

AutoTask Integration for Partners

For Partners that operate their own PSA AutoTask system, Infinigate Cloud offer a free, basic self-serve integration used to propagate the CORE transactions to AutoTask. Below you can find details on how to set this up and begin your integration. For the latest information on this integration, please see <https://portal.infinigate.cloud/PartnerIntegrations> or reach out to your account manager.

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Why?

Simplify your reconciliation through automation from CORE to your AutoTask. Remove the need for your teams to manually reconcile licenses on a monthly basis!

Who should this document go to?

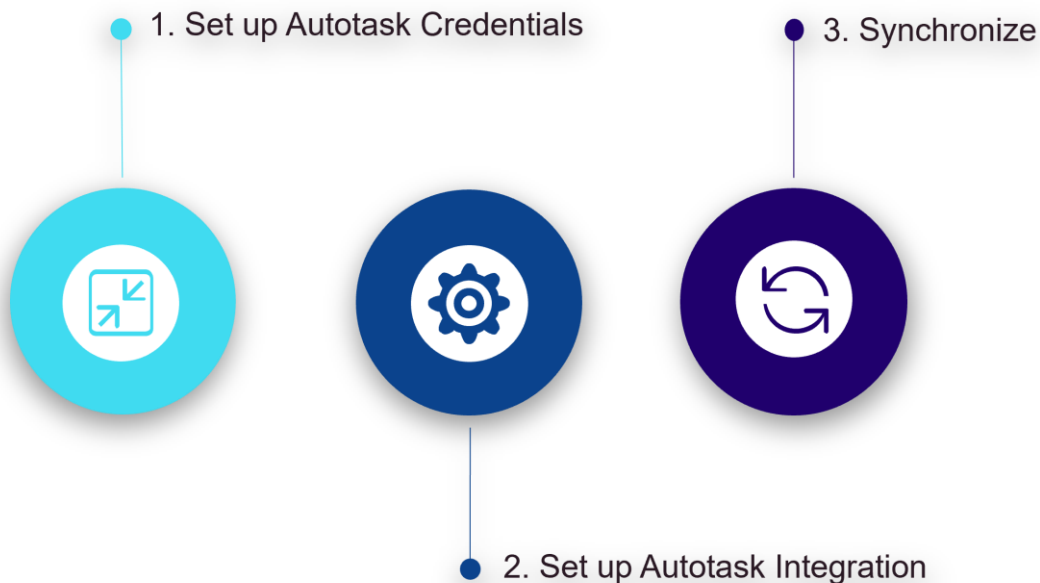
A person with technical ability and knowledge of your AutoTask system is recommended to enable and setup this integration. It is intended to be basic, free, and self-serve to Partners.

Preface to Autotask Integration

Before integrating between Reseller Marketplace and Autotask, we recommend you get acquainted with the following terms and procedures.

Steps to Get Started

The following main steps a reseller needs to do to get started with the Autotask PSA Integration service:

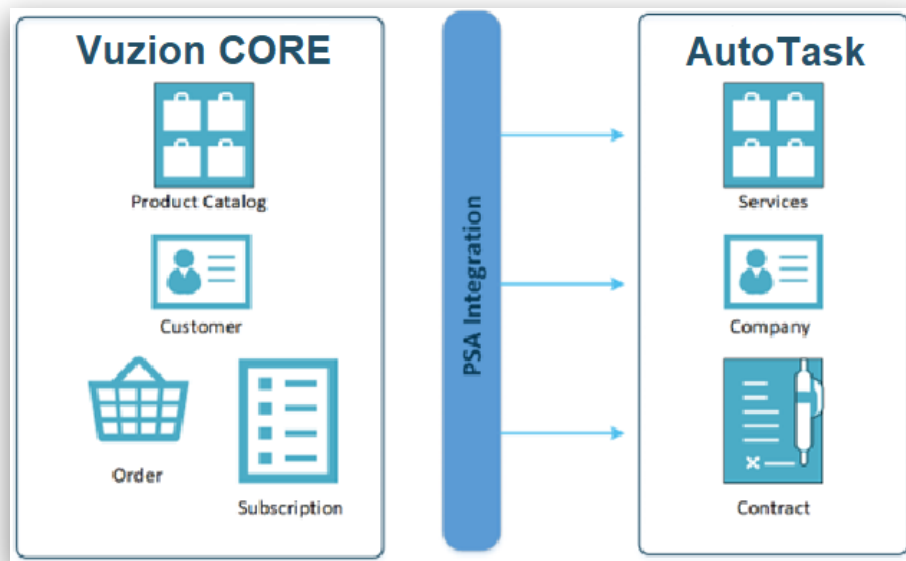


- Set up AutoTask API Credentials: The Reseller Marketplace communicates with Autotask through API. Therefore, you need to set up required API credentials (Info of how to do is under Obtaining AutoTask API Credentials)
- Set up Autotask Integration: At this step, you need to log in and integrate Autotask with Reseller Marketplace
- Synchronize: Now, you need to synchronize orders and subscriptions between Reseller Marketplace and Autotask using (Info on how to do is under Synchronizing Between Reseller Marketplace and Autotask)

Important: Several subscriptions can be synchronized with one contract; one subscription cannot be synchronized with several contracts.

