Rapid Fire Tools

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Email2Ticket™ Autotask® Users Guide

Contents

Purpose of this Guide

This document is intended for users of Autotask setting up the integration between Autotask and Email2Ticket.

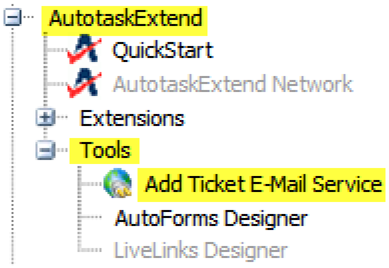
How Email2Ticket Interfaces with Autotask

Autotask provides two sets of APIs that are used by Email2Ticket; Add Ticket E-Mail Service (ATES) and Autotask Webservice API (ATWS). Both of these APIs provide the ability to create tickets or append (add Notes) to existing tickets, and they each have their pros and cons, and it is helpful to understand how Email2Ticket works with Autotask.

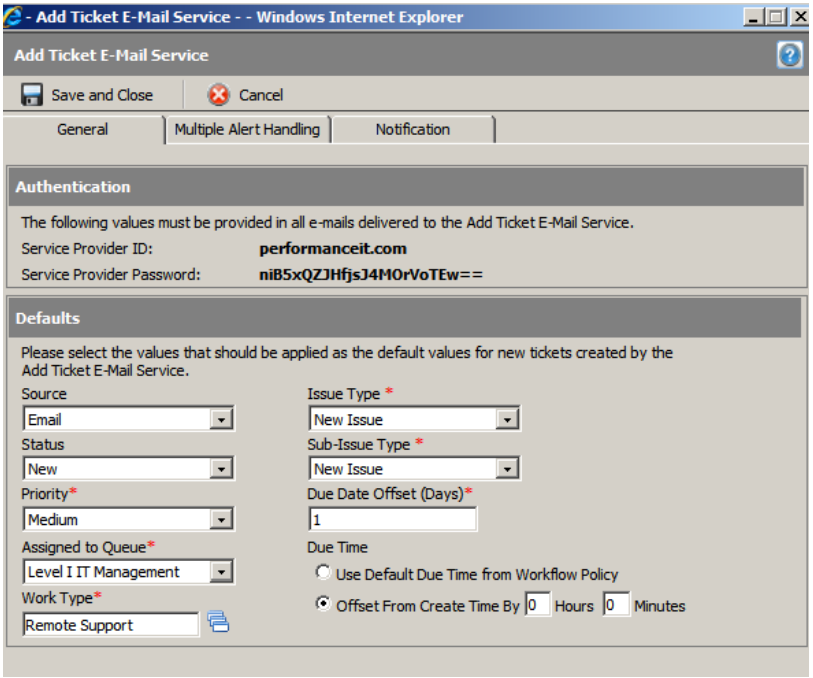
ATES

This is the simpler to configure, and it has the benefit that it will, in almost all cases, create a ticket. Our best practices suggest that you use this as the final "Catch All" rule to ensure that a ticket is created to avoid the chance of missing communications from your client and is one of the default rules created by the wizard.

The only limitation is that the ticket options (e.g. – Source, Status, Issue Types, etc.) for every ticket created via ATES use the defaults you set up in Autotask. Autotask Administrators can retrieve your ATES credentials, and view/change the defaults from Autotask by navigating to Admin, AutotaskExtend->Tools->Add Ticket E-Mail.



The ATES credentials you want are in the panel as shown below:


- Add Ticket E-Mail Service - - Windows Internet Explorer
Add Ticket E-Mail Service
Save and Close
Cancel
General
Multiple Alert Handling
Notification

Authentication

The following values must be provided in all e-mails delivered to the Add Ticket E-Mail Service.

Service Provider ID: **performanceit.com**

Service Provider Password: **niB5xQZJHfjsJ4MOrVoTEw==**

Defaults

Please select the values that should be applied as the default values for new tickets created by the Add Ticket E-Mail Service.

