Breach Secure Now Partner Guide

Autotask PSA Integration Setup

Notifications, alerts, and client integration

Questions, Concerns? Want a 1-on-1 on-boarding with our Operations team?

Email: Operations@breachsecurenow.com
Phone: (877) 275 – 4545

Autotask PSA Integration Setup

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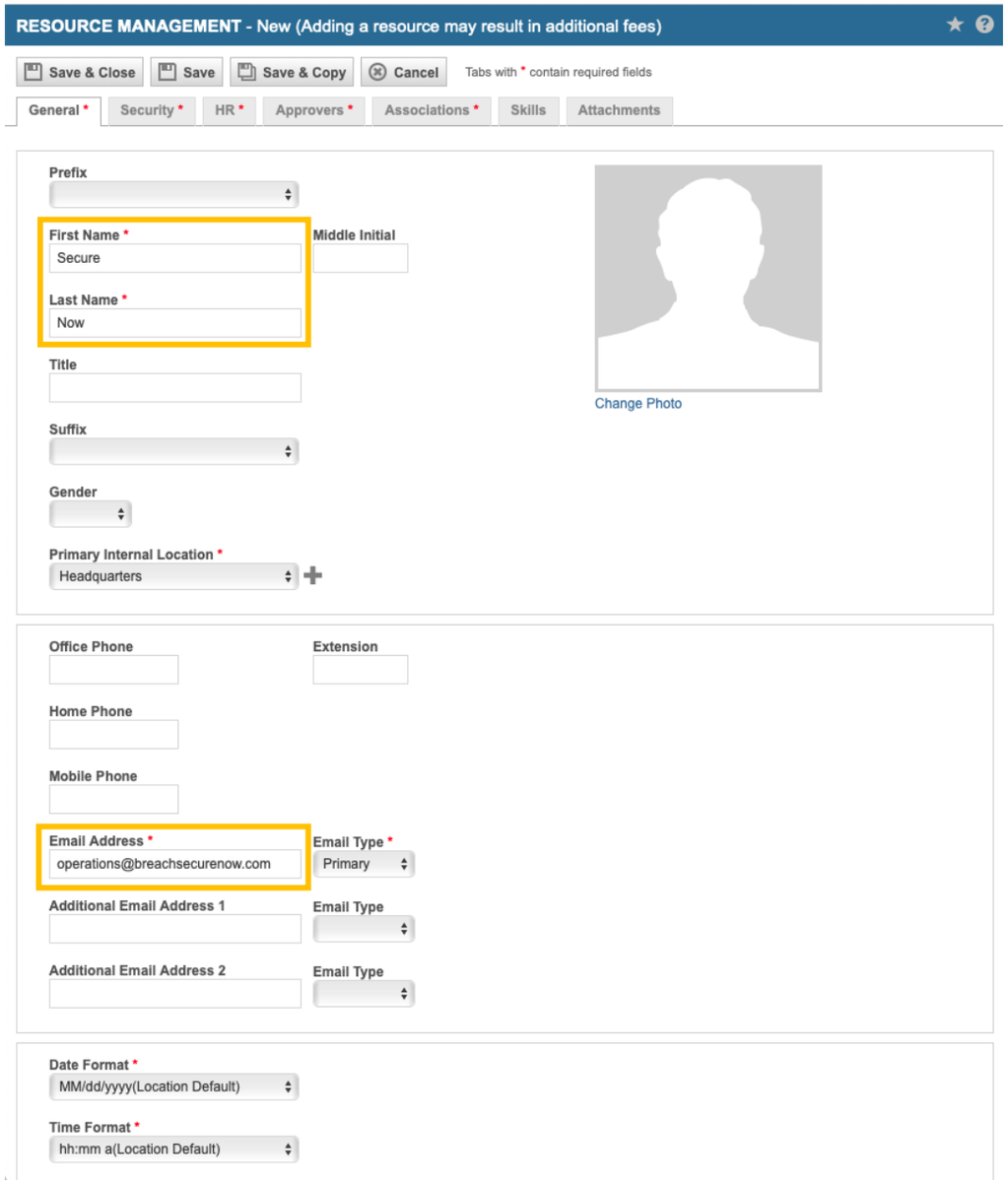
Configuring Settings in the Autotask Portal

Create New API User

Within the Autotask portal, navigate to the Menu/Admin/Resources (users) screen and click the **"New"** button.

Under the "**General**" tab, fill in the following information:

