

# Autotask Integration

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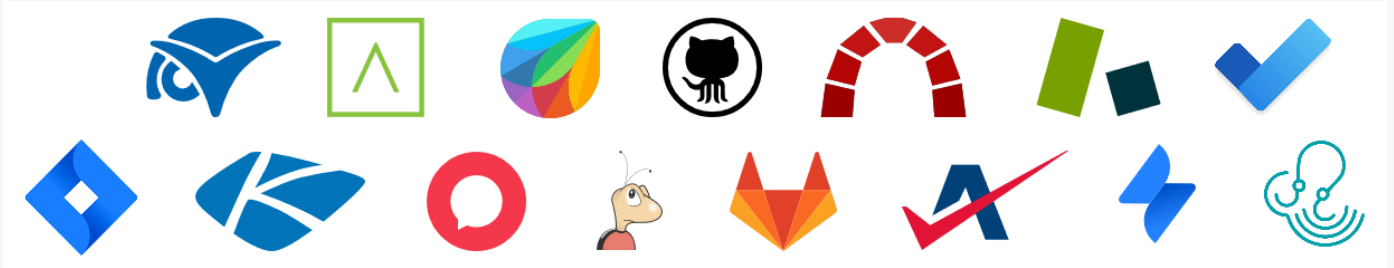


CHECKCENTRAL



BINARYFORTRESS

# Autotask Integration

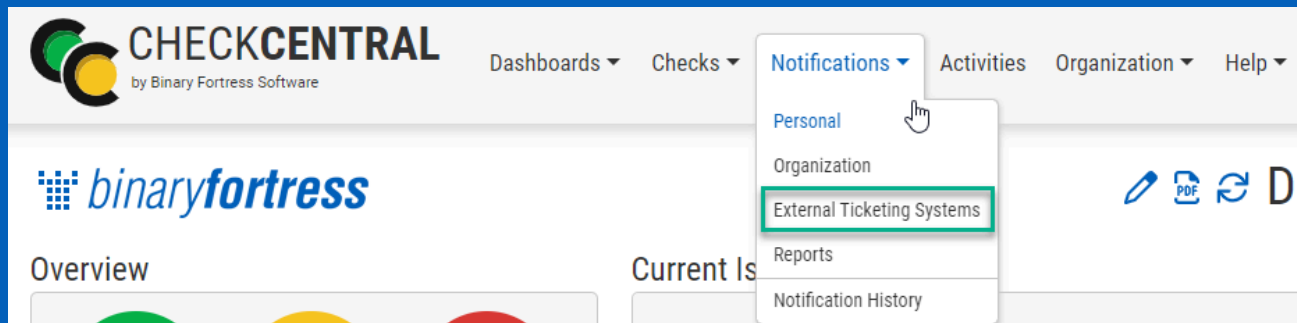


CheckCentral integrates with several RMMs, PSAs, and ticketing software, including Autotask, helping you consolidate service ticket issues.

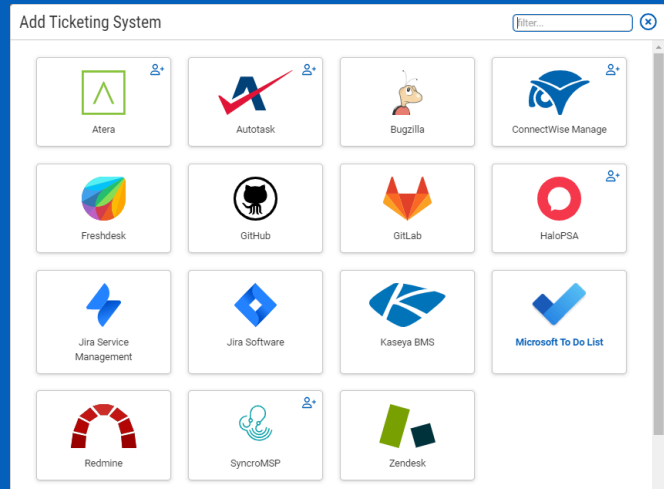
To integrate Autotask with CheckCentral, begin by logging into your CheckCentral account.

