



# Autotask Setup Guide

Overview and User Guide



# Overview & User Guide

## Guide Description

*The purpose of this guide is to lay out the steps for integrating Pax8 with Autotask. After the integration is in place you can:*

- *Import Companies*
- *Bind Products/Services*
- *Write Reoccurring Line Items to your contacts for invoicing*

## Steps:

1. Login to [app.pax8.com](http://app.pax8.com)

The screenshot shows the Pax8 application interface. On the left is a sidebar menu with a search bar at the top. The menu items include: Companies (1), Subscriptions (1), Catalog (377), Quotes (0), One Time Charges (4), Trials (0), Users (1), and an "ADVANCED" section containing Admin, Tools, Orders, and Billing. The main content area features a large banner for "WINGMAN 2020" with the Pax8 logo above it. The banner text reads "AN EXTRAORDINARY PARTNER EXPERIENCE IS TAKING OFF". Below the banner is a text block: "Introducing Wingman2020, the first national Pax8 event! We're building on the foundation of our popular Mission Briefings and Azure and Microsoft 365 Bootcamps to bring you three days of immersive learning and networking in the Rocky Mountains. Wingman2020 is loaded with sessions for product certifications, technical trainings, and business advice from cloud vendors and industry leaders. Date: June 3-5, 2020 Location: Denver, CO at the Gaylord Rockies Resort & Conference Center If you're interested in attending the largest event of the year for Microsoft-focused partners, [sign up](#) to be notified when registration for Wingman2020 opens."



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2. Go to **Tools > Business Automation** on the right-hand side

The screenshot shows the Autotask dashboard. On the left is a navigation menu with the following items: Companies (1), Subscriptions (1), Catalog (377), Quotes (0), One Time Charges (4), Trials (0), Users (1), and an 'ADVANCED' section containing Admin, Tools, Orders, and Billing. A red arrow points to the 'Tools' item in the 'ADVANCED' section. On the right is a 'Tools' grid with the following items: AutoPilot (View Market Penetrations), Microsoft Import Tool (Import Subscriptions from CSP), Business Automation (Manage Business Automation Tools), Manage Roles (Assign User Roles), Message History (View System Emails), Partner Shells (Manage Partner Shells), Pax8 Stax (View Market Penetration), and Pending Tasks (View Incomplete Tasks). A red arrow points to the 'Business Automation' tool in the grid.

3. Select Autotask

The screenshot shows the 'Business Automation' page with the 'Select Vendor' section. The page header includes 'Nick Ross | PARTNER ADMIN'. The 'Select Vendor' section contains five vendor options: Autotask, Connectwise, Kaseya, Syncro, and Tigerpaw. A red arrow points to the 'Autotask' option.



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4. Enter your Autotask API User Credentials. Please Note this must be an API User. We recommend creating a new API user specifically for the integration

**Business Automation**

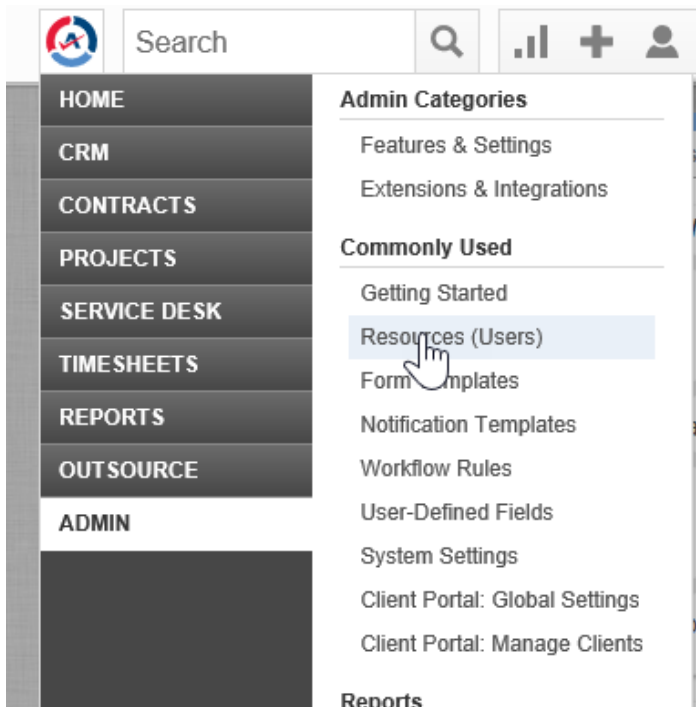
---

Create New Autotask Connection

**Username**

**Password**

- a. To set up a new API User in Autotask go to Admin>Resources





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b. Click New API User under the dropdown next to New