First Name: Secure
Last Name: Now
Email Address: operations@breachsecurenow.com



Configuring Settings in the Autotask Portal

Create API User Credentials

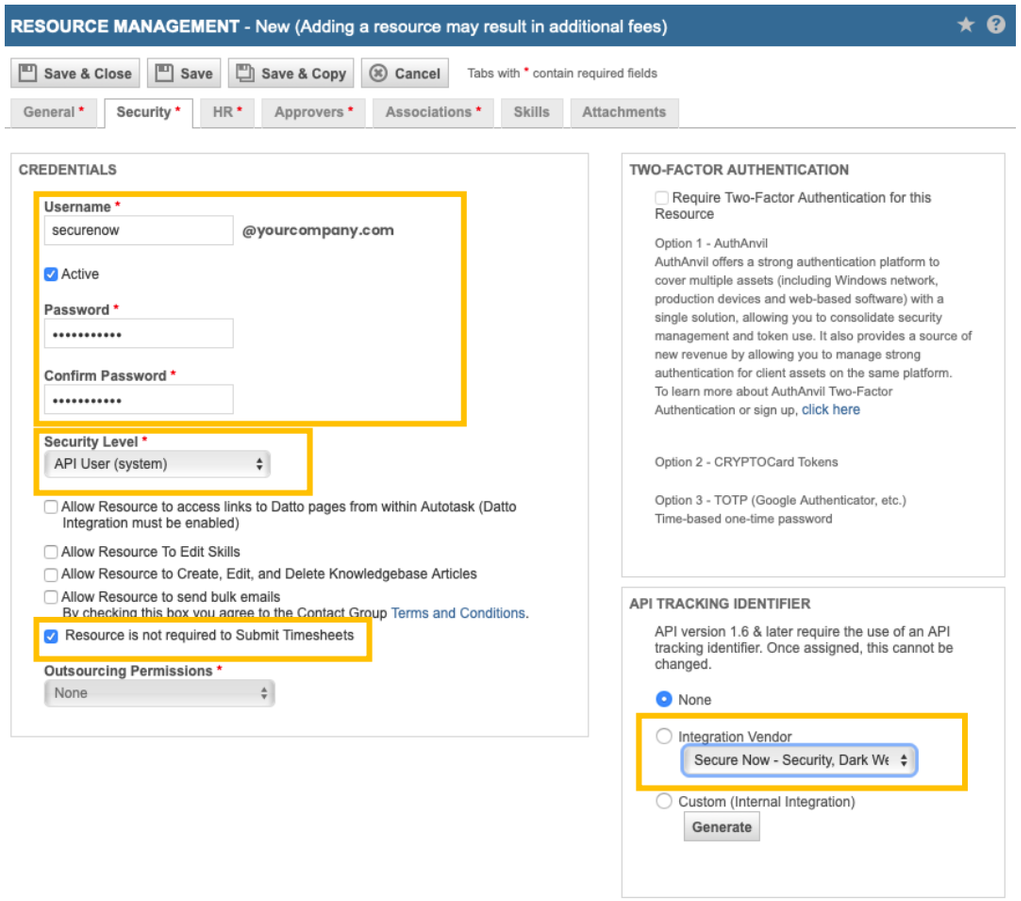
Configure the account credentials. You will utilize these credentials when configuring Autotask within the PII-Protect portal.

Under the "**Security**" tab, fill in the following information:

Username: securenow
Password: Create a password of your choosing
Security Level: API User (system)
Checkboxes: Resource is not required to Submit Timesheets

Under the "**API Tracking Identifier**" section, select:

Integration Vendor: Secure Now – Security, Dark Web & Training



Configuring Settings in the Autotask Portal

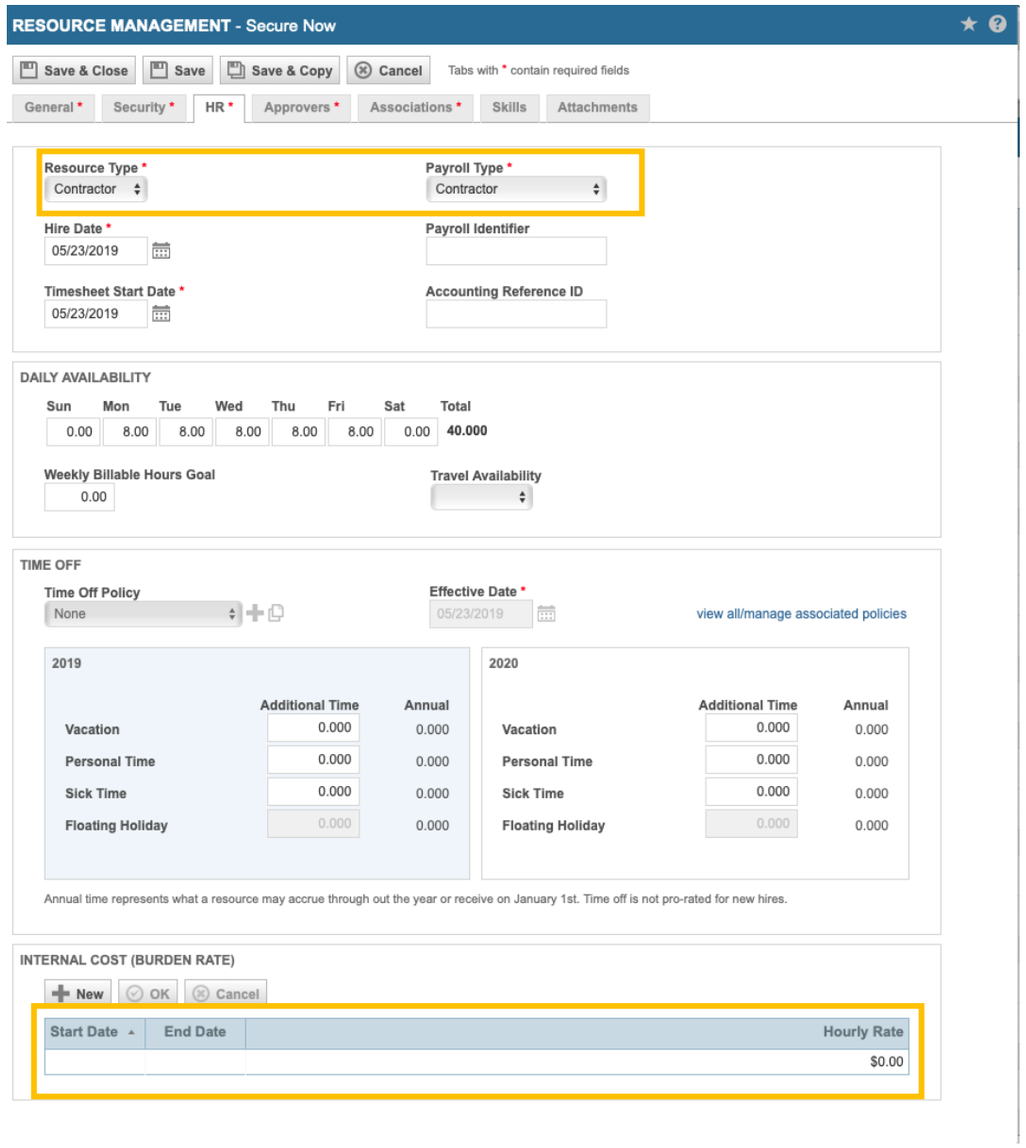
Modify the Required HR Tab

This tab is required for integration setup.

