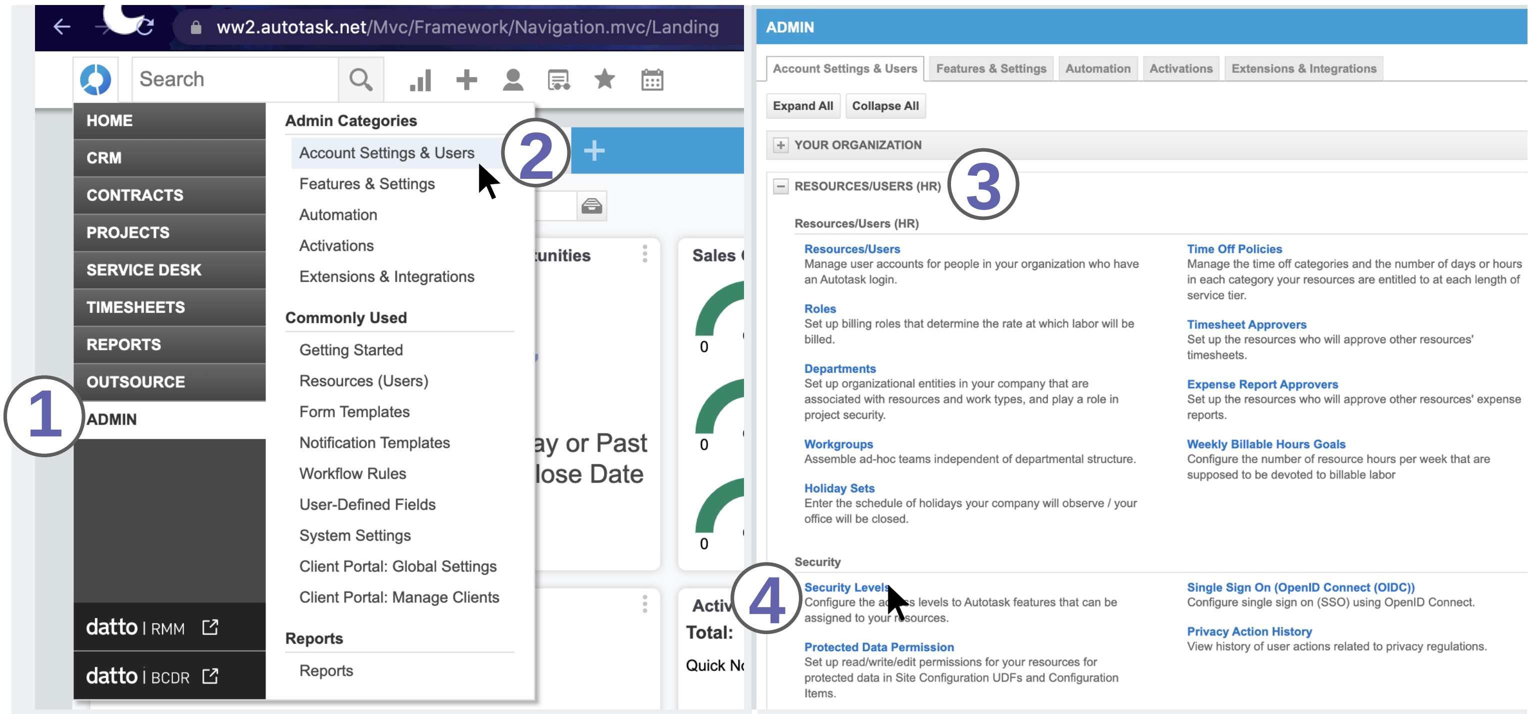
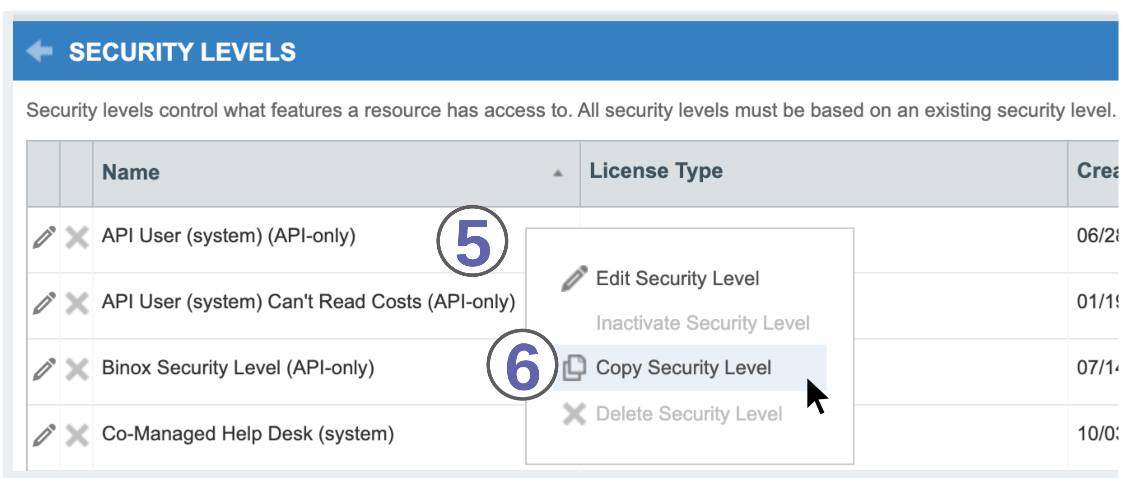
Integration Setup Guide
Version 2.0 | July 2021

