

# Setting up the Datto Autotask PSA Integration

Last Modified on 02/02/2024 11:46 am CST

Exciting news! Our ConnectBooster Support documentation is moving to a new location. Be sure to bookmark the new link below.

<https://help.cb.kaseya.com/help/Content/0-HOME/Home.htm>



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**datto** | AUTOTASK PSA

*ConnectBooster & Datto Autotask PSA Configuration Guide*

## Overview

Use this step-by-step guide for configuring ConnectBooster to synchronize with Autotask PSA.

Once completed, your ConnectBooster portal will then be able to pull Accounts, Contacts, Contracts, and more to help leverage AutoPay, and supercharge your Billing Automation!

The setup consists of two parts.

**Part 1.** The creation of dedicated credentials know as an "API User".

**Part 2.** Entering the credentials into your ConnectBooster Integrations section.

## Preparation

To perform the integration setup, you will need:

- Admin access to Autotask
- Admin level access on your ConnectBooster "Internal User" account

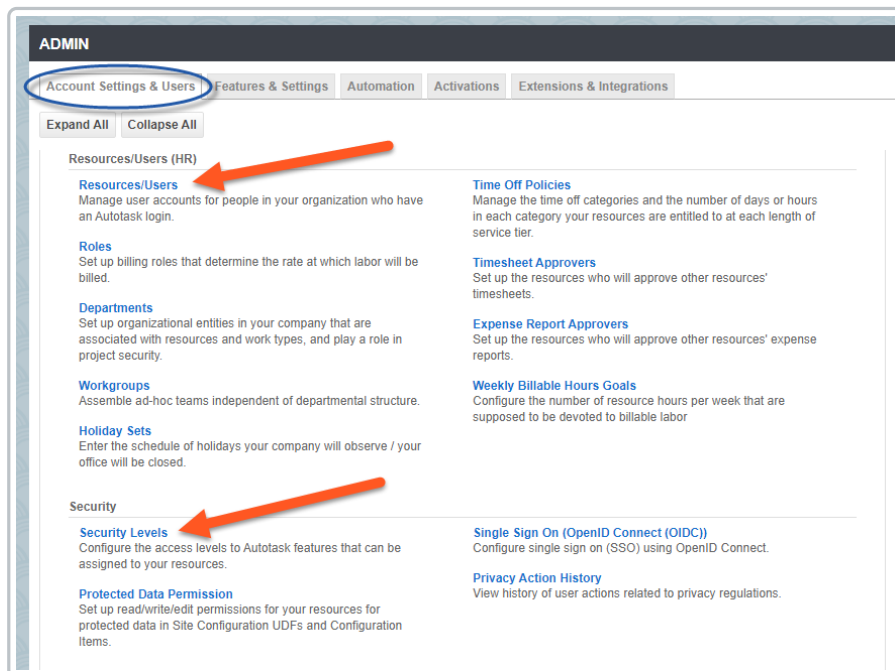
# PART 1

## Configuring Autotask PSA

### 1. Creating a new, dedicated API Resource user (recommended)

"API User" resources are a special type that does not User Interface access, and does not incur additional cost.

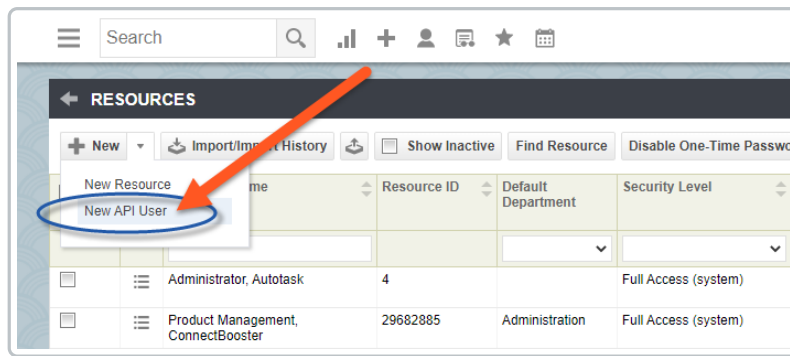
### 2. To generate a dedicated API User, navigate to **Admin --> Account Settings & Users --> Resources/Users**



Note the location of "Security Levels". It's usually recommended to create a dedicated security level for each of your vendor integrations.