## CheckCentral

From the main menu, click Notifications, then External Ticketing Systems.



Click Add Ticketing System and choose Autotask.



This will bring up the configuration options required for CheckCentral to communicate with Autotask servers via the API.

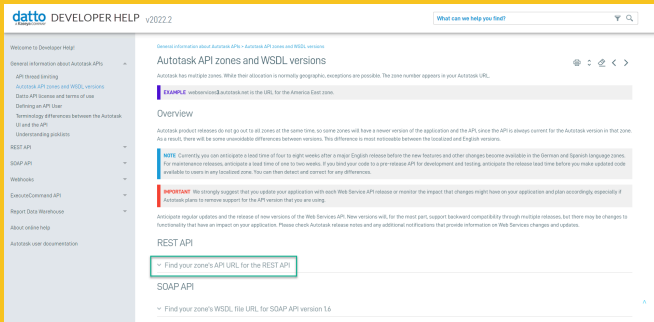
You can name this configuration anything you'd like.

The other details require you to log into your Autotask account.

# Browser

Visit the **Autotask API Zones** page to lookup your API server URL.

Expand the 'Find your zone's API URL for the REST API' section.



| Zone                          | API URL   |
|-------------------------------|---|
| Pre-release                   | https://webservice2.autotask.net/at servicesrest  |
| Pre-release (UK)              | https://webservice11.autotask.net/at servicesrest |
| Limited Release               | https://webservice1.autotask.net/at servicesrest  |
| Limited Release (UK)          | https://webservice17.autotask.net/at servicesrest |
| America East                  | https://webservice3.autotask.net/at servicesrest  |
| America East 2                | https://webservice14.autotask.net/at servicesrest |
| America West                  | https://webservice5.autotask.net/at servicesrest  |
| America West 2                | https://webservice15.autotask.net/at servicesrest |
| UK                            | https://webservice4.autotask.net/at servicesrest  |
| UK2                           | https://webservice16.autotask.net/at servicesrest |
| Australia / New Zealand       | https://webservice6.autotask.net/at servicesrest  |
| Pre-Release (Deutsch)         | https://prde.autotask.net/at servicesrest         |
| Pre-Release (Español)         | https://pres.autotask.net/at servicesrest         |
| German (Deutsch)              | https://webservice18.autotask.net/at servicesrest |
| EU1 (English Europe and Asia) | https://webservice19.autotask.net/at servicesrest |
| Spanish (Español)             | https://webservice12.autotask.net/at servicesrest |

If you are unsure of which zone you're in you can try looking at the URL you use to access Autotask. For example, if your URL starts with ww2.autotask.net you might also be in the zone that connects to webservice2.autotask.net.

## Browser and CheckCentral

Copy the URL for your zone.

Paste the URL into the API Server URL field.

| Zone                          | API URL   |
|-------------------------------|---|
| Pre-release                   | https://webservice2.autotask.net/at servicesrest  |
| Pre-release (UK)              | https://webservice11.autotask.net/at servicesrest |
| Limited Release               | https://webservice1.autotask.net/at servicesrest  |
| Limited Release (UK)          | https://webservice17.autotask.net/at servicesrest |
| America East                  | https://webservice3.autotask.net/at servicesrest  |
| America East 2                | https://webservice14.autotask.net/at servicesrest |
| America West                  | https://webservice5.autotask.net/at servicesrest  |
| America West 2                | https://webservice15.autotask.net/at servicesrest |
| UK                            | https://webservice4.autotask.net/at servicesrest  |
| UK2                           | https://webservice16.autotask.net/at servicesrest |
| Australia / New Zealand       | https://webservice6.autotask.net/at servicesrest  |
| Pre-Release (Deutsch)         | https://prde.autotask.net/at servicesrest         |
| Pre-Release (Español)         | https://pres.autotask.net/at servicesrest         |
| German (Deutsch)              | https://webservice18.autotask.net/at servicesrest |
| EU1 (English Europe and Asia) | https://webservice19.autotask.net/at servicesrest |
| Spanish (Español)             | https://webservice12.autotask.net/at servicesrest |

Autotask
⊙

**Name** Autotask

**API Server URL**

Visit this page to lookup your API server URL. Expand the 'Find your zone's API URL for the REST API' section and copy the URL for your zone. If you are unsure of which zone you're in you can try looking at the URL you use to access Autotask. For example, if your URL starts with ww2.autotask.net you might also be in the zone that connects to webservice2.autotask.net.

