



OBM/Legacy ShadowProtect Autotask Integration Guide

Updated October 2016



Why integrate Autotask with eFolder?

Autotask is all-in-one web-based Professional Services Automation (PSA) software designed to help you run your business more efficiently and profitably.

Configuring eFolder with the Autotask API allows you to

- Speed up billing by linking your eFolder customers to their accounts in Autotask.
- Push and monitor severity-based backup notifications to Autotask as service tickets.

Note: Autotask billing and ticketing integration is currently available for eFolder BDR for ShadowProtect and eFolder Backup for Files.

These instructions will help you:

- ✓ Prepare your existing Autotask accounts for connection with eFolder
- ✓ Complete the eFolder Integration Setup screen
- ✓ Add Autotask accounts to the eFolder Customer Map
- ✓ Assign Autotask contracts to customers in the eFolder Customer Map
- ✓ Synchronize Autotask billing with eFolder
- ✓ Create Autotask service ticket notifications in eFolder
- ✓ Configure or confirm Autotask service ticketing settings in eFolder

Contents

Preparing Autotask to integrate with eFolder	4
What to do <i>before</i> you add Autotask accounts to eFolder.....	4
Billing Setup CHECKLIST:	5
Ticketing Setup CHECKLIST:	6
I'm new to Autotask. Where can I find help with Setup?	6
Billing with Autotask.....	8
Preparing Autotask accounts for billing from eFolder.....	9
Billing Setup CHECKLIST:	9
Your Autotask accounts, services and contracts are set up. Now what?	10
Configure your Integration Setup on the eFolder Portal.....	10
Where do I find the Integration Setup from the eFolder Portal?.....	10
How to complete the Integration Setup.....	11
How to configure your Autotask Billing Settings.....	12
Billing Settings descriptions.....	12
Integrating Autotask accounts and contracts in eFolder.....	13
Adding Autotask accounts to the eFolder Integration Map	13
How to assign Autotask contracts to customers in the Integration Map.....	14
Synchronizing with Autotask.....	15
Validating your new eFolder + Autotask billing setup.....	16
Ticketing with Autotask.....	18
Preparing Autotask accounts for service tickets from eFolder.....	19
Ticketing Setup CHECKLIST:	19
Entering Autotask API credentials for ticketing.....	20
Adding Autotask ticketing accounts to the eFolder Integration Map.....	21
Creating notifications for Autotask service tickets.....	22
Confirming or customizing Autotask ticketing choices	24
Autotask ticket settings on the Integration Setup page.....	25
Validating your new eFolder + Autotask ticketing setup	26
Questions?.....	26

Preparing Autotask to integrate with eFolder

What to do *before* you add Autotask accounts to eFolder

If you are new to Autotask, please be aware that you must create and configure a variety of Autotask settings *before* you add your Autotask accounts to eFolder.

If you currently use Autotask, you probably have already performed most of these steps.

But review the following checklists for both billing and ticketing, to ensure you understand each requirement *before* you begin to add any accounts to eFolder.

Below are the MINIMUM Autotask setup requirements for eFolder billing:

Billing Setup CHECKLIST:

One-time-only Autotask setup:

- Select or create an eFolder administrative user in Autotask and assign API permissions to that user. Make a note of this administrative user's credentials (API Username and API Password.) You will need these credentials to add Autotask accounts in eFolder.

One-time-only Autotask activities required for each customer added to eFolder:

- Ensure that you have generated an Autotask account for each customer to be added to eFolder, including a unique Autotask Account ID#.
- Verify that all of your Autotask customers appear in your eFolder account listing.
Note: To integrate with eFolder, the Autotask **Account Type** must be *Customer*. Otherwise, Autotask account types (for example, *Leads*) may not behave as expected.
- In Autotask, create a service for each eFolder product.
Note: The service **Period Type** must be set to *Monthly*.
We recommend the service **Billing Code** be *Recurring Service Revenue* or *Managed Service Contract*, but you can customize this code as desired. However, please be sure to understand the Contract Requirements for each service.
- In Autotask, define a contract for each customer using an eFolder Service.
Note: **Contract Type** must be a *Recurring Service Contract*. Any attached services must be directly attached as "Services". They cannot be attached as a subset of a "Service Bundle".
- Did you know there are "cloning" tools available in Autotask that allow you to work with an entire frequently-used contract list at one time? This is useful if many of your customers have contracts with the same services. Refer to Autotask documentation or contact [Autotask support](#) for further help.

Below are the **MINIMUM** Autotask setup requirements for eFolder ticketing:

Ticketing Setup CHECKLIST:

One-time-only Autotask setup:

- Select or create an eFolder administrative user in Autotask and assign API permissions to that user. Make a note of this administrative user's credentials (API Username and API Password.) You will need these credentials to add Autotask accounts in eFolder.

One-time-only Autotask activities required for each customer added to eFolder:

- Verify that all of your Autotask customers appear in your eFolder account listing.
Note: To integrate with eFolder, the Autotask account type must be "Customer".
- Generate an Autotask account for each customer, with a unique Account ID#.