*API User's can have their level of access adjusted after creation, so the order of the following steps can be a matter of preference.*

### 3. On the Resource creation page --> **New --> API User**



Fill in the required fields with your preferred values.

Note: "Security Level"

- While "API User (system)" will work, it is *more access* than what ConnectBooster actually needs
  - To set paired down permissions, please follow the optional **Custom Security Level** steps outlined in the section below.

**ADD API USER**

! Error 1 of 8: Required

Save & Close Cancel

**GENERAL**

<p><b>First Name *</b></p> <input style="width: 90%; border: 1px solid red;" type="text"/>	<p><b>Security Level *</b></p> <input style="width: 90%; border: 1px solid red;" type="text"/>
<p><b>Last Name *</b></p> <input style="width: 90%; border: 1px solid red;" type="text"/>	<p>Date Format</p> <input style="width: 90%; border: 1px solid red;" type="text"/>
<p><b>Email Address *</b></p> <input style="width: 90%; border: 1px solid red;" type="text"/>	<p>Time Format</p> <input style="width: 90%; border: 1px solid red;" type="text"/>
<p><input checked="" type="checkbox"/> Active</p> <p><input type="checkbox"/> Locked</p>	<p>Number Format</p> <input style="width: 90%; border: 1px solid red;" type="text"/>
<p><b>Primary Internal Location *</b></p> <input style="width: 90%; border: 1px solid red;" type="text"/>	

- Generate Username (Key).
- Generate Password (Secret).
- Select ConnectBooster as the Integration Vendor.

**CREDENTIALS**

1

**Username (Key)\***

2

**Password (Secret)\***

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**API TRACKING IDENTIFIER**

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

Integration Vendor  
 Custom (Internal Integration)  
 None

**Integration Vendor\***

 3

**Be sure to temporarily copy these credentials.**

Save to create the new User, and **Proceed to Part 2** to enter these values in your ConnectBooster portal.

### Creating a Custom Security Level - (OPTIONAL)

*Please note: it's possible any future features/enhancements may require permission changes to a Security Level set with minimal permissions outlined below.*

Navigate to **Admin --> Resources/Users (HR) --> Security --> Security Levels**.

As a starting point, right click on "API User (system)", and "Copy Security Level".

**SECURITY LEVELS**

Security levels control what features a resource has access to. All security levels must be based on an existir

	Name	License Type	Created
	API User (system) (API-only)	API User	08/22/2017
	API User (system) Can't Read Costs (API-only)	API User	08/22/2017
	Co-managed Help Desk (system)	Co-managed I	08/22/2017
	Contractor	Contractor	08/22/2017

- Edit Security Level
- Inactivate Security Level
- Copy Security Level
- Delete Security Level

**Set a Name**

**SECURITY LEVEL - ConnectBooster - Custom Security Level**

Save & Close Cancel

General Resources

Expand All Collapse All

**GENERAL INFORMATION**

Name \*   Active

License Type  
API User

Save your changes, and assign the API User this new Security Level.

**EDIT API USER - Connect Booster**

Save & Close Cancel Erase (Redact)

**GENERAL**

First Name \*

Last Name \*

Email Address \*

Active  
 Locked

Security Level \*  
ConnectBooster - Custom Security Level  
API User (system)  
API User (system) Can't Read Costs  
**ConnectBooster - Custom Security Level**  
Copy (1) of API User (system)  
RandallDeveloper

