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## Sophos Central Partner Autotask integration guide

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# 1 About Autotask integration

You can connect your Sophos Central Partner account to Autotask, a Professional Services Automation (PSA) tool, if the following apply:

- You are part of the Sophos Managed Service Provider (MSP) program.
- You use Sophos Central Partner.
- You are an Autotask user.

Your Sophos Central Partner customer data (in particular, usage of Sophos products) is then synced with Autotask. This eliminates the need to update the same data in two places manually and makes it easier to bill customers for the products they use.

The license usage data is pulled from the Sophos Central Partner database into Autotask at predefined intervals, for example nightly, using the Autotask API.

## **Restriction**

Monthly billing only is supported. Autotask Integration does not support yearly billing.

## 1.1 Customer usage and other data sent to Autotask

If you're an MSP partner, Sophos Central Partner allows you to manage security for your customers.

You can manage security for two customer types:

- Customers who have purchased termed licenses.
- Customers who have chosen a monthly usage-based billing model. These customers could use different numbers of different licenses at different times.

The customers' product usage is recorded in Sophos Central Partner. Syncing this data with Autotask allows you to easily bill them for products they used in the past month.

Once the integration is set up, the following data is sent to Autotask:

- Customer name
- Sophos Central Partner license names
- Usage

You can see usage for your monthly customers on the **Dashboard**, in the **Usage For My Monthly Customers** section.

Clicking the **Edit Details** link in **Usage For My Monthly Customers** takes you to **Managed Customer Usage**.

The usage data displayed here for each customer is sent to Autotask when the integration is set up.

To see a specific customer's license details and usage, select the customer in the list and click **License Details**. The customer overview page is displayed.

## 2 Integration setup

Before customer data can be synced between Sophos Central Partner and Autotask, you need to perform initial setup tasks:

- In Autotask, create an API User account and perform other setup tasks.
- In Sophos Central Partner, enter the API User account details.
- In Sophos Central Partner, map Sophos Central Partner customers to Autotask customers and contracts.

These steps are described in detail in the sections that follow.

### 2.1 Set up Autotask

Follow the instructions in the following subsections to set up Autotask. For more details about how to perform these steps, see the Autotask documentation.

#### 2.1.1 Check for a “Software as a Service” code

You need to check that a **Software as a Service** billing code has been created in Autotask.

1. In the top left-hand corner of the Autotask web page, hover over the Autotask icon.
2. Click **ADMIN**.
3. Under **ADMIN**, expand **FINANCE, ACCOUNTING, & INVOICING** and click **Billing Codes**.
4. Under **BILLING CODES**, click the **Service** tab.
5. If there is not a billing code named **Software as a Service** in the table, create one by clicking **New**. In **NEW SERVICE CODE**, type `Software as a Service` as the name and ensure that **Active** is selected. If you use an external accounting system, you should also enter appropriate values in the other fields, to enable the billing code to appear in that system.

#### 2.1.2 Create an API User account

An API User account is used by Sophos Central to communicate with Autotask.

1. In the top left-hand corner of the Autotask web page, hover over the Autotask icon.
2. Go to **ADMIN > Resources (Users)**.  
Alternatively, go to **ADMIN > Features & Settings > RESOURCES/USERS (HR) > Resources/Users**.
3. Under **RESOURCES**, click **New** to create a new resource.
4. In the **RESOURCE MANAGEMENT** window, on the **General** tab, enter details in the required fields.
5. On the **Security** tab:
  - a) Enter a username and password that Sophos Central will use to access Autotask.

**Note**

Make a note of these because you will need these later.

- b) In the **Security Level** box, select **API User (system)**.
  - c) In the **API TRACKING IDENTIFIER** section, select **Integration Vendor**. In the box below, select **Sophos Central - Security**.
6. On the **HR**, **Approvers**, and **Associations** tabs, enter details in the required fields.
  7. Click **Save & Close**.  
The account is added to the list of resources.

**Tip**

If you need to edit the account after you've closed the **RESOURCE MANAGEMENT** window, right-click the account and use the shortcut menu.

