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:

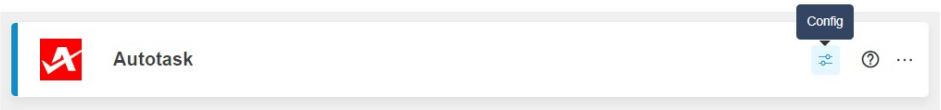
1. Creating an API User and Getting API Keys from Autotask

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**.

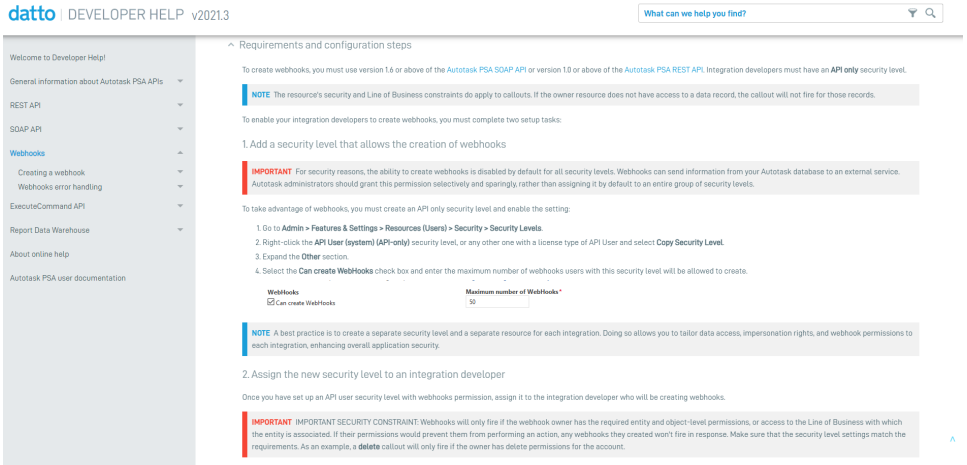


c. Fill out the following in the Information section:
    - For **API User Name**, enter the username (key) from Autotask.
    - For **API User Password**, enter the password (secret) key from Autotask.
d. Once both are entered, click **Save and Sync**. If set correctly, you'll get a message stating the synchronization was successful.

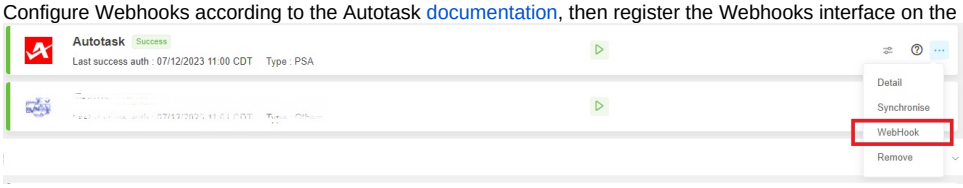
    - If the input information is incorrect, you will be prompted with the following message: "500 INTERNAL_SERVER_ERROR - Internal Server Error at auto task remote server" When this happens, re-enter the correct username (key) or password (secret).
    - If you encounter a data sync error with the message "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.



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



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