About Mappings

To ensure that there are no mismatches, and all changes in Reseller Marketplace are synchronized with Autotask, the objects in both systems must be mapped. That is, Reseller Marketplace Product Catalog, Customer Catalog, Order and Subscription must be mapped with the respective Autotask objects: Services, Company, and Contract.



There are three ways to map your customers between Reseller Marketplace and Autotask, and two ways to map your products between Reseller Marketplace and Autotask. Orders and subscriptions are mapped during the subscription synchronization process.

Note: You can also create an Autotask product during the synchronization process.

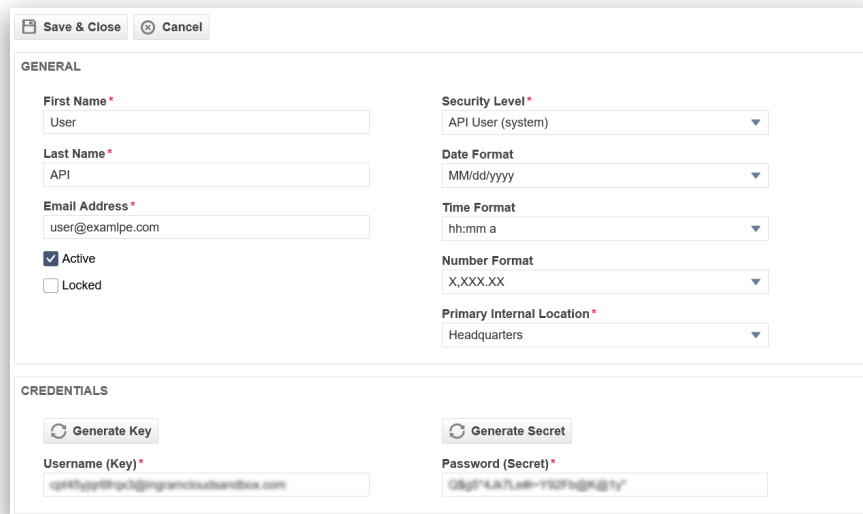
Obtaining Autotask API Credentials

Reseller Marketplace communicates with Autotask through API. The following API credentials, which are generated for a specific API user, are required:

- Username
- Secret

We recommend that you create a new API user for this integration. To do this, complete the following steps:

- In the Autotask control panel menu, go to **Admin > Extensions & Integrations > Other Extensions & Tools > Integration Center**
- In the navigation menu for a required vendor, click **Add API User**
- In the **General** section, fill out all fields marked as required
- In the **Credentials** section, enter a **Username (Key)** and a **Password (Secret)**. You can do this manually, or click **Generate Key and Generate Secret**
- Click **Save & Close**