Set the "**Resource Type**" and "**Payroll Type**" to what makes the most sense for your organization.

Under the "**Internal Cost (Burden Rate)**" section set:

Internal Cost: $0.00

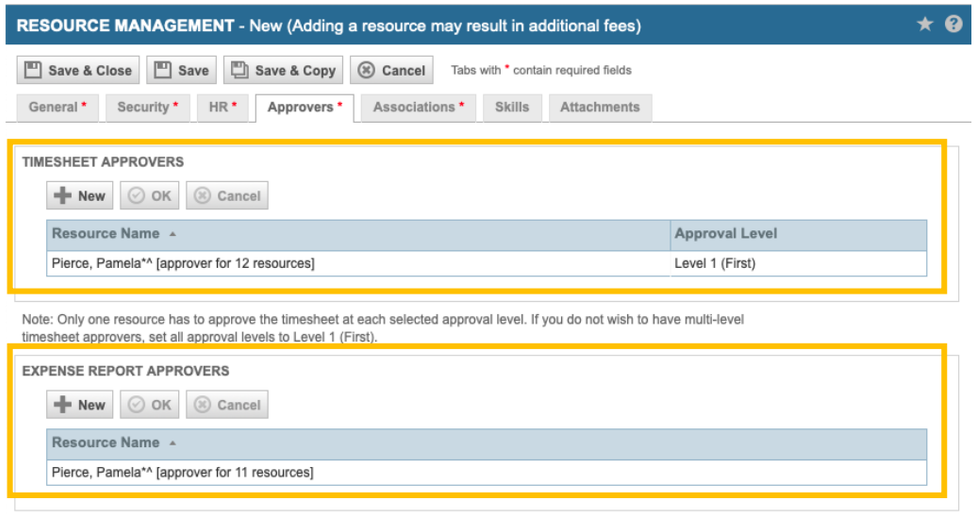


Configuring Settings in the Autotask Portal

Modify the Required Approvers Tab

This tab is required for integration setup.

Set the "**Timesheet Approvers**" and "**Expense Report Approvers**" to what makes the most sense for your organization.



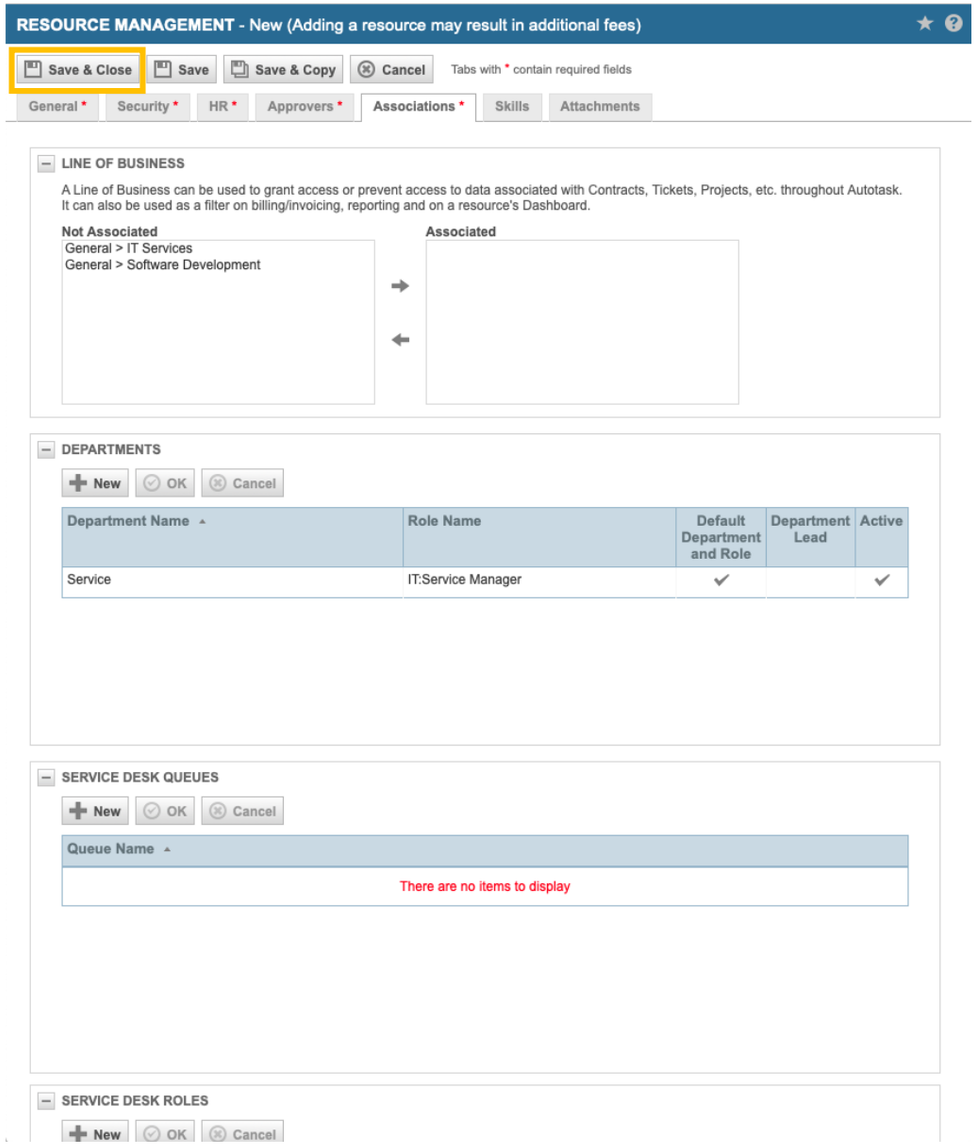
Configuring Settings in the Autotask Portal

Modify the Required Associations Tab

This tab is required for integration setup.

