User Guide- AutoTask Integration

Overview

This document outlines the steps required to integrate PRISM with AutoTask using the PRISM Connect tool. It assumed that you have a working knowledge of AutoTask and its setup as well as PRISM. If you require more information on setting up AutoTask, please review the AutoTask documentation. If you require more information about PRISM, please contact support.

Contents

Set up integration in AutoTask

For PRISM Connect to synchronise data from PRISM to AutoTask there are some initial set up tasks and configuration that must be completed.

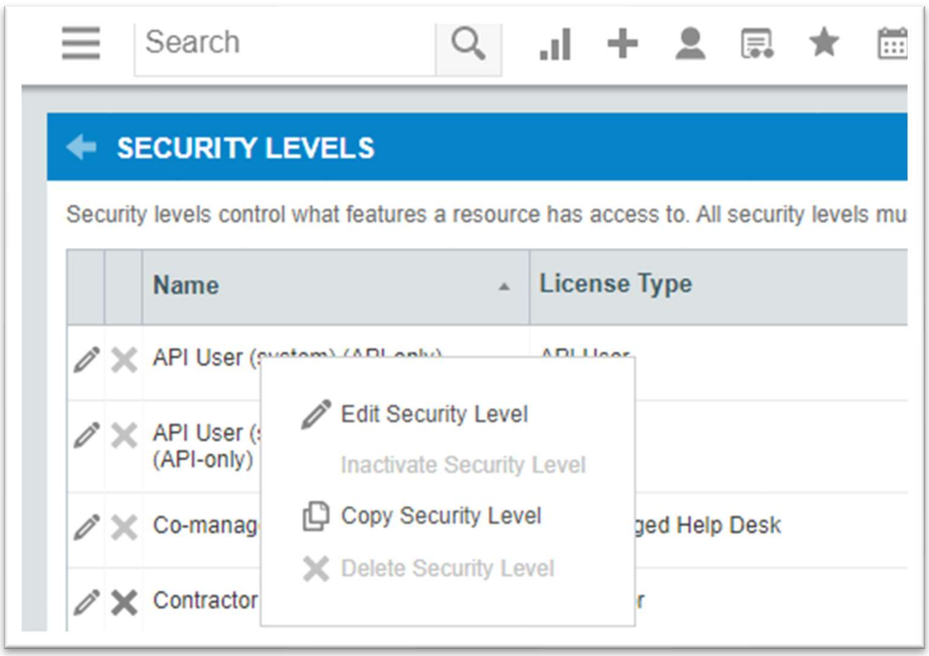
Setup a custom Security Level

This step is optional, but highly recommended

A security level with reduced permissions ensures the API user only has access to the minimum set of required resources.

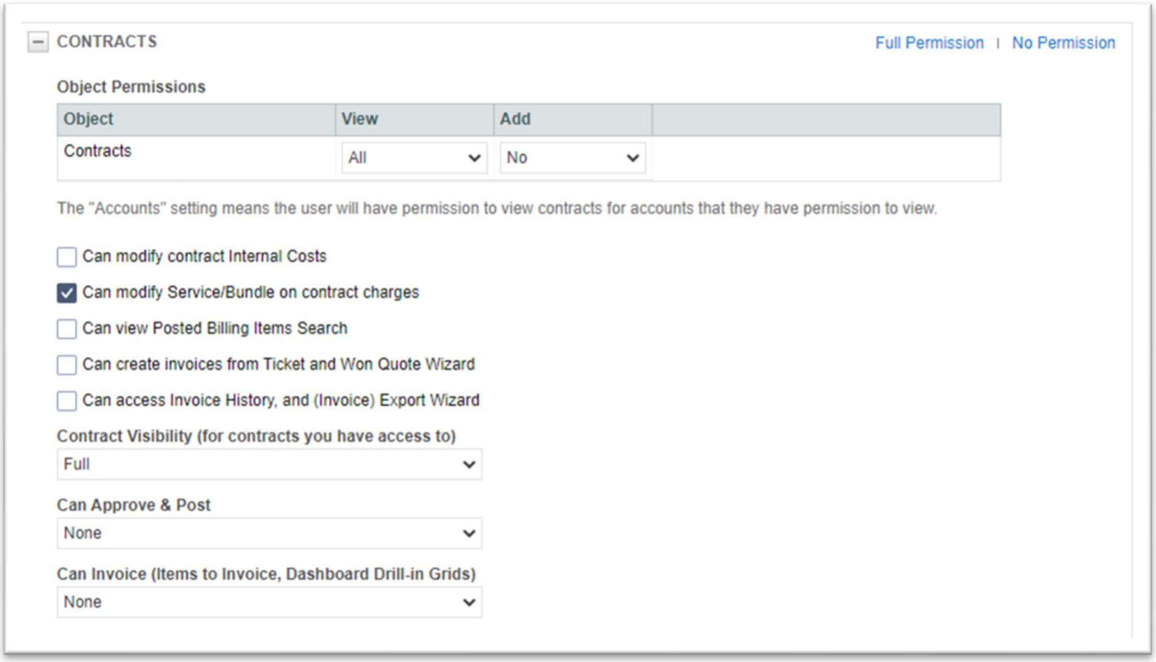
To set up a custom security level:

1. Navigate to **Admin > Account Settings & Users > Resources/Users > Security Levels**
2. Right click on **the API User (system) (API-only)** security level and select **Copy Security Level**



3. Enter a name for the new security level (e.g. "Rhipe Integration") and note this for later use
4. For each security area (e.g. Contracts, CRM) click **No Permissions**

5. For **CONTRACTS**, check **Can modify Service/Bundle on contract changes** and leave the other checkboxes unchecked, as shown here:



6. For **CRM**, configure the settings as follows (**All** for **Customer & Cancelation**):

CRM — Full Permission | No Permission

Account & Contact Access

Object	Permission
Customer & Cancelation	All
Vendor & Partners	None
Prospects, Leads, & Dead	None

The "Mine" setting for accounts allows the user to see all accounts where they are the account manager or a member of the account team. The "My Territories" setting also includes "Mine".

Object Permissions (for accounts you have access to)

Object	View	Add	Edit	Delete
Accounts	see above	None	None	None
Contacts		None		
Opportunities & Quotes	None	None	None	None
Sales Orders	None	not applicable	None	None
Configuration Items & Subscriptions	None	None	None	None
Configuration Item Notes			None	None
Notes	Yes	None	None	None
To-Dos	Yes	None	None	None
Attachments	None	None	not applicable	None

The "Mine" setting for the "Accounts: "Edit" and "Delete" permissions will also give the user Edit and Delete permissions for accounts in their territories if they have the "My Territories" or "All" Account Access/Availability setting.