[Section 1] AutoTask configuration

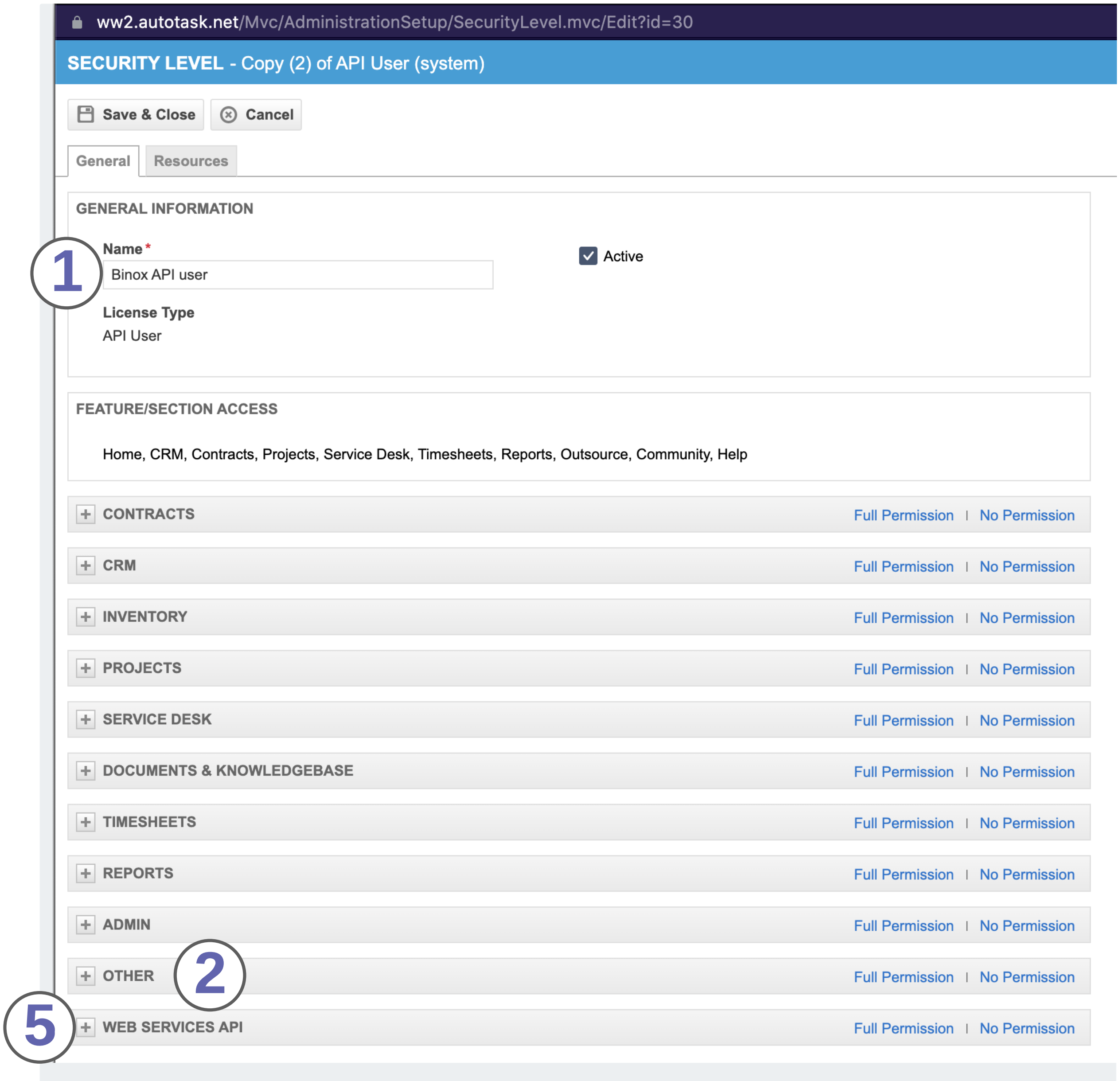


Starting from the top left of the dashboard, use the start menu to navagate over to Admin and then to the Account Settings & Users screen. From here you'll have access to the *Resources/Users (HR)* subsection which you can use to create a new *Security Level* which the Binox API user will need set properly in order to be created with the required permissions.

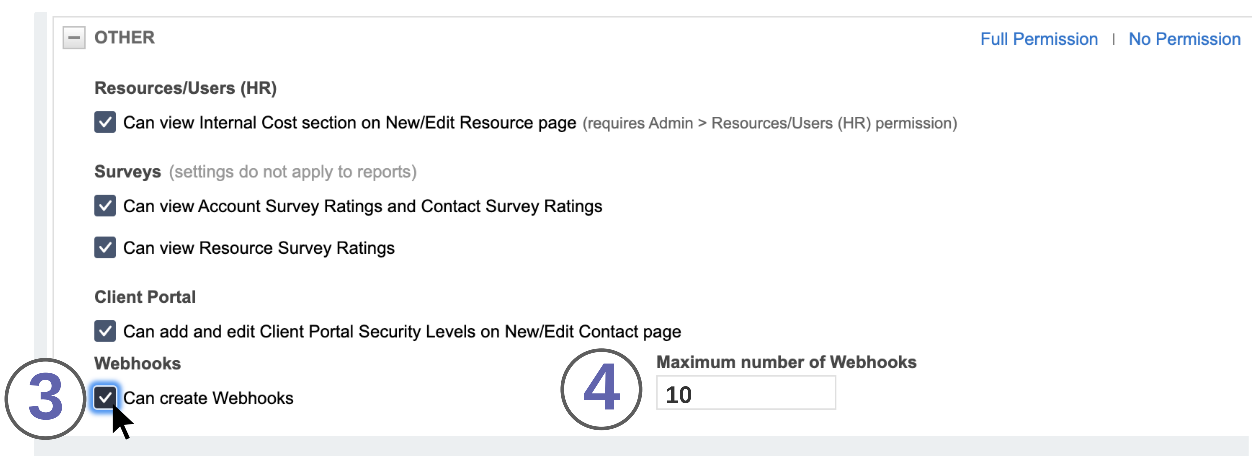


Right-click on the empty space to the right of an existing role you would like to use as a template for the new binox security role, from the dropdown menu that appears select "*Copy Security Level*"