Autotask ticket settings to be selected or customized for use by eFolder:

- (Optional) Select a **Ticket Subject Prefix** to identify a ticket from eFolder.
- Autotask **Queue** name: Leave default setting or customize
- Autotask **Priority** name: Leave default setting or customize
- Autotask **Status New** name: Leave default setting or customize
- Autotask **Status Complete** name: Leave default setting or customize

Questions?

I'm new to Autotask. Where can I find help with Setup?

For specific questions about performing Autotask steps, please refer to Autotask documentation or contact [Autotask support](#) for further help.

- Submit all eFolder questions to support@efolder.net.
- Call us at 800-352-0248.
- Browse our [Knowledgebase](#).



The People Behind Your Cloud

Billing with Autotask



Billing with Autotask

Understanding Autotask Billing Settings in eFolder

Every partner configures their billing settings within Autotask differently, depending on which services they sell.

However, remember that there is always a **one-to-one relationship** between

- eFolder services you configure in Autotask, and
- Billing settings available on your eFolder Integration page.

Service choices configured in Autotask mirror the service choices available in eFolder Billing Settings.

For example: One partner's eFolder services might look like this within their Autotask setup:

Service Name	Description	Vendor Name	Period Type	Unit Cost	Unit Price	Billing Code
eFolder Desktop Count	eFolder Number of Desktops	eFolder	Monthly	\$0.00	\$3.00	Recurring Service Revenue
eFolder Desktop Storage	eFolder Desktop Storage	eFolder	Monthly	\$0.35	\$1.00	Recurring Service Revenue
eFolder Server Count	eFolder Number of Servers	eFolder	Monthly	\$0.00	\$5.00	Recurring Service Revenue
eFolder Server Storage	Select Remote Storage	eFolder	Monthly	\$0.50	\$1.00	Recurring Service Revenue

This is how those same services look within that partner's Billing Settings setup in eFolder:

Autotask Billing Settings - Product Service Cross-Reference

Retrieve Services List

Basic Online Storage: Do Not Map

Select Online Storage: eFolder Desktop Count, eFolder Desktop Storage, eFolder Server Count, eFolder Server Storage

ShadowProtect Online Storage: Do Not Map

Online Backup # Desktops: Do Not Map

Online Backup # Servers: Do Not Map

Local Storage: Do Not Map

Local Backup # Desktops: Do Not Map

Local Backup # Servers: Do Not Map

ShadowProtect Desktop Licenses: Do Not Map

ShadowProtect Server Licenses: Do Not Map

Save Changes Cancel

Preparing Autotask accounts for billing from eFolder

If you are new to Autotask, be aware that you must create and configure a variety of Autotask settings *before* you add your Autotask accounts to eFolder.

If you currently use Autotask, you probably have already performed most of these steps.

Nevertheless, review this checklist to ensure you understand each requirement *before* you begin to add any accounts to eFolder:

Billing Setup CHECKLIST:

One-time-only Autotask setup:

- Select or create an eFolder administrative user in Autotask and assign API permissions to that user. Make a note of this administrative user's credentials (API Username and API Password.) You will need these credentials to add Autotask accounts in eFolder.

One-time-only Autotask activities required for each customer added to eFolder:

- Ensure that you have generated an Autotask account for each customer to be added to eFolder, including a unique Autotask Account ID#.
- Verify that all of your Autotask customers appear in your eFolder account listing.
Note: To integrate with eFolder, the Autotask **Account Type** must be *Customer*. Otherwise, Autotask account types (for example, *Leads*) may not behave as expected.
- In Autotask, create a service for each eFolder product.
Note: The service **Period Type** must be set to *Monthly*. We recommend the service **Billing Code** be *Recurring Service Revenue* or *Managed Service Contract*, but you can customize this code as desired. However, please be sure to understand the Contract Requirements for each service.
- In Autotask, define a contract for each customer using an eFolder Service.
Note: **Contract Type** must be a *Recurring Service Contract*. Any attached services must be directly attached as "Services". They cannot be attached as a subset of a "Service Bundle".
- Did you know there are "cloning" tools available in Autotask that allow you to work with an entire frequently-used contract list at one time? This is useful if many of your customers have contracts with the same services. Refer to Autotask documentation or contact [Autotask support](#) for further help.

Your Autotask accounts, services and contracts are set up. Now what?

After you have (a) created your Autotask administrative API credentials for eFolder and (b) set up all of your Autotask customer accounts, services and contracts, you are ready to complete the final two steps to start billing in eFolder:

Step 1. Configure your Integration Setup in eFolder.

Step 2. Add Autotask accounts to the eFolder Customer Map

Configure your Integration Setup on the eFolder Portal

Where do I find the Integration Setup from the eFolder Portal?

- Visit the [eFolder Web Portal](#).
- Under the **My Partnership** tab, select **Integration Setup** from the menu.