Number Format  
X,XXX.XX

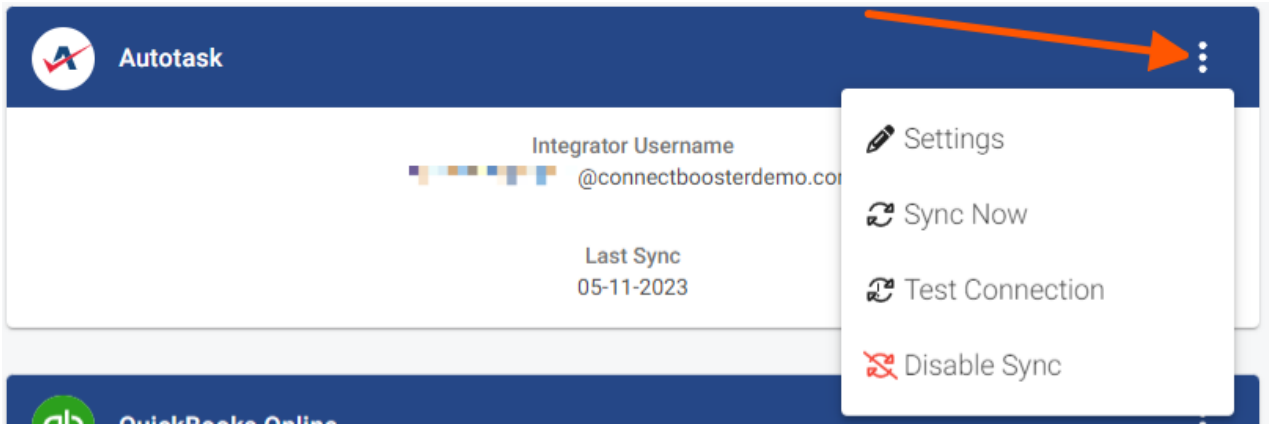
Primary Internal Location \*  
Headquarters

## PART 2

### ConnectBooster Setup

Next, within your ConnectBooster portal, navigate to **Integrations**.

Select the Autotask PSA integration card --> Settings



Note: if this integration does not exist for you, please contact [support@connectbooster.com](mailto:support@connectbooster.com) to have this added to your portal.

**Enter the credentials:**



Autotask

579faa7ffd8f343748ada6ec



Username

 1

Password

 2

Custom Quote URL Mapping🔗

Enter User-Defined Field Name

*Make sure integration information is saved, before using the test connection button.*

Test Connection

LAST ATTEMPTED SYNC

05-19-2023

LAST SUCCESSFUL SYNC

05-19-2023

Sync From Date

Sync From Hour

Sync From Minute

 3

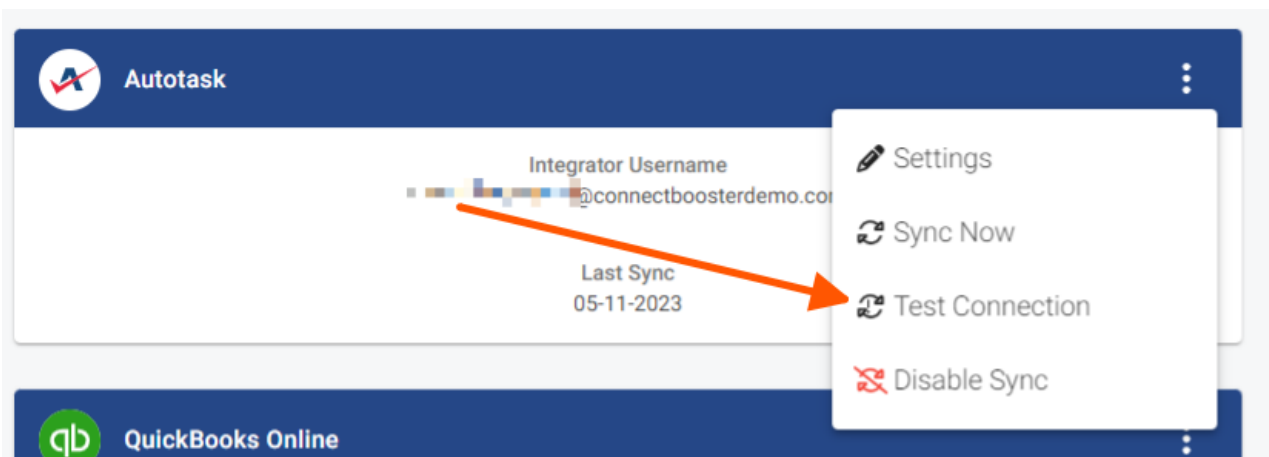
Close

Disable Sync

Save

1. The Username (Key)
2. The Password (Secret)
3. *Don't Forget to Save!*

Validate the credentials are correct via the "Test Connection" button.