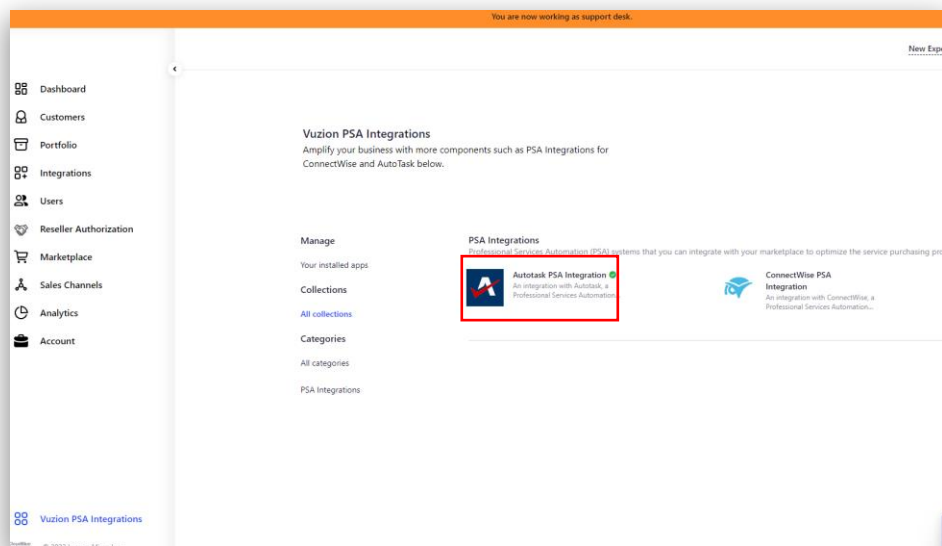


The screenshot shows a user configuration form with two main sections: GENERAL and CREDENTIALS. The GENERAL section includes fields for First Name (User), Last Name (API), Email Address (user@example.com), Security Level (API User (system)), Date Format (MM/dd/yyyy), Time Format (hh:mm a), Number Format (X,XXX.XX), and Primary Internal Location (Headquarters). There are also checkboxes for Active and Locked. The CREDENTIALS section includes buttons for Generate Key and Generate Secret, and fields for Username (Key) and Password (Secret).

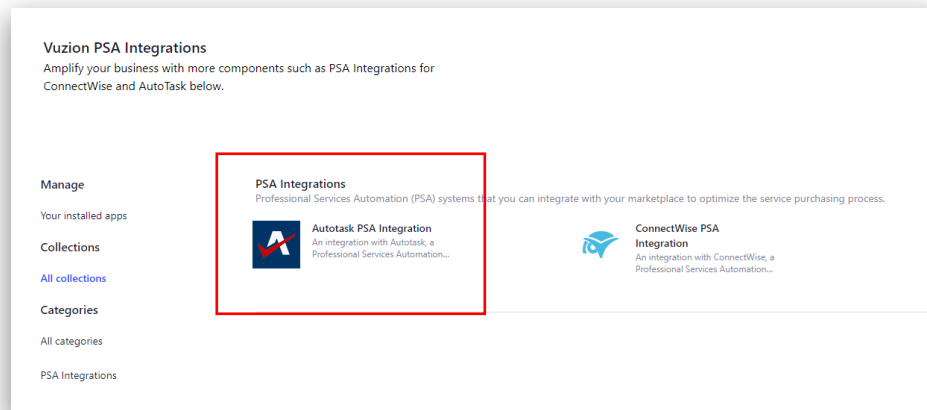
Configuring Autotask Integration

To integrate Autotask with Reseller Marketplace, complete the following steps:

- In your UX1 Panel, click **Infinigate Integrations**



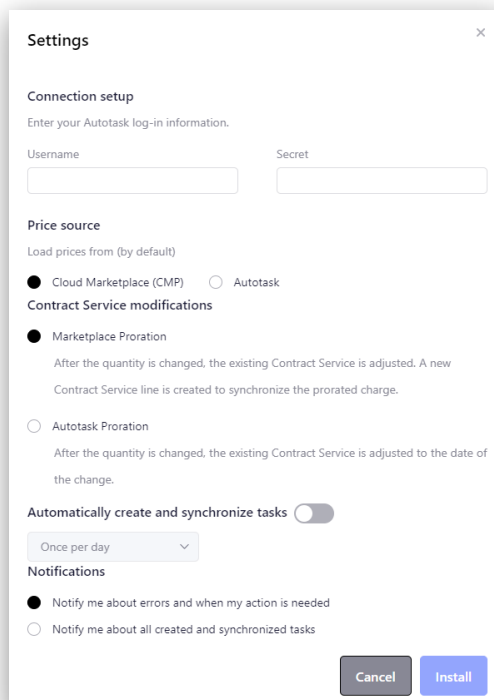
- Click onto the **AutoTask PSA Integration**



- In the pop-up window that displays, click **Install now**



- In the **Settings** pop-up window that displays, specify:
 - o Connection settings:
 - Username
 - Secret



For instructions on how to configure API credentials, refer to [Obtaining Autotask API Credentials](#) section in this document.

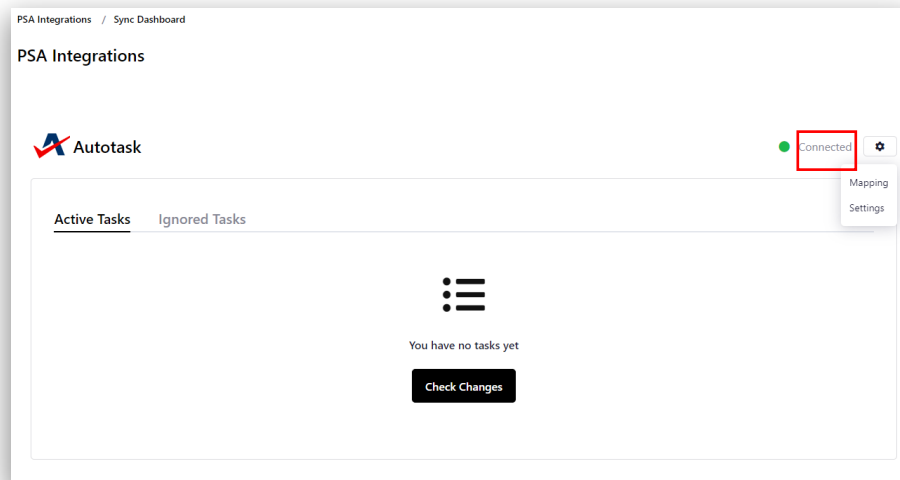
- Whether to load prices from Autotask or Reseller Marketplace by default
- Whether to use Marketplace Proration or Autotask Proration
- Whether to automatically create and process synchronization tasks. You can select from the two options of change checking periodicity: once per day, or once per 5 min
- Events you want to be notified of and tracked: only about errors and actions required from you, or about all tasks. These notifications are displayed in pop-up messages and Action Log

