

Autotask Integration
&
Microsoft Dynamic Business
Central

our 3rd generation of integration
to Autotask

Macali

datto | AUTOTASK PSA

Autotask Integration Benefits

ONE Workflow – SMART Integration – EASY Setup

Take your Autotask operation to the next level with integrated data and one efficient workflow. Our smart Macali software integrates Autotask and Business Central seamlessly in your daily business.

More than just invoices, and the Freedom to Integrate

The Perfect Overview

You're busy. You have work to do and people to help. Macali helps you be efficient with data that is maintained in one workflow.

No Challenge

- Same data and hours spend, Stock on Items / Products in all systems and more
- Better Reports, Better decision making
- Always updated



Autotask Integration Benefits

Macali integrates Autotask and Microsoft Dynamics Business Central - the two most popular systems for SMB.

One place to maintain all data

Easy maintains, Free Online Sync between

- Accounts/Customers/Vendors/Recourses and products and invoices and more..
- No extra education, Uses standard Autotask and Business Central work way
- No doubt, one world one view, same data every where

Handles your unique setup, no costly development

- Easy made adaption, easy mapping your Autotask setup to fit your Business Central needs.
- Without extra costs, Combines the freedom in Autotask's User Defined Fields with development in Business Central
- Simplify with out to simple



Autotask Integration Benefits

Fast Great Benefits and Easy Invoicing

All your tasks are updated and ready for invoicing when you are.

- Less Work, Fast Invoicing, Autotask Invoices goes automatically directly in too Sales Invoice
- Extended handling of Block Hours, if need
- Easy Track and Trace, same Invoice data in Autotask and Dynamics Business Central
- Better cashflow



Accounts / Customers / Vendors Autotask Benefits

- Just one place to maintain
- Balance and Balance Due SAME
- Invoice History SAME
- Bette Reports on Sales/Profits
- Free , easy use of UDF mapping to your, Saleshead and Accounts fields
- Always Updated

EDIT ACCOUNT - ABLE Manufacturing HQ* (ID: 29683561)

Save & Close Delete Cancel

General Additional Info User Defined Subsidiaries Site

Account Name *
ABLE Manufacturing HQ* Active

Account Number
5

Address 1
163 Consaul Road

Address 2

City

5 · ABLE Manufacturing HQ*

No.:	...	Salespe
Name:	ABLE Manufacturing HQ*	Service
IC Partner Code:	...	Docum
Balance (LCY):	0,00	Total Se
Balance Due (LCY):	0,00	Costs (L
Credit Limit (LCY):	0,00	Profit (L
Blocked:	...	Profit %
Privacy Blocked:	<input type="checkbox"/>	Last Da

Address & Contact

Address		Contact
Address:	163 Consaul Road	Primar
Address 2:		Contac
Post Code:	12205	Phone
City:	Albany	Email:



Items / Products Autotask Benefits

- Use Products in Autotask as Items in Business Central or
- Use your Items in Business Central as Products Autotask
- Just one place to maintain
- Product No. Like SKU Material Code also Sync, and can be used
- Free, easy use of UDF mapping to Items fields

29684110 · Cable Cat5e

Item			
No.:	29684110	Last Date Modified:	27-07-2018
Description:	Cable Cat5e	GTIN:	1981986500920
Blocked:	<input type="checkbox"/>	Item Category Code:	
Type:	Inventory	Service Item Group:	
Base Unit of Measure:	PCS	Automatic Ext. Texts:	<input type="checkbox"/>
Show fe			
Inventory			
Inventory:	0	Stockout Warning:	Default (Yes)
Qty. on Prod. Order:	0	Unit Volume:	

EDIT PRODUCT - Cable Cat5e			
Save & Close Save & New Cancel			
Summary User Defined Inventory			
Product Name* Cable Cat5e		Product Category	
Product Description		<input checked="" type="checkbox"/> Active <input type="checkbox"/> Serialized <input type="checkbox"/> Does not require Procurement	
Default Configuration Item Type			
Material Code* Hardware			
Unit Cost	Markup %	Unit Price	MSRP
0		0	0
Period Type			
Unit Cost and Unit Price will be used for quotes and ticket/project/contract charges.			
Internal Product ID		Manufacturer	
External Product ID 29684110		Manufacturer Product Number	
Product Link Preview		Product SKU 1981986500920	