Feature Access

- [ ] Contact Group Manager
- [ ] Can access Export features in CRM section (requires CRM standard reports permission)
- [ ] Device Discovery Wizard
- [ ] Can Manage Quote Templates and Quote Email Messages Outside of Admin
- [ ] Can request RMA

Opportunity Checklist Permissions

- [ ] Can add/edit Library Checklists
- [ ] Can delete Library Checklists
- [ ] Can add/edit items
- [ ] Can delete/uncomplete items

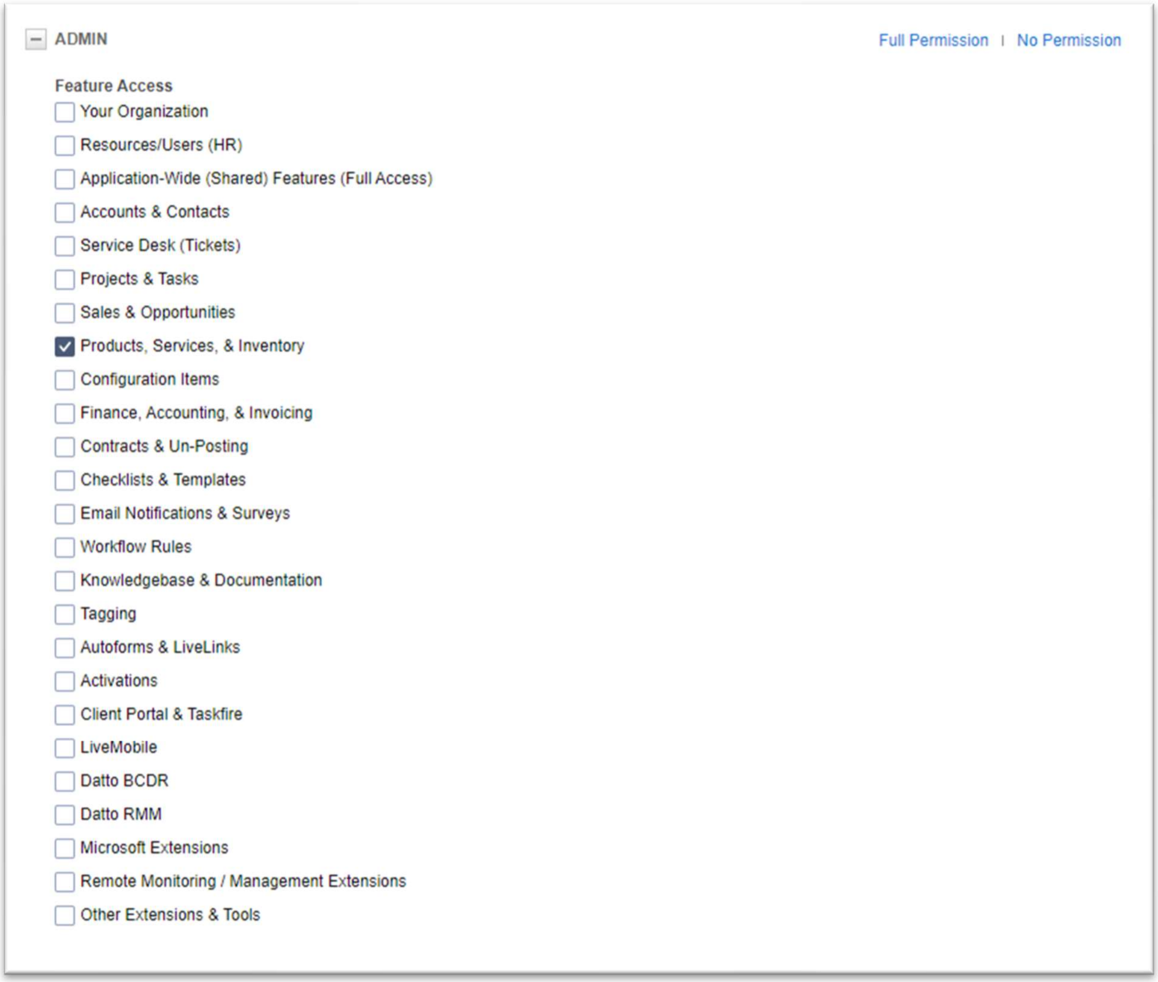
Other Permissions

- [ ] Can modify Account Manager (reassign Accounts)
- [ ] Can modify Opportunity Owner (reassign Opportunities)
- [ ] Display ALL accounts in account pick lists and data selectors When checked, resources will be able to create and search items associated with accounts that they do not have permission to view.
- [ ] Can erase (redact) Contacts

Dashboard Display

None

7. For **ADMIN**, check **Products, Services, & Inventory** and leave the rest unchecked, as shown here:



8. For **WEB SERVICES API**, ensure **Can login to Web Services API** is enabled. All other settings can be left unchecked.

Add a Recurring Service Contract

Follow AutoTask instructions to Add a Recurring Service Contract.

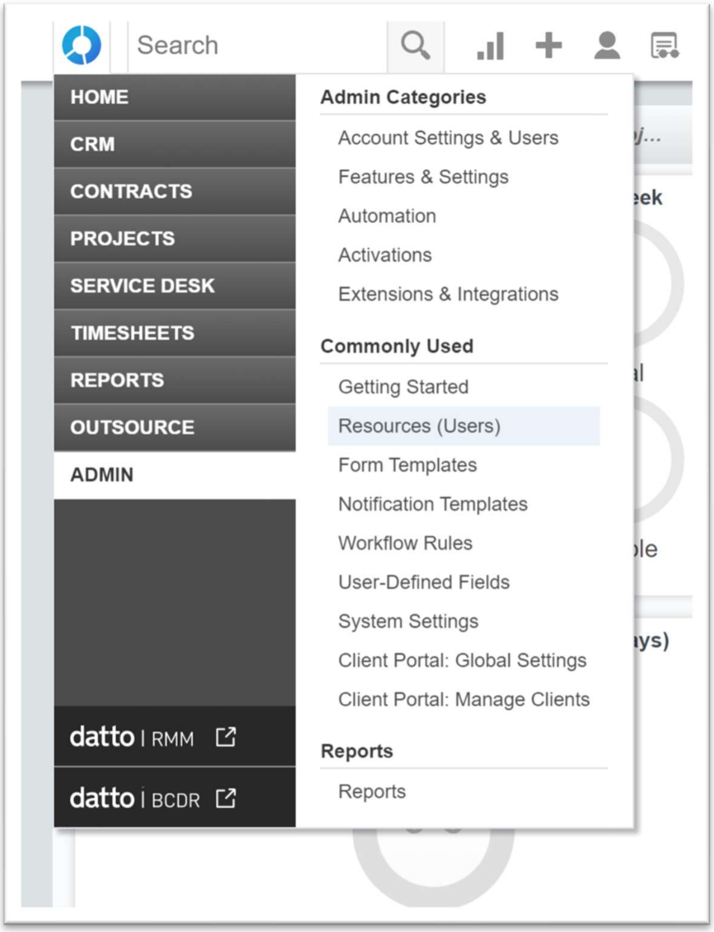
If you are billing in advance, see the section on Billing in Advance.

Please note to avoid prorated line items on invoices generated by AutoTask, set the start date of the contract to the first day of the month.