**API Username (Key)**

Open the menu in the top-left corner then browse to 'Admin > Resources (Users)'. Hover over the 'New' button and click on 'New API User'. Complete the new api user form. Click the 'Generate Key' button and paste the username (key) in the 'API Username' field here. Click the 'Generate Secret' button and paste the password (secret) in the 'API Secret' field below. In the 'API Tracking Identifier' section choose 'Custom (Internal Integration)' and give it a name. Copy the 'Tracking Identifier' value and paste it here in the 'Tracking Identifier' below. Click the 'Save & Close' button to save your API user once you have copied the 3 values.

**API Password (Secret)**

Follow the instructions for the 'API Username' to get this value.

**API Tracking Identifier**

Follow the instructions for the 'API Username' to get this value.

**Due Date (days)**  days  
The ticket due date as the number of days from the creation date.

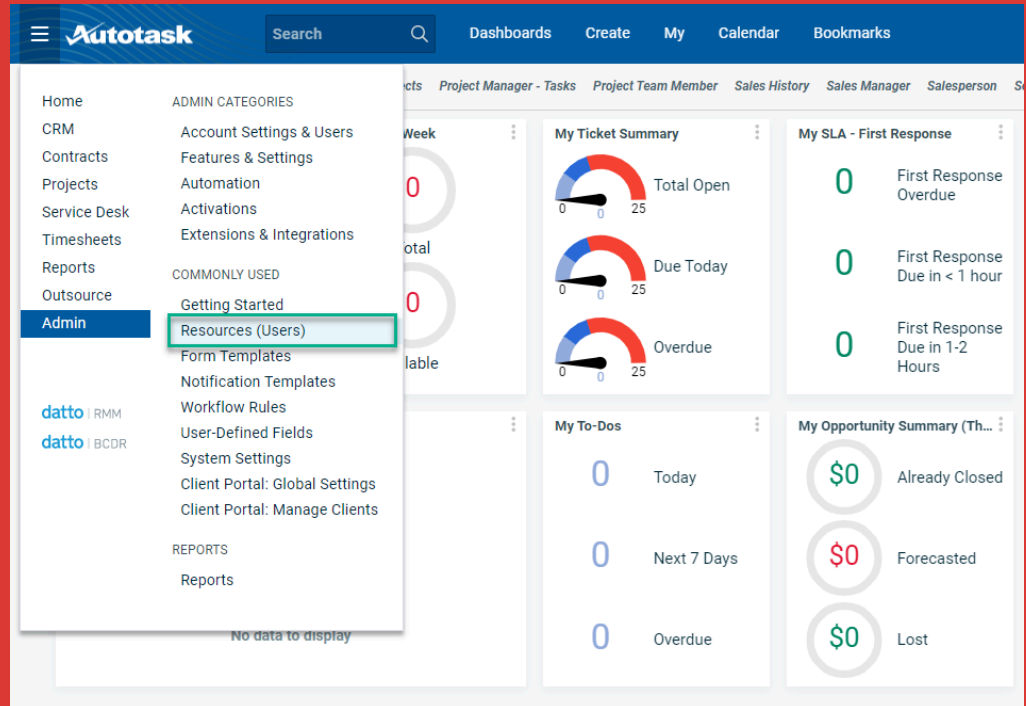
**Status**

**Priority**

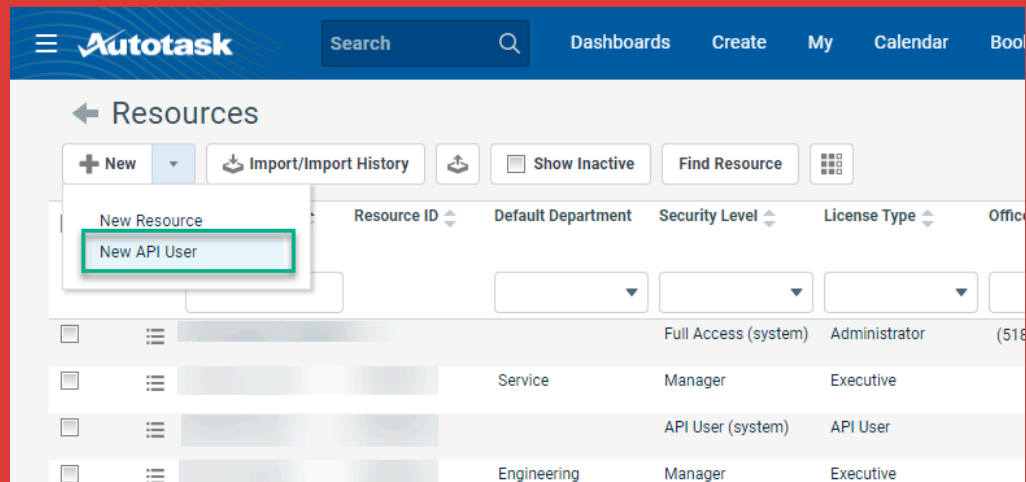
# Autotask

The remaining information is in Autotask's Resources area.

From the Autotask portal main menu, click Admin > Resources (Users).



Hover on the arrow by "+ New" and click "New API User."



In the Add API User prompt, fill in the General section.

**Add API User**
?

Save & Close
Cancel
Review Terms and Conditions for API Use

**General**

First Name \*

Last Name \*

Email Address \*

Active  