Source: Email

Status: New

Priority*: Medium

Assigned to Queue*: Level I IT Management

Work Type*: Remote Support

Issue Type *: New Issue

Sub-Issue Type *: New Issue

Due Date Offset (Days)*: 1

Due Time

○ Use Default Due Time from Workflow Policy

● Offset From Create Time By 0 Hours 0 Minutes

(Note: Must be admin.

Click

Admin->
AutotaskExtend->
Tools->
Add Ticket E-Mail Service

to see this dialogue.)

ATWS

The benefit of the Autotask Webservice is flexibility. You can specify different ticket parameters for each action. Theoretically, if you have 30 clients, you could setup rules specific for each client to set Priority, SLA, Contract, Issue, Sub-Issue, etc.

Another benefit with ATWS is that Email2Ticket can **add** a contact to an account if the contact does not already exist for the account.

The "catch" is that in Autotask, different clients may not all have the same Contracts, SLA, etc. Ideally you use a "general" rule for all contacts/accounts to create a ticket using ATWS. But if the Contract or other parameters are not valid for the "matched" Account, the add ticket can *fail.* Email2Ticket is designed with this in mind. As mentioned above, in the case of a failed ticket creation via ATWS, you would have an ATES add ticket rule as a "Catch-All" that would then make sure the ticket is created.

Special Features of Email2Ticket for Autotask

Service Desk Rules

From the Mailboxes screen, click on a Mailbox Parser Schedule, and then select Manage Rules from the right-side menu. Click, **Add Rule** to bring up the Add Rule screen. Note that this section discusses rules that are applicable to both Autotask and ConnectWise users, while some are for a specific PSA (which will be noted in the rule description).

Alternatively, you may click "Add Best Practice Rules" in the right-side menu, select "Autotask", and click next to select which rules you want to create from a list of suggested rules designed for Autotask:

Create Ticket in Autotask Using ATES

Use the Create Ticket in Autotask Using ATES option to create a new ticket or Append to an existing ticket. This action uses Autotask's "Add Ticket E-mail Service" (ATES) so you will need to select a "Connection" or click Manage Connections to create an ATES connection. The ATES protocol will create a new ticket against the correct Autotask contact and account by matching the contact information in the "From" field of this form. Use the text substitution *$from$* in the "From" field to cause Email2Ticket to use the contents of the "From" field of the original email.

The simplest way to open a new ticket is to have Email2Ticket simply use the original email content using the text substitutions *$subject$* and *$body$* in the appropriate fields as shown in the screen above.

Choose the "Create Ticket" radio button to create a new ticket. Or use "Append to Ticket" to add a Note to an existing ticket. The default substitution string with regex looks in the body of the email for a string that matches an Autotask ticket number. Only use this option if you have a matching trigger for a ticket number in the email body.

Note: The most commonly used text substitution strings, per above, are *$from$, to, $subject$* and *$body$.* Email2Ticket also offers a rich set of substring and regex pattern capture for more advanced matching. See Text Substitution Strings and Regular Expression Capture in the Quick Start Guide for more detailed information.

Append Ticket Using ATES

Setup the action as described in Create Ticket using ATES, above. However, choose the "Append to Ticket with match:" radio button and supply the text or a substitution string that ATES will use to select the ticket to append this information. Only use this option if you have a matching trigger for a ticket number in the email body.

The typical Email2Ticket substitution string to return an Autotask Ticket number using regular expression capture is:

> $body_regex("T[0-9]+\.[0-9]+")$

The string $body_regex("<*pattern*>")$ tells Email2Ticket to search the email Body and apply the regular expression capture to return the "matched" string.

