Autotask/MS Dynamics Integration

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Preliminary Set-up

Create Entity Fields/UDFs to store Account IDs, Contact IDs, and API Timestamps.

The Account and Contact ID fields will store the referenceable IDs of Accounts and Contacts within the corresponding platform. Account and Contact API Timestamps will allow you to see the last date and time the corresponding item was updated via the system's bi-directional sync.

*All Entity Fields/UDFs must be single line text fields

for MS CRM	**for AT**
Entity Field to store AT Account ID	UDF to store MS CRM ID
Entity Field to store Account API Timestamp	UDF to store Account API Timestamp
Entity Field to store Contact ID	UDF to store MS CRM ID
Entity Field to store Contact API Timestamp	UDF to store Contact AT UDF

Creating Entity's within MS Dynamics CRM

1. Go to **Settings** > **Customizations**.
2. Click **Customize the System**.
3. Under **Components**, expand **Entities**, and then expand the entity you want.
4. Click **Fields**.
   - To add a new field, on the Actions toolbar, click **New**, and then enter a **Display Name** to generate the **Name**.

     - OR -
   - To edit a field, select it in the list, and then on the Actions toolbar, click **Edit**. You can make changes to the following fields:

Creating User Defined Fields within Autotask

Autotask menu > Admin > Features & Settings > Application-wide (Shared) Features > User-Defined Fields> User-Defined Fields

To create a new user-defined field (UDF)

1. Click a tab to select the entity the UDF will be associated with.

The Companies tab is selected by default. If you do not select a different tab, the UDF will be created for the Company entity.

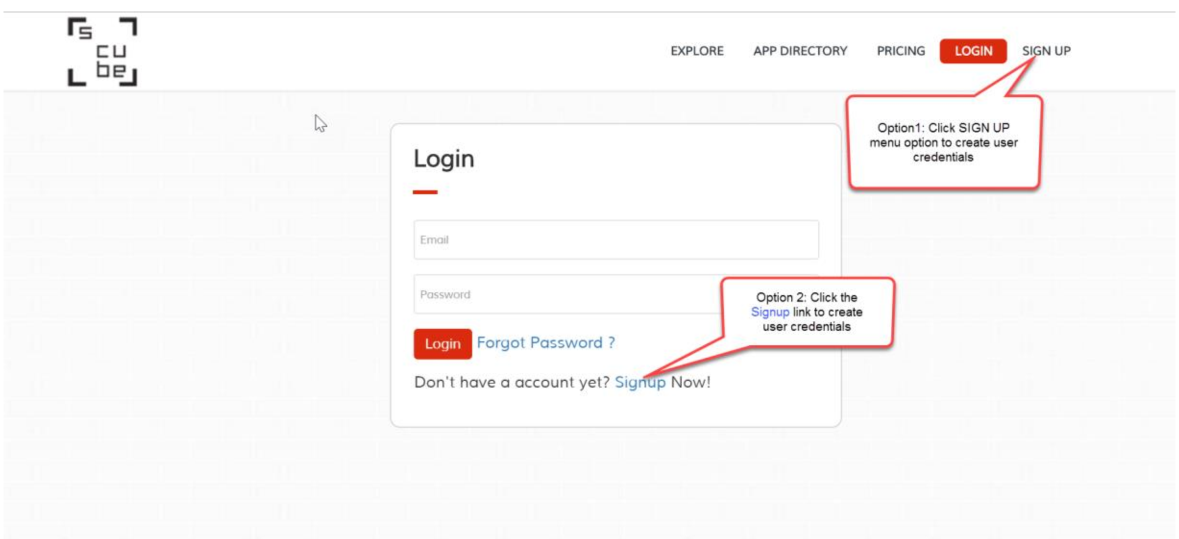
2. Click **New** to open the User-Defined Fields page, or right-click and select **Edit** to edit a UDF.