Note: You can access these settings later by clicking the gear icon on the dashboard and selecting Settings.

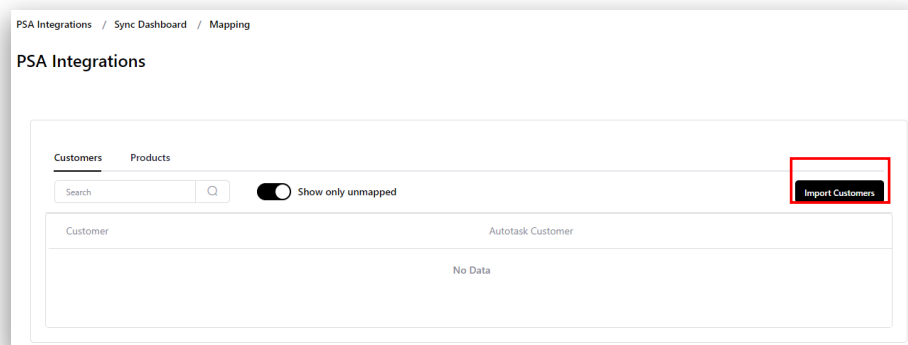
Importing Customers

To import your customers to Reseller Marketplace from Autotask using the customer import wizard, complete the following steps:

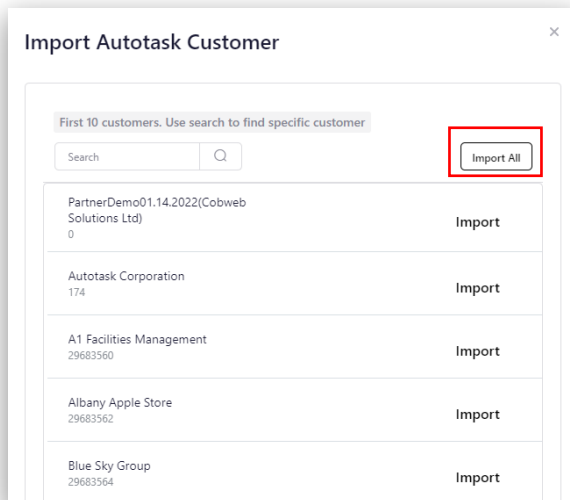
- In your UX1 Panel, click **Integrations>PSA Integrations**
- On the dashboard, click the gear icon and select **Mapping**



- In the **Customers** tab of the **Mapping** screen, click **Import Customers**



- In the customer import wizard, you can import customers individually or in bulk by clicking **Import All**



Import Autotask Customer

First 10 customers. Use search to find specific customer

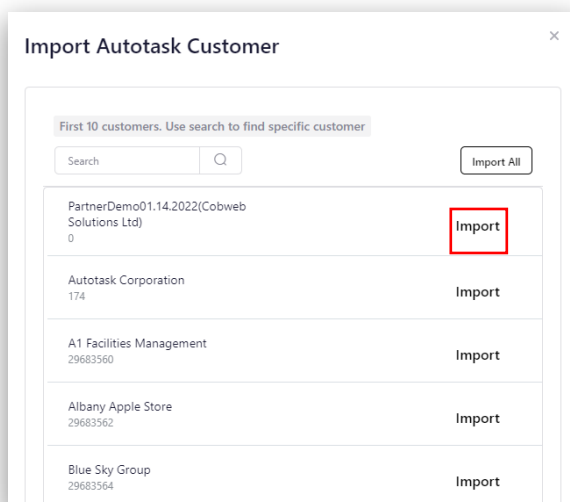
Search

Import All

PartnerDemo01.14.2022(Cobweb Solutions Ltd) 0	Import
Autotask Corporation 174	Import
A1 Facilities Management 29683560	Import
Albany Apple Store 29683562	Import
Blue Sky Group 29683564	Import

Note: Bulk customer import is performed only for those customers whose profiles are filled out completely. Otherwise, you need to import customers individually.

