Step 1: Creating an API User and Getting API Keys from Autotask

1. Log into Autotask and navigate to the menu on the left and hover over **Admin** and click on **Resources (Users)**
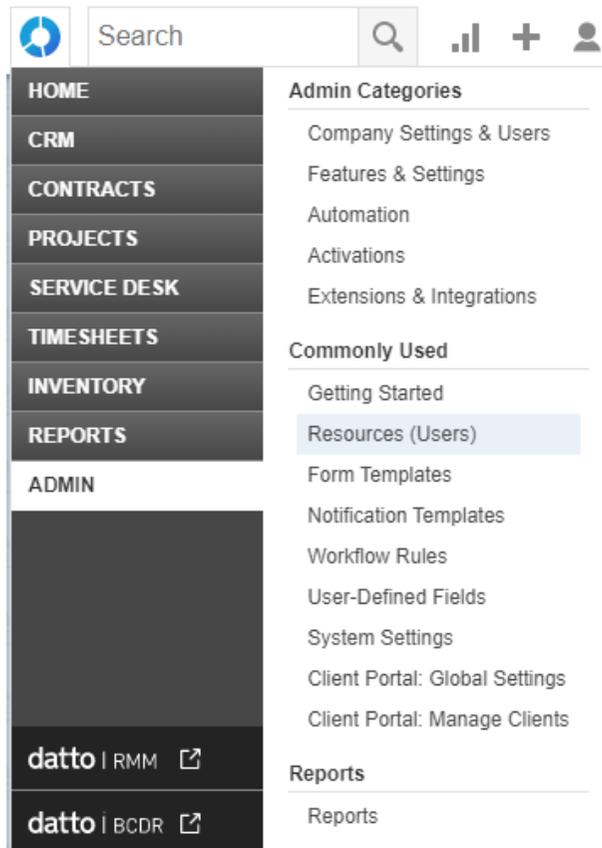
2. Hover over the downward arrow at the top left of the window and click on **New API User**
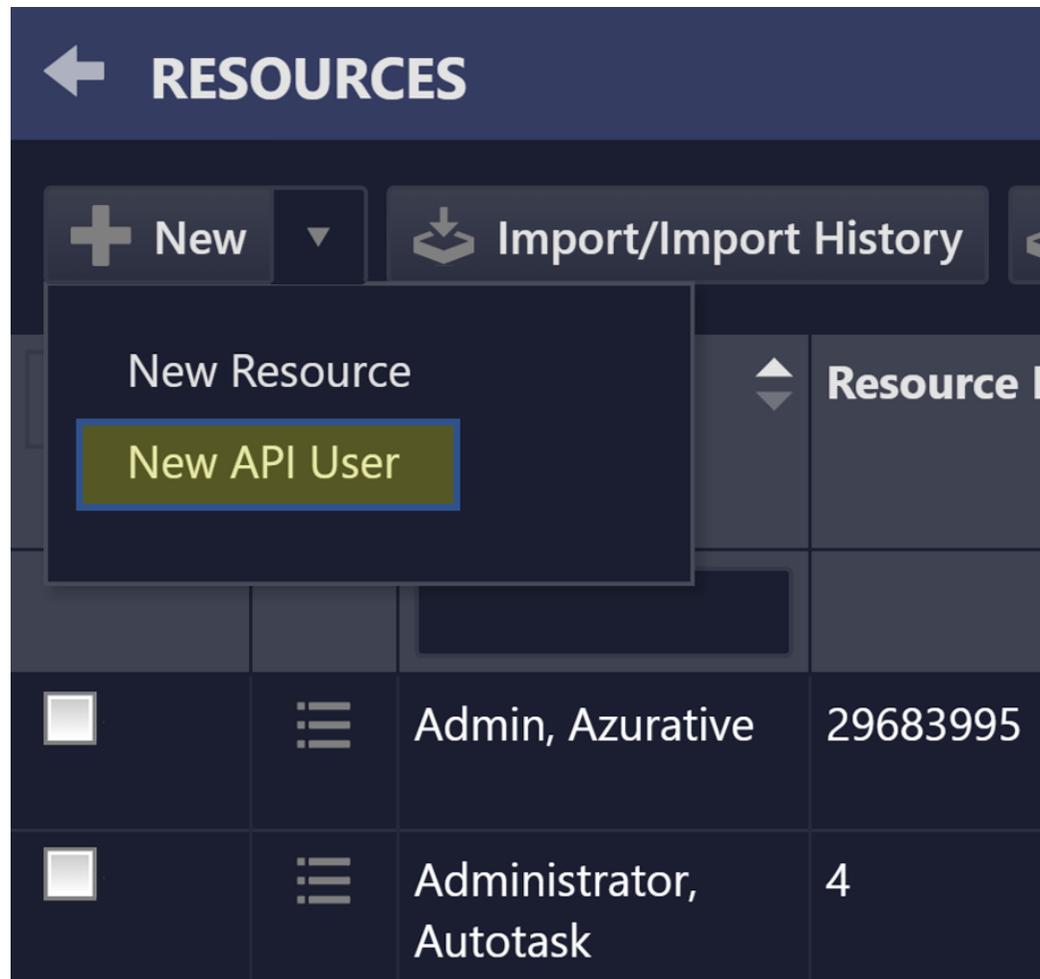
3. Fill out the necessary fields under the **GENERAL** area

- Set the **First Name** to Zen
- Set the **Last Name** to Contract

- Set the **Email Address** to anything - it won't be used for our API purposes, so even test@test.com will work
- Set the **Security Level** to API User (system) or the highest option to prevent sync and view permissions later

4. Generate the API keys under the **CREDENTIALS** area
   - Click the **Generate Key** button to generate a user key. *Make sure to copy and paste that key to a separate area, like Notepad or Word, for later usage.*
   - Click the **Generate Secret** button to generate a secret password. *Make sure to copy and paste that key to a separate area, like Notepad or Word, for later usage. This will not be accessible later so **DO NOT MISS THIS STEP**.*

5. Select the vendor from the dropdown in the **API Tracking Identifier** section. *REQUIRED.*
   - Ensure **Integration Vendor** is selected.
   - Scroll through the list to find and select **Zen Contract – Contract & Proposals**

6. For the **Line of Business** field, drag over all relevant line items. Drag over all if you're not certain which ones are right.

