

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.

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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

		Search	Q .1 + 2 ★ ∅
+	SE		EVELS
Sec	unity	Name	I what features a resource has access to. All security levels mu License Type
D	×	API User (?"	atom) (ADLanki) ADLUgar
Ø	×	API User (: (API-only)	Contractivate Security Level
D	×	Co-manag	Copy Security Level ged Help Desk
0.	×	Contractor	K Delete 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:

Object Permissions							
Object	View		Add				
Contracts	All	~	No	~			
The "Accounts" setting me	eans the user will have per	mission t	o view contra	cts for accounts the	at they have perm	ission to view.	
Can modify contract In	ternal Costs						
Can modify Service/Bu	undle on contract charges						
Can view Posted Billin	g Items Search						
Can create invoices fro	om Ticket and Won Quote	Wizard					
Can access Invoice Hi	story, and (Invoice) Export	Wizard					
Contract Visibility (for co	ontracts you have acces	s to)					
Full		~					
Can Approve & Post							
None		~					
Can Invoice (Items to Inv	voice, Dashboard Drill-in	Grids)					
Maria							



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

м			Full Permission
ccount & Contact Access			
Object	Permission	l)	
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

Mono			
NULLE			



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

ADMIN	Full Permission No Permiss
Feature Access	
Your Organization	
Resources/Users (HR)	
Application-Wide (Shared) Features (Full Access)	
Accounts & Contacts	
Service Desk (Tickets)	
Projects & Tasks	
Sales & Opportunities	
Products, Services, & Inventory	
Configuration Items	
Finance, Accounting, & Invoicing	
Contracts & Un-Posting	
Checklists & Templates	
Email Notifications & Surveys	
Workflow Rules	
Knowledgebase & Documentation	
Tagging	
Autoforms & LiveLinks	
Activations	
Client Portal & Taskfire	
LiveMobile	
Datto BCDR	
Datto RMM	
Microsoft Extensions	
Remote Monitoring / Management Extensions	
Other Extensions & Tools	

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)



Search	Q .ıl + ≜ ₪	
НОМЕ	Admin Categories	-
CRM	Account Settings & Users	
CONTRACTS	Features & Settings	
PROJECTS	Automation	
	Activations	
SERVICE DESK	Extensions & Integrations	
TIMESHEETS	Commonly Used	
REPORTS	Getting Started	
OUTSOURCE	Resources (Users)	
ADMIN	Form Templates	
	Notification Templates	
	Workflow Rules	
	User-Defined Fields	
	System Settings	\ \
	Client Portal: Global Settings	1
	Client Portal: Manage Clients	
datto I RMM	Reports	
datto i BCDR 🖸	Reports	

- 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'

