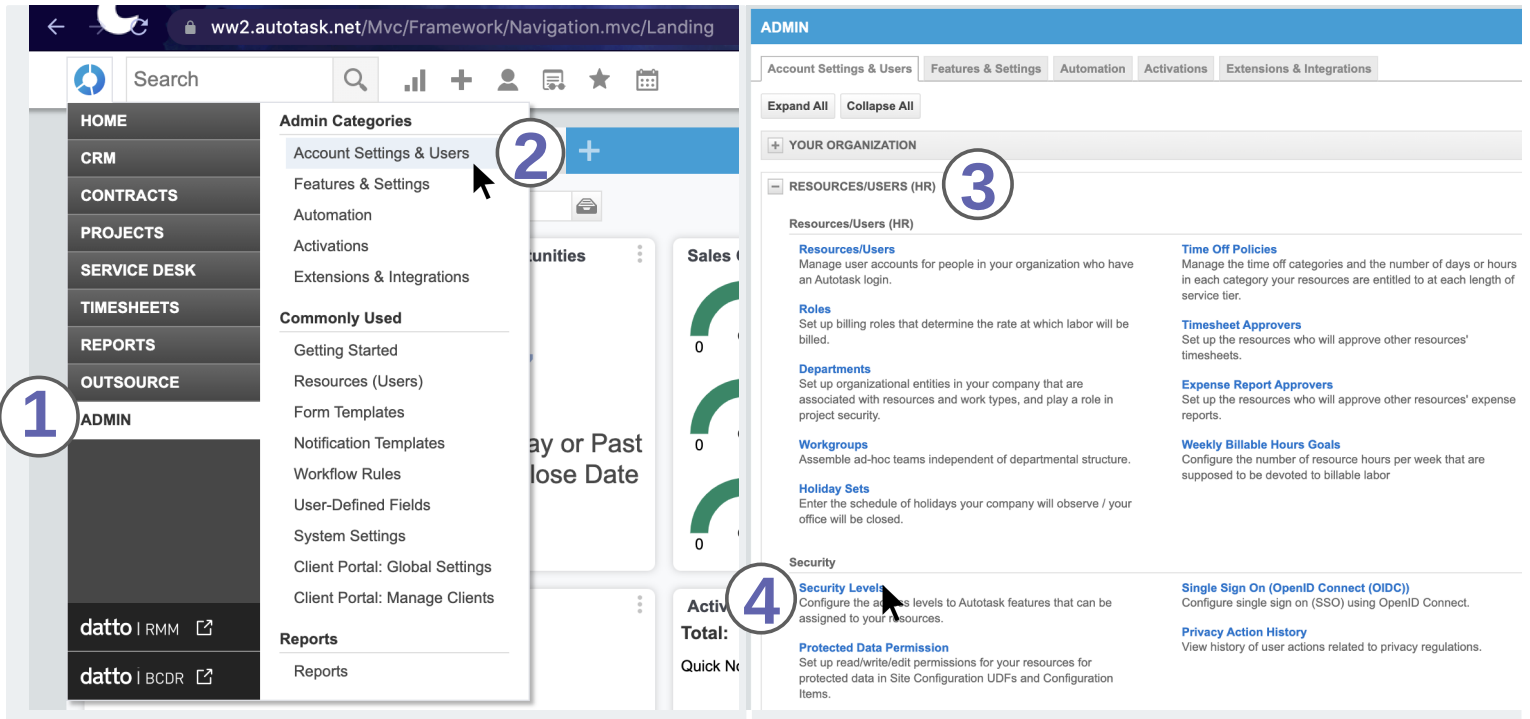
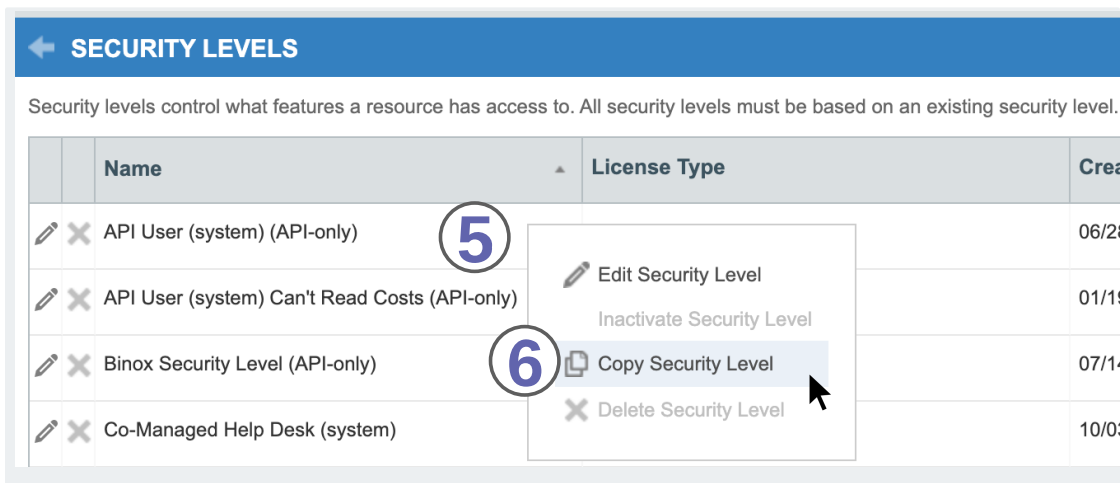


