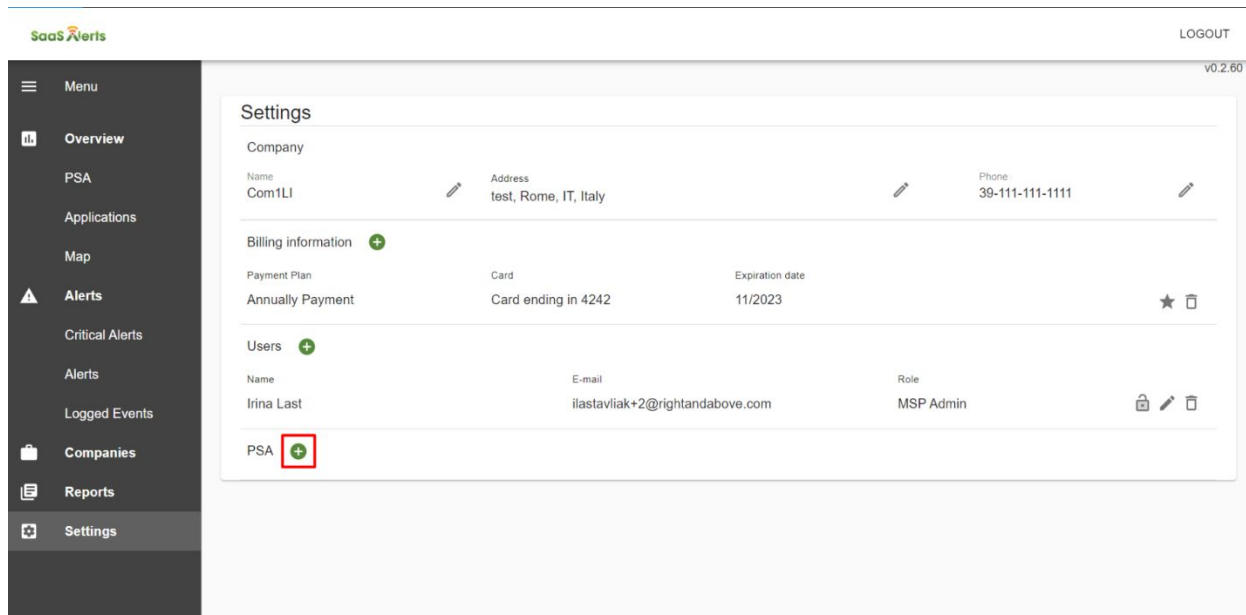


Autotask

To add Autotask as your PSA login to SaaS Alerts as the existing MSP Admin user.

From the Side Menu select “Settings”.

On the Settings page, click on + next to PSA, on the bottom of the screen.



Select Autotask from the PSA Choices that are presented.

To add Autotask, You will need the following parameters:

- **API USER Credentials** (email and password)
 - i.e. usernameAPI@companydomain.com Be sure you are not attempting to connect with a standard user account
- **API URL**
 - Probably: <https://webservices2.autotask.net/at services/1.5/atws.asmx> however your URL may differ and you should validate the correct URL for your instance with Autotask
- **ID** (of the Autotask user who should receive tickets sent by SaaS Alerts)

The screenshot shows a web browser window with the URL 'qa-dot-the-byway-248217.appspot.com/settings'. The page title is 'SaaS Alerts' and the version is 'v0.2.62'. The left sidebar contains a menu with items: Menu, Overview, PSA, Applications, Map, Alerts, Critical Alerts, Alerts, Logged Events, Companies, Reports, and Settings. The main content area displays a modal form titled 'Add Professional Service Automation'. The form asks the user to 'Please choose specific PSA to add.' and provides three radio button options: 'ConnectWise', 'Autotask' (which is selected), and 'Kaseya'. Below the options is the Autotask logo. The form contains four required input fields: 'Login *', 'Password *', 'API URL *', and 'User ID *'. At the bottom right of the form are 'CANCEL' and 'ADD' buttons.

In the Form above:

“Login” is the credential for an authorized API user..not a standard Autotask user.

“Password is the password for the the authorized API user

“API URL” - should be → <https://webservices2.autotask.net/at services/1.5/atws.asmx>.

“User ID” must be the ID for the user where all SaaS Alerts notifications will be sent.

- Note: The User ID is NOT the user login name. It is a numeric only value that is assigned to the user by the Autotask System
- You can select an existing User ID from your named user list as depicted below -or -
- You can create a new user specifically for the task of accepting SaaS Alerts Notifications.