DAPIUSER		
Save & Close ③ Cancel		
NERAL		
First Name "	Security Level *	
		*
Last Name*	Date Format	
	MM/dd/yyyy	-
Email Address*	Time Format	
	hh:mm a	
Active	Number Format	
Locked	X,XXX,XX	-
	Primary Internal Location*	
	rindiy internal cocation	-
TRACKING IDENTIFIER		
	API tracking identifier. Once assigned, this cannot be changed.	
API version 1.6 & later require the user of an A Integration Vendor Custom (Internal Integration) None		
API version 1.5 & later require the user of an A Integration Vendor Custom (Internal Integration) None Integration Vendor		
API version 1.5 & later require the user of an A integration Vendor Custom (Internal Integration) None Integration Vendor* Rhipe - Cloud Services		
API version 1.6 & later require the user of an A integration Vendor Custom (Internal Integration) None Integration Vendor* Rhipe - Cloud Services	v	
API version 1.6 & later require the user of an A integration Vendor Custom (Internal Integration) None Integration Vendor* Rhipe - Cloud Services E OF BU SINE SS	~	
API version 1.6 & later require the user of an A integration Vendor Custom (Internal Integration) None Integration Vendor* Rhipe - Cloud Services E OF BUSINESS A line of business can be used to grant access	or prevent access to data associated with Contracts, Tickets, Projects, etc.	
API version 1.6 & later require the user of an A (Integration Vendor) Custom (Internal Integration) None Integration Vendor* (Rhipe - Cloud Services E OF BUSINESS A line of business can be used to grant access Not Associated	or prevent access to data associated with Contracts, Tickets, Projects, etc. Associated	
API version 1.6 & later require the user of an A integration Vendor Custom (internal integration) None Integration Vendor* Rhipe - Cloud Services E OF BUSINESS A line of business can be used to grant access Not Associated General > IT Services	or prevent access to data associated with Contracts, Tickets, Projects, etc. Associated	
API version 1.6 & later require the user of an A Integration Vendor Custom (Internal Integration) None Integration Vendor* Rhipe - Cloud Services E OF BUSINESS A line of business can be used to grant access General > T Services General > Software Development	s or prevent access to data associated with Contracts, Tickets, Projects, etc. Associated	•
API version 1.6 & later require the user of an A integration Vendor Custom (Internal Integration) None Integration Vendor* Rhipe - Cloud Services E OF BUSINESS A line of business can be used to grant access Not Associated General > IT Services General > Software Development.	s or prevent access to data associated with Contracts, Tickets, Projects, etc. Associated	<u>^</u>
API version 1.6 & later require the user of an A (Integration Vendor) Custom (Internal Integration) None Integration Vendor* Rhipe - Cloud Services E OF BUSINESS A line of business can be used to grant access Not Associated General > IT Services General > Software Development	or prevent access to data associated with Contracts, Tickets, Projects, etc. Associated	•

- 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 <u>AutoTask help guide for adding or editing and API user</u>.

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.

Generate PRISM Credentials					
When you click Generate, Sidekick will create new client credentials in PRISM called "Sidekick"					
Client Email (required by PRISM) *					
GENERATE CANCEL					



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.

Connections	
rhipe RKM Connected	• • • •
Source data from PRISM to sync to your chosen PSA/s.	
CREDENTIALS	• • •
	0

Connecting to AutoTask

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

	PRISM CONNECT	Connections
==	Dashboard	
***	Connections	rhipe (RSN)
ø		Source data from PRISM to sync to your chosen PSA/s.
Э		✿ EDIT
		ConnectWise 🖉
		Sync PRISM data to ConnectWise
		COMMETT MOW
		Sync PRISM data to AutoTask by Datto.
		CONNECT NOW
	E BACK TO PRISM	



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

	PRISM CONNECT	AutoTask Configuration	
55	Dashboard		
***	Connections	API Username *	Password (Secret) *
Q	Support	TEST SAVE CANCEL	
€	Logout	1	

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**.

Microsoft CSP		Synt
Product Sync mode		
All Products	O In use Products only	SYNC PREVIEW
Sync Azure Subscriptio	ns	
Billing Code *		
Select		
select a billing code Vendor		
Select		
select a vendor		
Notifications		
Email Addresses		



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. <u>More Info.</u>
- Vendor
 - o (optional) The Vendor Company in AutoTask associated with product. A Vendor Company can be used to group services for reporting. <u>More info.</u>
- Email Addresses
 - o (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.

 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.

PRISM	CONNECT	AutoTask Microsoft CSP			https://webservices2.au	totask.net/ATSe	rvicesRest/		\$
Dashboard	d ns	Customers		C never	Products × 0 products synce	ed		C ne	ever
K Microsoft	CSP	 0 errors 0 warnings 		svalo	✓ 0 errors			SANG	
€ Logout		c	JSTOMERS			PRODUCTS	1	3110	
		Search PRISM Customer Name	Q, Tenant		AutoTask Company	Contract	Invoice	Sync	
		-	_	_				0- 0-	/

 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

× Link with AutoTask	
PRISM Customer Name	
Tenant Domain	
AutoTask Company	•
Contract	•
Sync	
SAVE AND SYNC NOW SAVE	CANCEL