Resources Benefits

- Use your Resources in Autotask in Business Central
- Just one place to maintain
- Better cost benefits reports
- Free use of UDF also with your own Business Central unique fields

RESOURCE MANAGEMENT - Frank^ Wilson

Save & Close Save Save & Copy Cancel Tabs wit

General * Security * HR * Approvers * Associations *

Prefix
Mr. ▾

First Name * Frank^ Middle Initial

Last Name * Wilson

Title
Support Specialist

Suffix ▾

Gender

Edit - Resource Card - 29683915 - Frank^ Wilson

HOME ACTIONS NAVIGATE REPORT

View Edit New Delete Manage Statistics Attachments Process Costs Prices Ledger Entries Resource Statistics Resource Usage Report

29683915 · Frank^ Wilson

General

No.: 29683915 ...

Name: Frank^ Wilson

Type: Person ▾

Base Unit of Measure: HOUR ▾

Search Name:

Resource Group No.: ▾



Invoice Benefits

- No extra work, Made in Autotask, ready to post and send in Business Central
- All *data from the Autotask are in the Business Central Invoice, incl. Attached Autotask Invoice
- Ad Hoc Invoices directly into SalesInvoice
- BlockHours and use of, directly into Jobs, ready for invoicing
- Free, easy use of UDF mapping to Salesheads fields



Easy Setup

Ones

- Setup an Autotask API Account
- Chosse Defaluts Templats for creations of data
- Setup posting defaults
- Using Blockhours setup Job
- Usings UDF, Setup mapping
- Missing something check the Service Log

Autotask

Administration

- Autotask Service Setup
- Autotask Template Templates
- Autotask Setup
- Autotask Job Task Mapping
- Autotask UDF Mapping
- Autotask Web Service Log

Autotask Setup

General			
Active From Posting Date:	<input type="text"/>	Use Address From:	Invoice
Cost Price On Jon Journal:	NAV Cost	Job Journal Template:	JOB
Show Block Hours On Invoice:	<input type="checkbox"/>	Job Journal Batch:	DEFAULT



Miraculous Benefits

- Unlimit use of Integration
- Unlimit use of Autotask UDF
- Easy Nice looking Invoices
- Just 1000 euro per year
- Can save Autotask uses in the Bookkeeping
- Free help to setup your integration
- Microsoft Appsource approved

EDIT ACCOUNT - ABLE Manufacturing HQ* (ID: 2)

Save & Close Delete Cancel

General Additional Info User Defined Subsid

Credit Limit
100,000.00

email

Number of Employees

Edit - Autotask UDF Mapping

HOME

New View List Edit List Delete Show as List Show as Chart Refresh

Autotask UDF Mapping

Name	Target Table	Target Field	Caption
10 Yourref	36 Sales Header	11 Your Reference	
20 Credit Limit	18 Customer	20 Credit Limit (LCY)	

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NAV / Business Central Benefits