 Locked

Security Level \*

Date Format

Time Format

Number Format

Primary Internal Location \*

## Autotask and CheckCentral

In Autotask, click the "Generate Key" button and paste the "Username (Key)" in CheckCentral's "API Username (Key)" field.

### Credentials

Generate Key
Generate Secret

Username (Key) \*

Password (Secret) \*

Autotask
✕

Name

API Server URL

Visit this page to lookup your API server URL.  
Expand the Find your zone's API URL for the REST API section and copy the URL for your zone.  
If you are unsure of which zone you're in you can try looking at the URL you use to access Autotask. For example, if your URL starts with ww2.autotask.net you might also be in the zone that connects to webservices2.autotask.net.

API Username (Key)

Open the menu in the top-left corner then browse to Admin > Resources (Users).  
Hover over the New button and click on New API User.  
Complete the new api user form.  
Click the Generate Key button and paste the username (key) in the API Username field here.  
Click the Generate Secret button and paste the password (secret) in the API Secret field below.  
In the API Tracking Identifier section choose Custom (internal integration) and give it a name.  
Copy the Tracking Identifier value and paste it here in the Tracking Identifier below.  
Click the Save & Close button to save your API user once you have copied the 3 values.

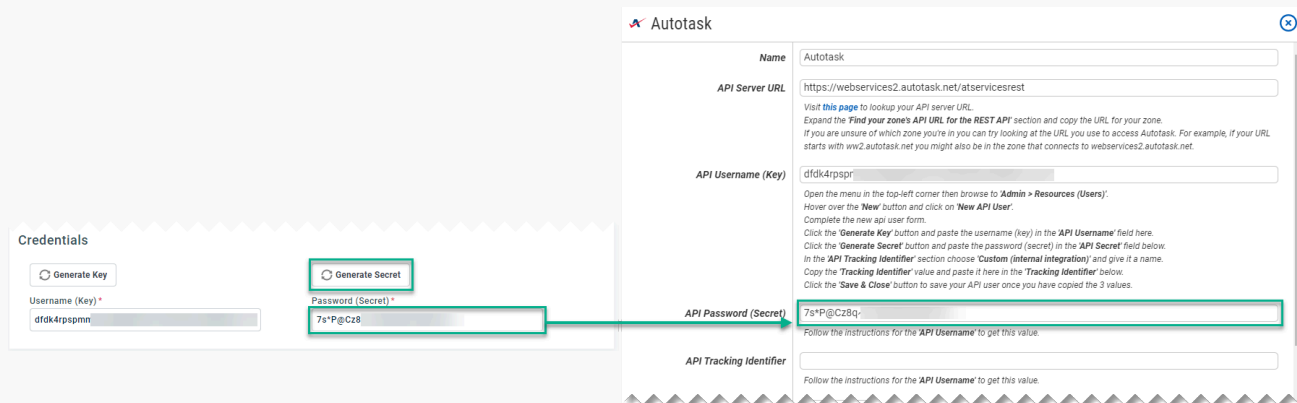
API Password (Secret)