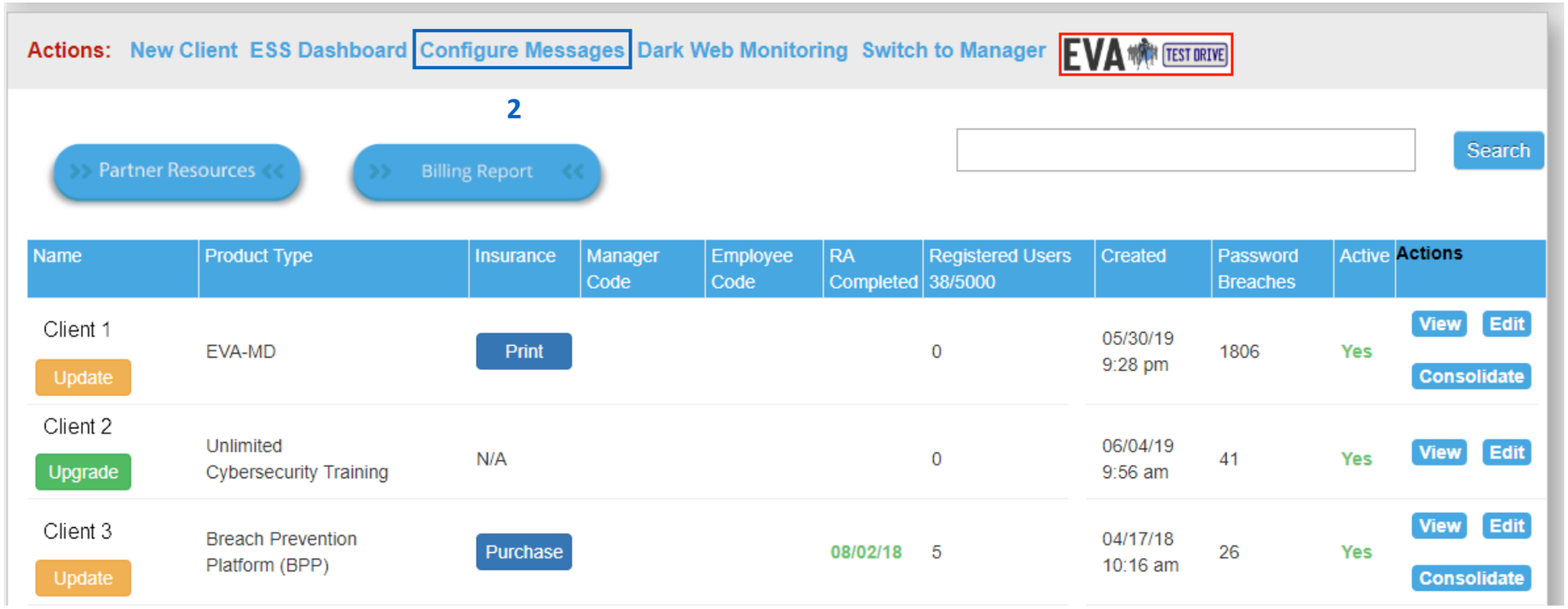
Set the required values to what makes the most sense for your organization.

Select the "**Save & Close**" button to save your configuration settings.