Configure AutoTask API User

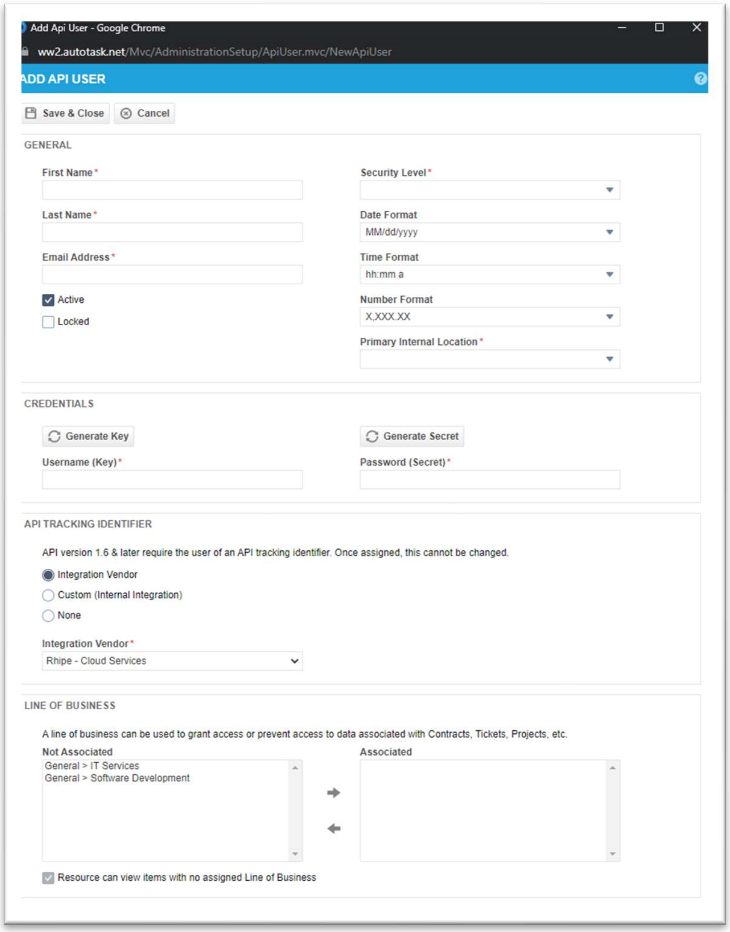
An API user will be required to enable PRISM Connect to sync data to AutoTask. Login to the AutoTask portal and perform the following steps:

1. In the menu (top left) go to Admin -> Resources (Users)



2. From the Resources view, at the top left, click + New and select New API User
3. Enter all the required fields for a new user. An email address that is actively monitored should be used in case you get notifications related to this user. Make sure to leave **Active**

checked and **Locked** unchecked. For the **Integration Vendor** select 'Rhipe - Cloud Services'



4. Generate a **Username** and **Secret**. Save the secret somewhere secure, as you will not be able to view it again after saving. This Username and Secret will be required in PRISM Connect when configuring the AutoTask sync
5. Click **Save & Close** in the top left corner

For more information see the AutoTask help guide for adding or editing and API user.

Initial setup in PRISM Connect

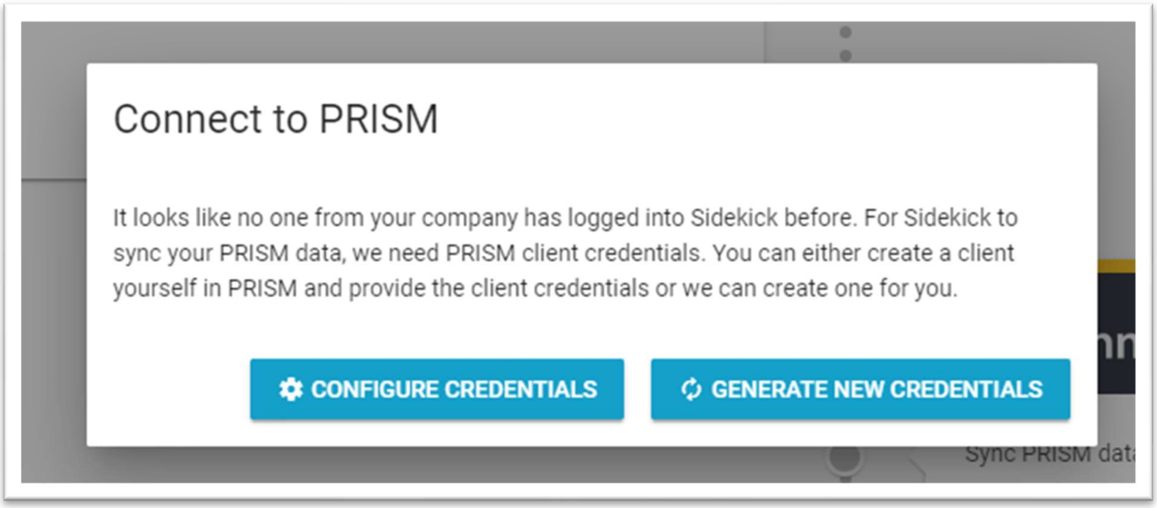
Accessing PRISM Connect

When logged into PRISM Portal, click the **PRISM Connect** link.

| **NOTE:** The UAT environment does not have a link from PRISM Portal

Establishing a connection to PRISM

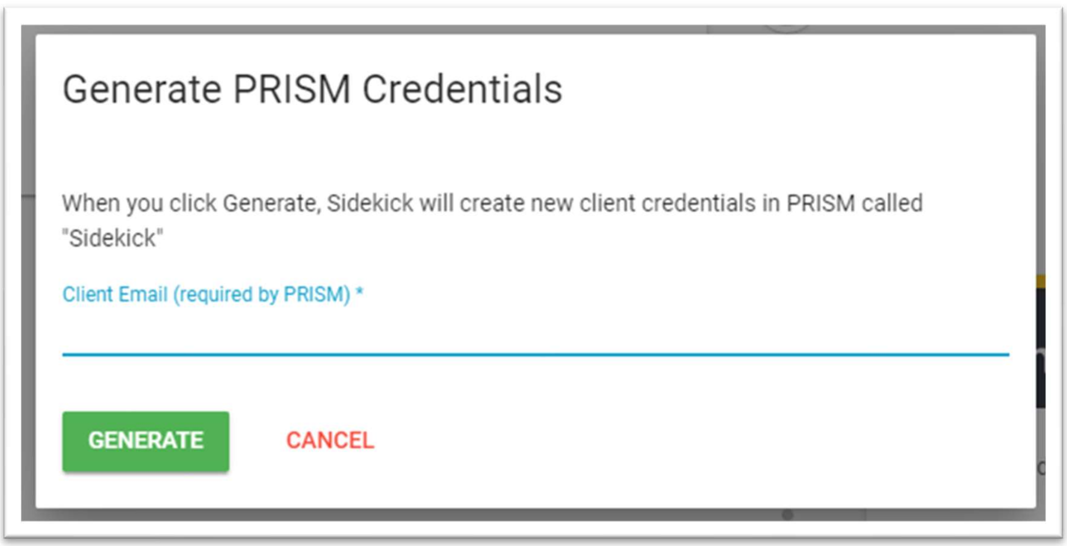
If it is the first time a user from your organisation has accessed the PRISM Connect site, you will be presented with an option to manually configure PRISM API client credentials, or for the Connect application to automatically generate PRISM Client credentials on your behalf.



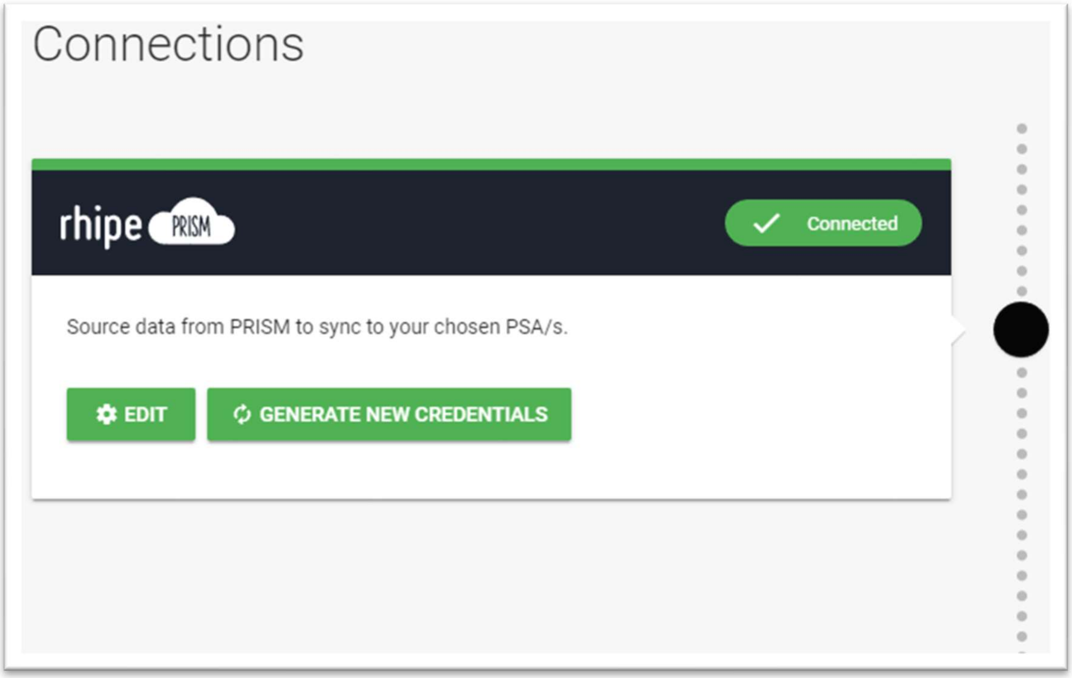
Either select **CONFIGURE CREDENTIALS** and fill in your API Client Credentials or click **GENERATE NEW CREDENTIALS** to have PRISM Connect generate them for you.