- To import customers individually, click **Import**, then fill out all required profile details and click **Import** again



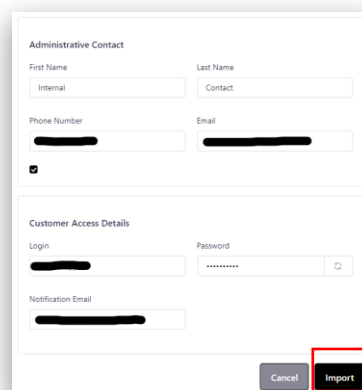
Import Autotask Customer

First 10 customers. Use search to find specific customer

Search

Import All

PartnerDemo01.14.2022(Cobweb Solutions Ltd) 0	Import
Autotask Corporation 174	Import
A1 Facilities Management 29683560	Import
Albany Apple Store 29683562	Import
Blue Sky Group 29683564	Import



Administrative Contact

First Name Last Name

Internal Contact

Phone Number Email

☒

Customer Access Details

Login Password

Notification Email

Cancel **Import**

During the importing operation, your customers are mapped automatically.

Mapping Customers and Products

On the **Mapping** screen, you can map your customers and products between Reseller Marketplace and Autotask.

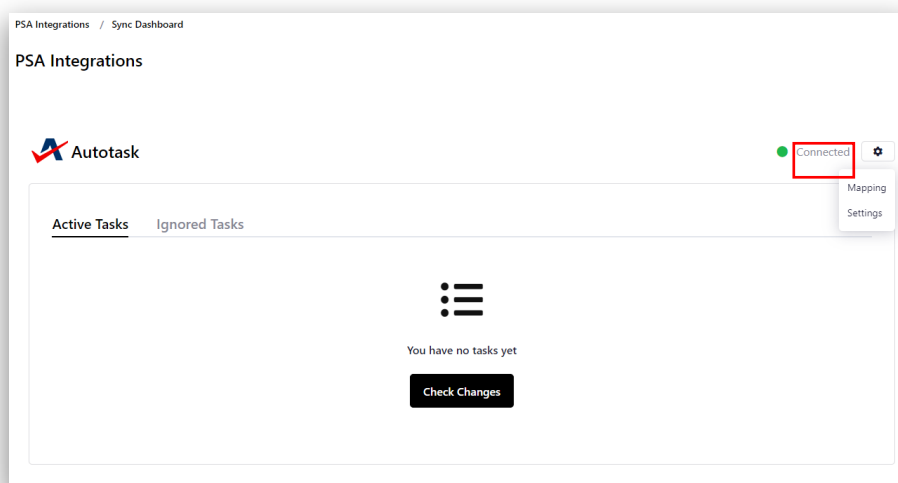
Mapping Customers

There are three ways to map your customers between Reseller Marketplace and Autotask:

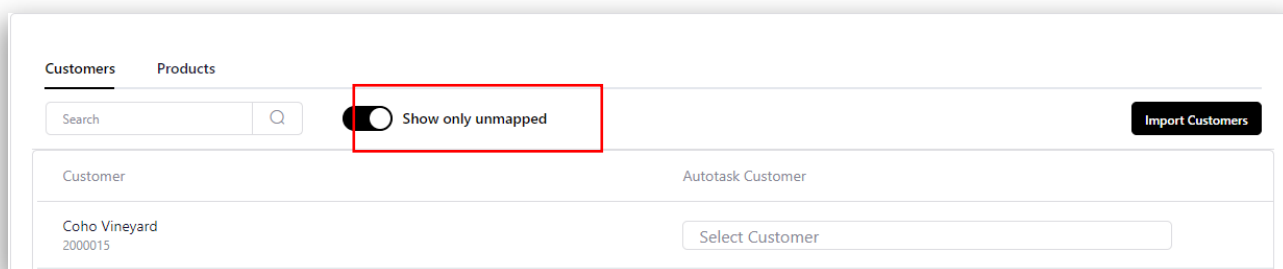
- Through the **subscription synchronization wizard, during subscription synchronizing**
- Through the **Mapping** screen

To map your customers using the **Mapping** screen, complete the following steps:

- In your UX1 Panel, click **Integrations>PSA Integrations**
- On the dashboard, click the gear icon and select **Mapping**