Configuring Autotask Within the PII Protect Portal

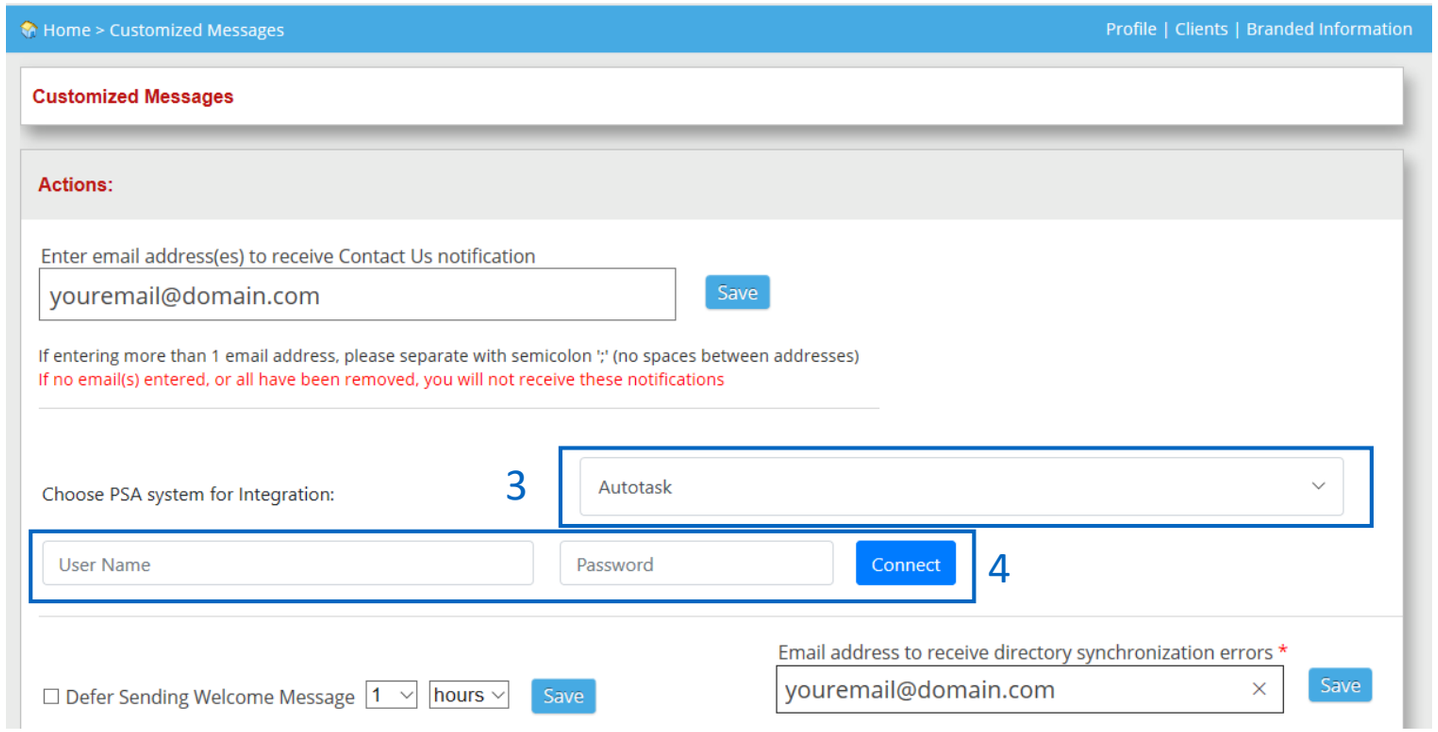
Navigating to the Client View Screen



1. Login as a Partner Administrator to the PII-Protect portal here. Once logged in you will be taken to your client list as the home screen (above).
2. Select "**Configure Messages**" to navigate to the Autotask PSA settings.

Configuring Autotask Within the PII Protect Portal

Configure Notification Settings

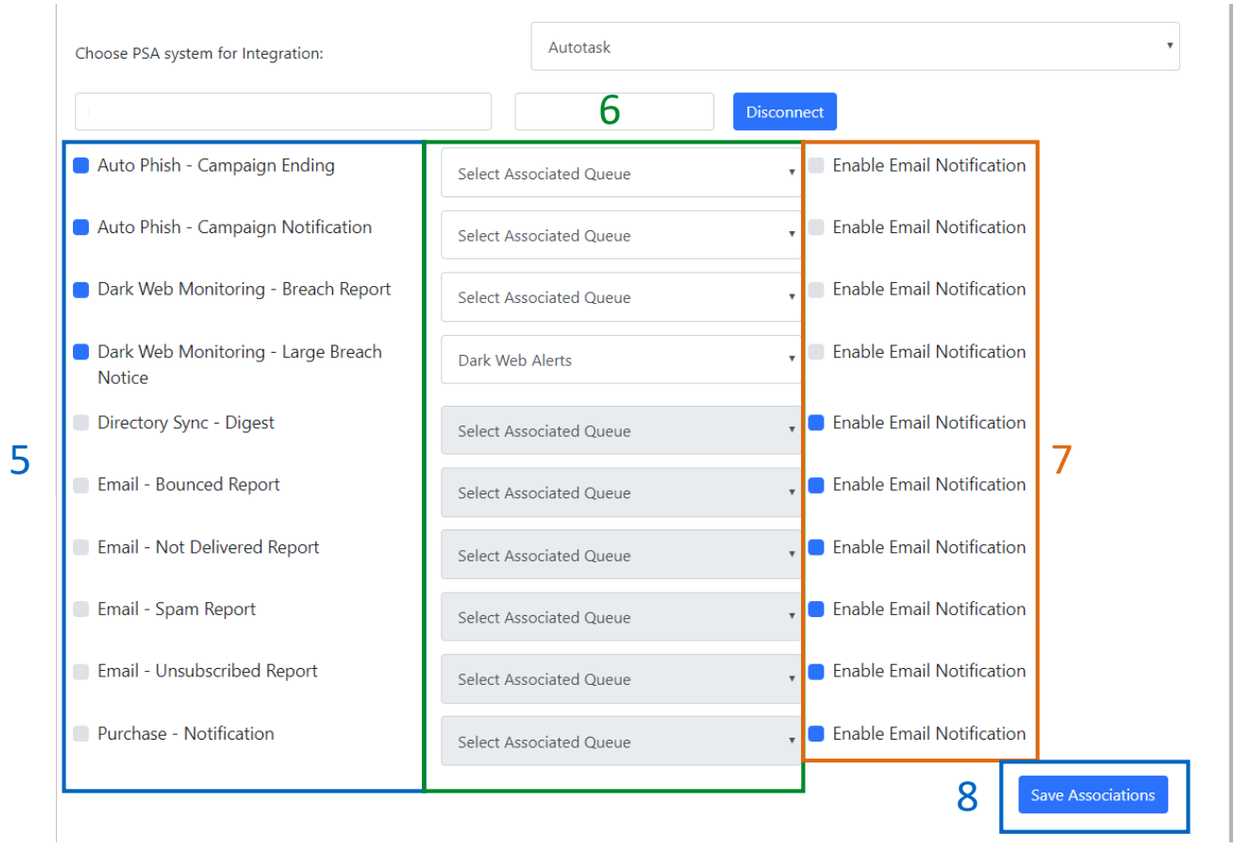


3. Click the "**Choose PSA system for Integration**" dropdown and select "Autotask"
4. Enter the User Name and Password created on page 4 and click "**Connect**".

Once you hit Connect, our portal will connect to your Autotask PSA. There may be a delay for the configuration settings to appear.

Configuring Autotask Within the PII Protect Portal

Configure Notification Settings



Not sure which notification to setup?