The regex capture pattern "T[0-9]+\.[0-9]+" means to find and return the first occurrence of a string with the following characteristics:

- capital letter "T"
- followed by a number (i.e.- 0 through 9)
- followed by any additional numbers (i.e. - +)
- followed by the literal string "." (period)
- followed by one or more additional numbers [0-9]+

Specifically, this string finds matches based on the Autotask ticketing number (e.g. - `T20110115.0022)` for appending to the ticket. See the section on Regular Expression in the Quick Start Guide for more information.

Create Ticket in Autotask using ATWS

Use this version of Create Ticket when:

- You want to specify Ticket parameters such as priority, status, etc., different from the defaults in the ATES action or specific to a contact or account.
- You want Email2Ticket to attempt to match contacts using the User Defined Fields (UDF)
- You want Email2Ticket to attempt to match an account using the User Defined Fields (UDF)
- You wish to have Email2Ticket create a contact if it does not exist.

Connection. Use the drop down to select an ATWS Connection to pull the API information from your Autotask account.

Account. Specify an account for this action, or use "Derive from Contact Email." This will cause Email2Ticket to use the account associated with the contact. If a contact is not matched, Email2Ticket will attempt to match an Account based on the email domain in the UDFs: Email2Ticket Domains and Email2AT Domains. (Note: Populate either of these UDFs for the account using
the format: "@domain1.com,@domain2.com" without the quotes.)

Contact Email. Typically leave as *$from$* or other substring / variable.

Be sure to complete all the required fields, shown with asterisk ("*"), and note that you must set either (a) an "Assigned Resource" and Role; or (b) Queue.

Enable **Add Description as Ticket Note** to *also* create a Note with the description. This is useful if you use Autotask Speed Codes, which will overwrite the Ticket Description.

Enable **Continue on Autotask exception** if you want Email2Ticket to continue processing rules if there is an error when trying to create the Ticket. This takes precedence over "Do not process subsequent rules…" Our best practices suggest that this should be enabled, and you should have an ATES rule following this to ensure that a ticket request from your clients is never lost or overlooked.

You may also attach a ticket to a configuration item in Autotask which is a great way to associate *monitoring alerts* with the machine. Click the Select button to use any of the pre-populated fields (e.g. – Kaseya). Email2Ticket will use the text returned from the connection to match any of the following UDFs in this order:

- Email2Ticket Device ID
- Kaseya Device ID
- Reference Title

(Note that a failed match will still create the ticket against the contact/account.)

How **Create Ticket in Autotask Using ATWS** Works

A. Email2Ticket will first attempt to find a Contact in your Autotask database with an email address that matches the **Contact Email**. If there is not an exact match, it will search the Contact UDFs: Email2Ticket Addresses and Email2AT Addresses, stopping at the *first* match it finds. If a Contact is matched, the Ticket is created for that Contact / Account.

B. If no Contact match is found, and if an **Account** is specified, it will create the Ticket in that Account. If **Auto Create Contact** is enabled, it will create a Contact and create/assign the Ticket, otherwise it will create the Ticket with no Contact.

C. If Account = "Derive from Contact Email," Email2Ticket will use the domain of the **Contact Email** to try to find a matching Account (searching Domains, Email2Ticket Domains and Email2AT Domains). If an Account matched, it will create the Ticket in that Account. If **Auto Create**

Contact is enabled, it will create a Contact and create/assign the Ticket, otherwise it will create the Ticket with no Contact.

Create Time Entry in Autotask Using ATWS

A handy feature of Email2Ticket is the ability for your engineers to add an Autotask Time Entry to an existing ticket by simply sending an Email!

Setup 2 Criteria Triggers:

Subject Equals TIME-ENTRY (or similar)

From Contains @mycompanydomain.com

Then fill out the fields (all are required) in the Action pane

The default settings for **Total Minutes** and **Summary** expect that the first line of the email contains only the amount of time, in minutes, and the second line through the end of the email will be added as the Summary information.

The End Time will be the time the email is received, and the Start Time calculated from the Total Minutes.

