The Autotask-Salesforce Extension

Security and navigation

SECURITY Security level with permission to configure Other Extensions & Tools

NAVIGATION > Admin > Extensions & Integrations > Other Extensions & Tools > Salesforce

This extension is no longer available for new implementations. The Customer Relationship Management integration from AxeRoy: Autotask++Salesforce ConnectPack may provide the features you need. Refer to Customer Relationship Management (CRM) Extensions and Integrations for Autotask.

The Autotask-Salesforce Extension allows you to keep all of your Autotask companies and contacts current with information from your Salesforce database.

Supported editions of Salesforce

The Autotask-Salesforce Extension requires access to the Salesforce Web Services, so it integrates with the following editions of Salesforce only:

- Enterprise
- Unlimited

Configure the Salesforce Extension

The Salesforce Extension must be turned on in Autotask and some settings in Salesforce must be adjusted.These steps are described in the following sections.

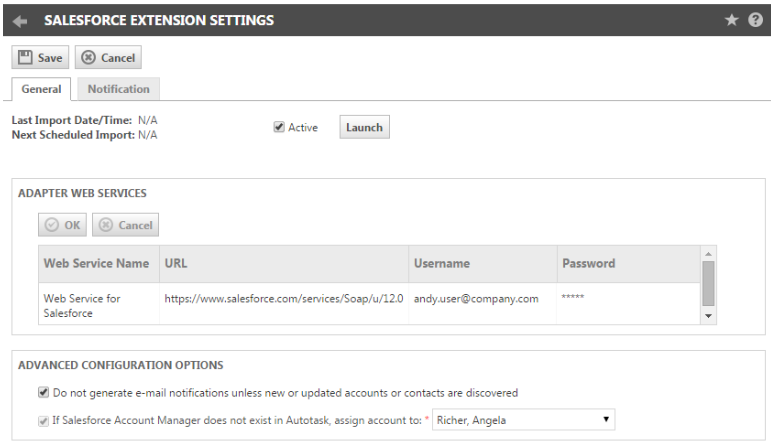
Autotask setup

An Autotask Administrator must configure the Salesforce Extension in the Admin module.

To configure the Salesforce Extension:

1. Navigate to > **Admin** > **Extensions & Integrations** > **Other Extensions & Tools** > **Salesforce.**

   The Salesforce Extension configuration page opens:



2. Enter/select the following:

Field	Enter or Select
Active	Select this check box to turn on the Salesforce Extension and begin importing data from Salesforce to Autotask.
URL	The URL field is pre-populated with the standard URL for Saleforce users. If you are not using the standard URL shown, enter the correct URL. If you are unsure about your URL, check with your Salesforce contact.
Username and Password	Enter your Salesforce username and password for authentication. NOTE For access via the API or a client, you must add your security token to the end of your password in order to log in. The security token is a key that Salesforce.com automatically generates. For example, if your password is "mypassword", and your security token is "12345", then your password would be "mypassword12345". You can obtain your security token by changing your Salesforce.com password or resetting your Salesforce.com security token. Salesforce.com will send a new security token to the email address that you entered in Salesforce.com. The security token is valid until you reset it, or you reset or change your password.
Do not generate e-mail	Select this option to turn off email notifications for users selected on the Notifications tab when there are no new or updated companies or contacts during the

Field	Enter or Select
notifications unless new or updated companies or contacts are detected	scheduled import.
If Salesforce Account Manager does not exist in Autotask, assign company to:	Select the Autotask resource from the drop-down list who will be automatically assigned as the account manager for imported Salesforce companies that do not have an Autotask resource as the account manager. The Salesforce Extension will look for an exact first name, last name match to determine if the Salesforce owner is an Autotask resource.

3. Click **Save** to save the Salesforce configuration. If you have selected the Active check box, your first Salesforce import will occur at the next scheduled interval.

   Two **User-defined Fields** (**UDFs**) are created when you click Save:

   Salesforce Contact ID

   Salesforce Company ID

4. If you would like to select resources who will receive email notifications when the Salesforce import is run or errors are encountered, click the **Notifications** tab.

   All active Autotask resources are listed as well as previously selected resources who have since been inactivated. Select the check box for each resource you would like to notify.

> NOTE You can configure the extension so that notifications are only sent to the selected resources when a new Salesforce company or contact is imported. Refer to the table in Step 2 of this procedure for details.

Salesforce setup

A security setting must be changed in Salesforce to allow Autotask to log in to the system and retrieve your company and contact data.

To configure Salesforce:

1. Login to Salesforce. You must have permissions that allow you to alter the accepted IP ranges.
2. Click **Setup** at the very top of the page.
3. On the left navigation frame under **Administration Setup**, click **Security Controls > Network Access**.
4. On the Network Access page, click **New** to add a new trusted IP range to Salesforce. This is required because Autotask needs to connect to Salesforce on your behalf, so the Autotask.net IP ranges need to be unblocked.
5. In the **Start IP Address** text box, enter 8.12.58.5 (the IP address for www.autotask.net).
6. In the **End IP Address** text box, enter 8.12.58.5 (the IP address for www.autotask.net).
7. Click **Save**.