The screenshot shows the eFolder Data Protection portal. The main heading is "Data Protection" with a sub-heading "Online backup, local backup, email archiving, and email filtering services". The navigation bar includes "Home", "My Account", "My Partnership", "Accounts", "Reports", "Support", "Web Access", and "Logout". The "My Partnership" tab is selected, and a dropdown menu is open, showing "My Brands", "Partner Notifications", "Integration Setup", and "Customer Map". The "Integration Setup" option is highlighted with a red box. Below the navigation bar, there is a "PARTNER CENTER" section with a link to "Partner Center" and a "REMOTE BACKUPS" section with a graph titled "Remote disk usage for past week". The graph shows a flat line at 0 GB from 3/25 to 3/31.

My Partnership tab on the Efolder portal

The Integration Setup screen appears.

There are five steps involved in completing this screen:

1. Check Autotask as the integration provider.

2. Provide the Autotask API Username and Password.

3. Select the Autotask Ticket Settings you prefer. (Ticketing settings are explained later in this document.)

4. Select the appropriate billing settings. (Billing settings are explained on the next page.)

5. Finally, when all settings are completed, click **Save Changes**.

How to complete the Integration Setup

Integration Setup

This page allows you to setup integration with other systems, such as professional services automation (PSA) and customer relationship management (CRM) systems. When saving changes, be sure to use the Save button at the very bottom of the page.

Detailed setup instructions for each provider are available in the documentation section in the [partner center](#).

CHOOSE INTEGRATION PROVIDERS

Choose the integration providers that you want to enable and configure:

Autotask
 ConnectWise PSA

CONFIGURE AUTOTASK INTEGRATION

This integration provides the ability to automatically open tickets when backups, other services, or appliances fail.

Autotask API Username: 2
 Autotask API Password:

Autotask Ticket Settings

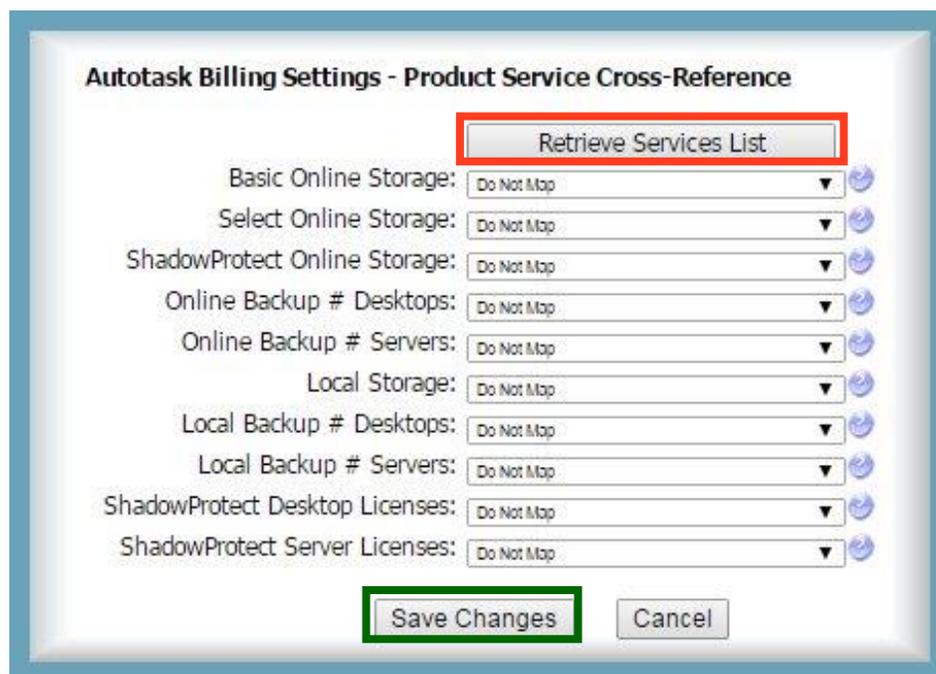
Ticket Subject Prefix: 3
 Autotask Queue Name: 3
 Autotask Priority Name: 3
 Autotask Status New Name: 3
 Autotask Status Complete Name: 3

Autotask Billing Settings - Product Service Cross-Reference

Basic Online Storage: 4
 Select Online Storage: 4
 ShadowProtect Online Storage: 4
 Online Backup # Desktops: 4
 Online Backup # Servers: 4
 Local Storage: 4
 Local Backup # Desktops: 4
 Local Backup # Servers: 4
 ShadowProtect Desktop Licenses: 4
 ShadowProtect Server Licenses: 4

How to configure your Autotask Billing Settings

- Step 1. Click on the Retrieve Services List button.
- Step 2. Next to each setting, the eFolder products assigned to this Autotask service appear. (A chart of descriptions of these settings is shown below.)
- Step 3. When you have made choices for all fields, select Save Changes to complete setup.