## 2.1.3 Enable the “Sophos Central - Security” integration vendor

1. In the top left-hand corner of the Autotask web page, hover over the Autotask icon and click **ADMIN**.
2. Under **ADMIN**, click the **Extensions & Integrations** tab.
3. Expand **OTHER EXTENSIONS & TOOLS** and click **Integration Center**.
4. Under **INTEGRATION CENTER**, in the list of integration vendors, find **Sophos Central - Security**.
5. Hover over the menu icon to the left of **Sophos Central - Security** and click **Edit**.
6. In **MANAGE INTEGRATION VENDOR**, under **GENERAL**, select **Active** and click **Save & Close**.

The integration vendor is shown as active and is displayed at, or near, the top of the list.

## 2.1.4 Create customer accounts and contracts

1. In Autotask, create an account for each of your Sophos customers. Include billing information, so that they can be billed for their license usage.
2. Create a contract for each of your Sophos customer accounts. To do this, create a **Recurring Service Contract** and enter the relevant details. For the account name, enter the name of the customer account, so that the contract is linked to the customer account.

## 2.2 Set up Sophos Central Partner

1. In Sophos Central Partner, go to **Settings & Policies** and click **PSA integration**.
2. On the **PSA integration** page, next to the Autotask logo, click **Get Started**.
3. In the **Autotask Details** dialog box, enter your Autotask API User account credentials, which you noted earlier. Click **Save**.

**Note**

If the data you entered is invalid, an error is displayed. Enter the correct data, ensuring that you use the correct case (upper or lower case), and click **Save** again.

If an error about a missing Software as a Service allocation code is displayed, ensure that you have created a **Software as a Service** billing code, as explained in [Check for a "Software as a Service" code](#).

When Sophos Central Partner has set up an account in Sophos Central Partner for accessing Autotask, Sophos Central Partner:

- Copies all Sophos Central Partner license names to Autotask where they appear as services.
- Copies all customers and contracts from Autotask to Sophos Central Partner.

The button next to the Autotask logo changes to **Manage Settings**.

If you have problems connecting with Autotask, see [Troubleshooting](#) for help.

**Related concepts**

[Troubleshooting](#) (page 8)

**Related tasks**

[Check for a "Software as a Service" code](#) (page 2)

You need to check that a **Software as a Service** billing code has been created in Autotask.

## 2.3 Map Sophos Central Partner customers to Autotask customers

You need to specify which Autotask customers and contracts correspond to which Sophos Central Partner customers.

1. In Sophos Central Partner, on the **PSA integration** page, next to the Autotask logo, click **Manage Settings**.  
The **PSA Integration** page now displays the details of your Autotask settings and the list of customers. The **Sophos Central Customer** column lists the name of each customer in Sophos Central Partner. The **Autotask Customer Name** and **Contract** columns are blank, to allow you to map each Sophos Central Partner customer name to the corresponding Autotask customer name and contract.
2. For each customer that you want to sync with Autotask, enter the corresponding Autotask customer name and contract in the **Autotask Customer Name** and **Contract** columns, respectively. Sophos Central Partner automatically displays the Autotask customer names as you type and the list of contracts is filtered depending on the customer name. In the **Sync to PSA** column, turn on synchronization.

**Note**

All unique contracts that are not canceled are synchronized. This includes expired contracts.

**CAUTION**

Sophos expects the contract names to be unique for a partner. This means that all contract names are unique across all your customers.

If you have problems with contract names see [Troubleshooting](#) for help.

3. Click **Save**.

The mappings are saved in Sophos Central Partner and a message is displayed briefly to confirm this.

**Note**

If in future you change your Autotask API User credentials in Autotask, click **View Details** in the upper left of the page to update them in Sophos Central Partner to match.

**Related concepts**

[Troubleshooting](#) (page 8)

## 3 Sync Sophos Central Partner customers with Autotask

Synchronization does not happen immediately. By default, synchronizations happen once every 24 hours. However, if you want to perform a synchronization now, do as follows:

In Sophos Central Partner, on the **PSA Integration** page, click **Sync Now**.

When the synchronization has finished successfully, a confirmation message is shown briefly.