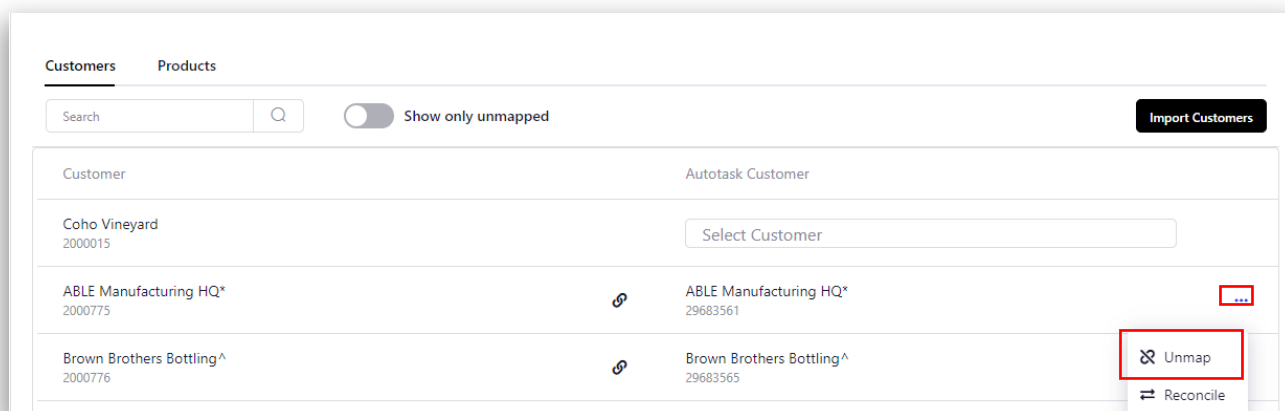


- In the **Customers** tab of the **Mapping** screen, select a customer you want to map



Note: Select Show only unmapped to filter out only unmapped customers.

To unmap a customer, select the three-dot icon for the customer and click **Unmap**.



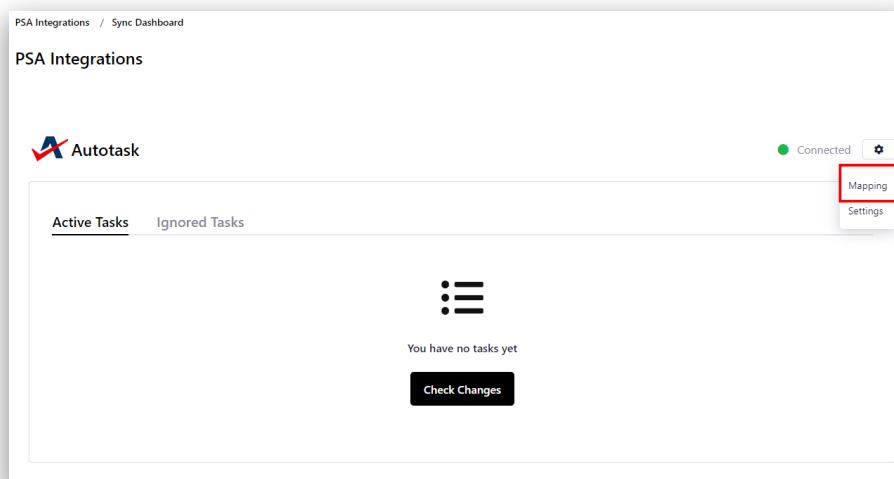
Mapping Products

There are two ways to map your products between Reseller Marketplace and Autotask:

- Through the **subscription synchronization wizard**, during subscription synchronizing
- Through the **Mapping** screen

To map your products using the **Mapping** screen, complete the following steps:

- In your UX1 Panel, click **Integrations>PSA Integrations**
- On the dashboard, click the gear icon and select **Mapping**



- In the **Products** tab of the **Mapping** screen, select a product you want to map

PSA Integrations

Customers

Products

Fees mapping >

Office 365 F1

812

>

Note: At this step, you can also add a product to Autotask by clicking **Add Product to Autotask** in the drop-down menu and configuring its parameters.

To unmap a product, select the three-dot icon for the product and click **Unmap**.