Global Microsoft Software for ERP like Windows Server / Office 365

Local Support near you, in your language

Lots of How too's on the Web

Cloud software like Autotask, or on-prim if you like



Need help

Available worldwide +40 countries

Seamless integration

Out of Box Integration

Simplify without too simple

We help online to setup your connection

Videos on many situations

We have or gets contact too your local partner

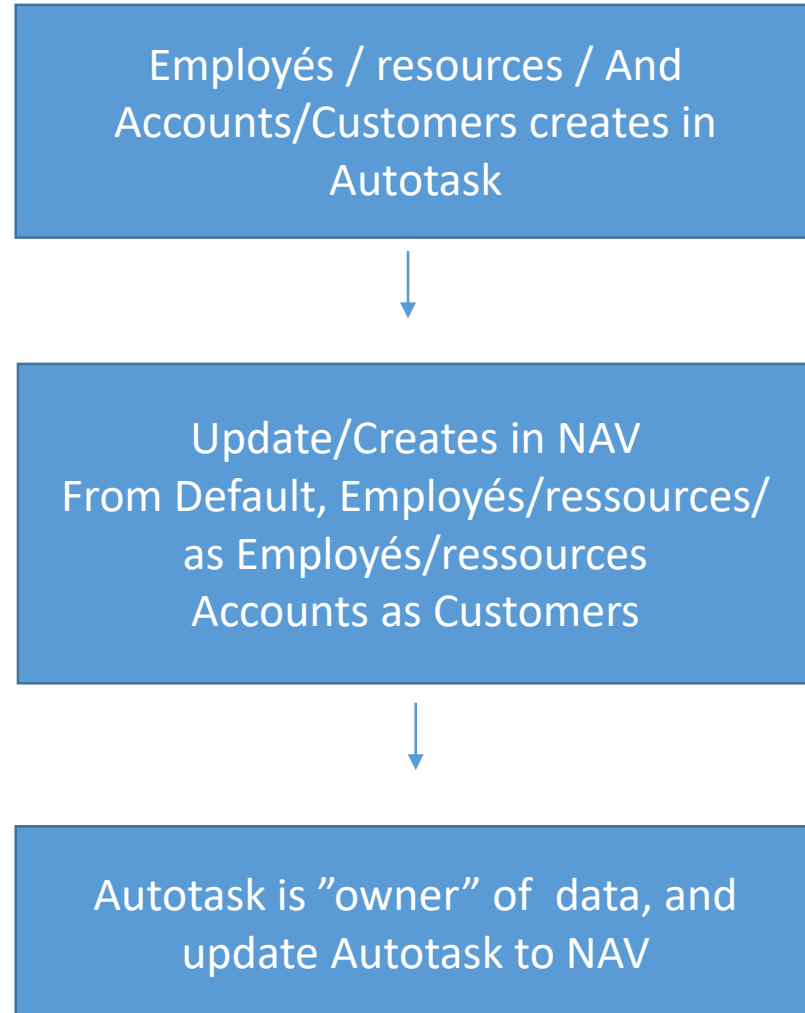
FRQ's

Call.: us +45 52 23 70 70

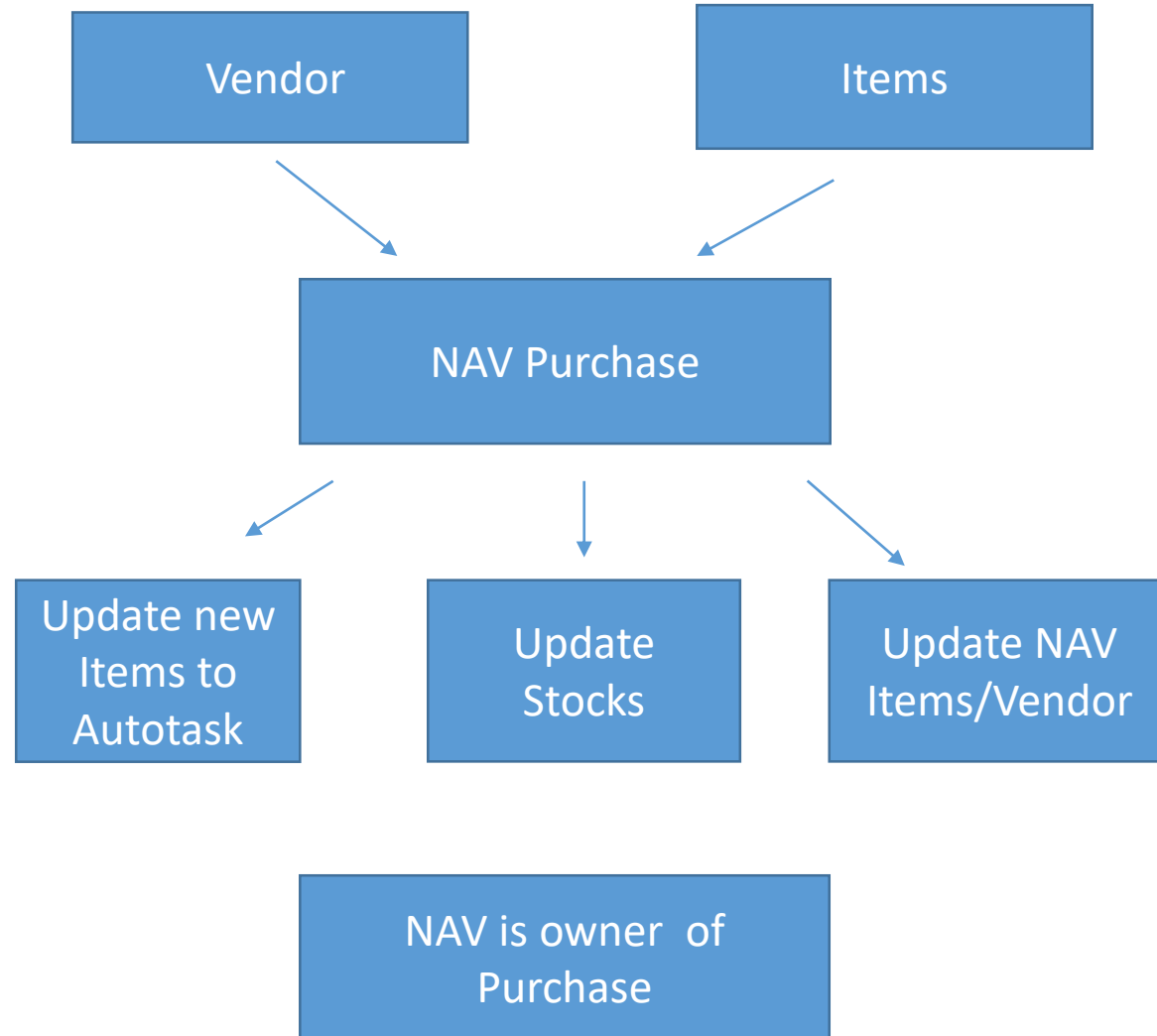
Free eMail Support.: autotask@macali.dk



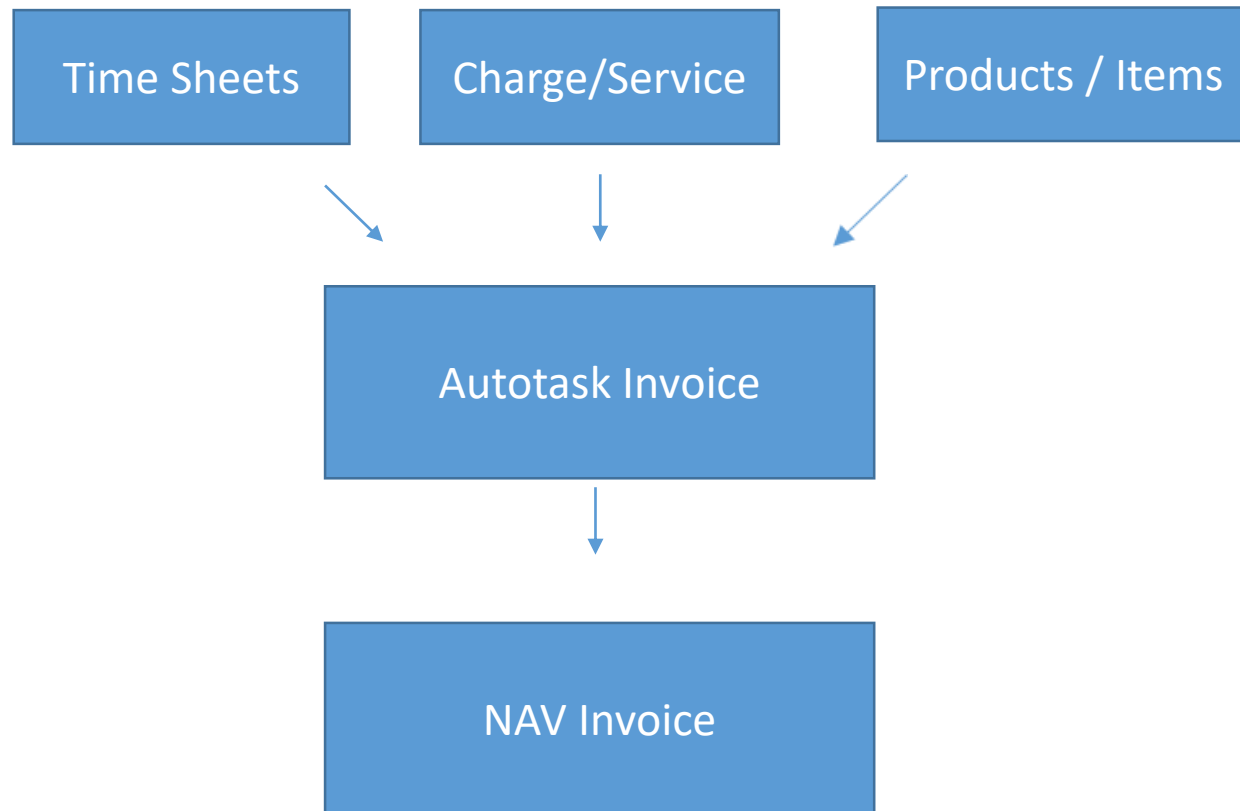
New Resources And Accounts



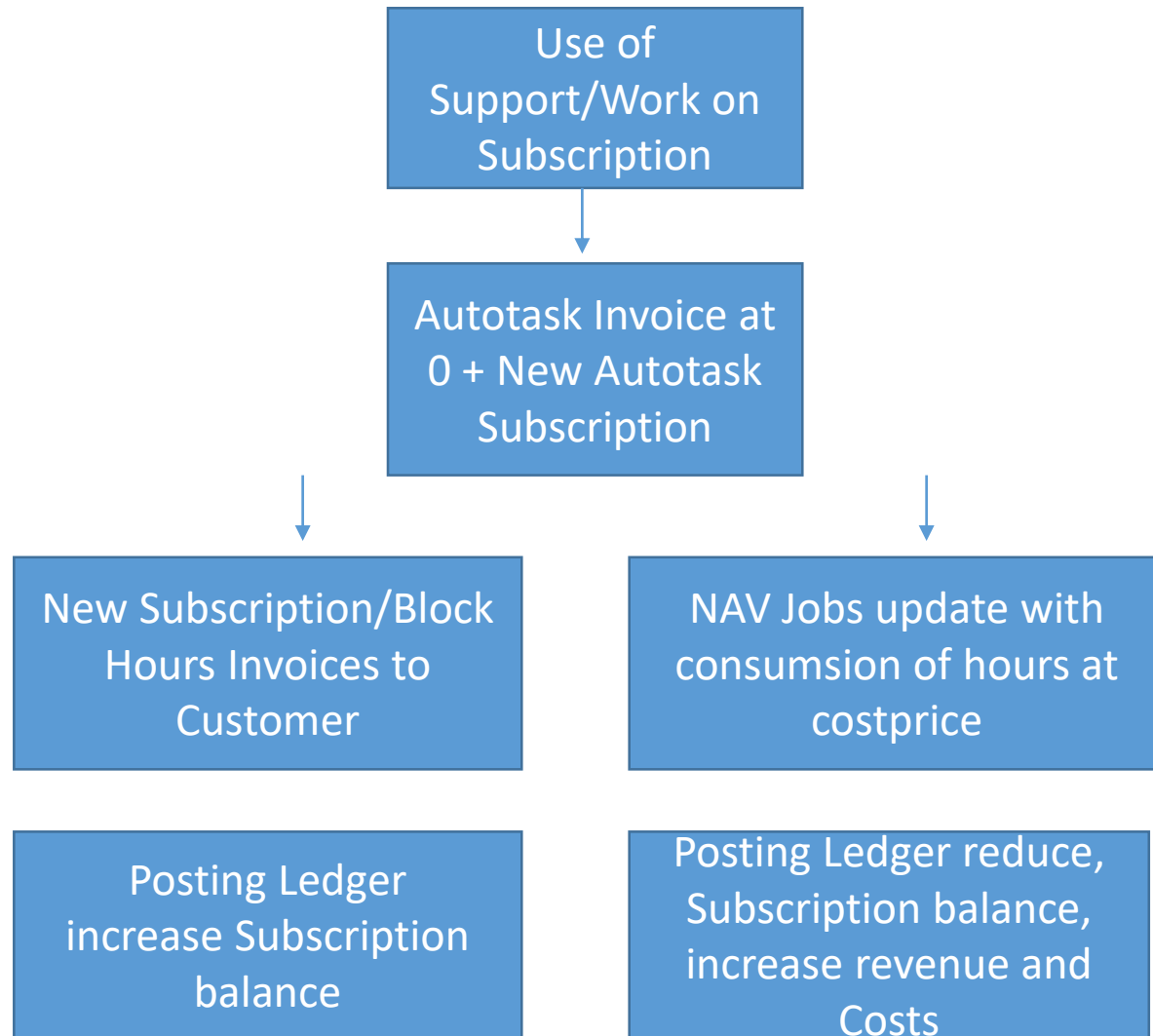
Purchase and new Items



Autotask Integration Benefits



Autotask Integration Benefits



Partners

Autotask World Leading Software for IT Service Provider

<https://www.autotask.com/>

Microsoft Dynamics 365 Business Central (former NAV / Navision) Leading ERP software for SMB from Microsoft

<https://dynamics.microsoft.com/en-gb/mixed-reality/overview/>

Both Global Presence, Local Support

Macali making our 3rd generation of integration to Autotask

<https://www.macali.dk/en/macali-autotask-2/>