Enable “Email Back Confirmation” to receive a confirmation of success (or failure).

Create Note in Autotask Using ATWS

Use this version of Create Note in Autotask when you want to specify parameters such as Note Type, Status, etc., different from the defaults in the ATES action.

The current APIs require Email2Ticket to add the Note and then set the attributes. Depending on your Autotask Workflow rules, this might trigger two separate Workflow rules, so be careful how you use Email2Ticket in conjunction with Autotask Workflow rules.

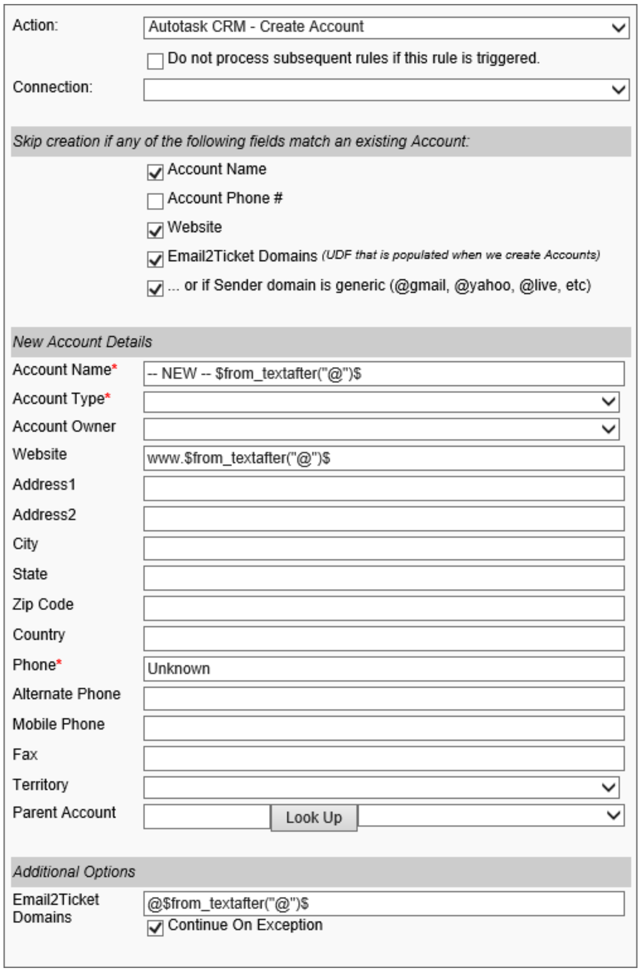
CRM Rules for Autotask

Create Account

This rule creates an account in Autotask when an email is received. The account will not be created if the following fields match an existing entry:

- Account Name
- Website
- Email2Ticket Domain

Account name is required, but is set to derive from sender by default. You must also specify an account type from the drop-down menu. "Phone Number" is also required, but this must be input manually.



Action:	Autotask CRM - Create Account ▾ □ Do not process subsequent rules if this rule is triggered.
Connection:	▾

Skip creation if any of the following fields match an existing Account:

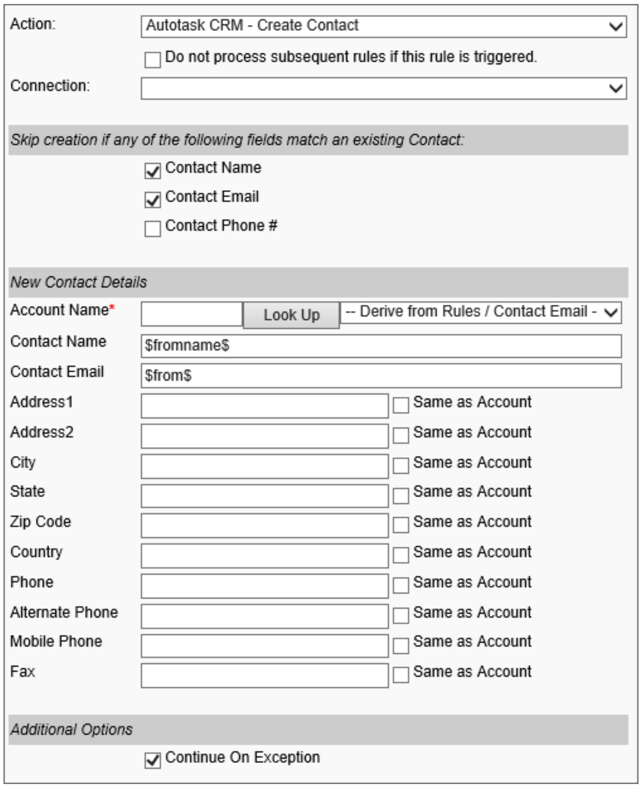
☑ Account Name
□ Account Phone #
☑ Website
☑ Email2Ticket Domains *(UDF that is populated when we create Accounts)*
☑ ... or if Sender domain is generic (@gmail, @yahoo, @live, etc)

New Account Details

Account Name*	-- NEW -- $from_textafter("@")$
Account Type*	▾
Account Owner	▾
Website	www.$from_textafter("@")$
Address1	
Address2	
City	
State	
Zip Code	
Country	
Phone*	Unknown
Alternate Phone	
Mobile Phone	
Fax	
Territory	▾
Parent Account	Look Up ▾

Additional Options

Email2Ticket Domains	@$from_textafter("@")$ ☑ Continue On Exception



Action:	Autotask CRM - Create Contact ▾ □ Do not process subsequent rules if this rule is triggered.
Connection:	▾

Skip creation if any of the following fields match an existing Contact:

☑ Contact Name
☑ Contact Email
□ Contact Phone #

New Contact Details

Account Name*	Look Up -- Derive from Rules / Contact Email - ▾	
Contact Name	$fromname$	
Contact Email	$from$	
Address1		□ Same as Account
Address2		□ Same as Account
City		□ Same as Account
State		□ Same as Account
Zip Code		□ Same as Account
Country		□ Same as Account
Phone		□ Same as Account
Alternate Phone		□ Same as Account
Mobile Phone		□ Same as Account
Fax		□ Same as Account

Additional Options

☑ Continue On Exception

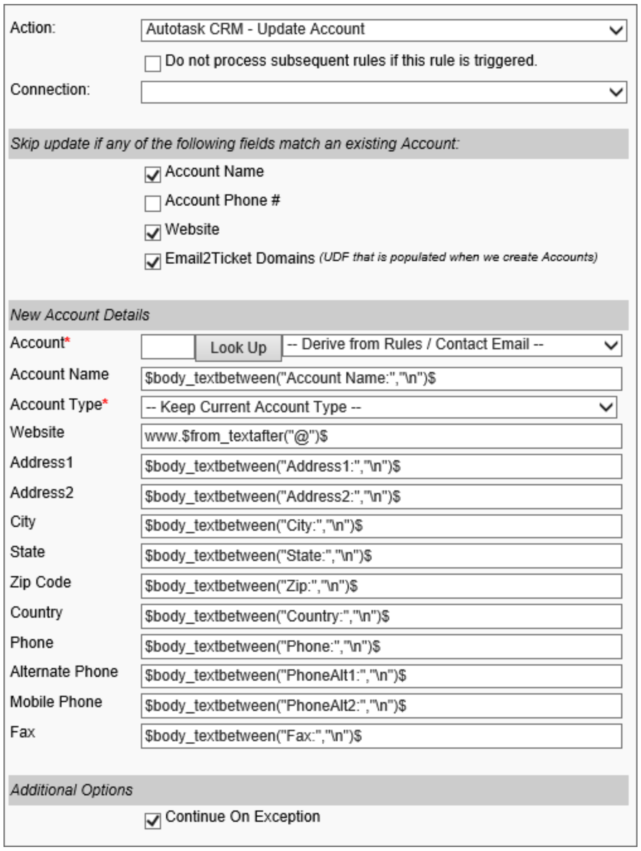
Create Contact

This rule creates a contact within an existing account following an email if the sender's information matches an existing account.