Integration Setup Guide Version 2.0 | July 2021

[Section 1] AutoTask configuration



Starting from the top left of the dashboard, use the start menu to navigate 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)

ww2.autotask.net/Mvc/AdministrationSetup/SecurityLevel.mvc/Edit?id=30

SECURITY LEVEL - Copy (2) of API User (system)

Save & Close Cancel

General Resources

GENERAL INFORMATION

1 Name* Active

License Type
API User

FEATURE/SECTION ACCESS

Home, CRM, Contracts, Projects, Service Desk, Timesheets, Reports, Outsource, Community, Help

+ CONTRACTS	Full Permission No Permission
+ CRM	Full Permission No Permission
+ INVENTORY	Full Permission No Permission
+ PROJECTS	Full Permission No Permission
+ SERVICE DESK	Full Permission No Permission
+ DOCUMENTS & KNOWLEDGEBASE	Full Permission No Permission
+ TIMESHEETS	Full Permission No Permission
+ REPORTS	Full Permission No Permission
+ ADMIN	Full Permission No Permission
+ OTHER 2	Full Permission No Permission
+ WEB SERVICES API 5	Full Permission No Permission

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*.

OTHER Full Permission | No Permission

3 Resources/Users (HR)

- Can view Internal Cost section on New/Edit Resource page (requires Admin > Resources/Users (HR) permission)

Surveys (settings do not apply to reports)

- Can view Account Survey Ratings and Contact Survey Ratings
- Can view Resource Survey Ratings

Client Portal

- Can add and edit Client Portal Security Levels on New/Edit Contact page

Webhooks

- Can create Webhooks

4 Maximum number of Webhooks

[Section 1] AutoTask configuration (Cont'd)

WEB SERVICES API Full Permission **1** mission

Feature Access

Can login to Web Services API

Resource Impersonation
 Impersonation allows API users to add and edit items on behalf of another resource. Select the objects/actions for which impersonation is allowed. The security level of the resource being impersonated must be configured to allow impersonation. The resource being impersonated must have permission to perform the action, as configured in the other sections on the Edit Security Level page.

Object	View (Query)	Add	Edit (Update)	Delete
Contracts				
Contract Notes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CRM				
Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Contracts					
Contract Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
CRM					2
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contact	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Opportunities & Quotes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Sales Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
To-Dos	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Configuration Items & Subscriptions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Configuration Item Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Inventory					
Inventory Locations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

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.

