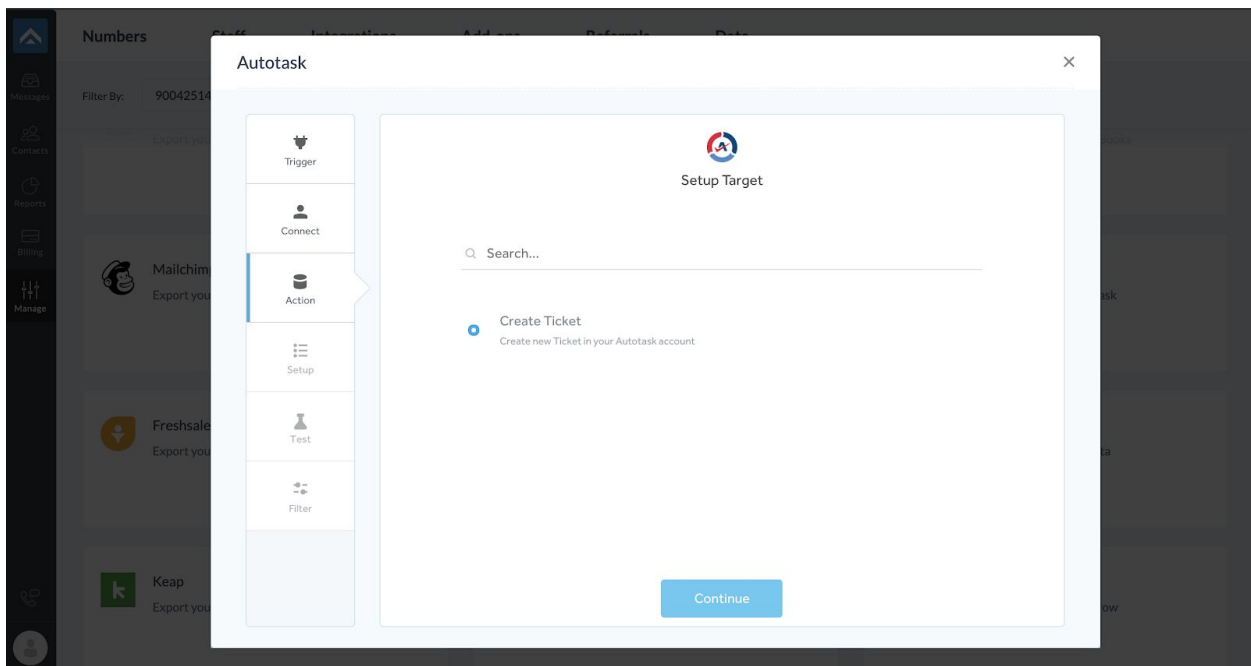
You will see a popup, where you need to enter your username & password. This is an Autotask Account Adding Step. Once done, click 'Continue'.

The screenshot shows a dark-themed software interface with a white popup window titled "Autotask". The popup contains the Autotask logo (a blue circle with a red and blue stylized 'A') and the text "AnswerForce requires your permission to access your Autotask account". Below this, there are two input fields: "UserName*" with the value "tstaging@answerforcesandbox.com" and "Password*" with masked characters ".....". A small instruction reads: "Go to Admin -> Resources/Users(HR) -> Resources/Users -> Select and Edit your resource -> Click on Security Tab". At the bottom of the popup are two buttons: "Continue" (blue) and "Cancel" (white).



Step 5 -

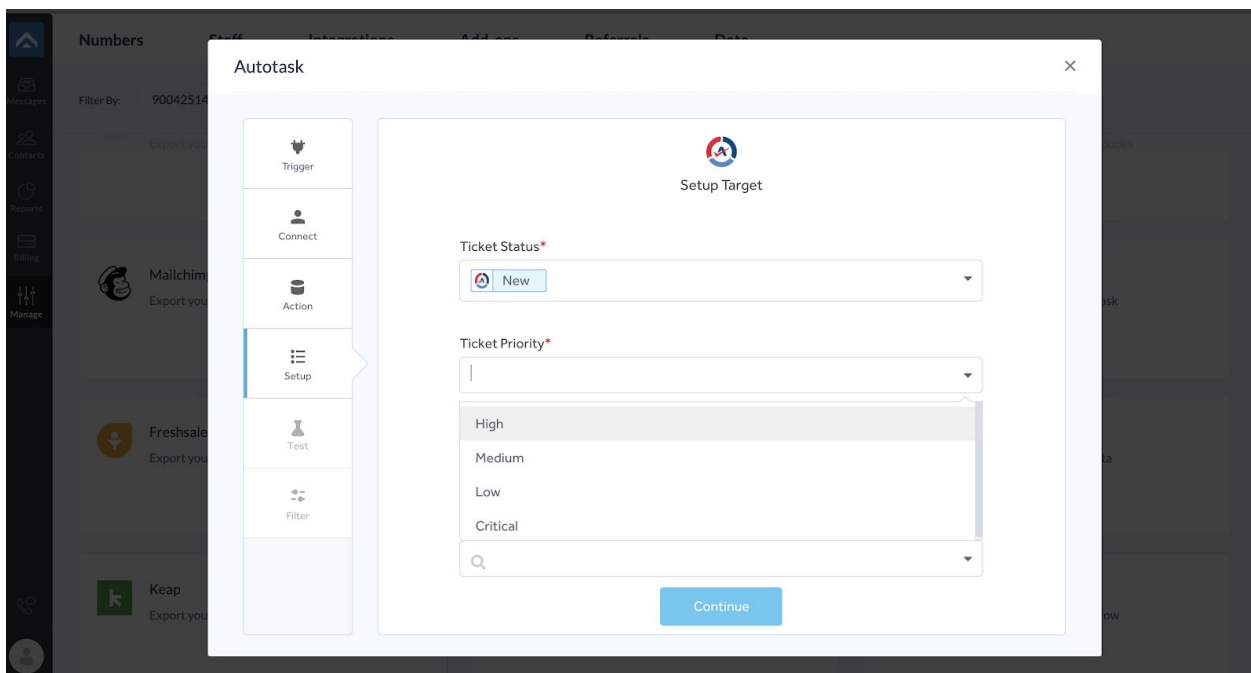
It will again go to the account list where you can see the recently added account, you can rename if you want. On clicking continue from there will land on Autotask's module selection part. Select 'Create Ticket' module, and then click 'Continue'.