Billing Settings descriptions

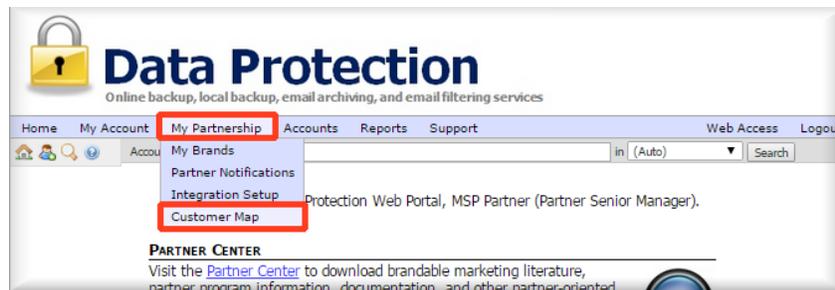
Setting:	Description:
Basic Online Storage	Autotask Service for eFolder Online Backup Basic Plan storage amounts
Select Online Storage	Autotask Service for eFolder Online Backup Select Plan storage amounts
ShadowProtect Online Storage	Autotask Service for eFolder Online Backup ShadowProtect storage amounts
Online Backup # Desktops	Autotask Service for the number of desktops backing up online
Online Backup # Servers	Click the Autotask Service for the number of servers backing up online
Local Storage	Normally leave this as "Do Not Map"
Local Backup # Desktops	Normally leave this as "Do Not Map"
Local Backup # Servers	Normally leave this as "Do Not Map"
ShadowProtect Desktop Licenses	Select Autotask Service for ShadowProtect Desktop License Counts
ShadowProtect Server Licenses	Select Autotask Service for ShadowProtect Server License Counts.

Integrating Autotask accounts and contracts in eFolder

After you have completed and saved all settings on the **Integration Setup** screen, the next step is "mapping" each Autotask Account ID number to the corresponding eFolder Customer ID.

- Visit the [eFolder Web Portal](#).
- Under the **My Partnership** tab, choose the **Customer Map** menu option.

Note: The Customer Map drop-down will only be visible *after* the **Integration Setup** is completed.



Adding Autotask accounts to the eFolder Integration Map

- The Integration Map displays all of your customers with an *eFolder Customer ID* number.
- Each eFolder customer will have a blank **Autotask PSA Account ID** field.
- Enter each customer's Autotask PSA Account ID# here.
- Retrieve and select the **Customer Contract** name.
- When you are finished, click the **Save Changes** button.

 A screenshot of the "Integration Map Customers" page in the eFolder web portal. The page title is "Integration Map Customers". Below the title, there is a paragraph explaining the page's purpose: "This page allows you to map customers and their Autotask service contracts for billing integration. When saving changes, be sure to use the Save button at the very bottom of the page." There is also a link to "partner center" for detailed setup instructions. The page is divided into two sections: "AUTOTASK PSA CROSS REFERENCE" and "Customer Contracts". Under "Customer Contracts", there are instructions: "Use the 'Get Contracts' button to query Autotask for the specific customer and populate their respective drop down fields. Then use the drop down fields to select which contract is to be used for eFolder services for each customer." There are two customer entries. The first entry has: eFolder Customer ID: 34468, Customer Organization: Bob Trucking, Autotask PSA Account ID: (empty field highlighted with a red box), and Autotask Customer Contract: (dropdown menu highlighted with a green box). The second entry has: eFolder Customer ID: 34468, Customer Organization: Bob's Dental, Autotask PSA Account ID: (empty field), and Autotask Customer Contract: (dropdown menu). At the bottom of the page, there are two buttons: "Save Changes" (highlighted with a blue box) and "Cancel".

How to assign Autotask contracts to customers in the Integration Map

Step 1. Locate the desired customer in the eFolder Integration Map, and enter that customer's Autotask PSA Account ID number. Now, click the **Get Contracts** button. All contracts which you previously configured for this customer in Autotask will appear.

Step 2. Select the contract to be linked to eFolder and click **Save Changes**.

Note: There are "cloning" tools available in Autotask which will allow you to work with an entire frequently-used contract list at one time.

Example:

How contracts look in the eFolder Integration Map

In the example shown:
Two contracts for ACME Insurance can be selected:

- (a) Onsite Maintenance
- (b) Select Storage Contract

Example:

How contracts look in Autotask setup

In the example shown:
Two contracts for ACME Insurance have been created:

- (a) Onsite Maintenance
- (b) Select Storage Contract

Contract Name	Contract Type	Contract Status
Onsite Maintenance	Block Hours	Active
Select Storage Contract	Recurring Service	Active

Synchronizing with Autotask

eFolder synchronizes storage amounts and license counts for billing purposes during event processing. Ideally, syncing occurs every time there is activity on an account. For eFolder to synchronize accurately with Autotask, you must set up a specific syncing notification.

Step 1. Under the **My Partnership** tab, choose the **Partner Notifications** menu item.



Step 2. Select the *Synchronize with Autotask* dropdown choice.

Setting	Value	Description
Notification Action	Synchronize with Autotask	What will happen when this notification is triggered.
Include Sub-Brands	Synchronize with Autotask	Whether or not to include notifications for accounts associated with sub-brands of your brand. Only relevant if you have more than one brand.
Subscribe to OK Events	Yes	Whether events that represent successful actions should trigger this notification.
Subscribe to Warnings	Yes	Whether events that represent warnings should trigger this notification.
Subscribe to Errors	Yes	Whether events that represent errors should trigger this notification.
Subscribe to All Event Types	Yes	Whether or not to subscribe to all types of events, except for integration failures (note that the restrictions on event severity configured above still apply).
Comments		Any comments you want to make about this notification.

Step 3. Leave all settings at the value of **Yes** and then click **Create** to save the synchronization request.