Generating PRISM credentials

1. Enter an email address. This is required by PRISM for reporting.

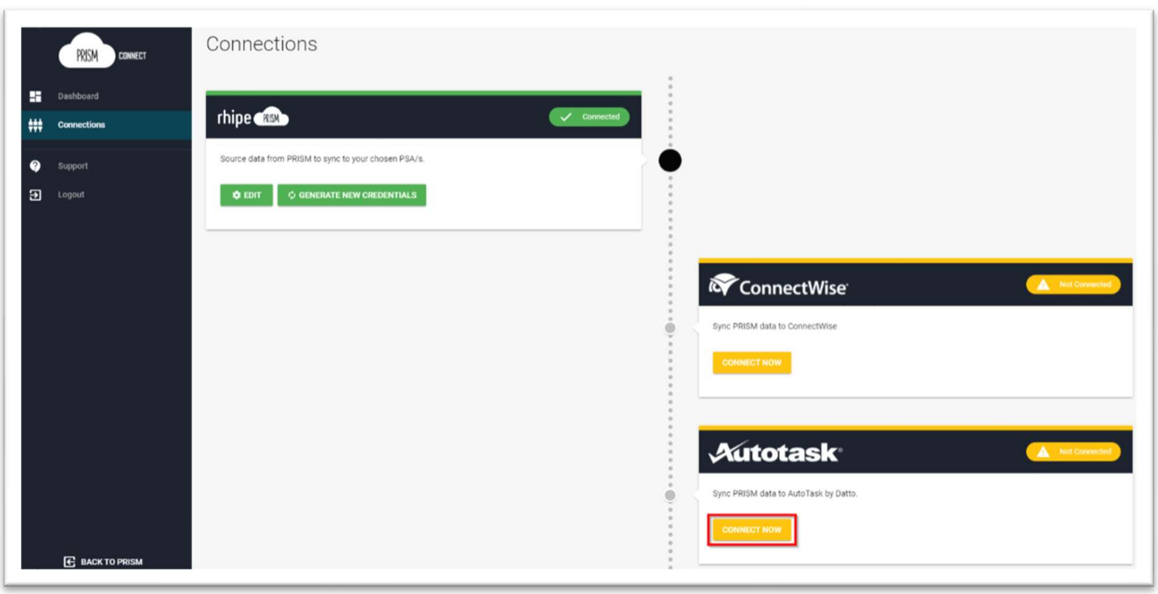


2. After clicking **GENERATE** the system will create new API client credentials on the PRISM platform and the Connections screen will display the green connected status for PRISM.

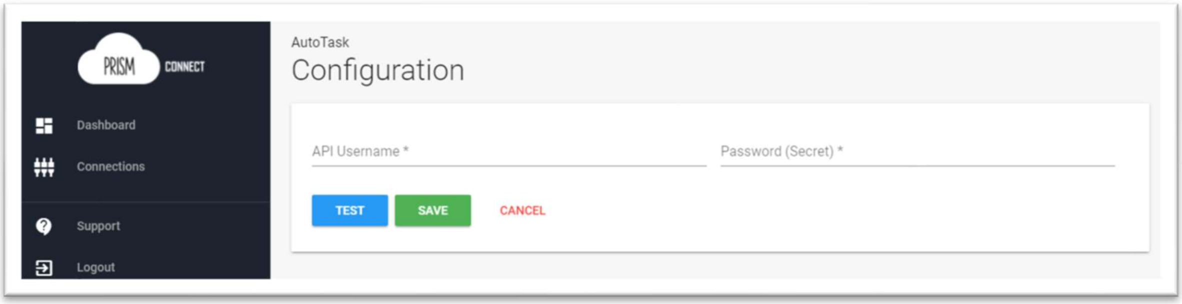


Connecting to AutoTask

1. On the **Connections** screen of PRISM Connect, click the **CONNECT NOW** button on the AutoTask card.



2. Enter the AutoTask API Username and Password. Click **Test** to perform a check that the credentials are set correctly. Click **Save**

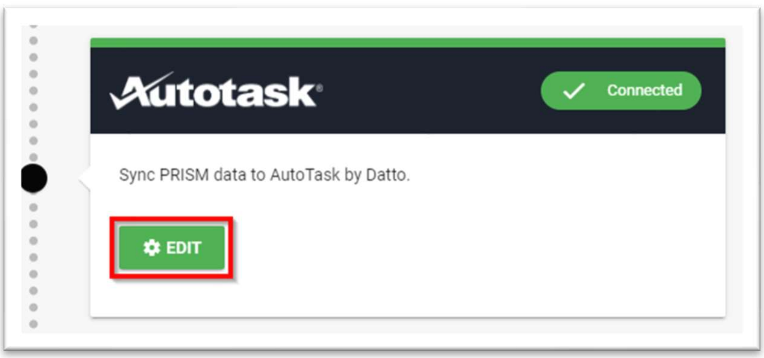


3. After successfully configuring AutoTask, the **Connections** page will show a green status.

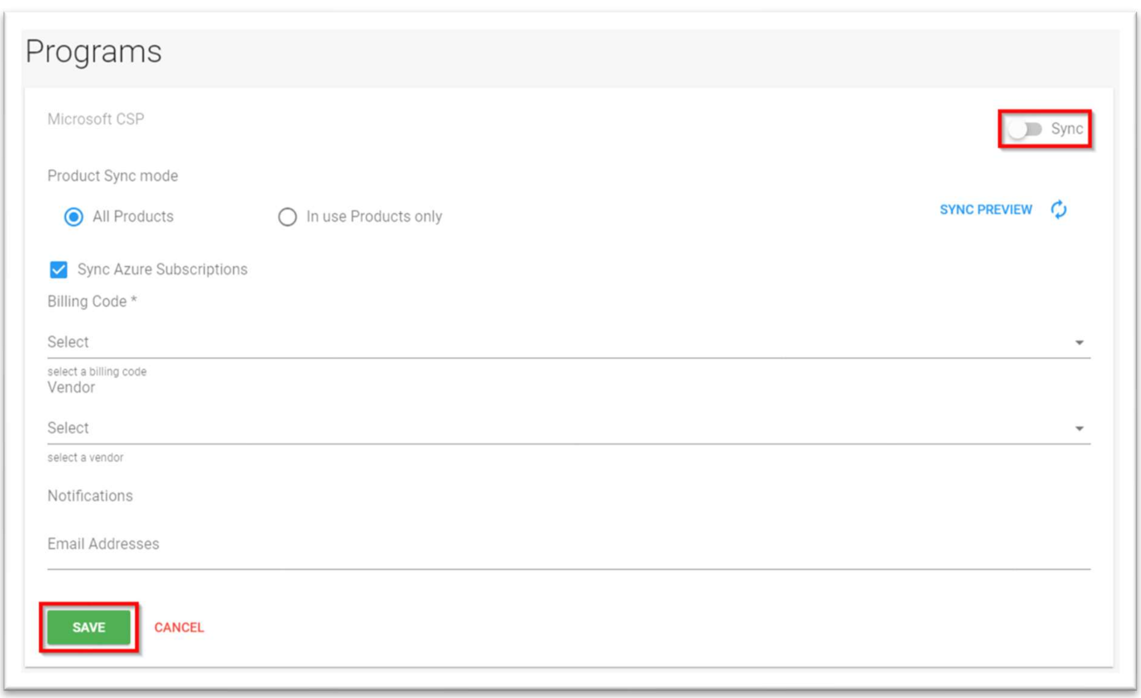
Configure Program Sync Options – Microsoft CSP

