

# 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.

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2. [Entering the API keys from Autotask to MSPbots](#)
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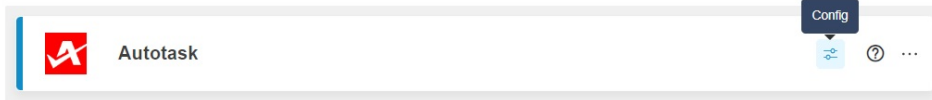
## 1. Creating an API User and Getting API Keys from Autotask

- 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**.
- i. 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 HELP v2021.3 What can we help you find?

Welcome to Developer Help!

- General information about Autotask PSA APIs
- REST API
- SOAP API
- Webhooks**
- Creating a webhook
- Webhooks error handling
- ExecuteCommand API
- Report Data Warehouse
- About online help
- Autotask PSA user documentation

### Requirements and configuration steps

To create webhooks, you must use version 1.6 or above of the **Autotask PSA SOAP API** or version 1.0 or above of the **Autotask PSA REST API**. Integration developers must have an **API only** security level.

**NOTE** The resource's security and Line of Business constraints do apply to callouts. If the owner resource does not have access to a data record, the callout will not fire for those records.

To enable your integration developers to create webhooks, you must complete two setup tasks:

1. Add a security level that allows the creation of webhooks

**IMPORTANT** For security reasons, the ability to create webhooks is disabled by default for all security levels. Webhooks can send information from your Autotask database to an external service. Autotask administrators should grant this permission selectively and sparingly, rather than assigning it by default to an entire group of security levels.

To take advantage of webhooks, you must create an API only security level and enable the setting:

- Go to **Admin > Features & Settings > Resources (Users) > Security > Security Levels**.
- Right-click the **API User (system) (API-only)** security level, or any other one with a license type of API User and select **Copy Security Level**.
- Expand the **Other** section.
- Select the **Can create WebHooks** check box and enter the maximum number of webhooks users with this security level will be allowed to create.

**Webhooks**

☒ Can create WebHooks

**Maximum number of WebHooks\***

50

**NOTE** A best practice is to create a separate security level and a separate resource for each integration. Doing so allows you to tailor data access, impersonation rights, and webhook permissions to each integration, enhancing overall application security.

2. Assign the new security level to an integration developer

Once you have set up an API user security level with webhooks permission, assign it to the integration developer who will be creating webhooks.

**IMPORTANT** **IMPORTANT SECURITY CONSTRAINT:** Webhooks will only fire if the webhook owner has the required entity and object-level permissions, or access to the Line of Business with which the entity is associated. If their permissions would prevent them from performing an action, any webhooks they created won't fire in response. Make sure that the security level settings match the requirements. As an example, a **delete** callout will only fire if the owner has delete permissions for the account.

b. Configure Webhooks according to the Autotask [documentation](#), then register the Webhooks interface on the MSPBots platform.

**Autotask** Success

Last success auth : 07/12/2023 11:00 CDT Type : PSA

**Webhooks**

Last success auth : 07/12/2023 11:00 CDT Type : PSA

Detail

Synchronise






**WebHook**

Remove

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

**Autotask**

**WebHook API List**

API	Last Callback Registration Time	Status	Action
Company		Failed	
Contact		Failed	
ConfigurationItem		Failed	
Ticket		Failed	
TicketNote		Failed	

**Callback Registration History**

Action	Time	Duration(s)	Status
No Data			