## 4 What happens in the sync

When the synchronization happens, you'll see changes in Autotask and in Sophos Central Partner.

### What happens in Autotask

Synchronization copies the following data from Sophos Central Partner to Autotask:

- Customer name
- Sophos Central Partner license names
- Usage

If there are problems with the customer name mapping to the contract, see [Troubleshooting](#) for help with resolving the problem.

#### Note

If you change the licenses that are assigned to a customer in Sophos Central Partner, you must manually make the corresponding changes to the customer's contract in Autotask. Sophos Central Partner does not update Autotask for you.

### What happens in Sophos Central Partner

The 24 hour synchronization does as follows:

- Updates any Autotask customer names and contracts in Sophos Central Partner if you have changed them manually in Autotask.

For customers that are synced, the **PSA Integration** page now displays synchronization status.

#### Note

If a synchronization error occurs, hover over the error icon in the **Sync Status** column to see the error details and solution advice.

If selected customers are not synced with Autotask, see [Troubleshooting](#) for help.

#### Related concepts

[Troubleshooting](#) (page 8)

## 5 Troubleshooting

This section tells you how to resolve problems with the integration between Sophos Central Partner and Autotask.

### Error about a missing Software as a Service allocation code is displayed

If an error about a missing Software as a Service allocation code is displayed, ensure that you have created a **Software as a Service** billing code, as explained in [Check for a "Software as a Service" code](#).

### Autotask connection troubleshooting and support

If you have trouble with setting up the connection between Sophos Central Partner and Autotask, try the following:

- In Sophos Central Partner, in the **Autotask Details** dialog box, check you have entered all the required information correctly, ensuring that you use the correct case (upper or lower case), and click **Save** again.
- Try logging into your Autotask API User account directly.

If you are still experiencing problems, open a ticket with Sophos support from Sophos Central Partner.

### Customer name changes or does not appear in Autotask, or sync fails

If you are not using unique contract names across all customers you might see the following problems:

- In Sophos Central Partner, **Autotask Customer Name** changes to a different customer name after you click **Save**.
- You can't find the customer name when you are entering data in **Autotask Customer Name**.
- Autotask synchronization fails.

You must ensure that all contract names are unique in Autotask. To do this, in Autotask, search for the contract name that you want to use, and see if it appears more than once.

### Selected customers are not synced with Autotask

If the **Last Sync Details** on the **PSA integration** page show that customers are being ignored, ensure that:

- You have entered the corresponding Autotask customer name and contract in the **Autotask Customer Name** and **Contract** columns, respectively.
- You have turned on synchronization in the **Sync to PSA** column.

## Changes to licenses in Sophos Central Partner are not reflected in Autotask

If you change the licenses that are assigned to a customer in Sophos Central Partner, you must manually make the corresponding changes to the customer's contract in Autotask. Sophos Central Partner does not update Autotask for you.

### **Related tasks**

[Check for a "Software as a Service" code](#) (page 2)

You need to check that a **Software as a Service** billing code has been created in Autotask.

## 6 Get additional help

To get help from Sophos Support:

1. Click **Help** in the top right of the user interface and select **Create Support Ticket**.
2. Fill in the form. Be as precise as possible so that Support can help you effectively.
3. Optionally, select the option to enable Support to directly access your Sophos Central session to be better able to help you.
4. Click **Send**.

Sophos will contact you within 24 hours.

### Note

If you selected the option to enable Support to access your Sophos Central session, this function is enabled when you click **Send**. Remote assistance will automatically be disabled after 72 hours. To disable it sooner, click on your account name (upper right of the user interface), select **Account Details**, and click the **Sophos Support** tab.

### Submit feedback

To submit feedback or a suggestion to Sophos Support:

1. Click **Help** in the top right of the user interface and select **Give Feedback**.
2. Fill in the form.
3. Click **Submit**.

### Additional help

You can also find technical support as follows:

- Visit the Sophos Community at [community.sophos.com/](https://community.sophos.com/) and search for other users who are experiencing the same problem.
- Visit the Sophos support knowledgebase at [www.sophos.com/en-us/support.aspx](https://www.sophos.com/en-us/support.aspx).

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