Account Name is required, but you may click "Look Up" to have Email2Ticket use the sender's email address to auto-populate this field.

Update Account

This rule allows updates to account information via a web form. A contact fills the form that emails field values to your mailbox. This rule reads those field values and makes the necessary changes.



Action: Autotask CRM - Update Account

□ Do not process subsequent rules if this rule is triggered.

Connection:

Skip update if any of the following fields match an existing Account:

☑ Account Name
□ Account Phone #
☑ Website
☑ Email2Ticket Domains *(UDF that is populated when we create Accounts)*

New Account Details

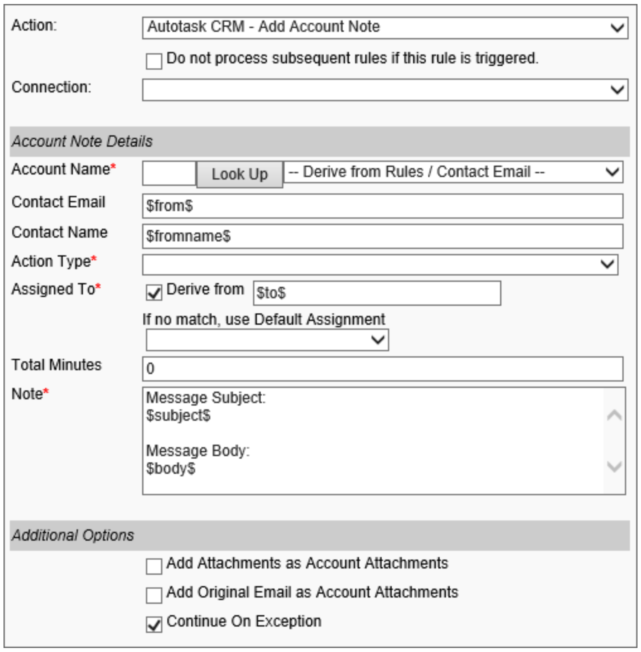
Account*	Look Up · -- Derive from Rules / Contact Email --
Account Name	$body_textbetween("Account Name:","\n")$
Account Type*	-- Keep Current Account Type --
Website	www.$from_textafter("@")$
Address1	$body_textbetween("Address1:","\n")$
Address2	$body_textbetween("Address2:","\n")$
City	$body_textbetween("City:","\n")$
State	$body_textbetween("State:","\n")$
Zip Code	$body_textbetween("Zip:","\n")$
Country	$body_textbetween("Country:","\n")$
Phone	$body_textbetween("Phone:","\n")$
Alternate Phone	$body_textbetween("PhoneAlt1:","\n")$
Mobile Phone	$body_textbetween("PhoneAlt2:","\n")$
Fax	$body_textbetween("Fax:","\n")$

Additional Options

☑ Continue On Exception

Add Account Note

This rule appends notes to an account (or contact within an account) when a sender's email is replied to. Best used for logging activity within sales/support tickets.



Action: Autotask CRM - Add Account Note

□ Do not process subsequent rules if this rule is triggered.