NOTE: The only Partner Notification which needs to be created for billing integration is the **Synchronize with Autotask** setting, as described in this step. Other Partner Notifications (such as those related to Autotask ticketing procedures) are not required to successfully complete billing integration.

Validating your new eFolder + Autotask billing setup

Congratulations! Your new eFolder + Autotask billing integration is now complete.

You should notice billing statistics pushed from eFolder within 12 hours of completing the integration.

To validate that all billing information is being integrated properly, please check your customer contracts within Autotask. Relevant eFolder billing information (such as the number of licenses or the amount of storage used) should now be visible.

Questions?

For specific questions about performing Autotask steps, please refer to Autotask documentation or contact [Autotask support](#) for further help.

- Submit all eFolder questions to support@efolder.net.
- Call us at 800-352-0248.
- Browse our [Knowledgebase](#).



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Ticketing with Autotask



Ticketing with Autotask

Configuring eFolder with the Autotask API allows your eFolder backup notifications to be viewed in Autotask as service tickets.

Your backup-related eFolder service tickets can then be efficiently managed alongside your other Autotask activities, allowing you to focus on one interface.

To successfully integrate your eFolder service tickets to Autotask, you must:

- Create a customer account in Autotask for each eFolder customer,
- Have access to each customer's Autotask Account ID number, and
- Enable a notification for Autotask service tickets

The following instructions will help you:

- Prepare Autotask accounts for service tickets from eFolder
- Enter Autotask API credentials for ticketing
- Add Autotask accounts to the eFolder Customer map
- Enable notifications for eFolder service tickets in Autotask.
- Customize a variety of service ticket labels (including Ticket Subject Prefix, Queue name, Priority name, Status New name and Status Complete name).

Preparing Autotask accounts for service tickets from eFolder

If you are new to Autotask, be aware that you must create and configure a variety of Autotask settings *before* you add your Autotask accounts to eFolder.

If you currently use Autotask, you probably have already performed most of these steps.

Nevertheless, review this checklist to ensure you understand each requirement *before* you begin to add any accounts to eFolder:

Ticketing Setup CHECKLIST:

One-time-only Autotask setup:

- Select or create an eFolder administrative user in Autotask and assign API permissions to that user.
- Make a note of this administrative user's credentials (API Username and API Password.) You will need these credentials to add Autotask accounts in eFolder.

One-time-only Autotask activities required for each customer added to eFolder:

- Create an Autotask account for each customer, with a unique Account ID#.
- Verify that any Autotask customers with backup services intended for integration are present in the eFolder account web portal.
- Note:** To integrate with eFolder, the Autotask account type must be "Customer"

Autotask settings to be configured:

- (Optional) Select a **Ticket Subject Prefix** to identify a ticket from eFolder.
- Autotask **Queue** name: Leave as default setting or customize
- Autotask **Priority** name: Leave as default setting or customize
- Autotask **Status New** name: Leave as default setting or customize
- Autotask **Status Complete** name: Leave as default setting or customize

Questions?

I'm new to Autotask. Where can I find help with setup tasks?

For specific questions about performing Autotask steps, please refer to Autotask documentation or contact [Autotask support](#) for further help.

Entering Autotask API credentials for ticketing

Before you can set up any ticketing choices, you must first enter the Autotask API credentials.

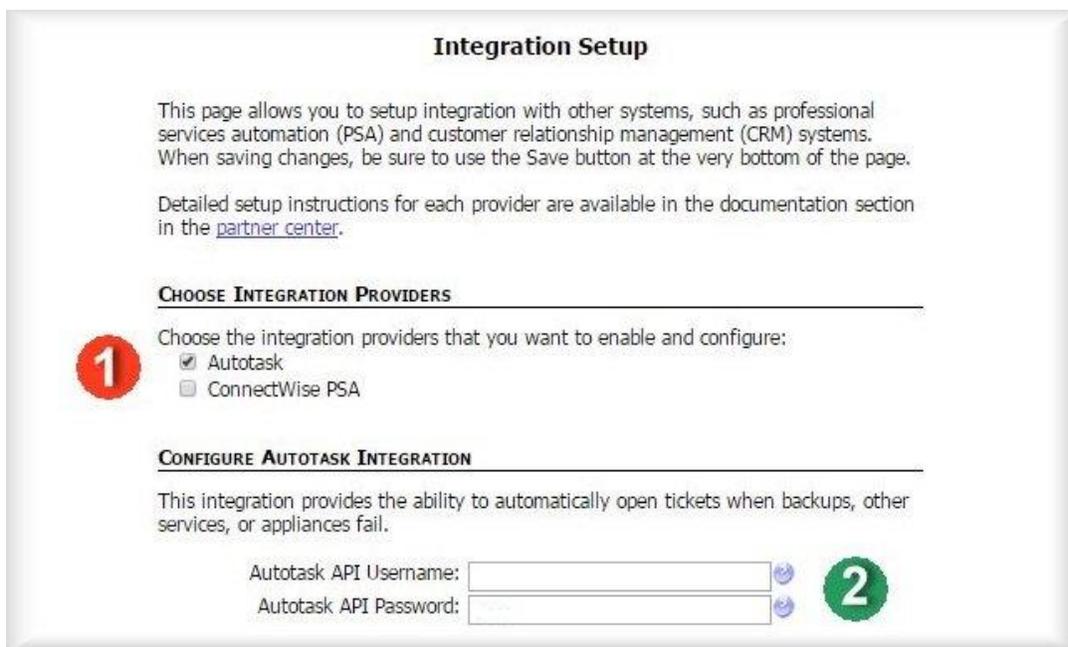
First, visit the [eFolder Web Portal](#).

