Autotask Integration Setup

Connecting your Autotask to MSPbots enables our bots to pull in read-only user data and activates message alert and reporting bots, among other MSPbots functionalities. To set up the Autotask connection, you have to generate the API user and API keys, input the API keys into MSPbots, and configure Webhooks.

What's in this article:

- 1. Creating an API User and Getting API Keys from Autotask
- 2. Entering the API keys from Autotask to MSPbots
- 3. Configuring and registering Webhooks

1. Creating an API User and Getting API Keys from Autotask

- a. Log in to Autotask. Navigate to the menu on the left and click Admin.
- b. Click on the + sign to expand the Resources/Users (HR) section.
- c. Next, click Resources/Users.
- d. Hover over the downward arrow at the top left of the window and click New API User.
- e. Fill out the necessary fields under the First General area.
 - i. Set the First Name to MSPbots.
 - ii. Set the Last Name to AI.
 - iii. Set the Email Address to any email address.
 - iv. Set the Security Level to the highest level to prevent sync and view permissions later.
- f. Next, generate the API keys under the Second General area.
 - i. Click the Generate Key button to generate a user key.
 - ii. Click the Generate Secret button to generate a secret password.
 - Take note of the key and the secret because these may be inaccessible in the future.
- g. Select the vendor from the dropdown in the API Tracking Identifier section. Ensure that Integration Vendor is selected.
- h. Go through the list and select MSPbots.
- For the Line of Business field, include all items relating to ticketing to ensure that MSPbots can see the right areas. If you are unsure which items to include, select all.

2. Entering the API keys from Autotask to MSPbots

Now that you have generated the user and API key information, it's time to sync and share data.

- a. Navigate to your MSPbots app and click Integrations.
- b. Scroll down to Autotask and click on Config.



- c. Fill out the following in the Information section:
 - For API User Name, enter the username (key) from Autotask.
 - For API User Password, enter the password (secret) key from Autotask.
- d. Once both are entered, click Save and Sync. If set correctly, you'll get a message stating the synchronization was successful.
 - If the input information is incorrect, you will be prompted with the following message: "500 INTERNAL_SERVER_ERROR -
 - Internal Server Error at auto task remote server" When this happens, re-enter the correct username (key) or password (secret).
 If you encounter a data sync error with the message "The logged in Resource does not have adequate permissions to query this entity type," this means that the user does not have enough permissions. To resolve this, refer to the article "AutoTask Integration Error | The logged in resource does not have the adequate permissions to query this entity type."

3. Configuring and registering Webhooks

a. Go to the Webhooks page.

datto DEVELOPER H	HELP v2021.3			What can we help you find?	₹ Q		
Welcome to Developer Help!		 Requirements and configuration steps 					
General information about Autotask PSA A	APIs v	To create webhooks, you must use version 1.6 or at	bove of the Autotask PSA SOAP API or version 1.0 or above of the Aut	.otask PSA REST APL Integration developers must have an API only security level.			
REST API	~	NOTE The resource's security and Line of Business constraints do apply to callours. If the owner resource does not have access to a data record, the callout will not fire for those records.					
SOAP API	~	To enable your integration developers to create webhooks, you must complete two setup tasks:					
Webhooks	1.Add a security level that allows the creation of webhooks						
Creating a webhook Webhooks error handling	* *	INFORTANT For security reasons, the ability to create webholds is disabled by default for all security lewis. Webholds can send information from your Autotask database to an external service. Autotask administrators should grant this permission selectively and spannally, rather than assigning it by default to an entire group of security lewis.					
ExecuteCommand API	~	To take advantage of webhooks, you must create a	an API only security level and enable the setting:				
Report Data Warehouse About online help	 1. Go to Admin > Features & Settings > Resources (Users) > Security > secur						
Autotask PSA user documentation		4. Select the Can create WebHooks check box	and enter the maximum number of webhooks users with this secur	ity level will be allowed to create.			
		WebHooks Can create WabHooks	Maximum number of WebHooks* 50				
		NOTE A best practice is to create a separate se each integration, enhancing overall application	curity level and a separate resource for each integration. Doing so a security.	illows you to tailor data access, impersonation rights, and webhook permissions to	þ		
		2. Assign the new security level to an	integration developer				
		Once you have set up an API user security level wi	th webbooks permission, assign it to the integration developer who	will be creating webhooks.			
		IMPORTANT IMPORTANT SECURITY CONSTRAIN the entity is associated. If their permissions wo requirements. As an example, a delete callout v	NT: Webhooks will only fire if the webhook owner has the required er uid prevent them from performing an action, any webhooks they ore will only fire if the owner has delete permissions for the account.	ntity and object-level permissions, or access to the Line of Business with which aated won't fire in response. Make sure that the security level settings match the			

b. Configure Webhooks according to the Autotask documentation, then register the Webhooks interface on the MSPBots platform.

	X	Autotask Success Last success auth : 07/12/2023 11:00 CDT Type : PSA	⊳	≈ ⑦ …	
١	-	Taxana and 27/22/2023 11.01 CDT Taxa Char	⊳	Detail Synchronise	
l				WebHook	
				Remove ~	

c. Click the **Register** icon to complete the registration.

Autotask							\oplus \times
WebHook API List			Callback Registration History				
API	Last Callback Registration Time	Status	Action	Action	Time	Duration(s)	Status
					No	Data	
Company		Failed	œ				
Contact		Failed	•				
ConfigurationItem		Failed	•				
Ticket		Failed	•				
TicketNote		Failed	•				