Connection:

Account Note Details

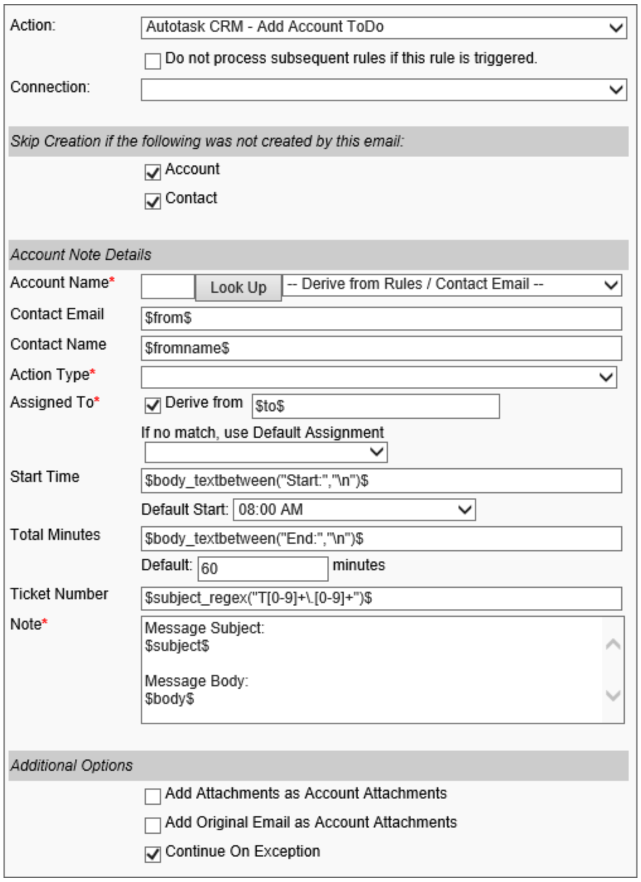
Account Name*	Look Up · -- Derive from Rules / Contact Email --
Contact Email	$from$
Contact Name	$fromname$
Action Type*	
Assigned To*	☑ Derive from to If no match, use Default Assignment
Total Minutes	0
Note*	Message Subject: $subject$ Message Body: $body$

Additional Options

□ Add Attachments as Account Attachments
□ Add Original Email as Account Attachments
☑ Continue On Exception

Add Account ToDo

This rule can create ToDos in Autotask when an email is received, assigned to the recipient of the email. Use cases would be to create scheduled appointments for phone calls, or to set deadlines for follow-ups with clients or prospects.



Action: Autotask CRM - Add Account ToDo

☐ Do not process subsequent rules if this rule is triggered.

Connection:

Skip Creation if the following was not created by this email:

☑ Account

☑ Contact

Account Note Details

Account Name* Look Up -- Derive from Rules / Contact Email --

Contact Email $from$

Contact Name $fromname$

Action Type*

Assigned To* ☑ Derive from to

If no match, use Default Assignment

Start Time $body_textbetween("Start:","\n")$

Default Start: 08:00 AM

Total Minutes $body_textbetween("End:","\n")$

Default: 60 minutes

Ticket Number $subject_regex("T[0-9]+\.[0-9]+")$

Note* Message Subject:
$subject$

Message Body:
$body$

Additional Options

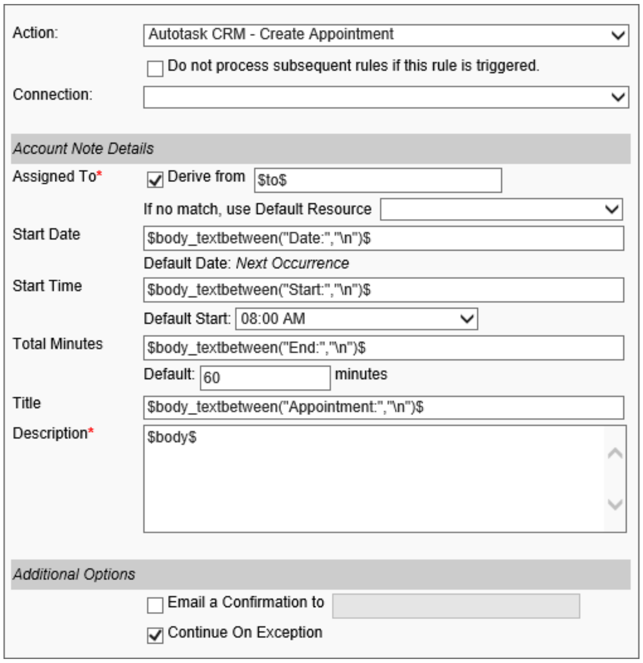
☐ Add Attachments as Account Attachments

☐ Add Original Email as Account Attachments

☑ Continue On Exception

Create Appointment

This rule allows you to create appointments via email by adding content to your email body. Use case is largely internal.