Customers

Products

Fees mapping >

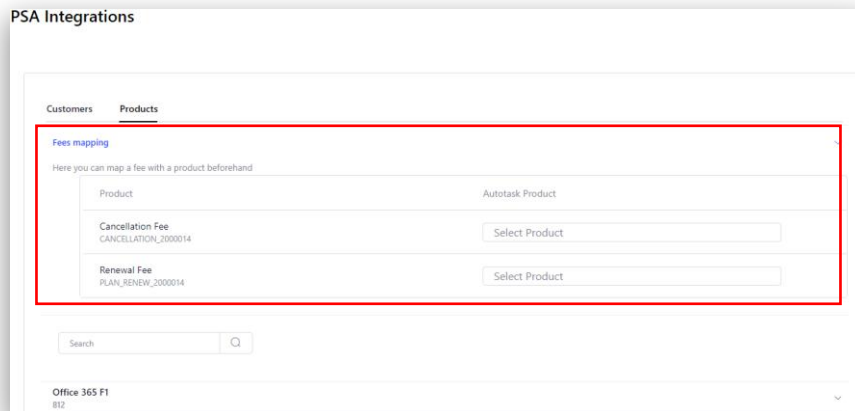
Office 365 F1

812

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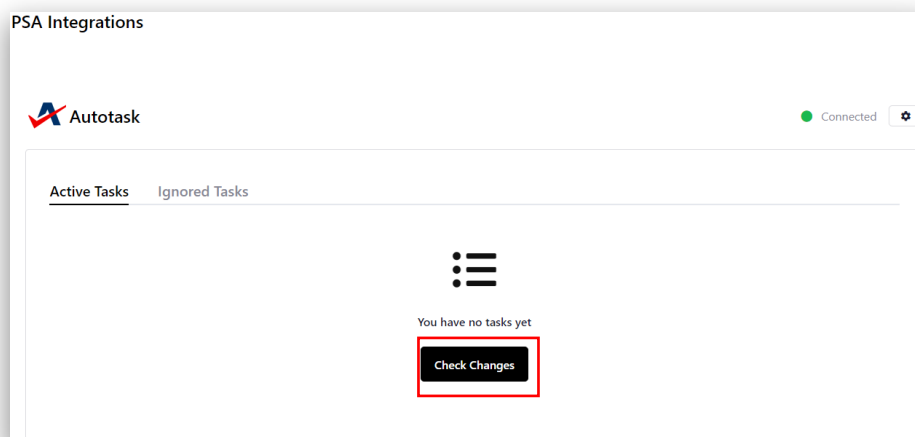
Product	Autotask Product	
Office 365 Threat Intelligence - billed per month Subscription period: 12 months efe1183a-8fa0-4138-b10a-5ae271ab6e3c	<input type="text" value="Select Product"/>	
Office 365 Advanced Threat Protection - billed per month Subscription period: 12 months a2706f86-868d-4048-989b-0c69e5c76b63	<input type="text" value="Select Product"/>	
Office 365 F1 - billed per month Subscription period: 12 months TESTSKU-JAMIE	Office 365 F1 Office 365 F1	...
Office 365 Extra File Storage - billed per month Subscription period: 12 months 53fc25f7-6639-4f78-bb44-3c2dfec3ed40	Office 365 F1 Office 365 F1	Unmap

Also, in the **Fees Mapping** pane, you can map a Cancellation Fee with a product before their synchronization.



To map both Customers & Products through the **Subscription Synchronisation Wizard** during subscription syncing, follow the below steps:

- In your UX1 Panel, click **Integrations>PSA Integrations**
- On the dashboard, click **Check Changes** to update the list of tasks

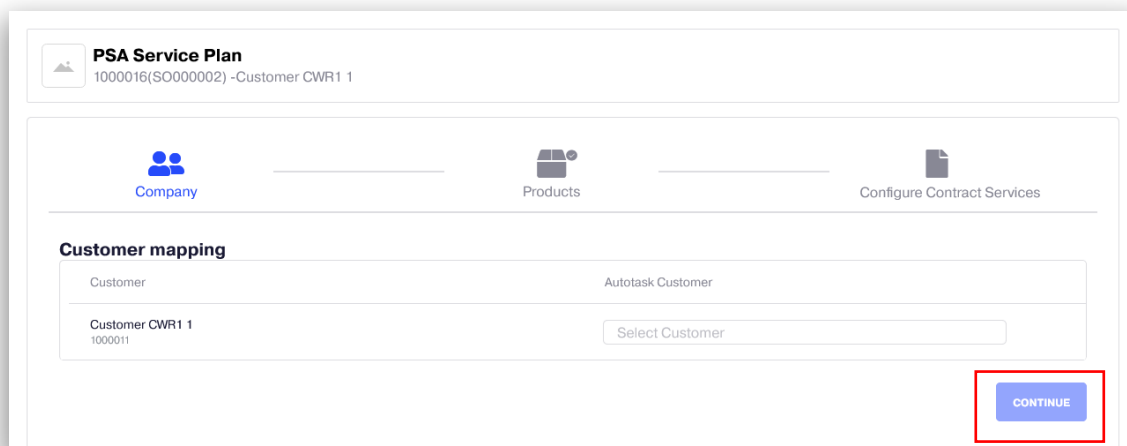


- Select a synchronization task for your customer with the Sales order type. Click **Sync Changes**