Follow the instructions for the API Username to get this value.

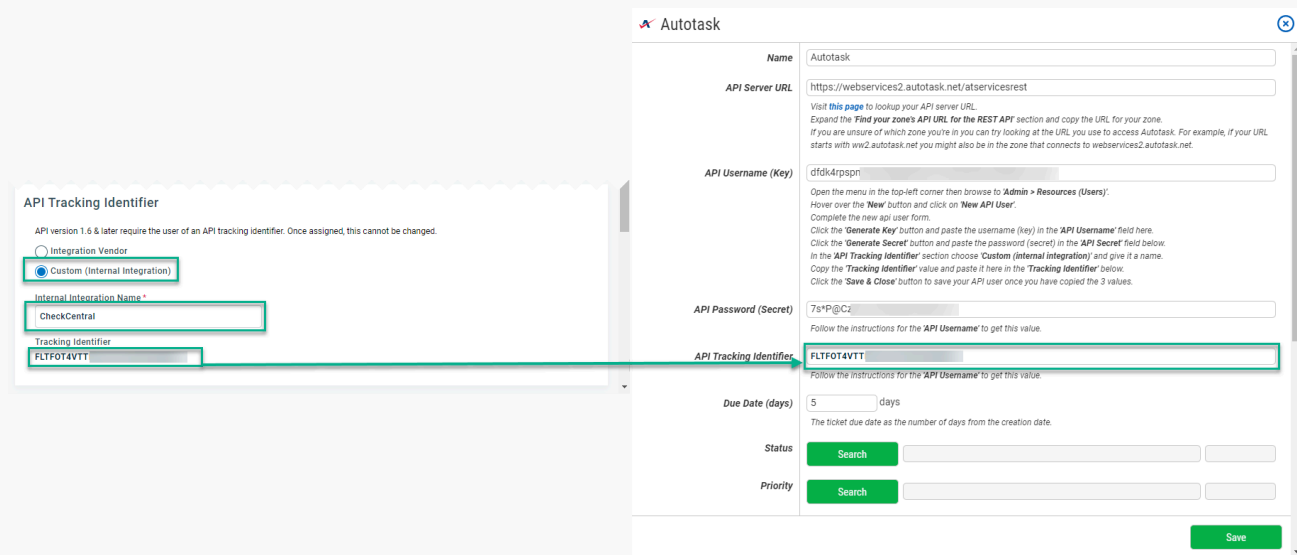
API Tracking Identifier

Follow the instructions for the API Username to get this value.

Click the "Generate Secret" button and paste the "Password (Secret)" in CheckCentral's "API Password (Secret)" field.



In the API Tracking Identifier section, select "Custom (Internal Integration)." Enter a name for the identifier in the "Internal Integration Name" field. Copy the Tracking Identifier and paste it into CheckCentral's "API Tracking Identifier" field.



Click "Save & Close" on Autotask's Add API User prompt.

**Add API User**

[Review Terms and Conditions for API Use](#)

**Save & Close** **Cancel**

**General**

First Name \*

Last Name \*

Email Address \*

Active  
 Locked

Security Level \*

Date Format

Time Format

Number Format

Primary Internal Location \*

## CheckCentral

Return to the CheckCentral configuration window to finish.

Enter a number of days for the due date applied to newly created tickets.

**Autotask**

Due Date (days)  days

The ticket due date as the number of days from the creation date.

Status

Priority

Account

Only accounts that have the 'Customer' type will be available to use.