Once you see the successful confirmation, you should be all set! The connection is complete!

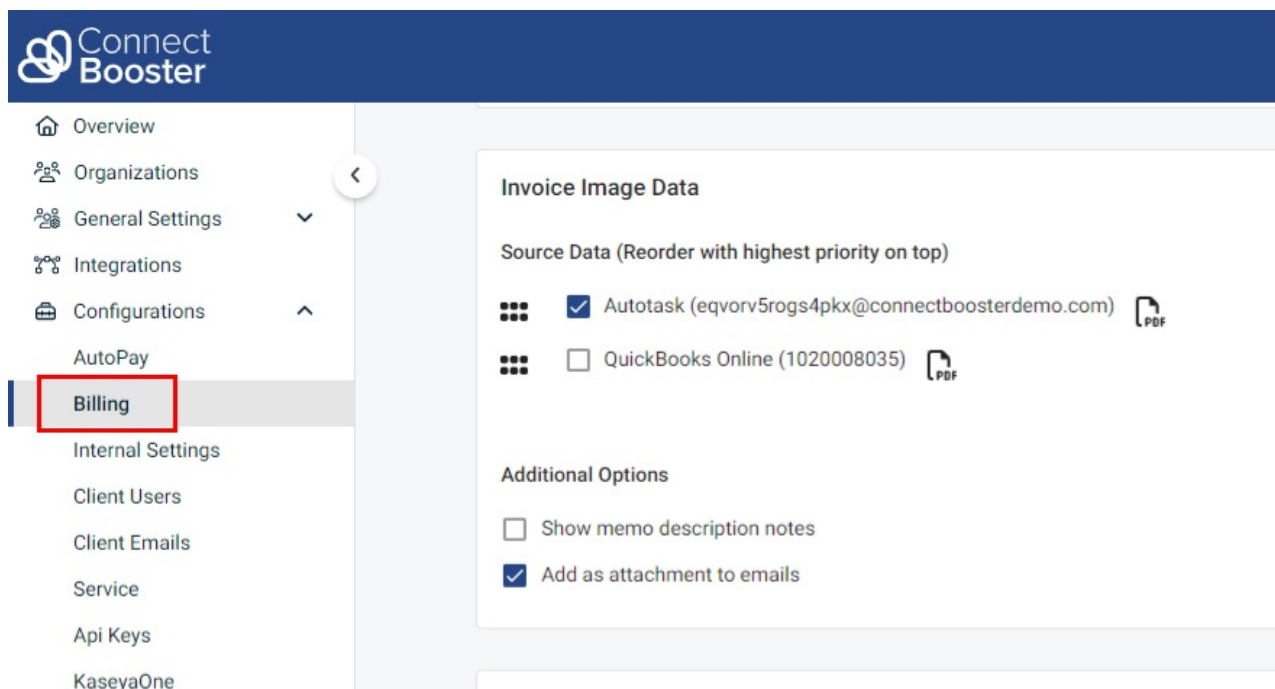
A sync will begin within the hour, otherwise you may immediately initialize via the "Sync Now" button.

## Selecting the Invoice Image

Utilize this function to allow your clients to view/print an HTML copy of the Autotask invoice.

### Invoice Image Data

Navigate to Configurations --> Billing --> Scroll to the *Invoice Image Data* section.



Check the box for the Autotask integration, and move it to the top of the list if that is your preferred system behavior.

**Don't forget to Save your changes!**



Congratulations!! You have now setup the invoice image data.

- *More information regarding how this, and the related functions impact your portal behavior [please see this article](#).*
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If you encounter issues, please don't hesitate to [Contact Support](#).

If the Autotask PSA integration does **NOT** exist, please contact ConnectBooster Support for creating **NEW** integrations or when **CONVERTING** current platforms.