You will need to configure which programs to sync to AutoTask. At this stage, only Microsoft CSP is available, but other programs may become available in the future.

1. From the **Connections** screen, click **EDIT** on the **AutoTask** card



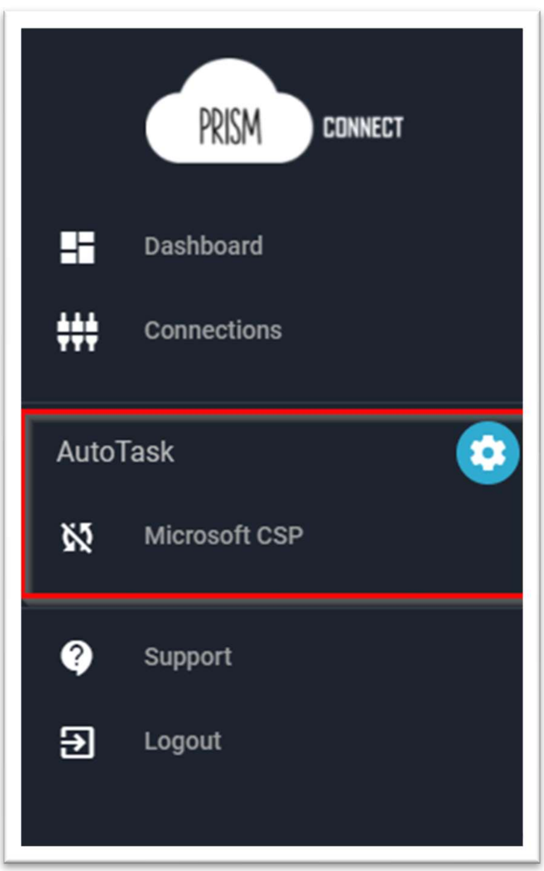
2. Toggle the **Sync** switch in the top right corner to allow syncing and choose your configuration options (more information below), then click **SAVE**.



Configuration options:

- **Product Sync Mode**
    - All products – All products for the PRISM Program will be synced to AutoTask as Catalogue items.
    - In Use Products only - Only products found in Invoices for the synced Customers will be added.
- **Sync Azure Subscriptions**
    - Azure usage will result in a contract service unit with a Quantity of 1. Cost/Unit Price will be set to the line item's prices; the following months usage will be set to zero
- **Billing Code**
    - The Billing Code (also known as Service Code) required for the AutoTask Service. Only Services Codes which are set to Recurring Contract will be available. More Info.
- **Vendor**
    - (optional) The Vendor Company in AutoTask associated with product. A Vendor Company can be used to group services for reporting. More info.
- **Email Addresses**
    - (optional) One or more email addresses to receive Notification emails when syncing this Program. For example, Sync errors and Price Change warnings.

Once you have configured a program to Sync, the program will show as a menu item, allowing you to quickly navigate and configure the program sync.



The Product Sync

PRISM Connect will create a service in AutoTask for each product in PRISM Connect, unless the sync mode is In **Use Products Only**, in which case a subset will be synced based on usage.

The service name will contain the product SKU and can be renamed after the first sync. The services added by PRISM Connect can be identified by the prefix "PC_" followed by the product SKU. PRISM Connect will continue to update the service based on the service id. Only the service unit price and unit cost will be updated after the first sync.

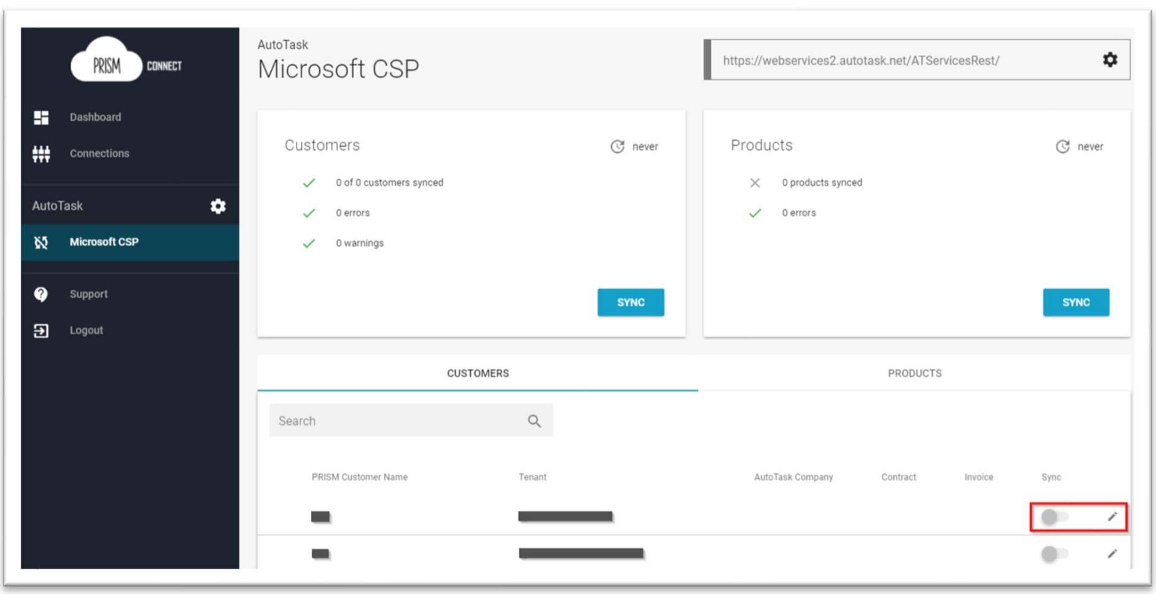
If a service is deleted in AutoTask, PRISM Connect will create an equivalent service on the next sync. If a service no longer exists in PRISM Connect, sync will NOT remove the service from AutoTask.

New services added by PRISM Connect are active. If a service that is synced by PRISM Connect is set inactive, PRISM Connect will continue to sync that service, but the service will remain inactive.