RESOURCES						
+ New ↶ Import/Import History Find Resource						
J						
<input type="checkbox"/>	Jackson, Timothy	Sales/Marketing	Sales	Professional	29683463	
<input type="checkbox"/>	Johnson, Allison	Engineering	Project Manager	Professional	29683951	
<input type="checkbox"/>	Jones, Cindy	Engineering	Project Manager	Professional	29683979	
L						
<input type="checkbox"/>	Lakosnyk, Jean	Finance	Contractor	Contractor	29683996	
M						
<input type="checkbox"/>	Miller, Susan^	Service	Manager	Executive	29683876	
<input type="checkbox"/>	Moore, James*	Service	Manager	Executive	29683781	
P						
<input type="checkbox"/>	Pierce, Pamela*^	Administration	System Administrator	Administrator	29682885	
<input type="checkbox"/>	Pierce-API, Pamela	Administration	API User (system)	API User	29683993	
S						
<input type="checkbox"/>	Shvaliuk, Vasyl	Engineering	Contractor	Contractor	29683995	
<input type="checkbox"/>	Smith, Matthew	Engineering	Manager	Executive	29683932	
T						
<input type="checkbox"/>	Taylor, Mark*	Service	Team Member	Team Member	29683794	
<input type="checkbox"/>	Thomas, Kathy	Service	Service Desk User	Professional	29683812	

USER ID Number

To add new Autotask user:

- Login using an Admin Account on <https://ww2.autotask.net/>;
- Open **Admin** on the manage panel and click the **Resources (Users)** item;

The screenshot shows the Autotask Admin dashboard. On the left, there is a sidebar menu with categories: HOME, CRM, CONTRACTS, PROJECTS, SERVICE DESK, TIMESHEETS, REPORTS, OUTSOURCE, and ADMIN. Under the ADMIN category, a sub-menu is open, listing 'Admin Categories' (Features & Settings, Extensions & Integrations), 'Commonly Used' (Getting Started, Resources (Users), Form Templates, Notification Templates, Workflow Rules, User-Defined Fields, System Settings, Client Portal: Global Settings, Client Portal: Manage Clients), and 'Reports' (Reports). The 'Resources (Users)' item is highlighted with a red box and a red arrow. The main dashboard area displays various performance metrics and charts, including 'SALES QUOTA PERFORMANCE THIS MONTH', 'ACTIVE OPPORTUNITIES BY ACCOUNT', 'OPPORTUNITIES THIS MONTH', 'ACTIVITY THIS MONTH', and 'MANAGED ACCOUNT TICKETS'.

- Click **+ New** icon

Source Name	Default Department	Security Level	License Type	Resource ID	Office Phone	Mobile Phone	E-Mail Address	Primary Location	Resource Survey Rating	Last Activated By	Last Activated Date
Administrator, Autotask		Full Access (system)	Administrator	4	(518) 720-3500			Headquarters		Administrator, Autotask	04/30/2013 03:03 PM
Anderson, Scott	Service	Manager	Executive	29683487			salesdemo@autotask.com	Headquarters		Administrator, Autotask	05/24/2012 08:00 PM
Brown, Michael	Engineering	Manager	Executive	29683663			salesdemo@autotask.com	Engineering Office		Administrator, Autotask	05/24/2012 08:00 PM
Davis, Gary	Engineering	Project Manager	Professional	29683992			salesdemo@autotask.com	Engineering Office		Administrator, Autotask	06/17/2012 08:00 PM
Jackson, Timothy	Sales/Marketing	Sales	Professional	29683463			salesdemo@autotask.com	Headquarters		Administrator, Autotask	05/24/2012 08:00 PM
Johnson, Allison	Engineering	Project Manager	Professional	29683951			salesdemo@autotask.com	Engineering Office		Administrator, Autotask	06/17/2012 08:00 PM
Jones, Cindy	Engineering	Project Manager	Professional	29683979			salesdemo@autotask.com	Engineering Office		Administrator, Autotask	06/17/2012 08:00 PM
Lakosnyk, Jean	Finance	Contractor	Contractor	29683996			ilakosnyk@rightandabove.com	Engineering Office		Pierce, Pamela**	02/26/2020 09:33 AM
Miller, Susan*	Service	Manager	Executive	29683876			salesdemo@autotask.com	Headquarters		Administrator, Autotask	06/17/2012 08:00 PM
Moore, James*	Service	Manager	Executive	29683781			salesdemo@autotask.com	Headquarters		Administrator, Autotask	05/24/2012 08:00 PM
Pierce, Pamela**	Administration	System Administrator	Administrator	29682885			salesdemo@autotask.com	Headquarters		Administrator, Autotask	12/14/2012 07:00 PM

- Enter all required fields on the following Tabs:
 - General
 - Security
 - HR
 - Associations

Attention! Make sure that:

- This user has an assigned role;
- This user has the same role in the “Departments” and “Service Desk Roles” sections of the Associations Tab;
- This is not API user;

- ID is ready to use

ww2.autotask.net/Mvc/Framework/Navigation.mvc/Landing

SEARCH

PAMELA™ PIERCE | LOGOUT

RESOURCES

New Import/Import History Find Resource # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z View Active (20)

	Resource Name	Default Department	Security Level	License Type	Resource ID	Office Phone	Mobile Phone	E-Mail Address	Primary Location	Resource Survey Rating	Last Activated By	Last Activated Date
<input checked="" type="checkbox"/>	Administrator, Autotask		Full Access (system)	Administrator	4	●●●●●●			Headquarters		Administrator, Autotask	04/30/2013 03:03 PM
<input type="checkbox"/>	Anderson, Scott	Service	Manager	Executive	29683487			●●●●●●●●	Headquarters		Administrator, Autotask	05/24/2012 08:00 PM

When the new user is created, highlight and copy the Resource ID number to paste into the SaaS Alerts form in the "User ID" field of the add Autotask form.