Step 6 -

You will be taken to the mapping Setup window. This is a provision to choose what value should be there in Autotask fields, whenever we do call intake.





How to setup mapping for the 'account' field?

Choose Answerforce from the dropdown menu.

The screenshot shows the 'Autotask' integration setup window. On the left is a sidebar with options: Trigger, Connect, Action, Setup (highlighted), Test, and Filter. The main area is titled 'Setup Target' and contains the following fields:

- Ticket Priority***: A dropdown menu with 'Low' selected.
- Account***: A dropdown menu with 'AnswerForce' selected. A 'Lookup available' link is visible to the right.
- Ticket Description**: A search input field.

A blue 'Continue' button is located at the bottom right of the main area.

<https://integrationtest.answerforce.com/full/integrations/configureEventApp/1a7d35c6-4b6b-4105-baa2-990b2075a7c5872/workFlowName%3Danswerconnect-autotask%26accountNumber%3D9004251475%26eventId%3Ddd0dbd79-77a5-47e...>



Choose the field which is configured as 'dropdown' in script end

Autotask

Setup Target

Ticket Priority*
Low

Account* Lookup available ⓘ
Drop Down

Lookup Data (Lookup enables to load corresponding data for answering service)

Ticket Department Name OR Ticket Queue Name*
Search

Ticket Description

Continue



Check the box for Lookup data. Enabling the lookup will ensure that, whenever we do call Intake, under the configured dropdown field, we will list the actual accounts that belong to Autotask. And in, call intake dynamically we can choose the accounts.

Then, click on 'Continue'.

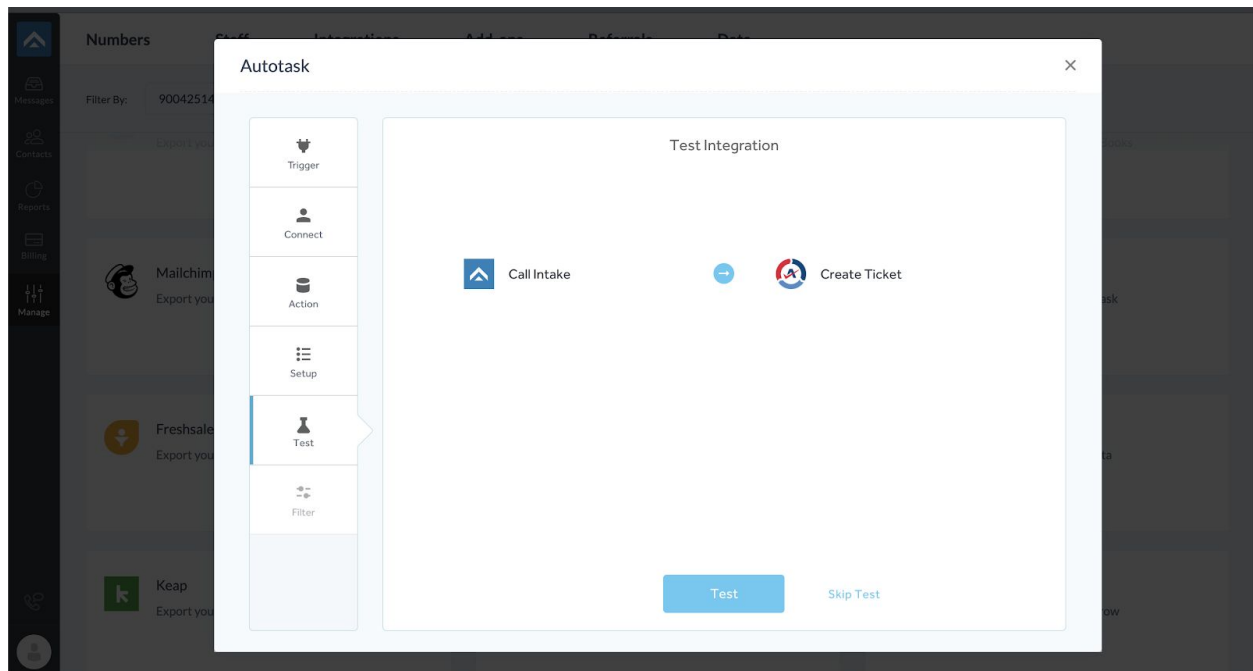
The screenshot shows the 'Autotask' configuration window with the following details:

- Title:** Autotask
- Section:** Setup Target
- Fields:**
 - Ticket Priority*: Low
 - Account*: Drop Down (with 'Lookup available' info icon)
 - Lookup Data: (Lookup enables to load corresponding data for answering service)
 - Ticket Department Name OR Ticket Queue Name*: (with search icon)
 - Ticket Description: (empty text box)
- Buttons:** Continue



Step 7 -

Click on the 'Test' button to test the integration.





Step 8 -

When the test is successful, it will land on finishing the setup screen. To complete the process, click on the 'Finish' button.

Autotask

Trigger

Connect

Action

Setup

Test

Filter

AnswerForce Call Intake - Autotask Create Ticket

1	Status		
174	AccountID		
3	Priority		

Show more

Finish Or Add Conditions