Search

- HOME
- CRM
- CONTRACTS
- PROJECTS
- SERVICE DESK
- TIMESHEETS
- REPORTS
- OUTSOURCE
- ADMIN**

Admin Categories

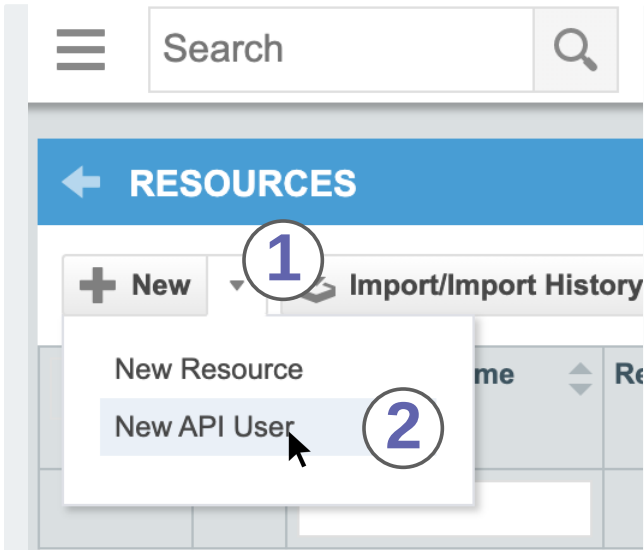
- Account Settings & Users
- Features & Settings
- Automation
- Activations
- Extensions & Integrations

Commonly Used

- Getting Started
- Resources (Users) **4**
- Form Templates
- Notification Templates

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

[Section 1] AutoTask configuration (Cont'd)



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.

The screenshot shows the 'ADD API USER' form. At the top, there are 'Save & Close' and 'Cancel' buttons. The 'GENERAL' section contains the following fields:

- First Name ***: Demo Binox (highlighted with callout 3)
- Last Name ***: API User
- Email Address ***: binoxdemo@myorganization.com
- Active

The **Security Level *** dropdown menu is open, showing the following options:

- Binox API user demo (highlighted with callout 4)
- API User (system)
- API User (system) Can't Read Costs
- Binox Security Level
- Copy (1) of API User (system)

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.

The screenshot shows the 'CREDENTIALS' section of the form. It contains two buttons: 'Generate Key' and 'Generate Secret'. Below the 'Generate Key' button is the **Username (Key) *** field with the value 'binoxdemo@myorganization.com'. Below the 'Generate Secret' button is the **Password (Secret) *** field with the value '1s\$XA#4z3n@EF6d*eG-0\$g5Ky'. A mouse cursor is pointing at the 'Generate Secret' button.

[Section 1] AutoTask configuration (Cont'd)

API TRACKING IDENTIFIER

API version 1.6 & later require the user of an API tracking identifier. Once assigned, this cannot be changed.

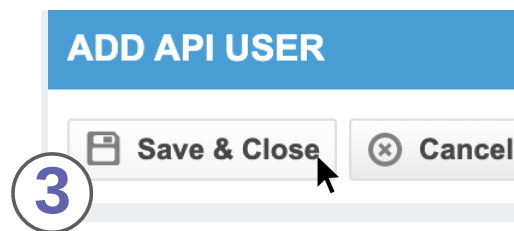
- Integration Vendor **1**
- Custom (Internal Integration)
- None