Then, under the **My Partnership** tab, select **Integration Setup** from the menu options.



1. Check Autotask as the integration provider.

2. Provide the Autotask API Username and Password.



Finally, when all entries are completed, remember to click the **Save Changes** button at the bottom of the **Integration Setup** page to store your API credentials.

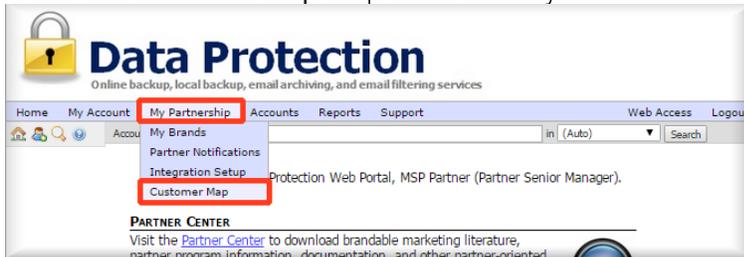


Adding Autotask ticketing accounts to the eFolder Integration Map

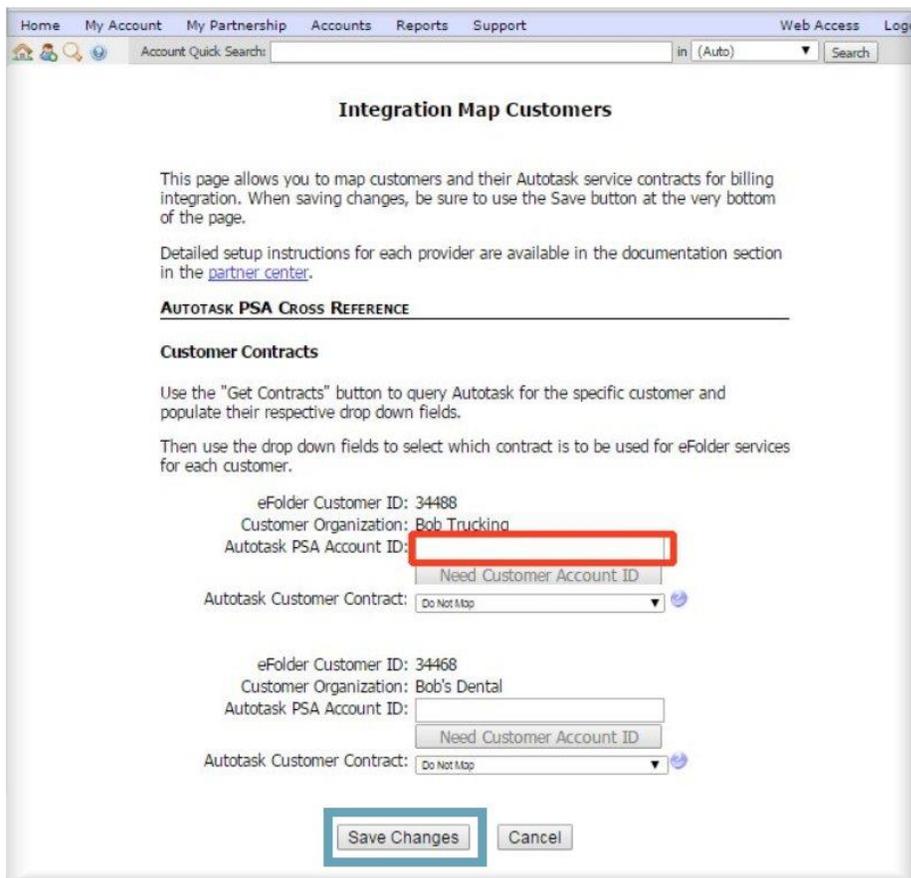
After you have entered and saved your Autotask API credentials on the **Integration Setup** screen, the next step is “mapping” each Autotask Account ID number to the corresponding eFolder Customer ID.

- Visit the [eFolder Web Portal](#).
- Under the **My Partnership** tab, choose the **Customer Map** menu option.

Note: The Customer Map drop-down will only be visible *after* the Integration Setup is completed.