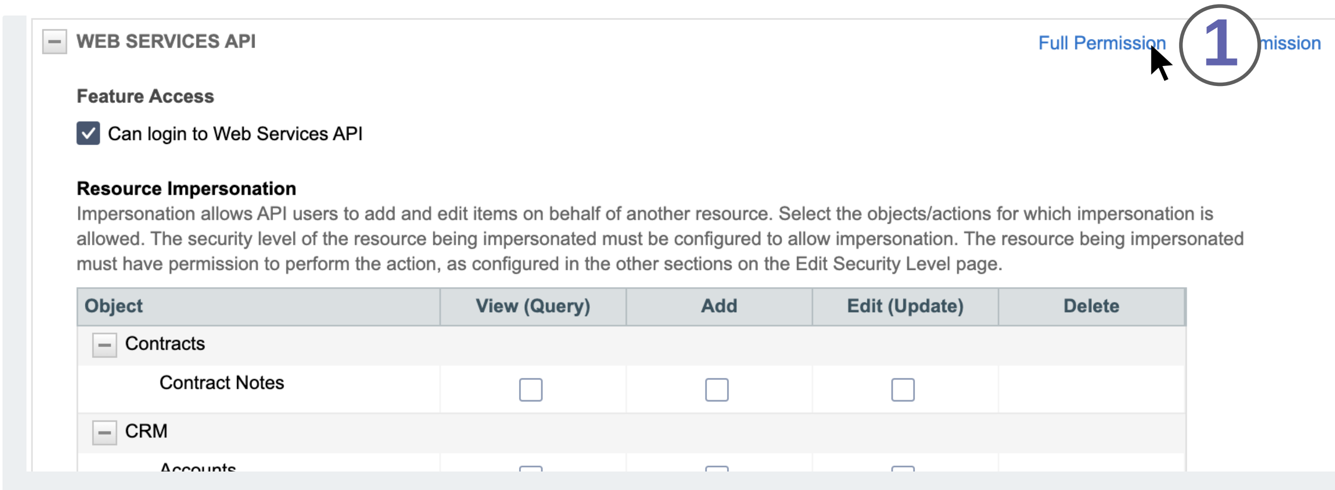
[Section 1] AutoTask configuration (Cont'd)

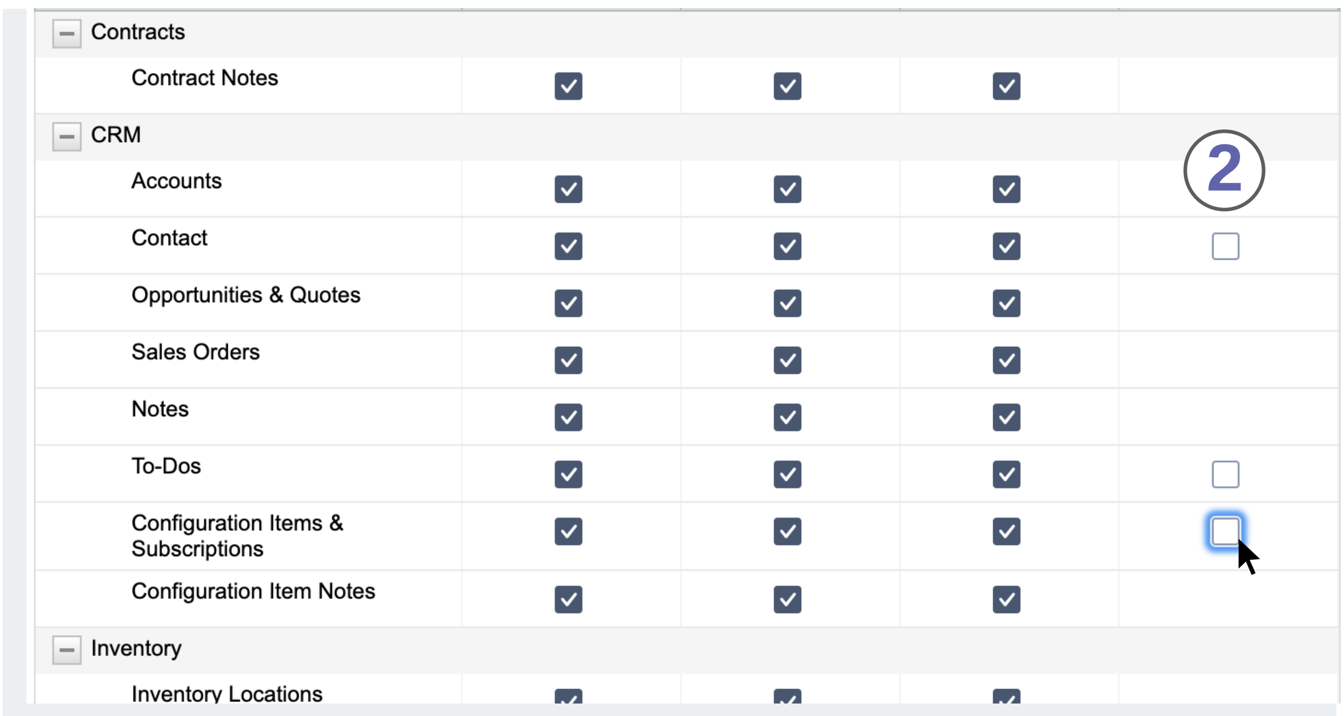


In the popup that appears after creating this security role, start by giving the new role a descriptive name that will help you identify it later when the time comes to assign it to the binox user. From there, depending on the role you've chosen to clone you'll have to make two adjustments to the role settings; first under *Other* and then second under *Web Services API.*