Integration Vendor*

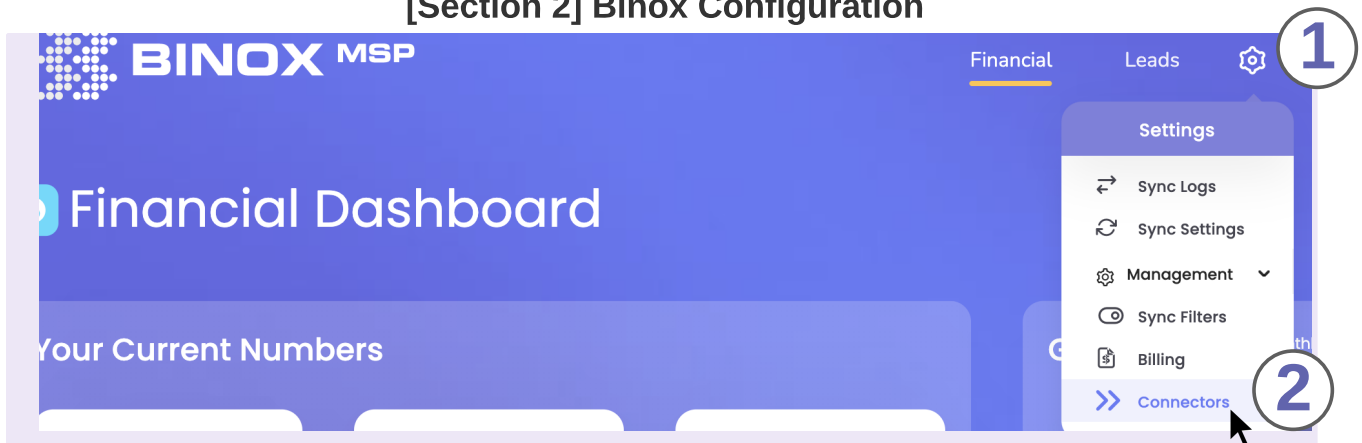
- Beachhead Solutions - Encryption Services
- Binox MSP - Data Synchronization and Sales Reporting** **2**
- BrightGauge Software - BrightGauge

Beneath the rest of the options you'll find the required field to set an **API Tracking Identifier**, select **Integration Vendor**, and then proceed to find **Binox MSP - Data Synchronization 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)

BINOX MSP

- Add PSA
- Connect
- Add a CRM

Let's add your PSA

These are some details about adding a PSA.

ConnectWise

Discover the Platform That Puts Business Management, Service Delivery, and Security at Your Fingertips

Connect

Datto Autotask

Datto's Autotask Professional Services Automation (PSA) is a powerful and intuitive cloud-based PSA platform providing a singular view of the entire business

Connect **1**

Let's add your PSA

These are some details about adding a PSA.

1 Username _____ **2** Password _____

Type your AutoTask Username

Username

2 binoxdemo@myorganization.com

Need help connecting? [Download our user guide.](#)

Next **3**

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.

Let's add your PSA

These are some details about adding a PSA.

Username _____ **2** Password _____

Type your AutoTask Password

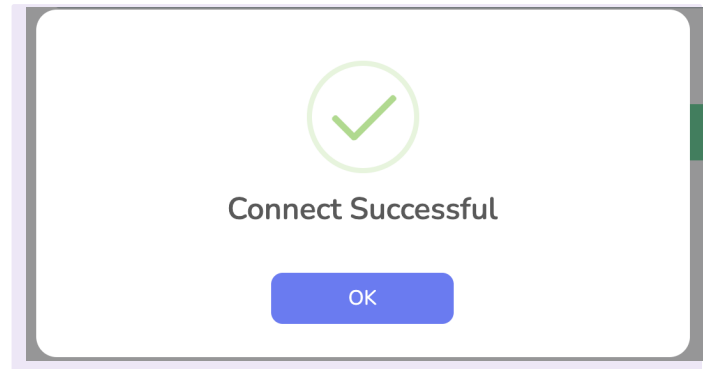
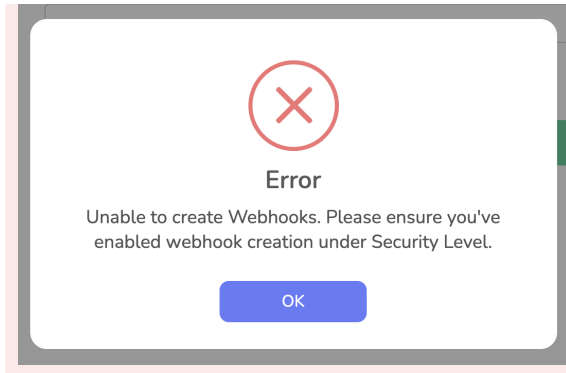
Password

4

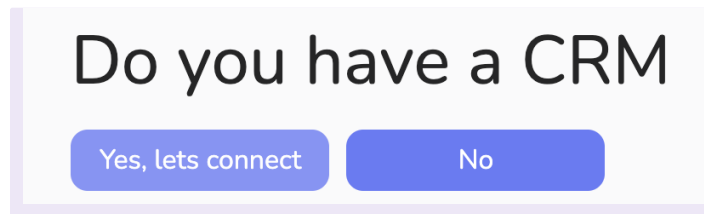
Need help connecting? [Download our user guide.](#)