Configuring Customers

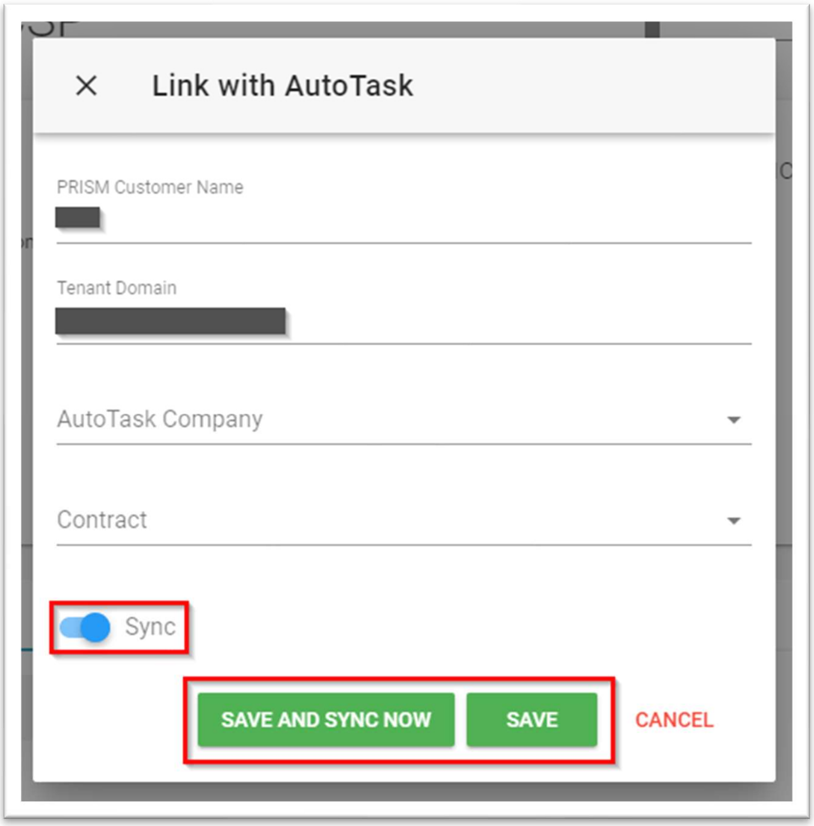
PRISM Connect works by syncing invoices from a PRISM Customer/Tenant to a Contract for an AutoTask account. You must have the AutoTask accounts and contracts set up prior to this step.

1. Locate the Prism Customer you wish to map. You may use the sorted headers on the Customers table, or type into the search filter box. Once you have located the Customer, you must first map it to AutoTask before you can turn on Sync. This is the 'pencil' icon.

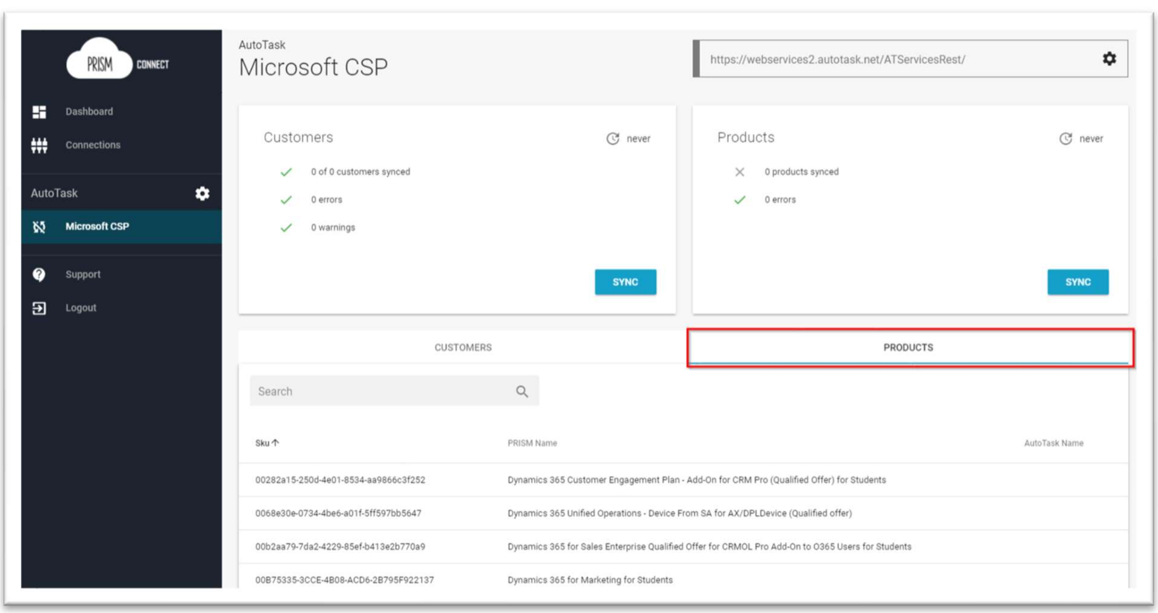


2. Clicking edit will open a window to map to existing AutoTask Company/Contract. Select your target Company and Contract. If you wish to turn the sync on immediately, ensure the **Sync** switch is on, otherwise turn it off. If you have turned Sync on, you may **SAVE** and let the background processing perform the sync, or you may choose to **SAVE AND SYNC NOW**.

Doing so will save the current mapping and immediately perform a sync for this customer



3. After setting up the Customer sync, you can *preview* the Product Sync results by selecting the **Products** tab



Billing in Advance

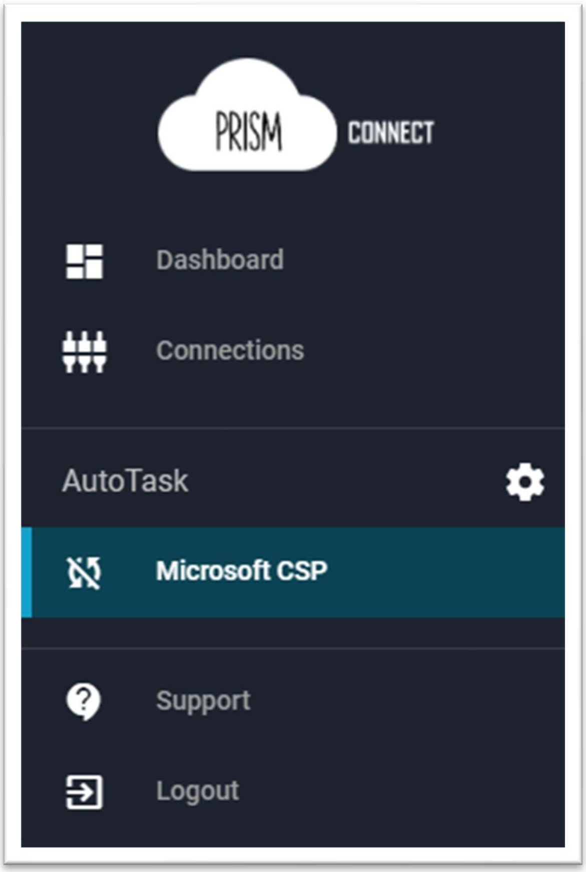
Billing in advance is not recommended, however you may be able to achieve it with the following steps.

1. Sync the most recent invoices for a customer in AutoTask

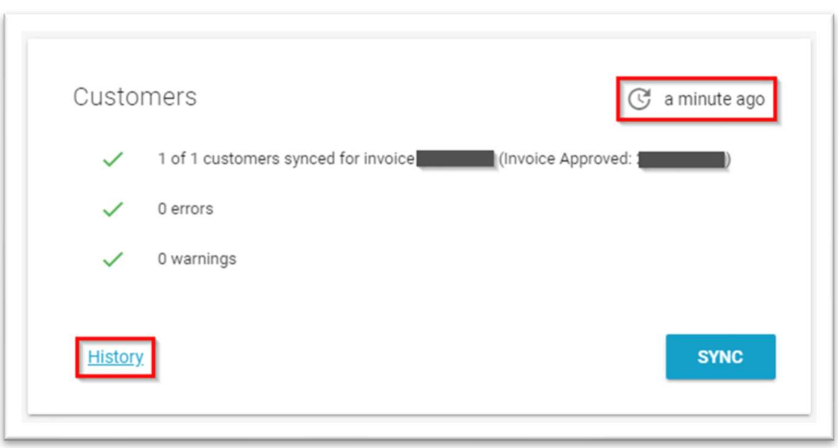
2. Manually update the **ContractService** to ensure quantities are correct
3. At the start of the billing period, update the quantity to the quantity from the previous step
4. Generate the invoice.