Resource

Role

Role requires a resource to be selected first.

Queue

If a resource is selected this will show queues that belong to that resource only.

Category

Check Groups  All Check Groups

Select check groups to use with this channel.

Enable this external ticketing system

**Save**

Select the ticket Status, and Priority that will be associated with newly created tickets in Autotask. Click on the Search button to bring up relevant lists and choose one from each list.

The screenshot shows the Autotask configuration window with two pop-up windows open. The 'Get Status' window on the left lists various ticket statuses such as 'Approved', 'Complete', 'Denied', 'Escalate', 'In Progress', 'New', 'Scheduled', 'Waiting Approval', 'Waiting Customer', 'Waiting Dispatch', 'Waiting Materials', and 'Waiting Vendor'. The 'Get Priority' window on the right lists 'High', 'Medium', 'Low', and 'Critical'. The main Autotask window in the background shows the 'Status' field set to 'Escalate' and 'Priority' set to 'High', with 'Search' buttons next to each field.

For accounts/customers, you can select a specific account from the list or set the channel to automatically select the account based on the Check Group name.

The screenshot shows the Autotask configuration window with the 'Get Account' pop-up window open. The 'Get Account' window has a search bar and a list of accounts including 'ABLE Manufacturing HQ\*', 'ABLE Manufacturing West Coast', 'binary fortress', 'Blue Sky Group', 'Brown Brothers Bottling\*2', 'Department of Public Works', 'Dynamo Corporation', 'E.G. Sawyer Co. Inc.', 'Excelsior Designs, LLC', 'Hewitt Associates, Inc.', 'Integrated Providers', 'Legal Help Inc.', 'Midco Annuities', 'Palmer's Supply', 'Phoenix Group', 'TopDog', and 'Upstate Document Providers'. The main Autotask window in the background shows the 'Account' field set to '/Automatically select account based on chec -99', with 'Search' and 'Clear' buttons next to it.

Select the Resource, Role, Queue, and Category to be used with the Autotask tickets.

Finally, choose which Check Groups will use this Autotask ticketing channel. By default, all check groups are selected. To be more selective, disable the All Check Groups checkbox then use the multi-select dropdown field below. Once you've selected your check groups, ensure the 'Enable this external ticketing system' checkbox is enabled, and click Save.



## External Ticketing Systems

Autotask



[+ Add Ticketing System](#) [↕ Collapse All](#) [▾ Expand All](#)

Check Groups [All Check Groups](#)

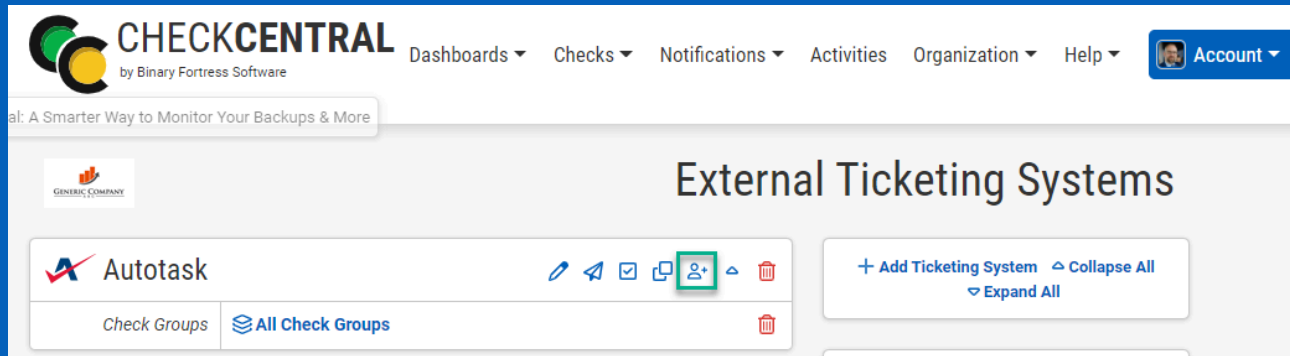
Currently Linked External Tickets:

This External Ticketing System channel will now be available for use with any check under your Check Central account.

