

W E L C O M E ,

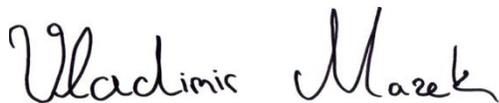
Thank you for your interest in Own Web Now integration with Autotask. We have worked closely with Autotask to create the most complete integration of software, support and services that allows you to save time, keep control of all the support intelligence and present the most relevant data through automated Autotask business process controls.

Own Web Now strived to provide the most complete Autotask integration and we are proud to say that it is second to none. As a result of such tight integration the initial configuration may be complex and time consuming. However, we believe that better alignment of your services with your PSA creates a more automated portfolio of products, allowing you to become more profitable.

To help you with your Autotask integration project we offer a full concierge service covering the deployment, configuration, testing and ongoing maintenance of your PSA integration. Furthermore, we offer webcasts, podcasts and other resources from our community of users to help you stay on top of all the best practices.

PSA integration is an ongoing commitment for Own Web Now and a part of our feature set. Expect it to evolve and please send us any suggestions and recommendations you may have. Remember that you can always download the latest guide through our portal at <https://support.ownwebnow.com>

Sincerely,



Vlad Mazek, MCSE

CEO, Own Web Now Corp

Email: vlad@ownwebnow.com

Phone: (877) 546-0316

Integration Overview

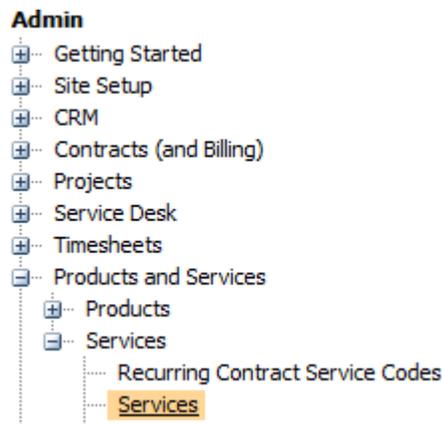
Information exchange between Own Web Now and your Autotask portal is conducted in a safe and controlled process. By enabling advanced integration features you do not sacrifice any of your privacy or security. Our integration process outlined here assumes the most conservative settings, separate service boards, limited information exchange and encrypted communications.

Own Web Now integration with Autotask takes advantage of the Autotask Web Services API .

AutoTask Integrator Setup

Before you can enable the integration, you need to create Services in your Autotask portal.

Open the Admin page in Autotask, expand **Products and Services**, **Services** and click **Services**



1. Click the new button, and type in **ExchangeDefender**, unit price to **\$0.00**, Period Type **Monthly**, Allocation Code **Managed Service Contract (Or your choice)**

Services			
Service Name	Unit Price	Period Type	Allocation Code
* ExchangeDefender	* 0.00	* Monthly	* Managed Service Contract

Do the above step replacing the Service Name for each:

- ExchangeDefender VAR 35
- ExchangeDefender VAR 50
- ExchangeDefender VAR 100
- Exchange Hosting
- Offsite Backups

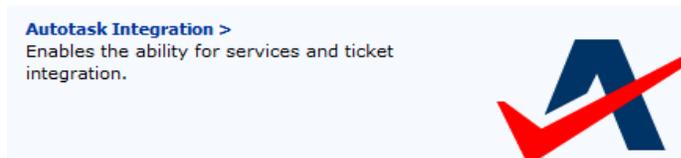
- Blackberry BES
- Web Hosting

Own Web Now Integration Connector

1. Login to the [OWN Support Portal](https://support.ownwebnow.com) (https://support.ownwebnow.com)
2. Click on the **Service Manager** button



3. Under Services, click on **Autotask Integration** to start the Autotask Integration Wizard.



4. Provide your portal location, and the username and password the integrator will use to login to your portal.

A screenshot of a form titled 'Autotask Config'. The form has three input fields: 'Location' with a dropdown menu set to 'United States', 'Username' with the text '@ownwebnowdemo.com', and 'Password' with six black dots. Below the fields is a green message that says 'Authentication Successful!'.