Sync Results and Failures

You may see sync results on your dashboard, or by navigating to a program:



The dashboard and program screen will show 2 cards with the latest sync results: one for customers and one for products.



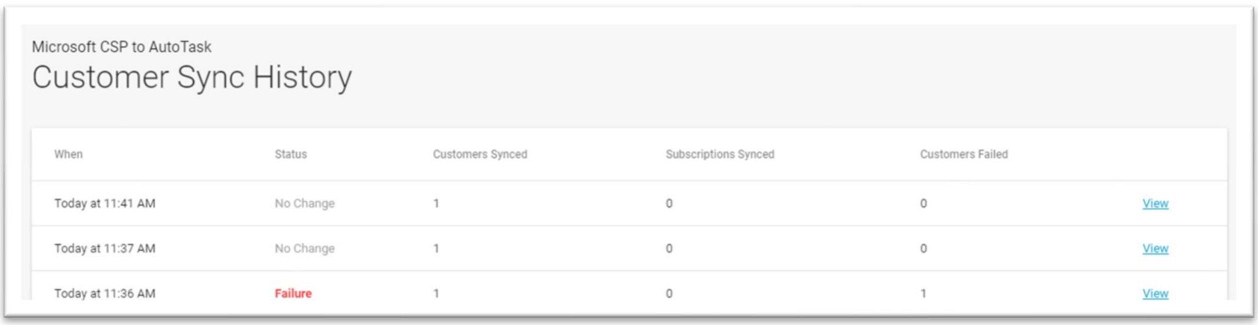
The card will show the date of the **last successful** sync. i.e., the last sync where data could be considered correct. The card also shows the sync counts for the **last sync**, regardless of its status. The bottom of the card will have a link to the **history** of the sync process.

Sync History Screen

Each time the PRISM connect sync executes a new record is created in the Customer Sync History screen.

The status gives you an idea of what happened for that sync:

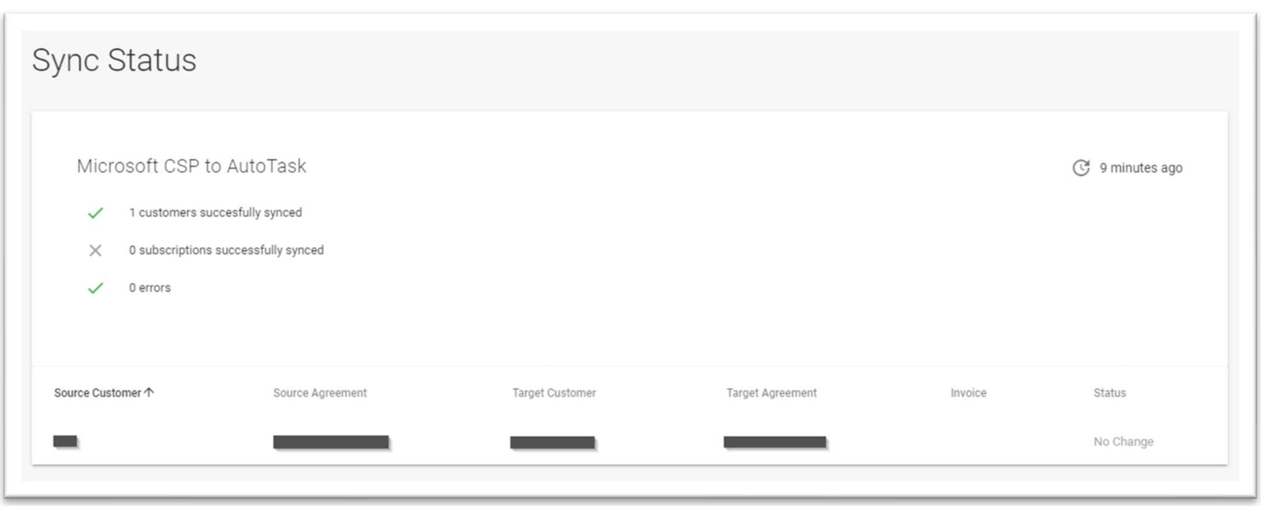
- **No Change** – There was no changes or new data to sync
- **Success** – New data from PRISM was successfully synced to AutoTask
- **Warning** – New data synced but there where warnings raised, to review the items view the details
- **Failure** – There was data to sync but the sync had one or more failures, to review the items view the details of the error(s)



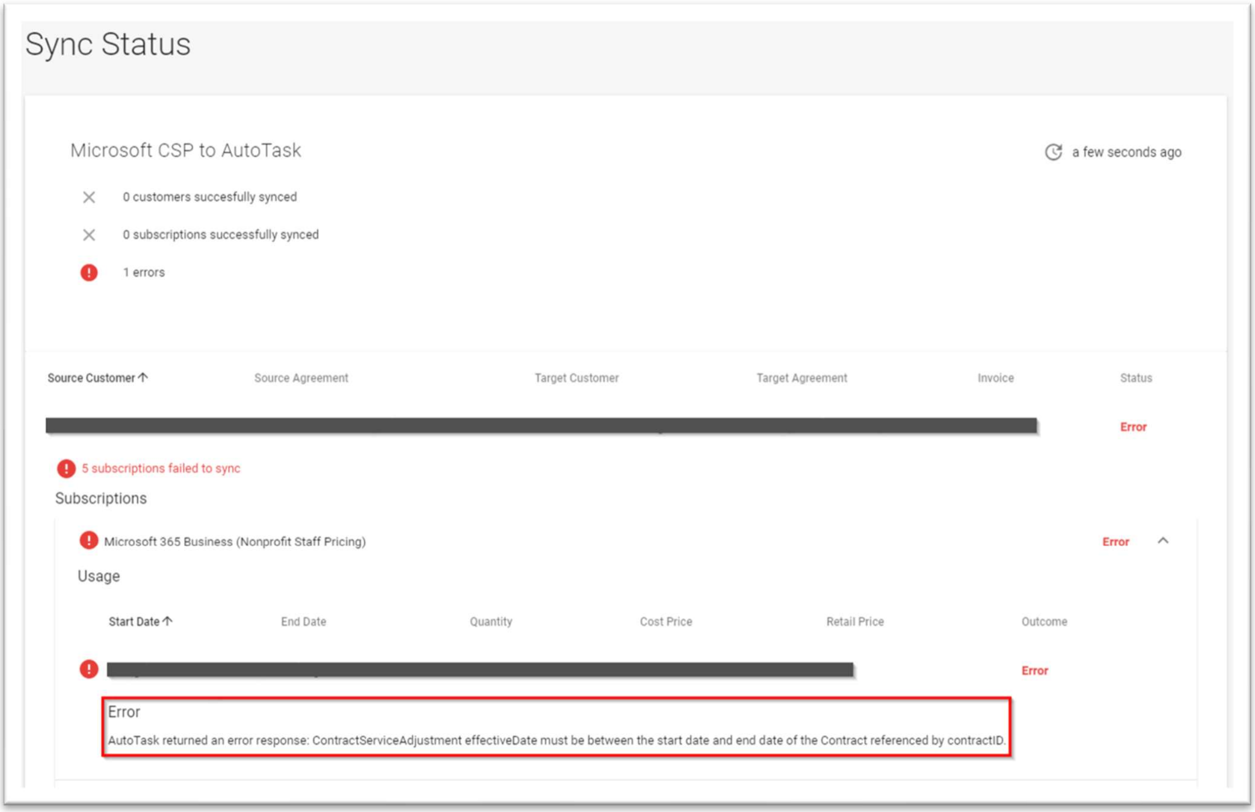
Clicking any line item of the **View** link will take you to the Sync Status screen.