# Import Customers as Check Groups

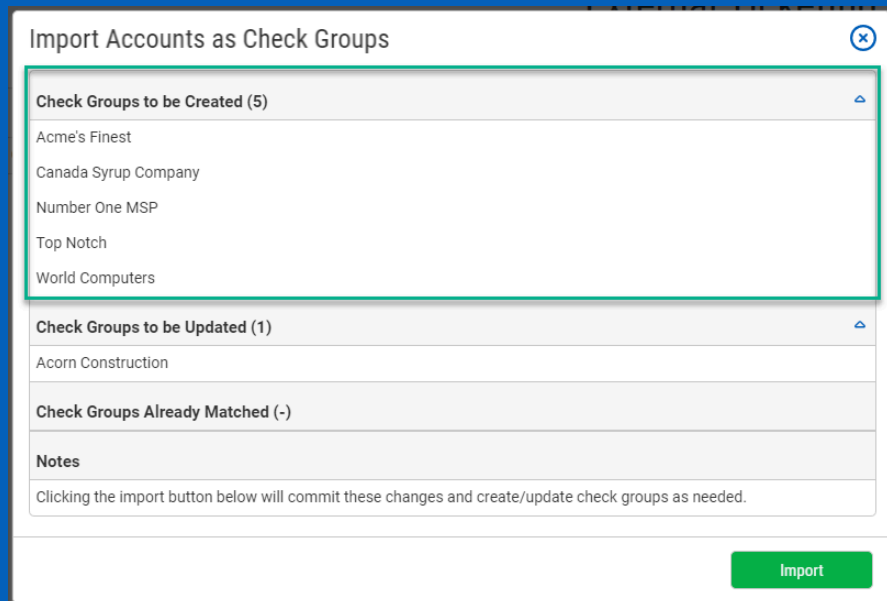
## CheckCentral

To create and match account-centric check groups, we'll use this new API connection to import accounts directly from Autotask.



From the External Ticketing Systems page, click on the Account Import icon above your newly-created channel.

If no similar check groups exist, your accounts will be listed under Check Groups to be Created.



If you've already created Check Groups using account/customer names, they will display in the Check Groups to be Updated section, ensuring they match with Autotask.

**Import Accounts as Check Groups**

**Check Groups to be Created (5)**

- Acme's Finest
- Canada Syrup Company
- Number One MSP
- Top Notch
- World Computers

**Check Groups to be Updated (1)**

- Acorn Construction

**Check Groups Already Matched (-)**

**Notes**

Clicking the import button below will commit these changes and create/update check groups as needed.

**Import**

Existing Groups Already Matched with Autotask will be skipped.

**Import Accounts as Check Groups**

**Check Groups to be Created (5)**

- Acme's Finest
- Canada Syrup Company
- Number One MSP
- Top Notch
- World Computers

**Check Groups to be Updated (1)**

- Acorn Construction

**Check Groups Already Matched (-)**

**Notes**

Clicking the import button below will commit these changes and create/update check groups as needed.

**Import**

Now click Import to complete the import.

**Import Accounts as Check Groups**

**Check Groups to be Created (5)**

- Acme's Finest
- Canada Syrup Company
- Number One MSP
- Top Notch
- World Computers

**Check Groups to be Updated (1)**

- Acorn Construction

**Check Groups Already Matched (-)**

**Notes**

Clicking the import button below will commit these changes and create/update check groups as needed.

**Import**

# About CheckCentral

CheckCentral Monitoring consolidates and simplifies backup, system, and software email updates into a clean, graphical dashboard, bringing peace of mind to IT administrators of SMBs, Enterprises, and MSPs.

To learn more about CheckCentral, visit: <https://www.checkcentral.com>

# About Binary Fortress Software

Binary Fortress has spent 19 years in pursuit of one goal: create software to make life easier. Our software ranges from display management and system enhancement utilities to monitoring tools and digital signage. IT administrators, professional gamers, coffee-shop owners, and MSPs all rely on Binary Fortress to make their days better, and their lives easier.

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