Action: Autotask CRM - Create Appointment

☐ Do not process subsequent rules if this rule is triggered.

Connection:

Account Note Details

Assigned To* ☑ Derive from to

If no match, use Default Resource

Start Date $body_textbetween("Date:","\n")$

Default Date: *Next Occurrence*

Start Time $body_textbetween("Start:","\n")$

Default Start: 08:00 AM

Total Minutes $body_textbetween("End:","\n")$

Default: 60 minutes

Title $body_textbetween("Appointment:","\n")$

Description* $body$

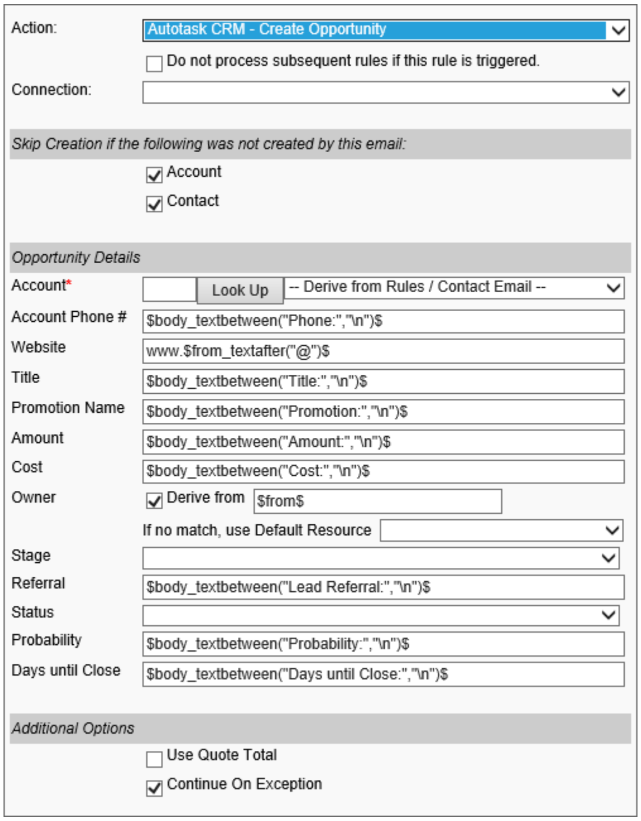
Additional Options

☐ Email a Confirmation to

☑ Continue On Exception

Create Opportunity

This rule creates an opportunity when someone sends an email and is not associated with any account. Use case would be when prospects email in with Sales inquiries.



Action:	Autotask CRM - Create Opportunity
	□ Do not process subsequent rules if this rule is triggered.
Connection:	

Skip Creation if the following was not created by this email:

☑ Account
☑ Contact

Opportunity Details

Account*	Look Up -- Derive from Rules / Contact Email --
Account Phone #	$body_textbetween("Phone:","\n")$
Website	www.$from_textafter("@")$
Title	$body_textbetween("Title:","\n")$
Promotion Name	$body_textbetween("Promotion:","\n")$
Amount	$body_textbetween("Amount:","\n")$
Cost	$body_textbetween("Cost:","\n")$
Owner	☑ Derive from $from$
	If no match, use Default Resource
Stage	
Referral	$body_textbetween("Lead Referral:","\n")$
Status	
Probability	$body_textbetween("Probability:","\n")$
Days until Close	$body_textbetween("Days until Close:","\n")$

Additional Options

□ Use Quote Total
☑ Continue On Exception