3. Complete all required fields.

Sign-up

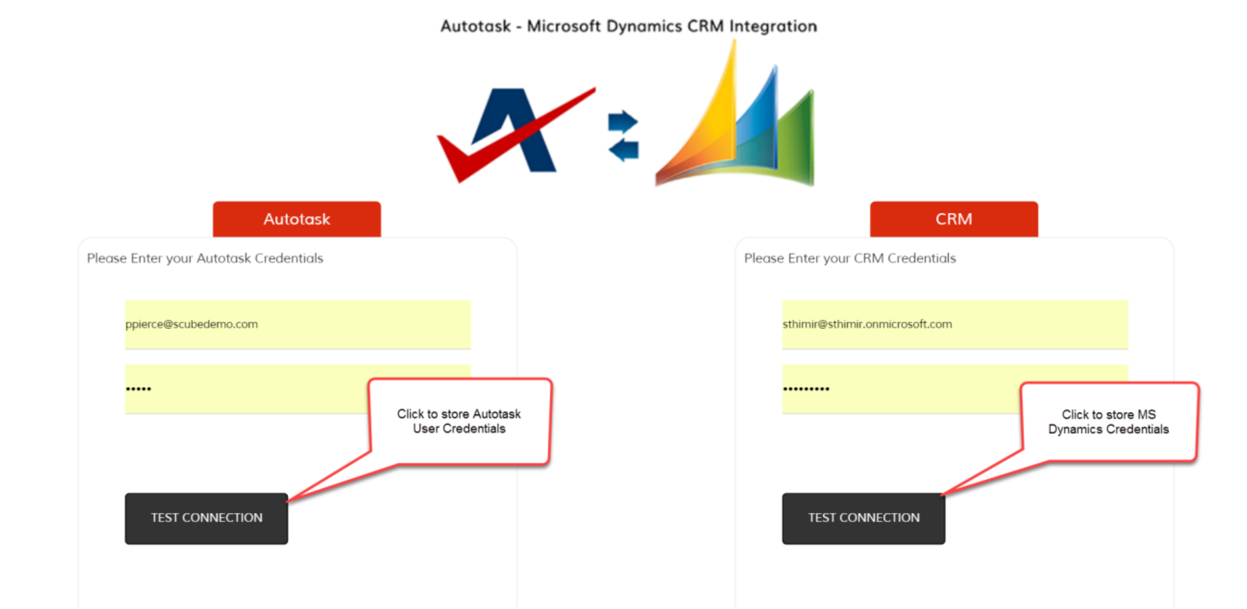
Once you have created all required user defined fields navigate to the [s]Cube integration page:

https://integrations.scubeenterprise.com/attocrm



Connection

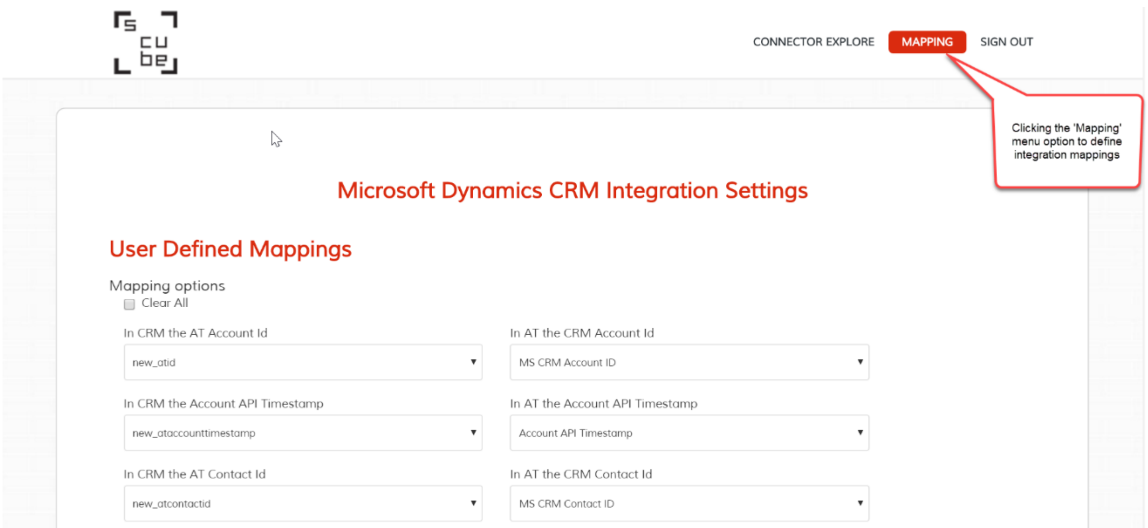
Upon Sign-up you will be directed to the Connector Page, allowing you to connect to each system's APIs. Plug in your Autotask and MS CRM credentials. Clicking 'Test Connection' will validate your credentials and provide you access to the mapping screen.