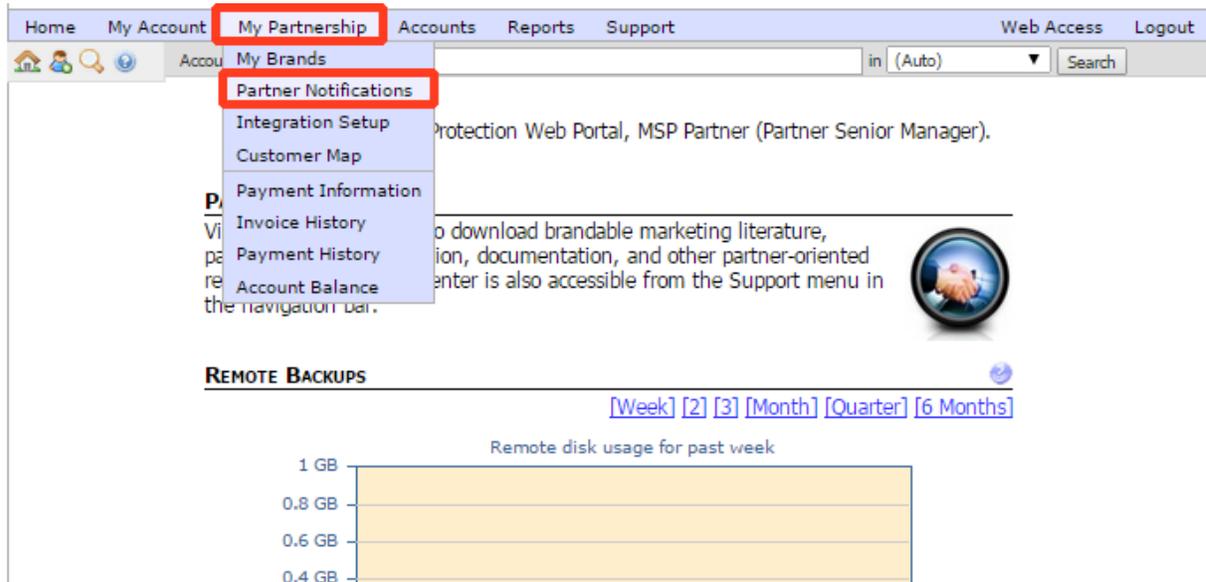
- The Integration Map displays all of your customers with an *eFolder Customer ID* number.
- Each eFolder customer will have a blank **Autotask PSA Account ID** field.
- Enter each customer’s Autotask PSA Account ID# here.
- When you are finished, click the **Save Changes** button.



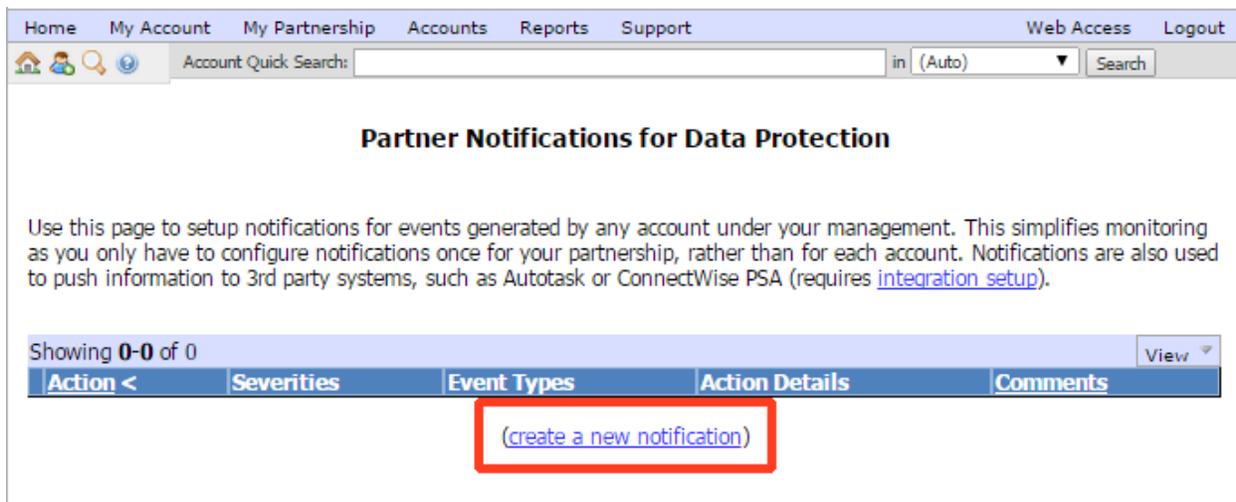
Creating notifications for Autotask service tickets

As events related to your customer accounts are generated in the eFolder portal, it is possible to send those events to Autotask to create tickets. To assign the triggering conditions which send event information to Autotask, use the **Partner Notifications** menu option.

1. Select the My Partnership > Partner Notifications menu item.



2. Click the Create a New Notification link at the bottom of the *Partner Notifications* page.



3. In the *Notification Action* field, select **Open an Autotask ticket**.

4. Decide which events should trigger an Autotask ticket notification. Typically, you will only want to be notified about a ticket when there is a warning or error. In most cases, we recommend that you leave the *Subscribe to OK Events* field set to its default value of **No** and leave the *Subscribe to All Event Types* field set to its default value of **Yes**. You will then be notified only about warnings or errors (including backup failure, archiving failure, BDR hardware failure, and so forth.)