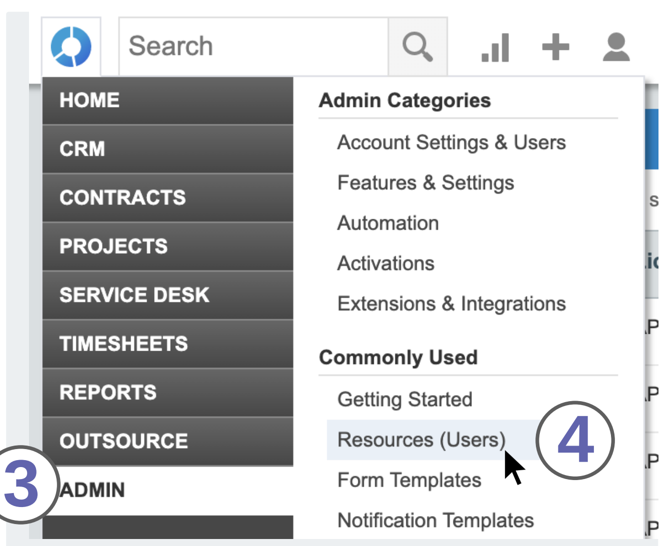


[Section 1] AutoTask configuration (Cont'd)

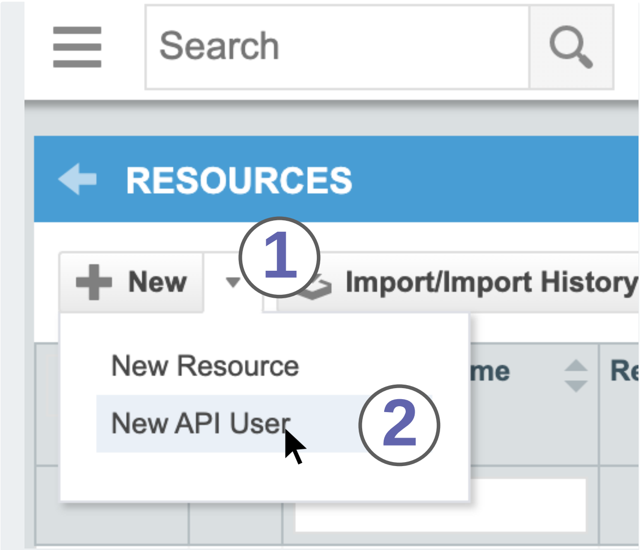




Start by giving Binox full permissions over all the Web Services items, then narrow this down to exclude deletion because Binox will never delete your PSA's records.

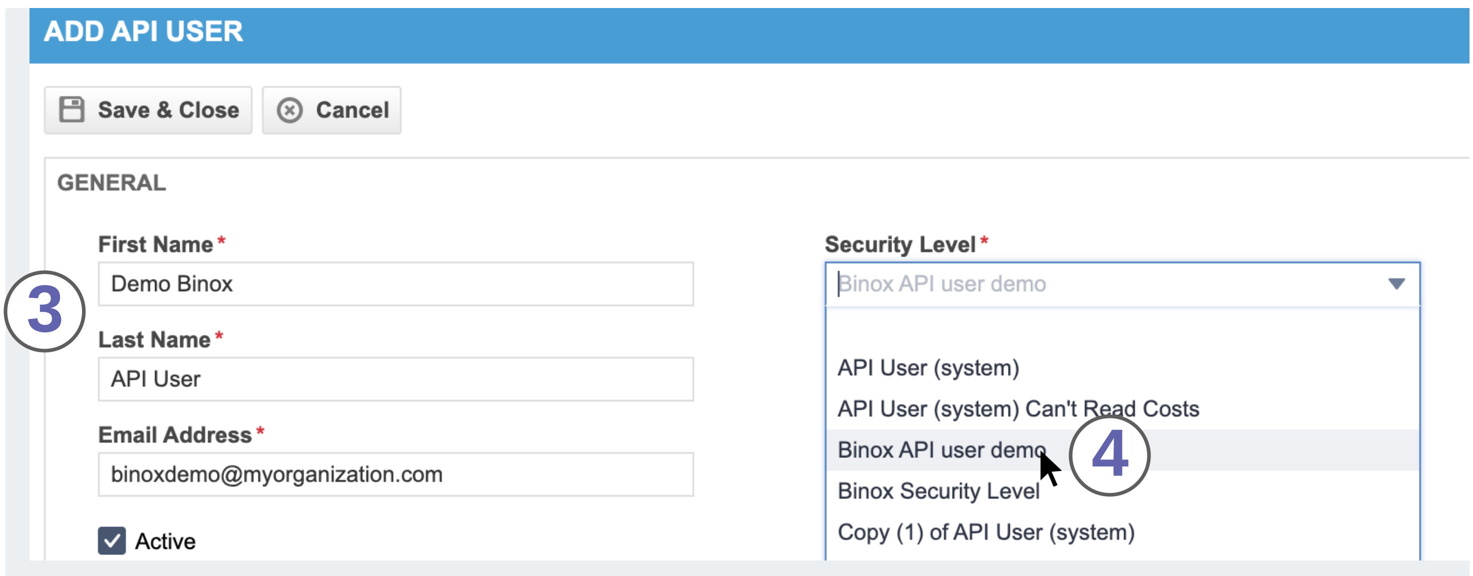


With this process completed you can save and close the security role and proceede to create the new binox API user.