ADD API USER

Save & Close | **Cancel**

GENERAL

First Name *
Cloud

Last Name *
Radial

Email Address *
test@test.com

☑ Active

☐ Locked

Security Level *
API User (system)

Date Format
MM/dd/yyyy

Time Format
hh:mm tt

Number Format
X,XXX.XX

GENERAL

Generate Key

Username (Key) *
g2tpmt5gfruwbao@azurativesandbox.com

Generate Secret

Password (Secret) *
gE$4C2y@0#JbX7p~xT*83jZ@t

API TRACKING IDENTIFIER

API version 1.6 & later require the user of an API tracking identifier. Once assigned, this cannot be changed.

◉ Integration Vendor

○ Custom (Internal Integration)

○ None

Integration Vendor *
CloudRadial - Portal & Account Management

LINE OF BUSINESS

A line of business can be used to grant access or prevent access to data associated with Contracts, Tickets, Projects, etc.

Not Associated

Associated
General > IT Services
General > Software Development

☑ Resource can view items with no assigned Line of Business

7. Click **Save & Close** at the top once of this window once you've copied over both keys and ensured all fields are set correctly.

Step 2: Entering the API keys from Autotask into ZenContract

1. Navigate to your ZenContract tenant and go to **Admin > Settings > Integrations**
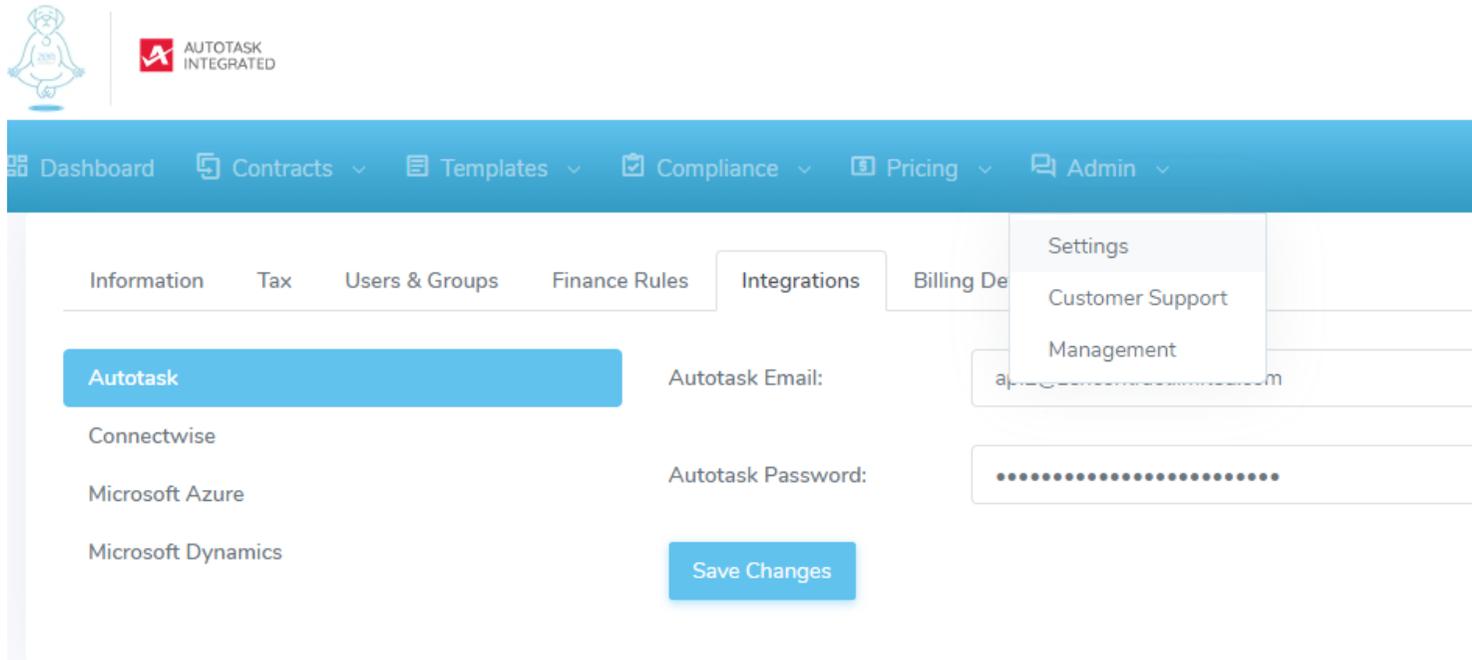
2. Select **Autotask**
3. Enter the information from Autotask
   - **Autotask Email**, enter the username (key) you copied earlier from Autotask
   - **Autotask Password**, enter the password (secret) key you copied earlier from Autotask

4. Click on **Save Changes**

All done! Your ZenContract is integrated with Autotask.