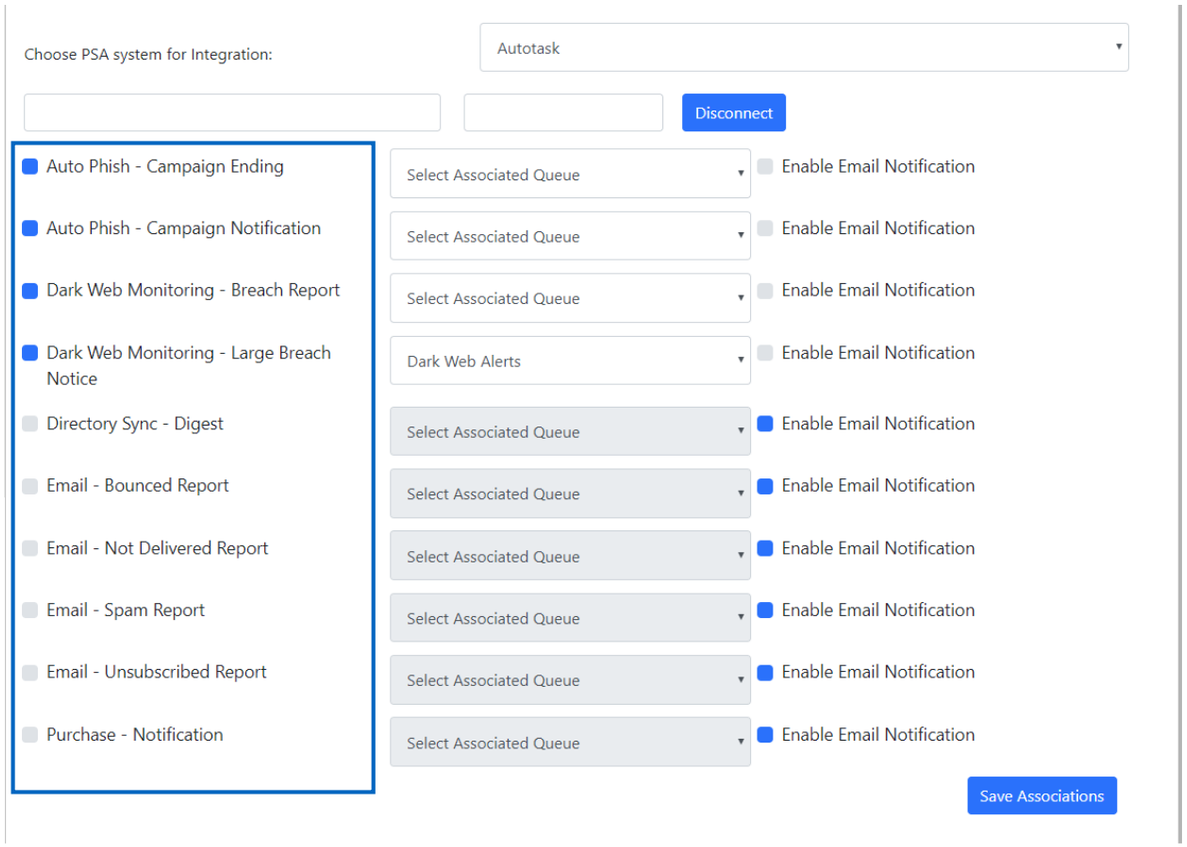
Jump to pages 13 – 14 for more details on the notifications and their descriptions.

Once Autotask has connected to the PII Protect portal, you will be able to configure notification settings.

5. **Click the checkbox** next to the notification(s) you would like to enable. For more details on these notification settings and descriptions, see page 13.
6. Click the "**Select Associated Queue**" dropdown next to the desired notification to associate it with a pre-existing queue from Autotask.
7. If you would NOT like to receive an email notification in addition to the Autotask notification, uncheck the "**Enable Email Notification**" box next to the associated notification.
8. Click "**Save Association**" to save your changes.
9. Jump to page 15 for client notification setup.

Configuring Autotask Within the PII Protect Portal

Configure Notification Settings – Notification Details & Descriptions



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AutoPhish – Campaign Ending: Get an alert when a scheduled AutoPhish phishing campaign has ended.

AutoPhish – Campaign Notification: Get an alert 2 days before a scheduled AutoPhish phishing campaign is about to be initiated.

Dark Web Monitoring – Breach Report: Get an alert when your customer has been involved in a data breach