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

PRISM CONNECT	AutoTask Microsoft CSP		https://webservices2.autotask.net/ATServicesRest/	۵
Dashboard Connections AutoTask	Customers v 0 of 0 customers synced v 0 errors	⊙ never	Products × 0 products synced ✓ 0 errors	C never
Microsoft CSP Support Logout	✓ 0 warnings	SYNC		SYNC
	CUSTOMER	S Q	PRODUCTS	
	Sku ↑ 00282a15-250d-4e01-8534-aa9866c3f252	PRISM Name Dynamics 365 Customer Engagement Plan -	Add-On for CRM Pro (Qualified Offer) for Students	AutoTask Name
	0068e30e-0734-4be6-a01f-5ff597bb5647	Dynamics 365 Unified Operations - Device Fr	om SA for AX/DPLDevice (Qualified offer)	

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:

== ;;;;	CONNECT Dashboard Connections
Auto	Task 🏩
8 5	Microsoft CSP
Ŷ	Support
€	Logout

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

Custor	ners	♂ a minute ago
~	1 of 1 customers synced for invoice	ce Approved:
\checkmark	0 errors	
\checkmark	0 warnings	
History]	SYNC

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

CONNECT

PRISM

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)

N (licrosoft CSP to AutoTask Customer Sync H	History				
	When	Status	Customers Synced	Subscriptions Synced	Customers Failed	
	Today at 11:41 AM	No Change	1	0	0	View
	Today at 11:37 AM	No Change	1	0	0	View
	Today at 11:36 AM	Failure	1	0	1	View

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.

Sync Status					
Microsoft CSP to 1 customers succ 0 subscriptions su 0 errors	AutoTask cesfully synced uccessfully synced				€ 9 minutes ago
Source Customer ↑	Source Agreement	Target Customer	Target Agreement	Invoice	Status No Change

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

DDICN	CONNECT
L L L L L	COMMENT

MUCIOSOTI USP TO AUTO L	ask				C	a few seconds and
					0	a rew seconds ago
X 0 customers succesfully syn	nced					
X 0 subscriptions successful	y synced					
1 errors						
ource Customer ↑ Sou	iroo Agroomont			Target Agreement	Annual and an an	Status
	ince Agreement	Target Custor	mer	Target Agreement	Invoice	Status
	nce Agreement	Target Custor	mer	rarget Agreement	Invoice	Error
5 subscriptions failed to sync	nce Agreement	Target Custo	mer	raiget Agreement	invoice	Error
5 subscriptions failed to sync Subscriptions	nce Agreement	Target Custo		larget Agreement	invoice	Error
5 subscriptions failed to sync Subscriptions	roft Staff Drining)	Target Custo	-	raiger Agreennen	invoice	Error
5 subscriptions failed to sync Subscriptions Microsoft 365 Business (Nonpr Usane	rofit Staff Pricing)	Target Custo	-	raiyer Ayrennen	invoice	Error ^
 5 subscriptions failed to sync Subscriptions Microsoft 365 Business (Nonpr Usage 	rofit Staff Pricing)	Target Custo	-	rarger Agreennen	invoice	Error
 S subscriptions failed to sync Subscriptions Microsoft 365 Business (Nonpr Usage Start Date ↑ 	rofit Staff Pricing) End Date	Target Custor Quantity	Cost Price	Retail Price	invoice	Error A
 2 Subscriptions failed to sync Subscriptions Microsoft 365 Business (Nonpr Usage Start Date ↑ 	rofit Staff Pricing) End Date	Target Custo Quantity	Cost Price	Retail Price	invoice Outcome Error	Error ^

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 <u>AutoTask help on Services</u> 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.
- 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 <u>import/export</u> 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 <u>import/export</u> 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	PRISM Connect can only operate with active
between the start date and end date of the Contract referenced by contractID.	'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	This error occurs when a service that was not created by PRISM Connect a name that matches the SKU of a product in PRISM.
(**********************). Error updating database for new entity records.	For example, if a product SKU is <i>sku_1357</i> , then when the service is created in AutoTask, the service name will be <i>CP_sku_1357</i> . 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/ATServices Rest/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 <u>Connecting to AutoTask</u> for instructions. Check that the API user in AutoTask is not locked. See the <u>FAQ</u> .
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