Our Support Portal will contact your Autotask portal and verify that the correct credentials are present. You should see “**Authentication Successful!**” message. If you get an error please consult the Troubleshooting section and redo the previous section for *Autotask Integrator Setup*.

5. Our portal will initiate a prerequisites check to make sure the services above were created in Autotask. Click Next if you receive no failures.

Checking Prerequisites

Web Hosting	Success!
Exchange Hosting	Success!
Offsite Backups	Success!
ExchangeDefender VAR 35	Success!
ExchangeDefender VAR 50	Success!
ExchangeDefender VAR 100	Success!
ExchangeDefender	Success!
Blackberry BES	Success!

Next

You will now be presented with a Create Companies page. For each customer in your Autotask portal **that has services** with OWN, will have to provide us with their Company Name.

6. Type in the name of an Autotask account you'd like to link to SM billing and then hit tab (or click out of the text box)

Adding companies from Autotask

Company Name:

Next

Adding companies from Autotask

Company Name:

Query Result

Company Name Police Department
Address 78 B Snowbound Drive

Add AT Company

Next

- a. If the company typed in was valid, a new box will appear that will show the company address (*this is just for your verification and isn't stored*). Click **Add AT Company**
- b. Once you are done adding companies, click Next

This page will display all of your subscribed services that can be linked to Autotask. If you forgot to add a company, you can use the company quick add section at the top.

Company Quick Add:

Exchange Hosting

vlad@vladfire.com

Please Select ▼

travis@vladfire.com

Please Select ▼

amy@bluesky.com

Please Select ▼

7. For each item, select the Autotask account to link the subscription to.

Exchange Hosting

vlad@vladfire.com

Please Select ▼

travis@vladfire.com

Please Select

amy@bluesky.com

Police Department
Blue Sky Group

Exchange Hosting

vlad@vladfire.com

Police Department



After each item is linked, the select box will be replaced with the linked company name and an undo button.

Once all items are linked, click the next step button.

The next page will display the results of creating the contracts within Autotask

Creating contracts in Autotask

vlad@vladfire.com

Creating contract for Police Department Success!
 Linking contract 29684033 (vlad@vladfire.com)
 Adjusting contract 29684033 units 1

travis@vladfire.com

Creating contract for Police Department Success!
 Linking contract 29684037 (travis@vladfire.com)
 Adjusting contract 29684037 units 1

amy@bluesky.com

Creating contract for Blue Sky Group Success!
 Linking contract 29684041 (amy@bluesky.com)
 Adjusting contract 29684041 units 1

ABLEBackup

Creating contract for Blue Sky Group Success!
 Linking contract 29684045 (ABLEBackup)
 Adjusting contract 29684045 units 1

Now, each month your customer that you linked your subscriptions to will have a reoccurring monthly contract that you can bill the client for.

Example Contract (Offsite backup, 10 GB):

SERVICE NAME	UNIT PRICE	PERIOD TYPE
Offsite Backups	\$1.00	Monthly

CONFIGURATION ITEMS	UNITS	EXTENDED PRICE	ADJUSTED PRICE
	0	\$0.00	\$16.00
	0 Adjust		Adjust

After completing the wizard, when integration is enabled, you will be required to select the AT company to associate any new services with.

Autotask Integration

AT Company:

Terms:

Agreements:

Managing Autotask Integration

After completing the wizard, going back to Service Manager, Autotask Integration will display your integration account with management options.



If you disable integration, you will be permitted to add new services, however, the next time you enable integration, you will have to link any new subscriptions to AT accounts.

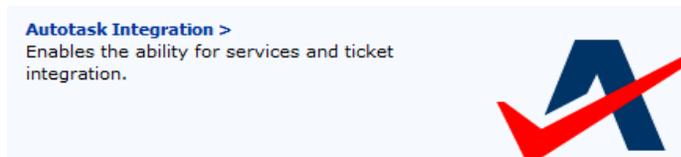
Deleting all integration data will delete all records of integration in OWN and will delete the created contracts.