	Name	Resource ID	Default Department	Security Level
<input type="checkbox"/>	Administrator, Autotask	4		Full Access (system)
<input type="checkbox"/>	Anderson, Scott	29683487	Service	Manager
<input type="checkbox"/>	API, Autotask	29683994	Administration	API User (system)
<input type="checkbox"/>	Brown, Michael	29683663	Engineering	Manager
<input type="checkbox"/>	Davis, Gary	29683992	Engineering	Project Manager
<input type="checkbox"/>	Gibson, Zach	29683996	Engineering	API User (system)
<input type="checkbox"/>	Jackson, Timothy	29683463	Sales/Marketing	Sales

c. Fill out each required field. Select API User (system) for the security level.

**ADD API USER**
?

**GENERAL**

<p><b>First Name *</b></p> <input style="width: 90%;" type="text" value="Pax8"/>	<p><b>Security Level *</b></p> <input style="width: 90%;" type="text" value="API User (system)"/>
<p><b>Last Name *</b></p> <input style="width: 90%;" type="text" value="API"/>	<p><b>Date Format</b></p> <input style="width: 90%;" type="text" value="MM/dd/yyyy"/>
<p><b>Email Address *</b></p> <input style="width: 90%;" type="text"/>	<p><b>Time Format</b></p> <input style="width: 90%;" type="text" value="hh:mm tt"/>
<p><input checked="" type="checkbox"/> Active</p> <p><input type="checkbox"/> Locked</p>	<p><b>Number Format</b></p> <input style="width: 90%;" type="text" value="X,XXX.XX"/>



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- d. You can input your own custom Username and Password or click to Generate Key and Generate Secret. Save a copy of these credentials. Once you save and close you will not be able to retrieve these again without generating new ones.

GENERAL

Username (Key)\*

Password (Secret)\*

- e. Set the API Tracking Identifier. Select Pax8 – Cloud Distributor from the Integration Vendor dropdown.

API TRACKING IDENTIFIER

API version 1.6 & later require the user of an API tracking identifier. Once assigned, this cannot be changed.

Integration Vendor  
 Custom (Internal Integration)  
 None

Integration Vendor\*

- f. After all required fields have been filled and you have copied the username and password, click Save & Close at the top of the window.

5. Now you can plug these credentials into the respective fields back in the Pax8 Platform. You will get a success message once the connection is created.

The screenshot shows the Pax8 Business Automation interface. A green notification banner at the top right reads "Create Connection" and "Connection Was Created". The main window title is "Business Automation". Below the title, there is a section titled "Select Autotask Connection" with a search bar containing the text "Autotask". At the bottom right of the window, there are two buttons: "Cancel" and "Create New".



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6. On this page you can bind Pax8 companies to Autotask Companies, Import Autotask companies to Pax8, Bind Pax8 Products to Autotask Services, and Export Pax8 Products as new services to Autotask:



Edit Connection

Delete Connection

### Bind Pax8 Company

#### Pax8 Company

Denver Broncos

#### Autotask Account

- de
- Department of Public Works
- Excelsior Designs, LLC
- Integrated Providers
- Upstate Document Providers
- Denver Nuggets

### Import Autotask Account

#### Autotask Account

Search Autotask Account

### Bind Pax8 Product

#### Pax8 Product

Search Pax8 Product

#### Autotask Service

Search Autotask Service

### Export Pax8 Product

#### Pax8 Product

Search Pax8 Product

\* all accounts and services must have a 1:1 bind established between Pax8 and Autotask. This will allow you to push the correct service to the correct contracts when syncing later. \*