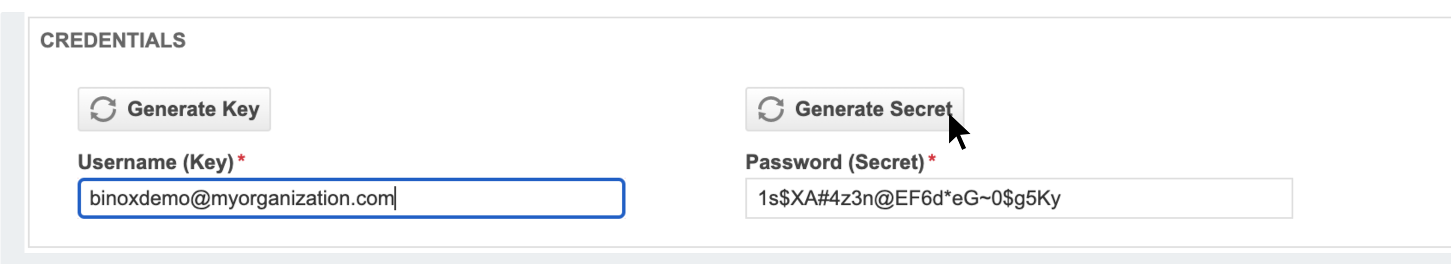


In the upper left corner of your users table, hover over the dropdown menu next to the **+ New button** until you are presented with the option to create a new API user or New Resource. Select **New API User** and start to fill out the required fields in the popup dialogue. Since this won't actually constitute an actual user within your system, you can give it any descriptive name and email you like.

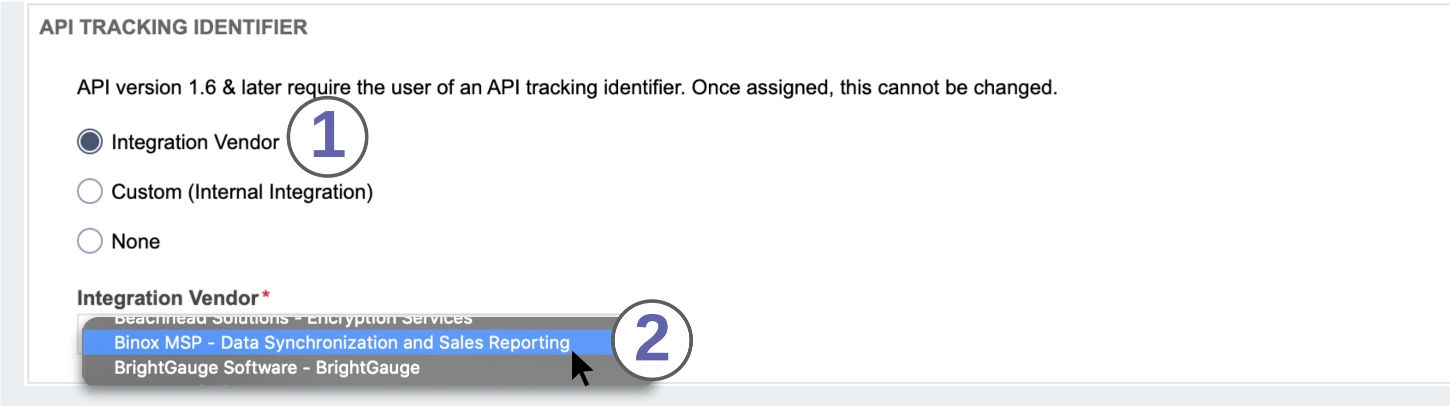
When asked to select a **Security Level**, locate the one you just created for Binox and click on it.



Under credentials create a username similar to the email address you provisioned above, this email must contain the domain of your organization. You can also generate a username using the Generate button, however this isn't recommended as it will make the username less distinct and more difficult to recognize on reports. It is recommended to use the Generate Secret button to make a strong and unique secret password which you will need to enter into the Binox application directly to complete the process.

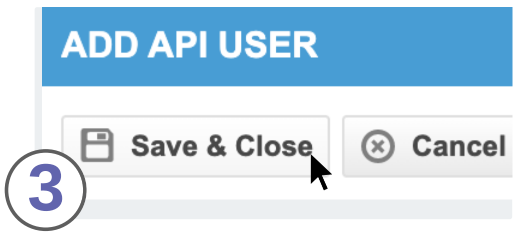


[Section 1] AutoTask configuration (Cont'd)

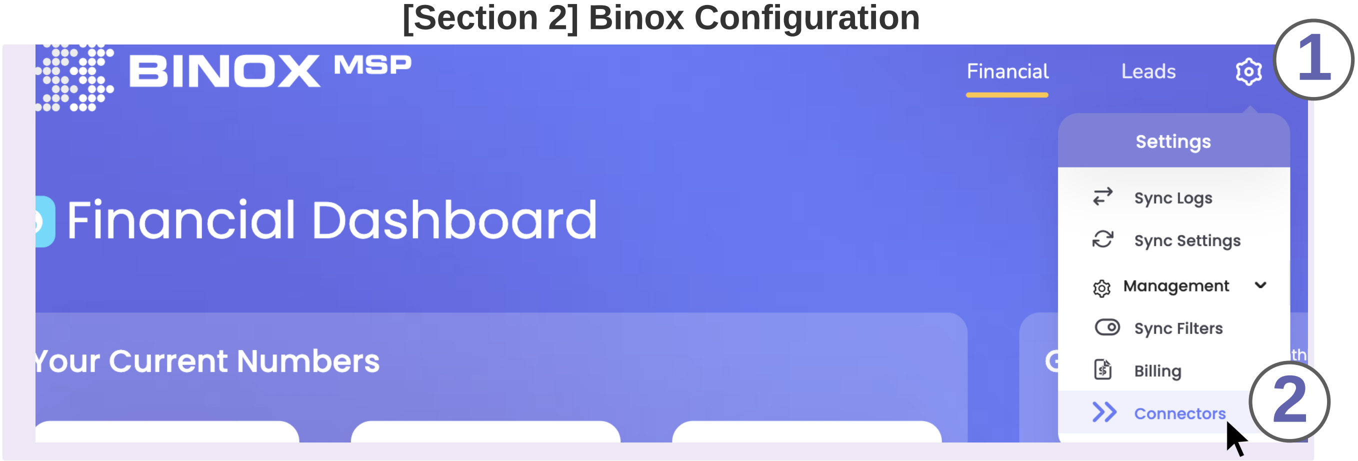


Beneath the rest of the options you'll find the required field to set an **API Tracking Identifier**, select **Integration Vendor**, and then proceede to find **Binox MSP - Data Syncrhonization and Sales Reporting** from the dropdown list.