Integrating OWN Service Requests (Tickets):

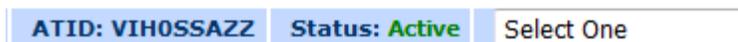
1. Login to the [OWN Support Portal](https://support.ownwebnow.com) (<https://support.ownwebnow.com>)
2. Click on the **Service Manager** button



3. Under Services, click on **Autotask Integration** to start the Autotask Integration Wizard.

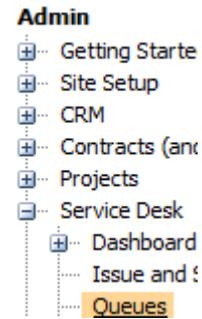


4. Note your ATID, it will be used later

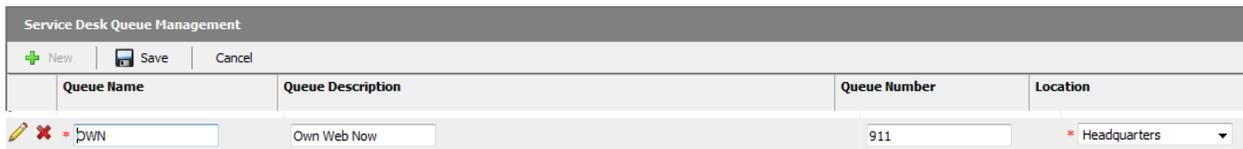


5. Log back into your Autotask portal as an administrator, click on the Admin button.

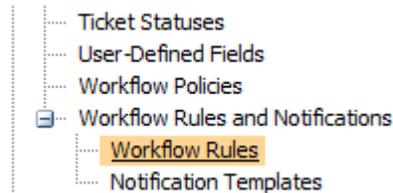
6. On the left pane, expand service desk, and click Queue, and New.



7. Set the Queue name to OWN, and all the other options are your discretion.



8. Back to the left admin pane, Expand Workflow Rules and Notifications and click Notification Templates and then click New



9. Give the template a name and description, and in notification template subject, put **AT_INT_ID[#]<TicketNumber>[#]<TicketTitle>**
Replacing AT_INT_ID with your ID saved in step 4
 Example: VIHOSSAZZ [#]<TicketNumber>[#]<TicketTitle>

10. Inside Notification Template Body, put the following:

<Description>[#]<TicketNote>[#]<TicketNumberNoLink>

-----End User Information-----

<AccountName>

(Make sure to have no whitespaces) click save and close.

Notification Template
?

Save and Close
 Save and New
 Cancel

Notification Template Name*

Notification Template Description

Notification Template E-Mail Subject*

Entity*

Active

Notification Template Sort Order

Notification Template Variables

- Account Address First Line
- Account Address Second Line
- Account City
- Account Country
- Account Name
- Account Phone
- Account Zip Code
- Account State
- Actual Hours
- Allocation Code Name
- Assigned Queue
- Assigned Resource
- Contract Name
- Create Date
- Description
- Due Date
- Estimated Hours
- Configuration Item Name
- Configuration Item Reference Number
- Configuration Item Serial Number

Insert

Notification Template Body

<Description>[#]<TicketNote>[#]<TicketNumberNoLink>

Send Test Email

11. Back to the left pane, click Workflow Rules and then click New

Workflow Rules			
New			
Workflow Rule Name	Entity	Events	Conditions
Auto Assign Lead Tech for Company: Integrated IT	Ticket	When a ticket is: Created	And the following conditions are met: Account name equal to "Integrated IT Solutions, LLC" Issue equal to "Managed Services Alert"
Change Ticket Status to Dispatch	Ticket	When a ticket is: Edited Created	And the following conditions are met: Service Call Scheduled equal to "True" Status equal to "Waiting Dispatch"
Infinity Rule	Ticket	When a ticket is:	And the following conditions are met:

- Give the rule a name, and select the events Created and Edited, and set the condition to Queue name equal to the queue name you created earlier.