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7. You will also have an import company tab under the company's section now by clicking 'Import via BAT':

ID	Name	Partner	Phone	City	State	Deleted	SS	BoB	Action(s)
100692	Blue Sky Group	TechnoLogic IT	555-555-5565	Albany	New York	false	Yes	No	[edit] [delete]
101288	Burface's Music Emporium	TechnoLogic IT	3032229876	Denver	Colorado	false	No	No	[edit] [delete]
101037	Department of Public Works	TechnoLogic IT	555-555-5555	Irvine	California	false	No	No	[edit] [delete]
100950	Dynamo Corporation	TechnoLogic IT	555-555-5591	Rensselaer	New York	false	No	No	[edit] [delete]

a. Search for an Autotask company and click Import Company

Select vendor you would like to import your company from



Import Autotask Account

Accounts

f

- ABLE Manufacturing HQ\*
- Department of Public Works
- ABLE Manufacturing West Coast
- Blue Flash LLC
- Buffalo Technology Exchange





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- b. The companies contact info will be prepopulated as it exists in Autotask.

**Create New Pax8 Company**

Name \*  
ABLE Manufacturing HQ\*

Address 1 \*  
163 Consaul Road

Address 2

City \*  
Albany

State \*  
New York

Zip Code \*  
12205

Country \*  
United States

Phone \*  
555-555-5561

Fax  
555-555-8672

Domain \*  
www.ablemanufacturing.com

- c. The contact below is internal to your company. If you have already created a contact then you can click use existing contact:

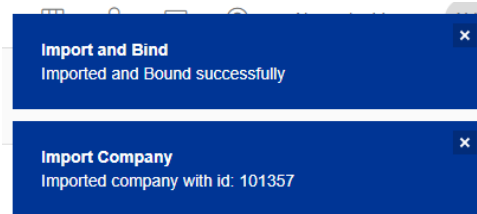
**Primary Contact for Pax8 Related Communications**

Create New Contact       Use Existing Contact

Existing Contacts \*

select
select
Nicholas Ross

- d. Click Create and Bind. You will get a success message and will be able to see the company in the Pax8 Platform after you refresh the page



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8. When you go to any subscription you can view subscription history and sync over to Autotask

**Microsoft Office 365 Business Essentials - Includes Exchange Email**

ID: 234357  
 SKU: MST-OFC-BES-C100  
 Term: Monthly  
 Renews: 3/1/2019

---

Quantity: 7

Retail Price: \$5.00

Partner Cost: \$4.20

Start Date: 11/27/2018

Modify
Cancel Subscription

---

History
Support Tickets

**Subscription History**

ID	History Action	Quantity	Effective Date	Renews	Ordered By	Subscription Status	Sync Status
157571	Initial Order	8	7/1/2018	3/1/2019	A. Markov	Active	<span style="background-color: #4caf50; color: white; padding: 2px 5px;">SYNCED</span>
234357	Quantity Change	7 (-1)	11/27/2018	3/1/2019	K. Park	Active	

9. When you click on Sync, you will go through a binding process to match everything with Autotask. You will be prompted to establish account and service binds if it has not already been done. It will skip over steps that have already been done:

a. First is asking for our company name in Autotask:

CONNECTION  
Autotask

ACCOUNT

SERVICE

CONTRACT

REVIEW  
(0 items)

Previous
Next

---

**Manage Companies**

Bind Pax8 Company

---

Pax8 Company  
Denver Nuggets

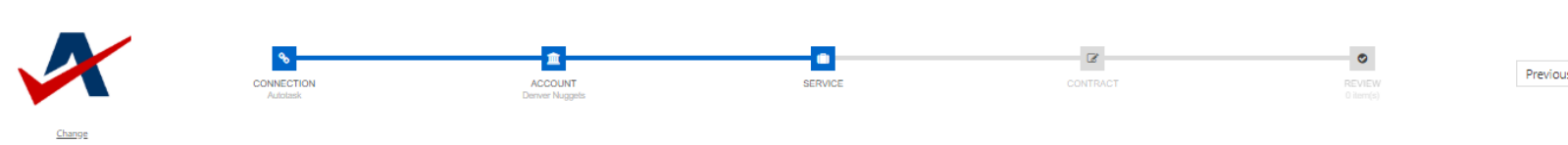
Autotask Account

Bind



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b. Next, we bind a Pax8 product to an Autotask service. If you do not have the service, you can export our product as a new service in AT:



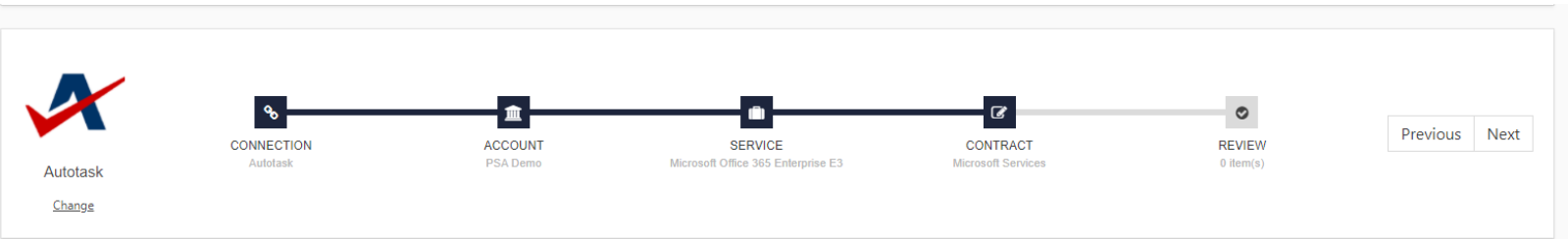
### Manage Products

**Bind Product**  
Bind an existing Pax8 product in the command console with an existing product found on your Autotask account. [Bind Product](#)

OR

**Export Product**  
Export and bind an existing Pax8 product to Autotask. (You will only have to do this once per product.) [Export Product](#)

c. Step 4 is selecting the contract we are writing to. All active contracts with matching term are available from the dropdown:



### Configure Contract Charge

Contract\* Dates: 07/01/2020 - 06/30/2022

Effective Date\* 12/23/2020

Quantity 4.00

Price \$ 20.00 Cost \$ 16.00

Short  Long

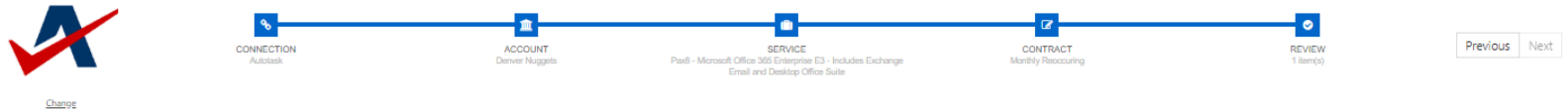
Office 365 is perfect for small and medium-sized businesses interested in enabling their users with greater productivity, efficiency, and security, while eliminating the hassles of managing on-premises hardware and applications.

[Continue](#)



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- d. The final page is a summary of what we are writing over. After confirming sync, you will get a success message and the line items will be written in the services section of your contract



**Review**

Please review each Contract Service below and click confirm to complete the sync process for this order.

Updating current Autotask contract service.

	Pax8	Autotask
Product:	Microsoft Office 365 Enterprise E3 - Includes Exchange Email and Desktop Office Suite	Pax8 - Microsoft Office 365 Enterprise E3 - Includes Exchange Email and Desktop Office Suite
Term:	Monthly	Monthly
Quantity:	4 units	4 units
Unit Price:	\$20.00	\$20.00
Recurring Price:	\$80.00	\$80.00 (\$20.00 x 4 units)
Effective Date:	2/8/2019	2/8/2019

[Confirm Sync](#)

Sync Success!  
Subscription was synced successfully.