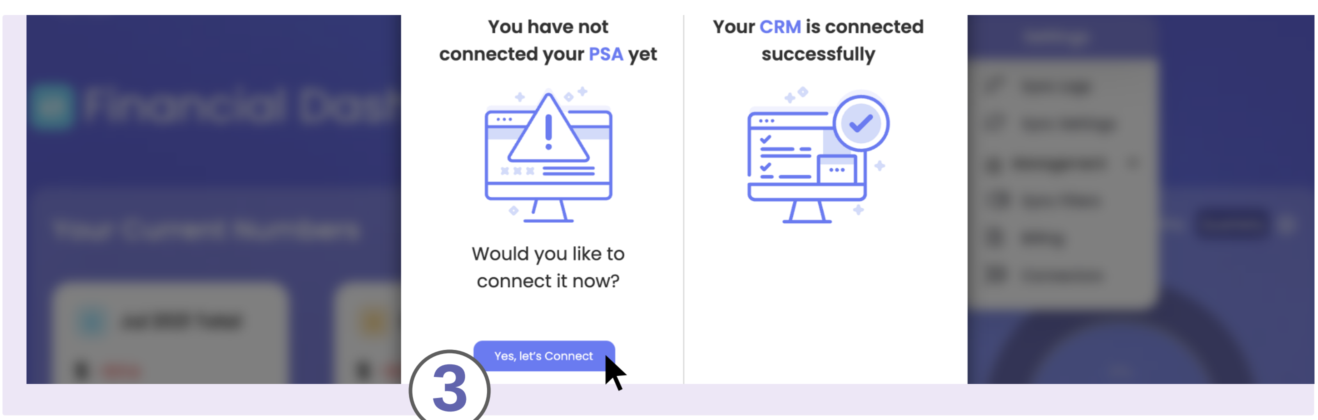
Once this is complete and you have copied your API user's username and password, you can save and close the window.