Back **5** Connect

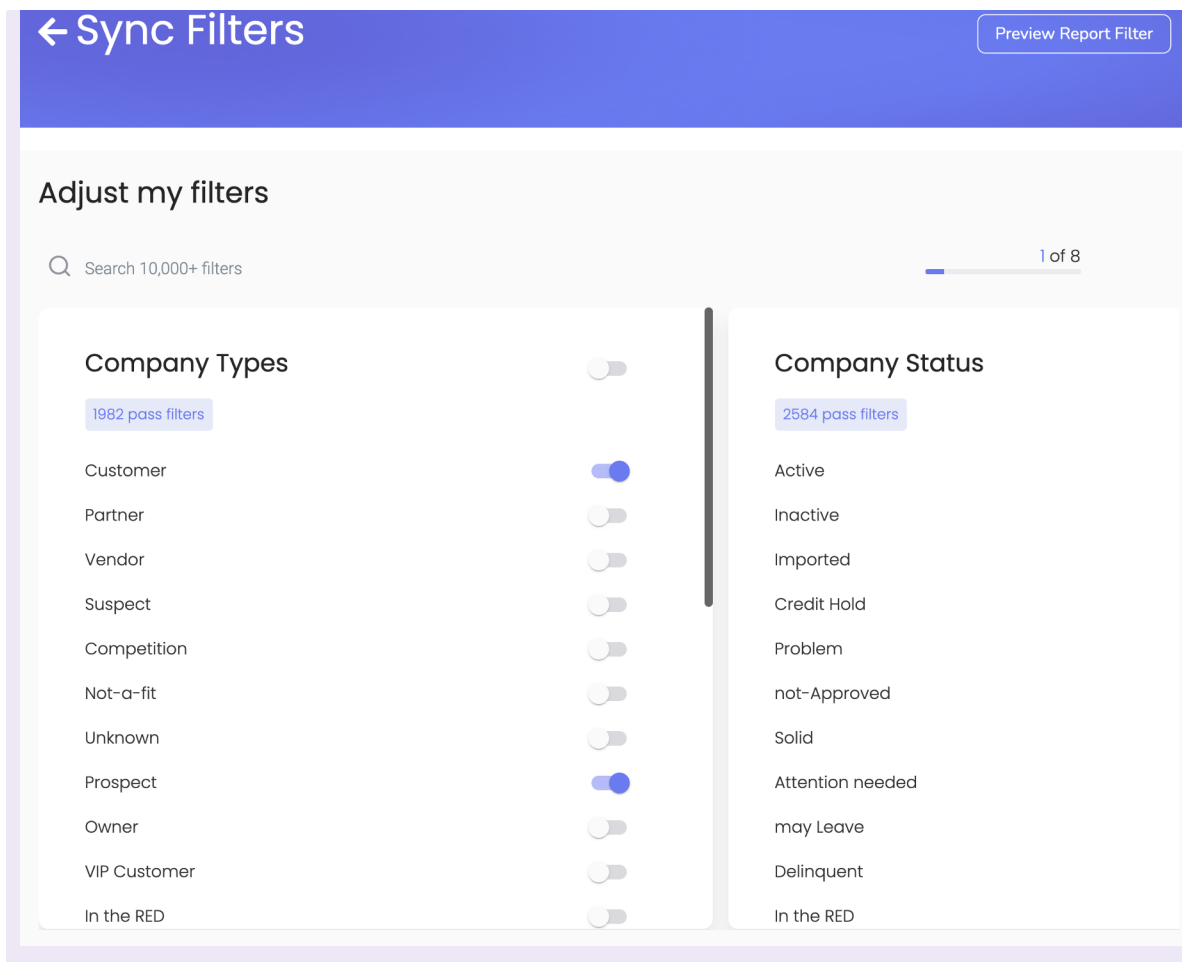
[Section 2] Binox Configuration (Cont'd)



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 synchronize 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**