Denver Nuggets  
 Microsoft Office 365 Enterprise E3 - Includes Exchange Email and Desktop Office Suite  
 ID: 102051  
 Term: Monthly

SKU: MST-OF-EE3-C100  
 Renews: 3/1/2019

**Autotask Sync Complete** [Go to Subscription](#)

Product	Quantity	Proration	Action	Message
Pax8 - Microsoft Office 365 Enterprise E3 - Includes Exchange Email and Desktop Office Suite	4	—	Updated	Successfully updated subscription. Entity id: 151



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10. When incrementing seats, you can modify seat counts in a one-step checkout:

- a. Go to the subscription and click modify, update seats, and agree to terms and conditions:

Renews: 3/1/2019

Quantity	Retail Price	Partner Cost	Start Date	Proration
4	20.00	\$20.00	02/11/2019	<input type="checkbox"/> I want to waive prorate.

Cancel  I accept the [terms and conditions](#)

[History](#) [Support Tickets](#)

### Subscription History

ID	History Action	Quantity	Effective Date	Renews	Ordered By	Subscription Status	Sync Status
102047	Initial Order	1	2/8/2019	3/1/2019	N. Ross	Provisioning	<input type="button" value="SYNCED"/>

- b. You are immediately prompted to Sync to AT

### Next Steps

**Subscription Updated!**  
Your subscription for Microsoft Office 365 Enterprise E3 - Includes Exchange Email and Desktop Office Suite has been successfully modified.

If this is the initial order of a Microsoft product through Pax8 for a U.S. customer, [CLICK HERE](#) to assign Arrow as a Delegated Admin on the Customer Account.

If this is the initial order of a Microsoft product through Pax8 for a Canadian customer, [CLICK HERE](#) to assign Arrow as a Delegated Admin on the Customer Account.

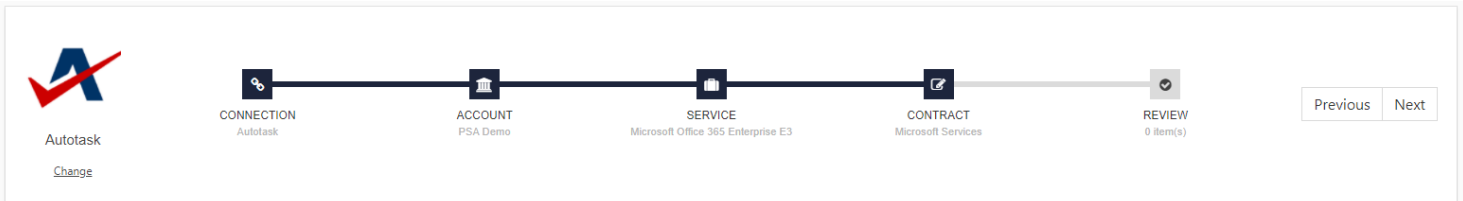
If the customer has previously ordered a Microsoft product through Pax8, disregard this step.

or



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- c. Now you are simply asked to update your Service in AT to the new quantity. This will update your quantity on your contract



### Configure Contract Charge

Contract \* Dates: 07/01/2020 - 06/30/2022      Effective Date \* 12/23/2020

Microsoft Services

**Previous Contract Service found in Autotask:** Would you like to update the most recent existing one or create a new one?

Invoice Description: Existing | Short | Long

Office 365 is perfect for small and medium-sized businesses interested in enabling their users with greater productivity, efficiency, and security, while eliminating the hassles of managing on-premises hardware and applications.

Quantity: 11.00

Price: \$ 20.00      Cost: \$ 20.00



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10. Lastly, we have created an “Unsynced Subscriptions” Tab so you can additionally audit any subscriptions that have not been synced with your Agreements. You can view, sync, or ignore the subscriptions”

Companies	1
Subscriptions	1
Catalog	377
Quotes	0
One Time Charges	4
Trials	0
Users	1
ADVANCED	
Admin	
Tools	
Orders	
Billing	



 <b>AutoPilot</b> View Market Promotions	 <b>Microsoft Import Tool</b> Import Subscriptions from CSP	 <b>Business Automation</b> Manage Business Automation Tools
 <b>Manage Roles</b> Assign User Roles	 <b>Message History</b> View System Emails	 <b>Partner Shells</b> Manage Partner Shells
 <b>Pax8 Stax</b> View Market Penetration	 <b>Pending Tasks</b> View Incomplete Tasks	 <b>Unsynced Subscriptions</b> View Subscriptions Not Synced With Other Vendors