***Note**
If you are connecting to an on-premise version of MS CRM please contact sCube at 518-390-6705 for assistance.

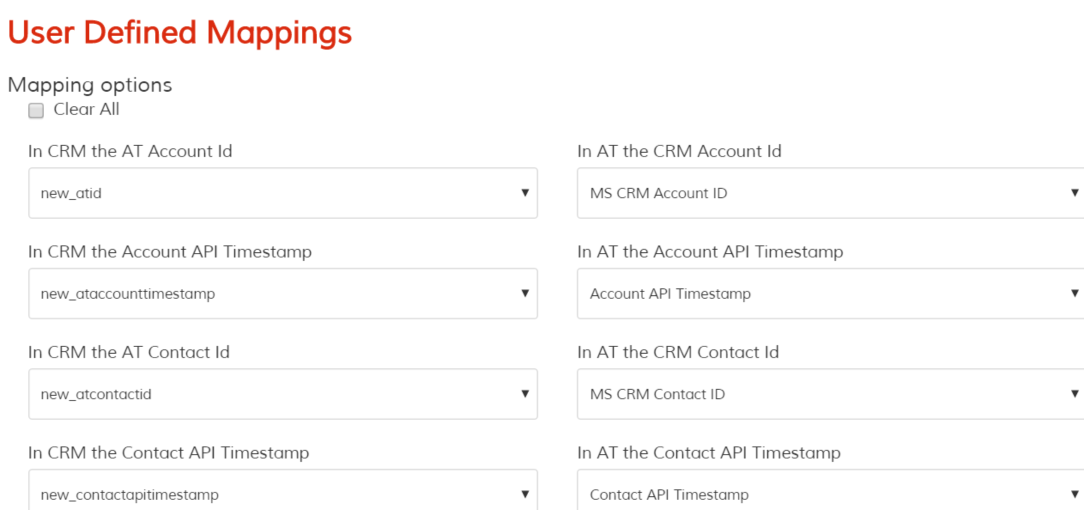
Mappings

Once Credentials are validated. Click the mapping link in the upper right hand corner to complete the set-up



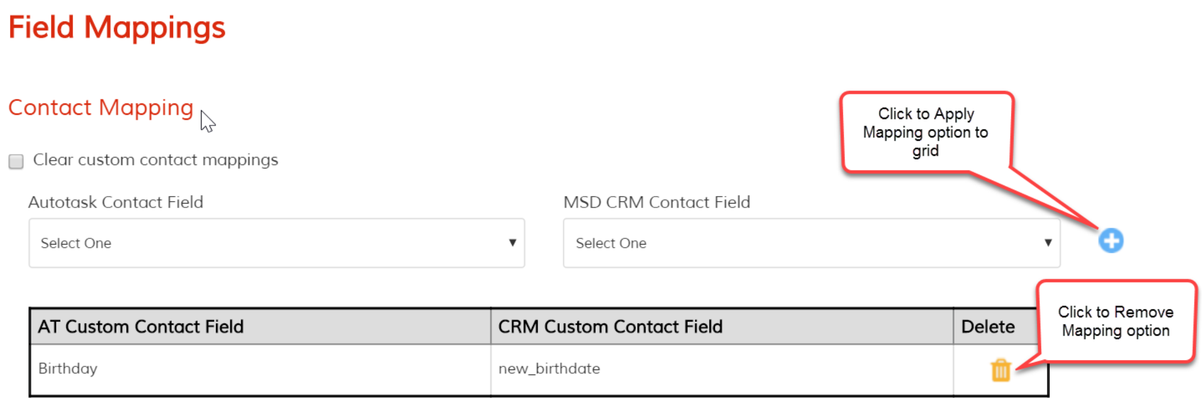
There are five unique mapping sections available, of these five sections 3 are required (User Defined Mappings, Account Owner Mappings, and Account Type Mappings)