Using the Salesforce Extension

The import process

Once the Salesforce Extension is turned on and configured by your Autotask Administrator, an import will run every 20 minutes. Any new Salesforce companies or contacts that are found will be imported into Autotask.

Refer to "Salesforce data mapping" on page 8 for a table outlining the company and contact field mapping between Salesforce and Autotask.

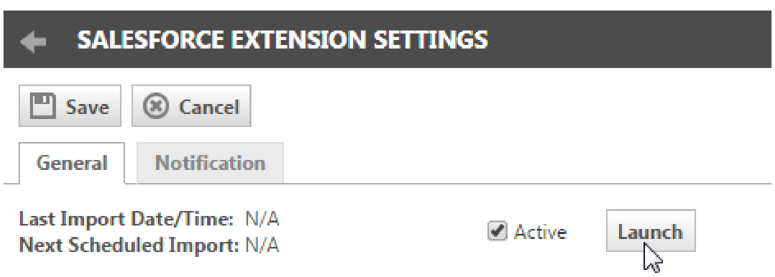
Import rules

The following rules apply to the import:

- If the Salesforce Extension finds an Autotask company with the same Company Name, Address Line 1, City, State it is considered the same company and will not be recreated.
- If it finds a contact that has the same Company Name, First Name, Last Name it is considered the same contact and will not be recreated.
- If a Salesforce contact is not associated with a company, it will not be imported to Autotask.

Running a manual import and viewing import status

To run a manual import, go to the Salesforce Extension configuration page and click the **Launch** button:

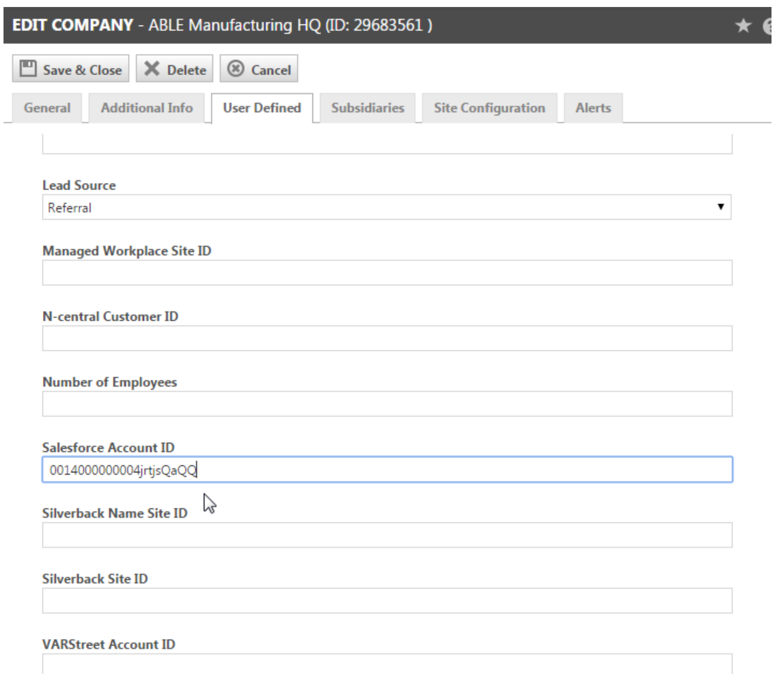


To find out the last time an import ran and when the next import is scheduled, view the Salesforce Account and Contact Import section on the General tab.

Un-mapping the Salesforce data from the Autotask data

Two UDFs are created when the Salesforce Extension is turned on. If you find you need to disassociate the Salesforce company from the Autotask company or the Salesforce contact from the Autotask contact, find the Salesforce UDF for the company or contact and clear the field.

The UDFs can be cleared on the edit company or contact pages:



- **Companies** (> CRM > Search > Companies > find company > Edit Company > User-Defined Field tab)
- **Contacts** (> CRM > Search > Contacts > find contact > Open Contact > Edit > User Defined tab)

Salesforce data mapping

The following tables shows how company and contact data is mapped between Salesforce and Autotask.

Contacts

Salesforce Field	Autotask Field
Email	EMail Address
Fax	Fax Number
First Name	First Name
Other Phone	Alternate Phone
Last Name	Last Name
Mailing City	City
Mailing Postal Code	Zip Code
Mailing State	State
Mailing Street	Address Line
Post code	Zip Code
Mobile Phone	Mobile Phone
Phone	Phone
Title	Title

Companies

Salesforce Field	Autotask Field

Company Number	Company Number
Name	Company Name
Annual Revenue	Asset Value
Billing Street	Address 1
Billing City	City
Billing Country	Country
Billing Postal Code	Postal Code
Billing State	State
Fax	Fax
Phone	Phone
Sic	SICCode
Ticker Symbol	Stock Symbol
Type	Company Type (if it does not match an Autotask company type it will be set to "Customer")
Website	Web Address
Company	Salesforce Company ID (UDF)

ID	
Rating	Classification
Owner Id	Account Manager (if Salesforce owner is not an Autotask Resource, this is set to the default account manager).
Industry	Market Segment (if does not match an Autotask market segment this field will be empty)
Parent ID	Parent Company