Sync Status Screen

Clicking a **view** link from the History page, or clicking a link from a **failed sync email**, you will see the **Sync Status** screen that lists out the synced items and their individual status as required.



When an error or warning occurs, the details will be displayed inline with the subscription where the error/warning occurred.



NOTE: The ***Troubleshooting*** section in this document has information on some of the common warnings and errors, including what actions you can take to rectify them.

Tips to make the transition to PRISM Connect smoother

1. Preview the product sync before enabling the sync.
2. Start small. Initially just enable sync for 1-3 tenants which will be easy to confirm and review prior to invoicing. Don't enable sync for every tenant in your first invoice period.
3. Check your data. This is particularly important for the first 2 billing periods after each customer is enabled in the sync. As each partner using AutoTask differently there may be something in your process we haven't thought of, please check the addition records that are created and review invoices prior to them being sent.

Limitations and Restrictions

Syncing Microsoft CSP to AutoTask

AutoTask Service field is truncated

The AutoTask service **Description** and **Invoice Description** fields have character limits of 400 and 1000 respectively. When the service is created by PRISM Connect, if the field would exceed the character limit, the field is truncated. See the AutoTask help on Services for more information.

No Manual Credit or Adjustment Invoices

Manual Credits and Adjustments are too complicated to reliably automate and may cause issues when invoicing from AutoTask.

Only 'Recurring Service' Contracts

For a contract to successfully sync with the PRISM Connect tool the Contract must be a 'Recurring Service' contract.

No support for annual licences

This product does not support syncing of subscriptions which have been purchased on an annual basis. Those subscriptions will be ignored by the synchronisation process.

Partners with multiple MS CSP Agreements

Partners who have multiple Microsoft CSP Agreements in place (more than one contract agreement with rhipe) are not support by this product. Partners in this scenario who use the product will have no control over which of the rhipe agreements in used for the sync.

Data timeliness

During the month it is only possible for to get an estimated cost for a subscription, actual partner costs are not finalised until the monthly invoice is generated. This product will sync automatically when a new invoice is detected and will accurately set quantity and pricing data for subscriptions. However, in between invoices the adjustments will not be an accurate indicator of a subscriptions state in PRISM. This means if a new MS CSP tenant is created and the sync of tenant is configured in the product no **contract services** will created in AutoTask until the next PRISM invoice is generated which includes the tenant.

FAQ

What information is synced?

1. PRISM Connect creates, and updates services in AutoTask based on the PRISM price list. PRISM Connect will update the price and cost of the product.
2. PRSIM Connect will also sync the standard monthly invoices for the program, creating Additions in ConnectWise to correctly prorate the subscription changes from the previous month.

What pricing are you using?

The cost price will be your rhipe buy price and the price (sell price) will be set the scheduled RRP price for the products also based on the PRISM price list. This should ensure you are always selling at your correct margin.

Will PRISM Connect overwrite all my services in AutoTask?

PRISM Connect will create a new service for every product and keep its pricing information up to date thereafter. It will not update any services in AutoTask that existed before the first sync.

Is it possible to bulk edit services created by PRISM Connect?

AutoTask support bulk edit of services using it's import/export feature as documented in AutoTask Help. You can export all services to CSV, make appropriate edits to the services, and import only the services you want to update. Please see the AutoTask documentation for more information.

Can I easily remove all the services created by PRISM Connect?

There is no way to bulk-delete services in AutoTask. Instead, consider using the import/export tool to deactivate services as needed.

What if I have a product which is no longer on the pricelist, but I still get invoiced for it?

For **retired** products you will need to contact rhipe program support to manually map the retired product for you in PRISM Connect.

What if I don't already have the product in AutoTask?

No problem, PRSIM Connect will add the product for you. Unless the product is no longer on the pricelist (i.e. retired products) this case you will need to manually create the product and contact rhipe program support to manually map the product for you in PRISM Connect.

Why do the products that are added have an ugly SKU as the Service name?

This is due to the field limits set by AutoTask. You can change the **Service Name** to anything you like after the products has been created.

Do I need to start with all new contracts?

No. You can use your existing contracts and PRISM Connect will create new Contract Services for invoice items on the first sync.

Can I change the Contract Services after they are synced?

You sure can, your data is your data. Just remember that the next time an invoice is synchronised new adjustments will be created against the Contract Services which will set the quantity to match the quantity on the PRISM invoice.

How does the system do proration for new subscriptions?

When a subscription is added part way through the month it is simply created with the correct effective date, AutoTask will handle the proration of the cost and price.

Can I stop the sync?

Sure. You can disable the sync at any time just be careful of you timing if you re-enable it.

You can disable the sync for an individual customer or for the entire program.

The AutoTask API User is locked. How do I unlock it?

In AutoTask, go to **Admin > Resources (Users)** and find the API user. Then clicked **Edit** and uncheck **Locked**, then **Save & Close.**

Troubleshooting

This section can be used to diagnose common warnings and errors reported in PRISM Connect.

Warnings

Warnings occur when a sync occurs and transfers data, but the outcome of the sync may need manual adjustment depending on your billing details.

Warning Message	Description and action required

Errors

When an error occurs, PRISM connect has failed to sync the data for one or more subscriptions.

Error Message	Description and action required
ContractServiceAdjustment effectiveDate must be between the start date and end date of the Contract referenced by contractID.	PRISM Connect can only operate with active 'Recurring Service' AutoTask contracts. An active contract is one where the 'Active' field in AutoTask is set and the current date is between the Contract start and end date. Review the contract in AutoTask
AutoTask returned an error response: Violation of UNIQUE KEY constraint 'IX_service'. Cannot insert duplicate key in object 'dbo.Service'. The duplicate key value is (********************). Error updating database for new entity records.	This error occurs when a service that was not created by PRISM Connect a name that matches the SKU of a product in PRISM. For example, if a product SKU is *sku_1357*, then when the service is created in AutoTask, the service name will be *CP_sku_1357*. Because all service names are required to be unique, if a service with that name already exists, the error will occur. It is recommended to rename or delete the service that is causing the conflict, and then sync products again. After successfully syncing the product, and required changes can be made, including changing the name. PRISM Connect will continue to sync the PRISM product to the same service in AutoTask.
Error executing AutoTask POST request to 'https://webservices2.autotask.net/ATServicesRest/v1.0/Services'. Status code: Unauthorized. Error message:	This error will occur if the sync has started, but some requests to the AutoTask API were unauthorised. The API user in AutoTask may not be authorized for many reasons. - The user credentials may have changed - The user may be locked - The security level may not be configured correctly

	Check that the AutoTask credentials are correct. See Connecting to AutoTask for instructions. Check that the API user in AutoTask is not locked. See the FAQ.
Could not find source product or multiple matches	The product associated with the subscription could not be found in the set of know PRISM connect products Please contact rhipe Operations team
An unexpected error occurred	Please contact rhipe Operations team