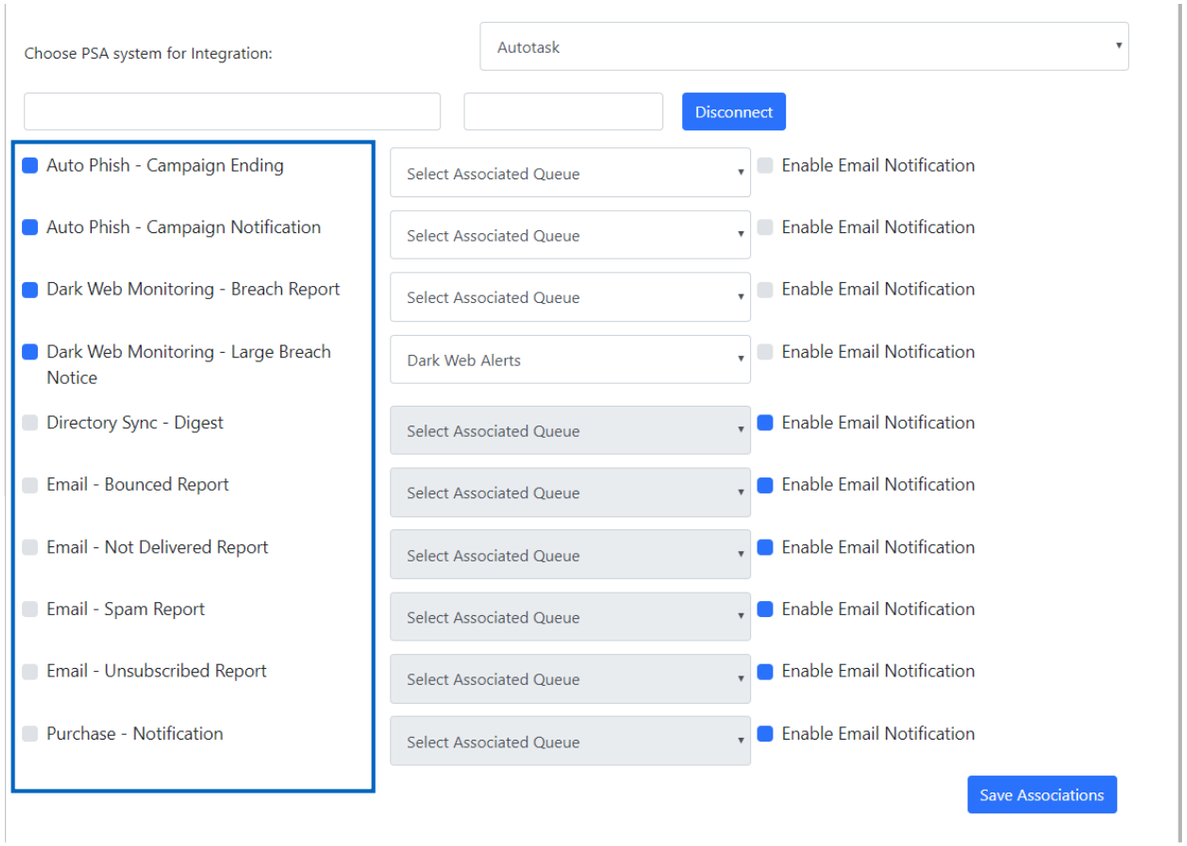
Dark Web Monitoring – Large Breach Notice: Running a scan on a domain with over 5,000 results takes a few moments to process. Get notified once your large breach report is ready.

Directory Sync – Digest: Get a summary report of your Azure AD, On-Premise, or Bulk Upload results and any associated errors.

Details & descriptions continued on next page.

Configuring Autotask Within the PII Protect Portal

Configure Notification Settings – Notification Details & Descriptions



Purchase – Notification: Get notified when one of your Partner Administrators makes a purchase in the portal

Email delivery notifications for automated security tip or welcome emails:

Email Bounced Report: Receive a notification each time an email bounces, contains user details.

Email Not Delivered Report: Receive a notification each time an email cannot be delivered, contains user details.

Email Spam Report: Receive a notification when a user marks an email as spam, contains user details.

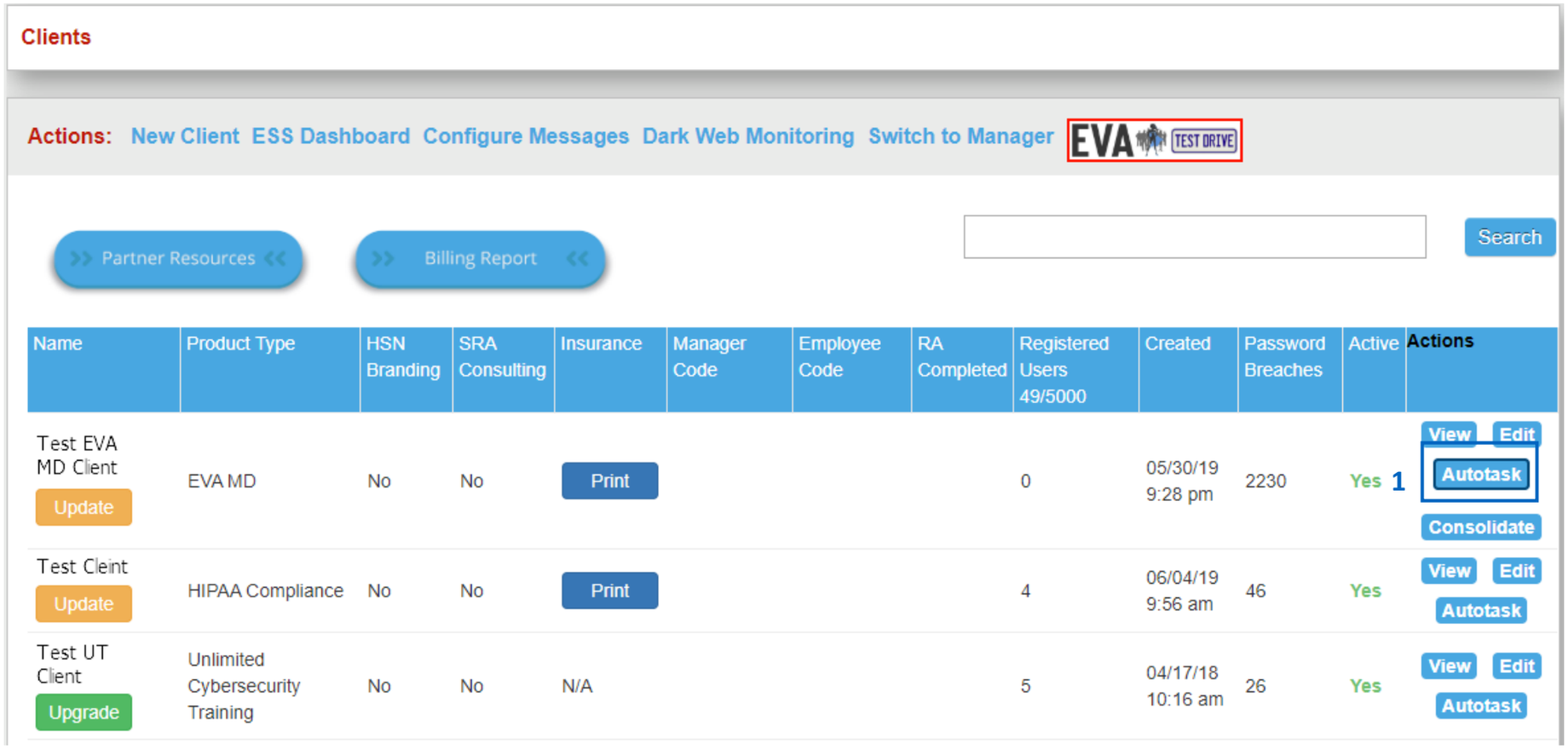
Email Unsubscribed Report: Receive a notification when a user unsubscribes from the email list, contains user details.