User Defined Mappings (Required Mappings)
User Defined Mappings allow you to map your newly created UDF/Entity fields that will store the corresponding systems Account/Contact IDs and identify the last time an update was made



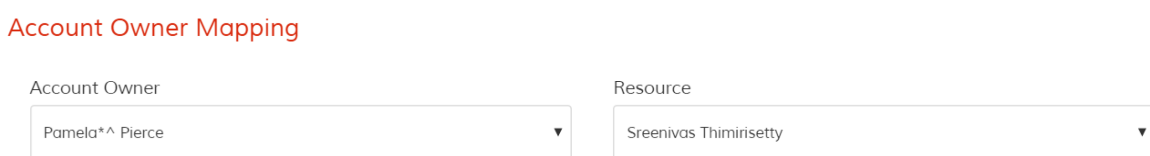
Field Mappings

Field Mappings allow you to map Autotask Contact UDFs to MS Dynamics CRM Contact Entity Fields



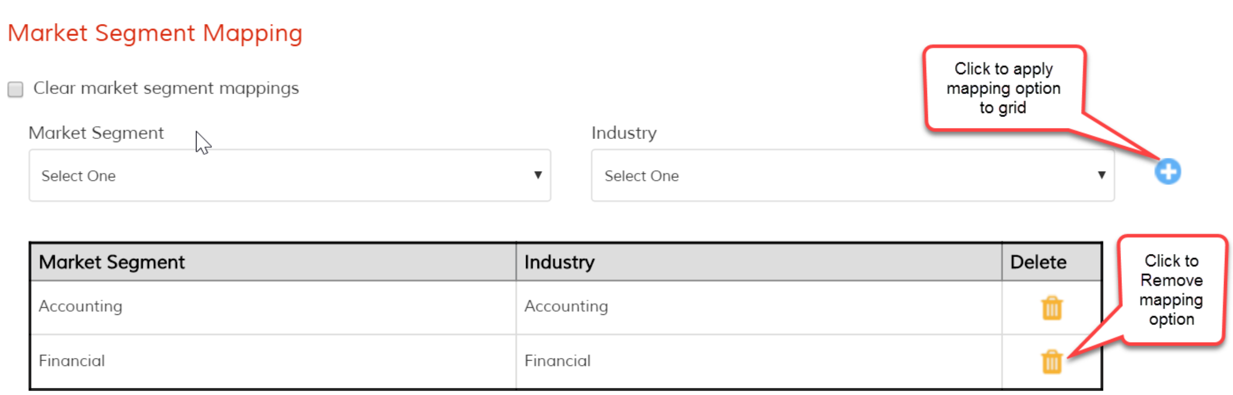
Account Owner Mappings (Required Mappings)

If the sync tool is unable to match Assigned Account Owners and Resources via resource/user email address or First Name and Last Name, the system will assign the newly synced account the Default Account Owner/Resource identified within the following mapping section.