Workflow Rule

Save and Close | Save and New | Cancel

General
Notification

Workflow Rule Name*
 Active

Workflow Rule Description

Events **When a(n)**
Ticket is Created Idle for Minutes
 Edited Due in Minutes
 Overdue by Minutes

Conditions **And the following conditions are met:**

Queue Name
▼
Equal to
▼
OWN
▼

and
(Select an Attribute)
▼
(Select an Operator)
▼

and
(Select an Attribute)
▼
(Select an Operator)
▼

and
(Select an Attribute)
▼
(Select an Operator)
▼

and
(Select an Attribute)
▼
(Select an Operator)
▼

Actions **Then execute the following actions:**

(Select an Attribute)
▼
=
(Select/Enter a Value)
▼

and
(Select an Attribute)
▼
=
(Select/Enter a Value)
▼

and
(Select an Attribute)
▼
=
(Select/Enter a Value)
▼

and
(Select an Attribute)
▼
=
(Select/Enter a Value)
▼

and
(Select an Attribute)
▼
=
(Select/Enter a Value)
▼

- Click the notification tab at the top
- Select Send email from (the email address you have set in your portal)
- Inside additional email addresses, put autotask@ownwebnow.com
- Select Save and Close.

Workflow Rule

Save and Close | Save and New | Cancel

General | Notification

Recipients

Assigned Resources
 Account Owner
 Ticket Contact
 [Select All](#)
 Account Contacts
 Initiating Resource
 Send e-mail from helpdesk@autotask.com

Account Contacts

Please select an account condition before selecting account contacts

Resources

	Resource Name	E-Mail Address	E-Mail Type
<input type="checkbox"/>	Billy, Bates	bill@autotaskdemo.com	Primary
<input type="checkbox"/>	Connie, Clark	Connie@autotaskdemo.com	Primary
<input type="checkbox"/>	Dunn, Donnie	ddonnie@autotaskdemo.com	Primary
<input type="checkbox"/>	Ed, Evans	Ed@autotask.com	Primary
<input type="checkbox"/>	Jefferson, Janet	janet@Autotaskdemo.com	Primary

Additional E-Mail Addresses

autotask@ownwebnow.com

Notification Template

OWN Portal

E-Mail Subject

DXJWVAAH4[#]<TicketNumber>[#]<TicketTitle> Use Notification Template E-Mail Subject

Notification Preview

<Description>[#]<TicketNote>[#]<TicketNumberNoLink>

Now when you create a ticket in the OWN queue or move a ticket to the queue and update it, it will check with OWN if the ticket exists in our portal, and creates it if it doesn't.

Congratulations

You are now done with your Autotask Integration with Own Web Now, we hope you enjoy it and find the experience very profitable.

Please tell us what would help improve the integration process and how we can be of better service to our mutual clients.

Own Web Now has made a significant commitment to Autotask as a business operating platform and will continue to add value to the solution as the products and services evolve. If you would like to be involved in that process please let us know.

Please stay tuned to the Community tab in our Support Portal for the very latest news and training collateral.

Solutions Community & Support

As a part of our launch of the Autotask integration we are offering Solutions Community & Integration Support access at a discount for just \$199 one-time.

Support package includes integration work done by one of our engineers, minimizing time and effort required to get the sync going between Autotask and Own Web Now. Because we will be handling the entire deployment you can be sure that the solution works right away, as intended, and is supported between API upgrades on both Own Web Now and Autotask side. We will handle all the change management and troubleshooting as needed and answer your questions regarding more complex deployments.

Additionally, Solutions Community gives you access to a world of documentation, podcasts and webcasts that will help you get the best practices and solutions from IT providers that leverage the solution to the fullest.

Note: Due to the complexity of the integration and potential mistakes that can be made, Solutions Community & Integration Support can only be purchased when you sign up for the integration. *If you opt out of it there is no way to purchase it at a later date.*

Mission Statement

Own Web Now Corp's mission is to deliver reliable and affordable globally-reliable business platform solutions, support them 24/7/365 and drive their development, maintenance and support in the direction that benefits our partners and clients.

Support & Contact Information

Own Web Now is a global company and we are available to serve you 24/7/365. There are several ways to reach us:

Support & Partner Portal:

<https://support.ownwebnow.com>

Phone Numbers:

USA: (877) 546-0316

International: +1 (954) 839-8495

UK: 0800 0620149

Australia: 02 8307-3865

Mailing Address:

Own Web Now Corp

8131 Vineland Ave #102

Orlando, FL 32821

We are also available individually on Skype and MSN Live Messenger, get in touch with us and ask for the info.