This can be turned back on in the portal.

1. On the client list (home screen) click "View" on the Client account the user is associated with.
2. Scroll down to the User Details table
3. Click Edit on the unsubscribed user, uncheck the "Don't send Micro-Training/Monthly Newsletter" and click Submit to re-subscribe them.

Autotask Client Configuration

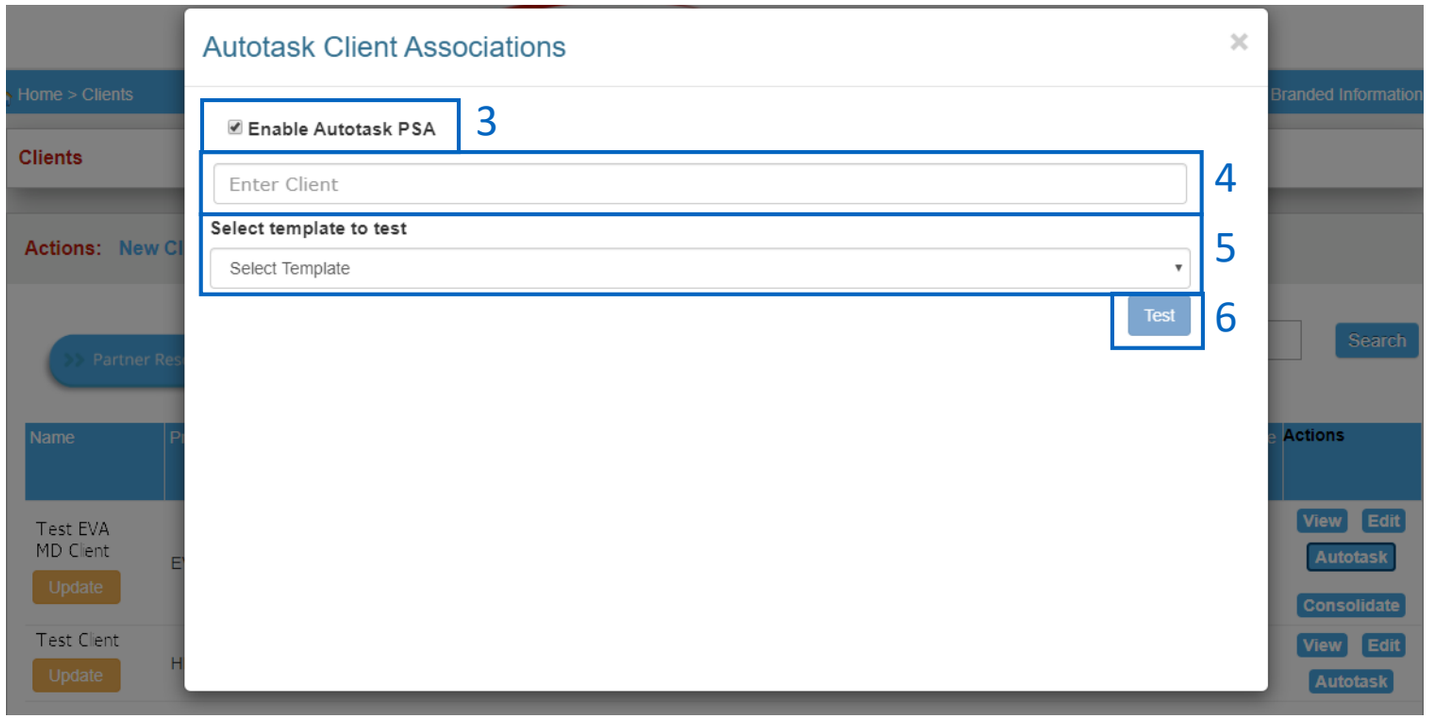
Setup Autotask Notifications for a Client



1. Login as a Partner Administrator to the PII-Protect portal here. Once logged in you will be taken to your client list as the home screen (above).
2. Under the "Actions" column, click the "**Autotask**" button for a client you'd like to configure Autotask notifications for.

Autotask Client Configuration

Setup Autotask Notifications for a Client



That's it! You've just configured Autotask notification for this client! Repeat steps 2 – 6 on pages 13 – 14 for each client you wish to setup!

The Autotask button on the home screen will be outlined in green for each client that has been successfully configured (see page 13 for example of home screen and Autotask button).

3. Click the "**Enable Autotask PSA**" checkbox to configure and test the notification settings for this client.
4. Click the "**Enter Client**" dropdown to sync your PII Protect client account with the associated Client Name in Autotask. This list will populate based off client accounts already setup in your Autotask console.
5. Click the "**Select Template**" dropdown to choose the notification type you would like to test.
6. Click "**Test**" to send a test notification to your Autotask PSA system!

You're All Set!

- Your Autotask PSA Integration Setup is complete!

- Questions? Comments? Want a 1-on-1 onboarding with our Operations team?

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