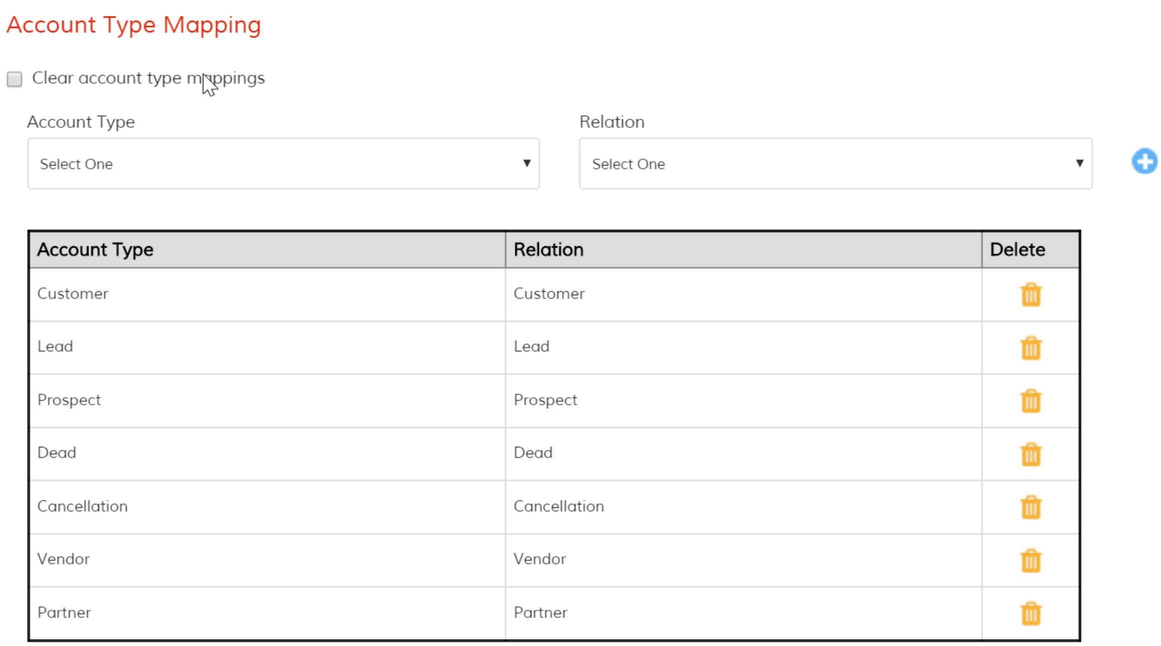


Market Segment

Map Autotask Market Segments to corresponding MS CRM Industries. This is an optional translation, so if an unmapped value is associated with an Account during sync, the integration will not populate these fields.



Account Type (Required Mappings)
Map Account Type (Autotask) to Relationship Type (MS Dynamics) within the following grid. This is a mandatory translation. If an account type or relationship value is not mapped during an attempted sync, the transaction will error out.



Submit Mappings

Click the submit button on bottom of form to store your mapping options.

Mapping Index

Accounts

Autotask	MS Dynamics CRM
Account ID	Autotask Account ID
Account Name	Account Name
Address 1	Address 1: Street 1
Address 2	Address 1: Street 2
City	Address 1: City
State	Address 1: State/Province
Zip Code	Address 1: ZIP/Postal Code
Country	Address 1: Country/Region
Phone	Main Phone
Alternate Phone 1	Address 1: Telephone 2
Alternate Phone 2	Telephone 3
Fax	Fax
Web	Website
Account Type	Relationship Type
Account Owner	Owner
Market Segment	Industry
Parent Account	Parent Account
SIC Code	SIC
Asset Value	Annual Revenue
Account Number	Account Number
Account Active	Status
Account Active	Status Reason
Country	Country
Bill To Address Line 1*	Address 2: Street 1
Bill To Address Line 2*	Address 2: Street 2
Bill To City*	Address 2: City
Bill To State*	Address 2: State/Province
Bill To Zip Code*	Address 2: ZIP/Postal Code
Bill To Country ID*	Address 2: Country/Region

***Billing Address fields are not bi-directional. Billing Address is only transferred from Autotask to MS Dynamics Address 2 fields**

Contacts

Autotask	MS Dynamics CRM
First Name	First Name
Last Name	Last Name
Middle Initial	Middle Initial
Title	Title
Contact Address 1	Address 1: Street 1
Contact Address 2	Address 1: Street 2
Contact City	Address 1: City
Contact State	Address 1: State/Province
Contact Zip Code	Address 1: ZIP/Postal Code
Contact Country	Address 1: Country/Region
Email	Email
Contact Phone	Business Phone
Contact Alternate Phone	Home Phone
Contact Mobile Phone	Mobile Phone
Contact Fax	Fax
Active	Status
Active	Status Reason
Contact Country ID	Address 1: Country/Region
Bulk Email Opt Out	Do not allow bulk email