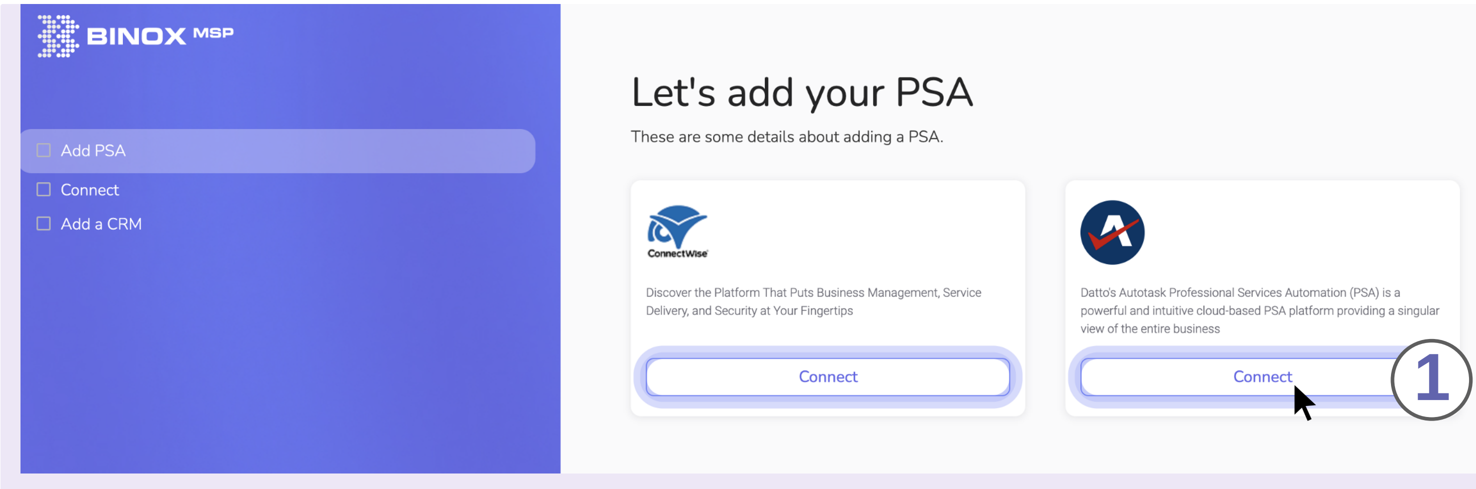
[Section 2] Binox Configuration

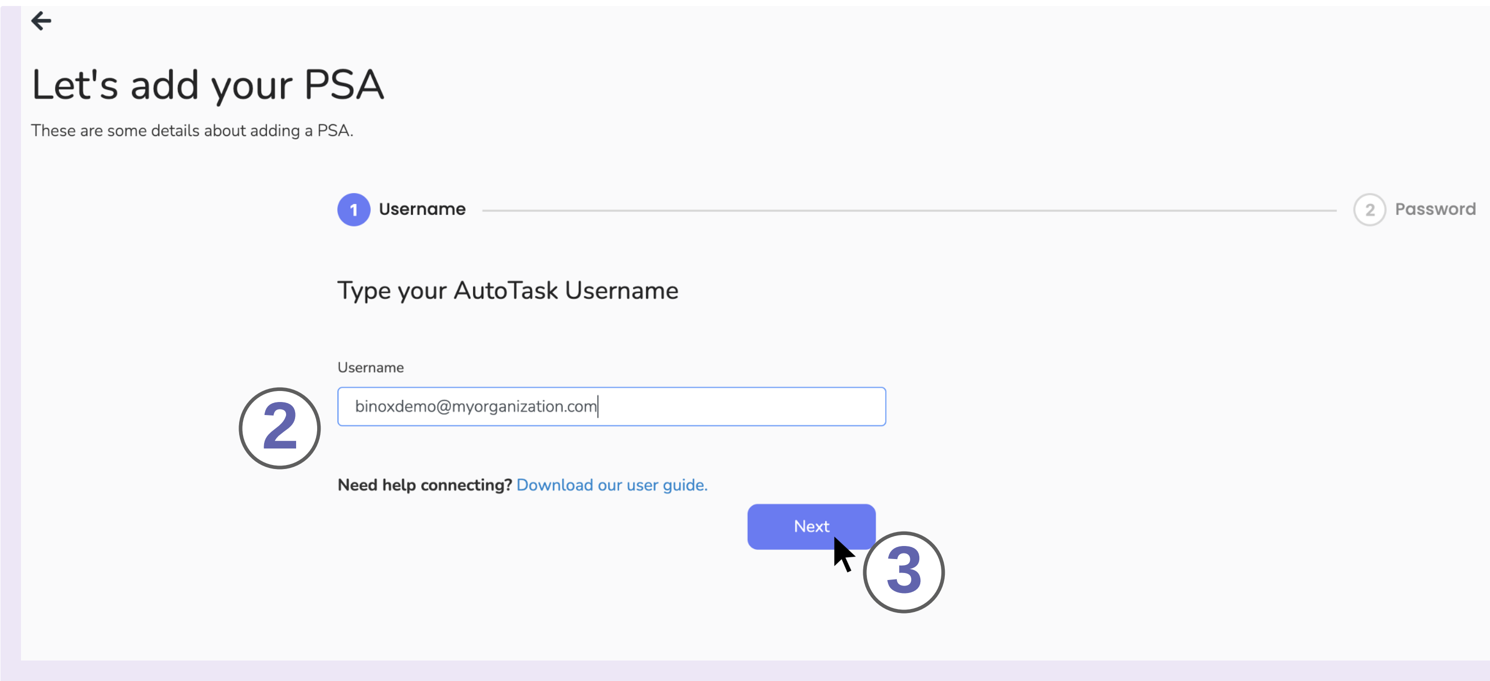


If you aren't prompted to connect your AutoTask as your PSA, you can initiate the connection by hovering over the **gear icon** in the upper right hand corner of the screen and then selecting **Connectors**. From here you can see if a PSA is already connected to your account; if there is nothing connected you can click on **Yes, let's connect** to get started.

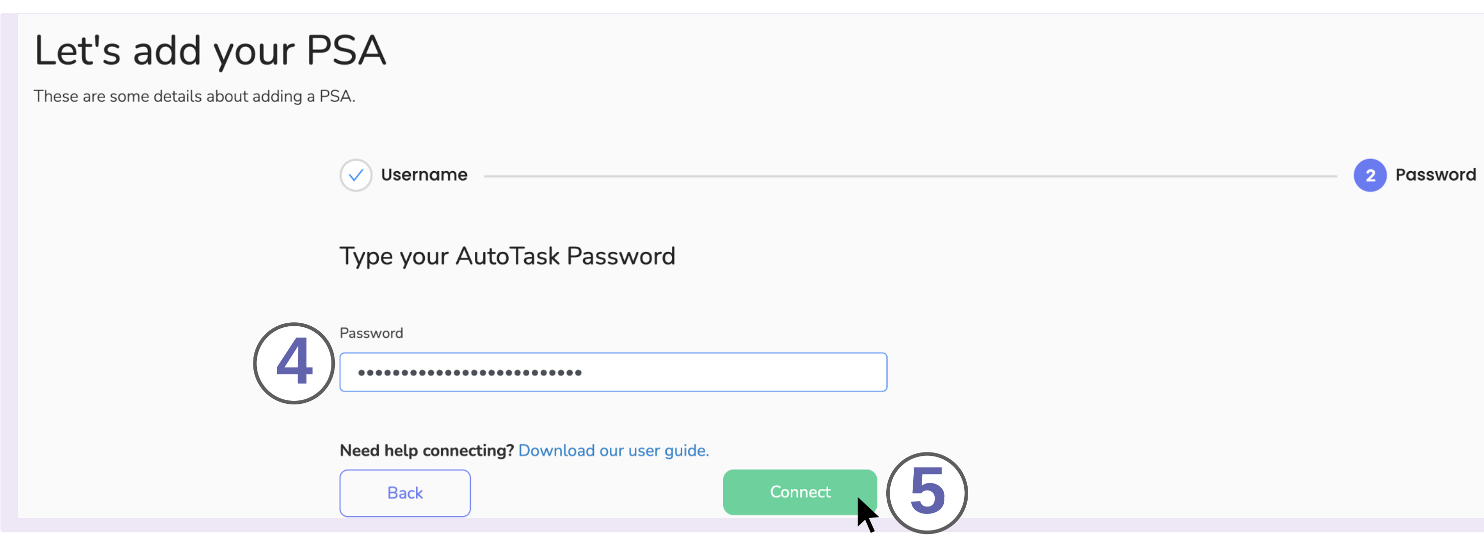


[Section 2] Binox Configuration (Cont'd)

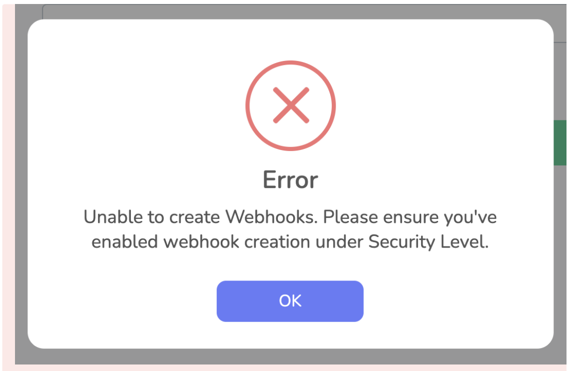


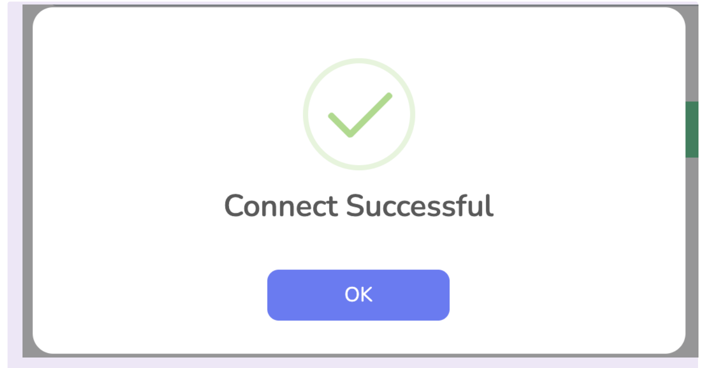


After clicking on **Connect** under Datto Autotask, you'll be prompted to first enter the username you created inside of AutoTask. Once you've clicked **Next** you'll be able to proceed to putting in the password you generated inside autoTask as well. Make sure you have these saved in the event you need to reenter them or change them.