Setting	Value
Notification Action	Open an Autotask ticket 3
Include Sub-Brands	Yes
Subscribe to OK Events	No
Subscribe to Warnings	Yes
Subscribe to Errors	Yes
Subscribe to All Event Types	Yes 4
Comments	<input type="text"/>
<input type="button" value="Create"/> <input type="button" value="Cancel"/>	Back to Partner Notifications List 5

5. When all selections are correct, click **Create** to accept these new settings.

You can revisit this page to change these settings at any time.

NOTE: The only Partner Notification which needs to be created for ticketing integration is the **Open an Autotask ticket** setting, as described in this step. Other Partner Notifications (such as those related to Autotask billing procedures) are not required to successfully complete ticketing integration.

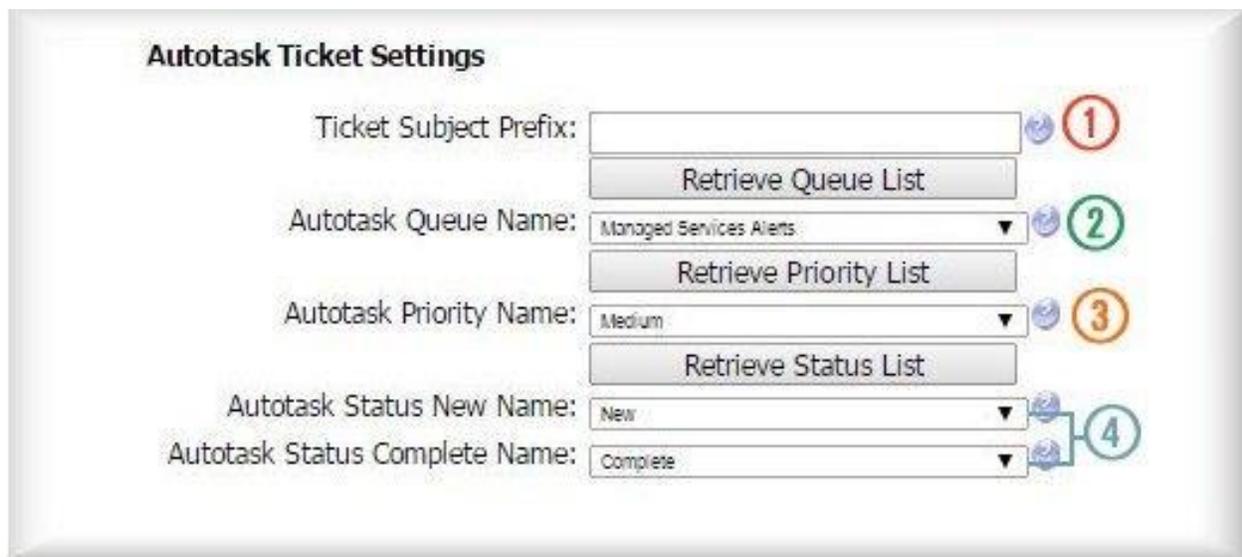
Confirming or customizing Autotask ticketing choices

Several settings on the eFolder Integration Setup page must be confirmed or customized before ticketing can be fully integrated from eFolder to Autotask.

- Visit the [eFolder Web Portal](#).
- Click the **My Partnership** tab and then select **Integration Setup** from the menu options.



Now, confirm or customize these Autotask ticket settings on the **Integration Setup** page, using the detailed instructions that immediately follow:



Autotask ticket settings on the Integration Setup page

① (OPTIONAL) Ticket Subject Prefix

This is an optional setting and can be left blank. This prefix will be prepended to the ticket subject, allowing you to customize the subject line of incoming tickets if desired.

② Autotask Queue name

Select the **Retrieve Queue** button to see all of the available queue name choices. Choose the name you prefer from the drop down menu. The default queue name is *Managed Services Alerts*.

Caution: This field must contain a selection for ticketing to occur. Setting this field to *Do Not Map* will disable ticketing, even if a Partner Notification has been created to enable ticketing.

③ Autotask Priority name

Select the **Retrieve** button to see all of the available priority name choices. Choose the name you prefer from the drop down menu. The default ticket priority is *Medium*.

④ Autotask New name

Autotask Complete name

Autotask **Status New name** is the text which will indicate a newly-created ticket. The text can be configured by you in Autotask. Select the **Retrieve** button to see all choices.

Autotask **Status Complete name** is the text indicating that eFolder has closed a ticket. Select the **Retrieve** button to see all choices. The text can be configured by you in Autotask. You may prefer a customized text label, to differentiate tickets you have closed yourself.

Validating your new eFolder + Autotask ticketing setup

Congratulations! Your new eFolder + Autotask ticketing integration is complete.

As backup notifications occur, eFolder will now begin pushing information to Autotask.

To validate that all of your expected eFolder backup notifications are being created and displayed in Autotask, please review the Event Log for several of your eFolder accounts.

In Autotask, you should begin to see new tickets being created within the designated Ticket Queue, based on the triggers you specified in the Partner Notifications.

Questions?

For specific questions about performing Autotask steps, please refer to Autotask documentation or contact [Autotask support](#) for further help.

- Submit all eFolder questions to support@efolder.net.
- Call us at 800-352-0248.
- Browse our [Knowledgebase](#).



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