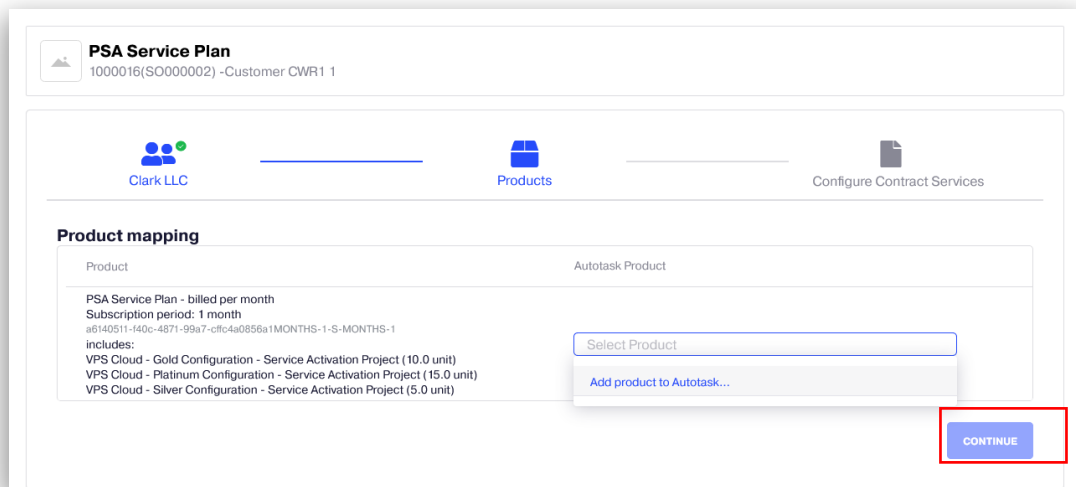
Note: The Sales order type means that a subscription is new. The Change order type means that the existing subscription is upgraded or downgraded. The Billing order type means that this is an existing usage-based subscription. The Cancellation order type means that this subscription is canceled.

- In the synchronization wizard that opens, map the customer between Reseller Marketplace and Autotask. Click **Continue**



Note: If a customer was mapped before, this step is skipped.

- Map a product between Reseller Marketplace and Autotask. Click **Continue**



Note:

- If a product was mapped before, this step is skipped
- At this step, you can also add a product to Autotask by clicking **Add Product to Autotask** in the drop-down menu and configuring its parameters

- On this step, select a Contract. Then, check changes to the Contract

The Contract Services represent a separate fee that is charged in the scope of the Contract.

You can select Contract Services and configure their parameters, such as dates, description, quantity, price, and cost, as well as whether to load prices from the Autotask or Reseller Marketplace.

Setup Billing Amount

The Contract may have a setup billing amount. This is an amount to be invoiced once for this Contract.

Recurring Billing Amount

The Contract may have a recurring billing amount. This is an amount to be invoiced each billing period for this Contract.

Important:

- Contracts with the same billing cycle must be selected here, that is, monthly Contracts for monthly subscriptions, and so on
- The Contract currency and the currency in Reseller Marketplace must be the same

Note: When a Sales Order is propagated to Autotask, the PSA integration will take into account the existing Contract Services.

- If the new quantity is higher than the current quantity of the Contract Service, then changes will be applied in the current billing period
- If the new quantity is lower than the current quantity of the Contract Service, then changes will be applied in the next billing period
- If the quantity is the same, prices and costs will be synced

- Confirm the synchronization by clicking **Sync All**

PSA Service Plan

1000016(SO000002) - Customer CWR11

Clark LLC

Products

Configure Contract Services

Configure Contract Service

Here you can edit contract services and mark/unmark what you don't want to synchronize to Autotask.

Contract
Load prices from
Autotask

	Invt (Standard) - Monthly								
	Effective Date	End Date	Service Name	Invoice Description	Current Quantity	Quantity Change	Price	Cost	Detail
	Sepember 1, 2022	-	#EOffice-Creater User - Disk Usage - Recurring	=	-	2	0	1	New Sales
	Sepember 1, 2022	Septhermber 30, 2021	#EOffice-Creater User - Disk Usage - Recurring	=	-	1	0	0.99	-

Synchronizing Between Reseller Marketplace and Autotask

Synchronizing between Reseller Marketplace and Autotask allows a reseller to process order placement and invoicing within the two systems more efficiently.

After the initial integration of Autotask with Reseller Marketplace, synchronization tasks are created for every active customer subscription. When a new subscription is provisioned or a change in a subscription occurs, a corresponding task is created for synchronization between Reseller Marketplace and Autotask. These tasks are created after clicking **Check Changes** to update a task list.

If no tasks were created after clicking **Check Changes**, orders that are no older than one month will be processed. If tasks exist, orders after the creation date of the last task will be processed.



Infinigate Cloud

Delme Place
Cams Hall Estate
Delme 3
Fareham
PO16 8UX

www.infinigate.cloud