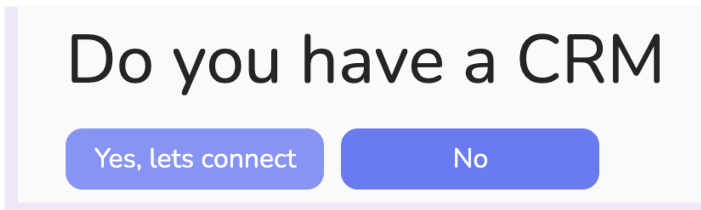


[Section 2] Binox Configuration (Cont'd)

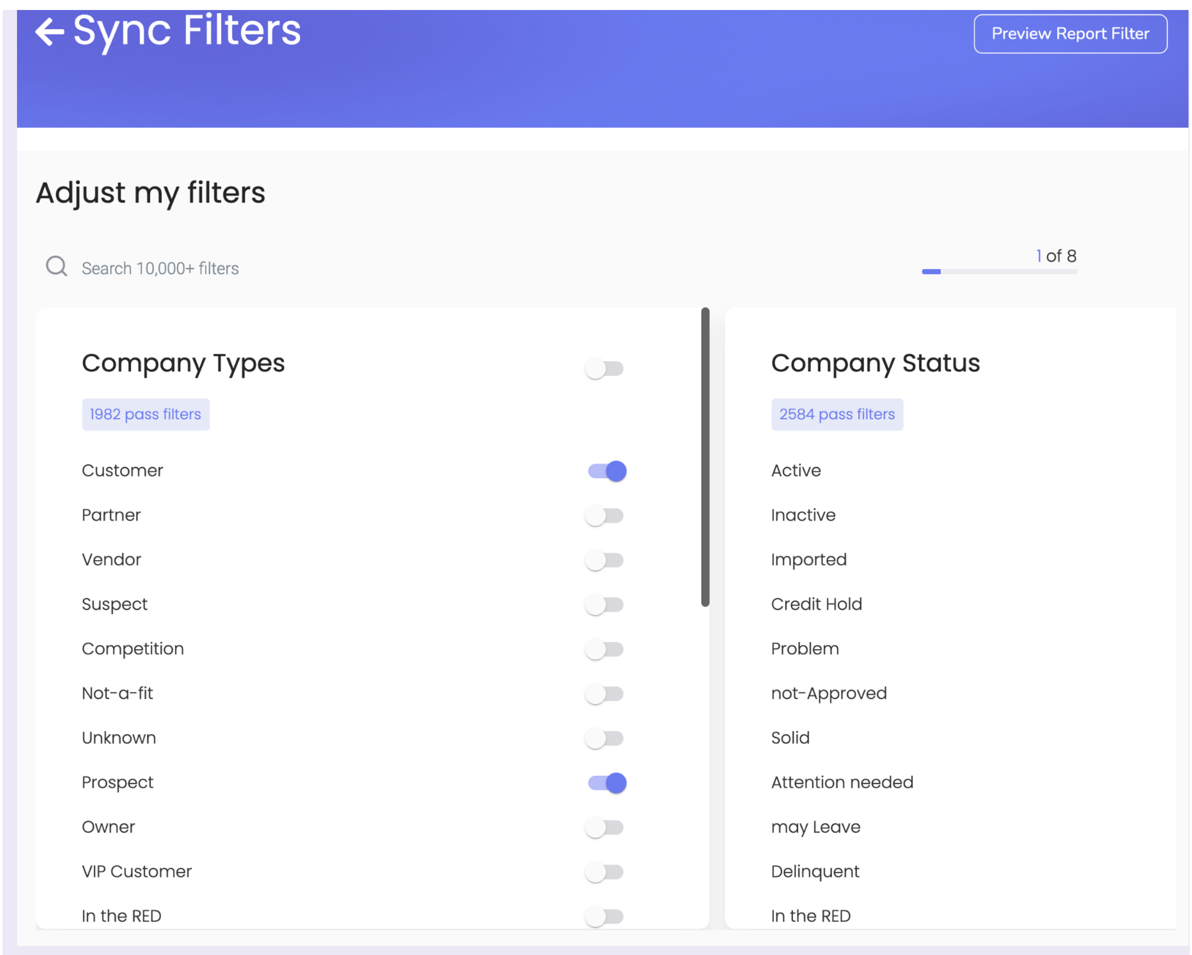




Your API credentials will be tested to ensure the security level was properly set and that the keys have access to everything Binox needs to function. If there is an error, you will be notified as to which portion of the setup needs to be adjusted in order to get the app up and running. If you see **Connect Successful**, you're good to go.



If you have a CRM you would like to syncrhonize with Autotask, you can continue to set that up here.



Lastly, once AutoTask is connected you can proceed to set up your PSA filters which control the records that will be created inside your CRM if you decide to sync them. Records will still sync regardless if there is a match by exact name on both sides, but these filters which propagate from the AutoTask API allow you to select what will be generated in the CRM by **Company Types, Statuses, Markets, Territories** along with **Contact Statuses**