

Autotask Integration  
&  
Microsoft Dynamic Business  
Central

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**Mecal**ali

The Autotask logo features a red checkmark icon to the left of the word "Autotask" in a bold, dark blue sans-serif font. A registered trademark symbol (®) is located at the end of the word.

# Autotask Integration Benefits

## **ONE Workflow – SMART Integration – EASY Setup**

Take your 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 too intergrate

## **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.

- Same data and hours spend in all systems
- 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**  
Sales Quote Sales Invoice Sales Credit Memo Sales Reminder Send Approval Request Cancel Approval Request See my FI Approval: Request Approval

**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**

<b>Address</b>		<b>Contact</b>
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	0	Markup %	0
Unit Price	0	MSRP	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 <a href="#">Preview</a>		Product SKU	1981986500920



# Resources Benefits

- Use your Resources in Autotask in Business Central
- Just one place too maintain
- Better cost bennefits reports
- Free use of UDF also with your owen 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 \* Middle Initial  
Frank^

Last Name \*  
Wilson

Title  
Support Specialist

Suffix  
▾

Gender

Edit - Resource Card - 29683915 · Frank^ Wilson

HOME ACTIONS NAVIGATE REPORT

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

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)	

# 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 get contact too your local partner

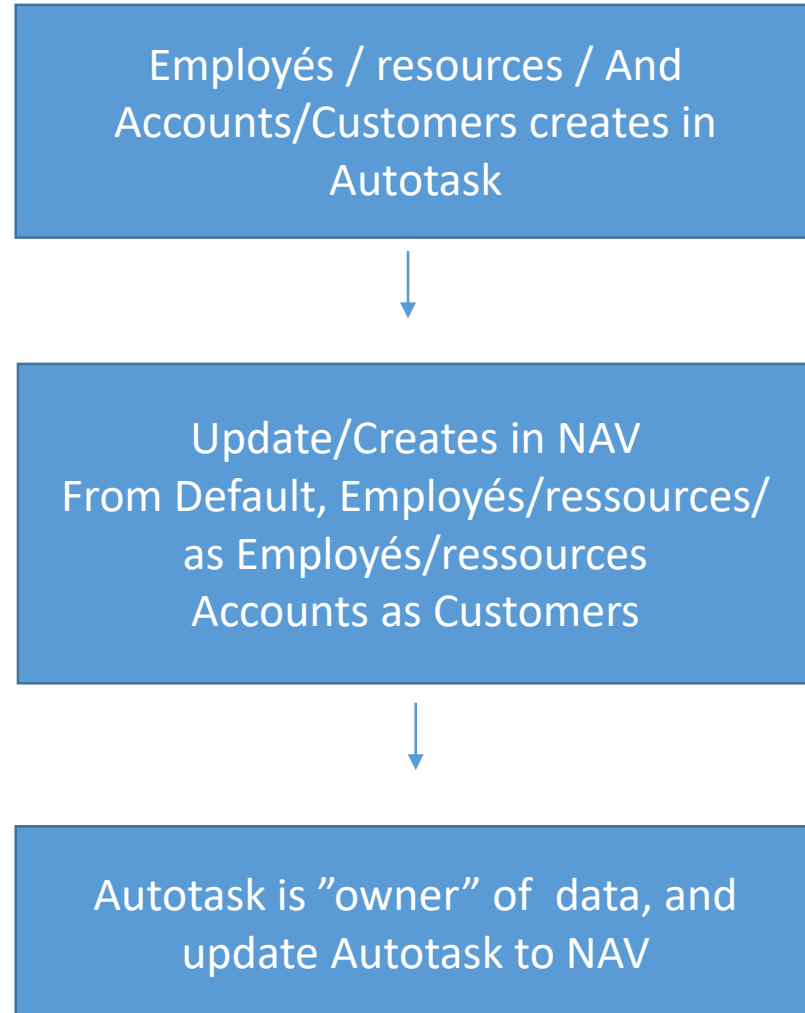
FRQ's

Call.: us +45 52 23 70 70

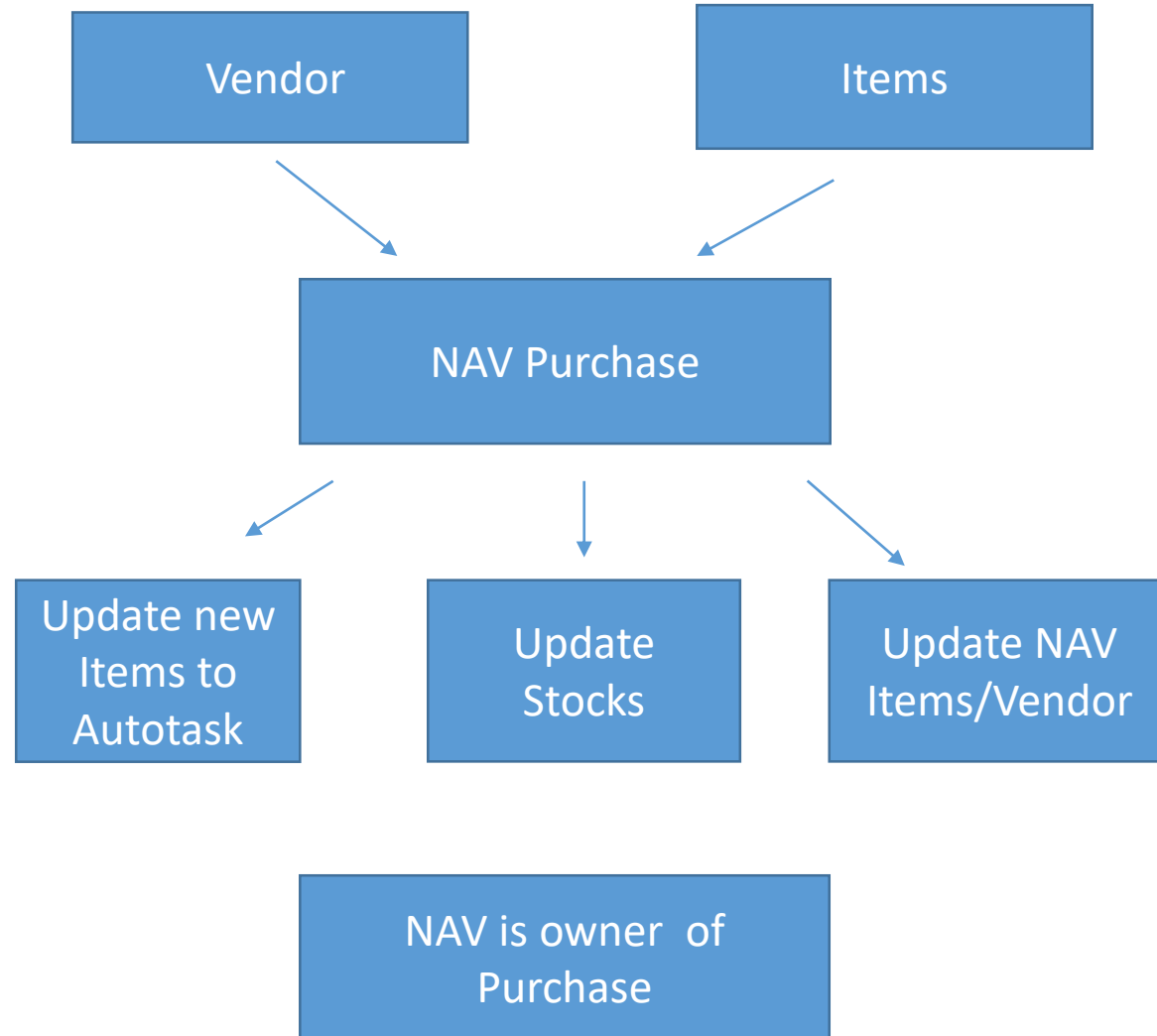
Free eMail Support.: [autotask@macali.dk](mailto:autotask@macali.dk)



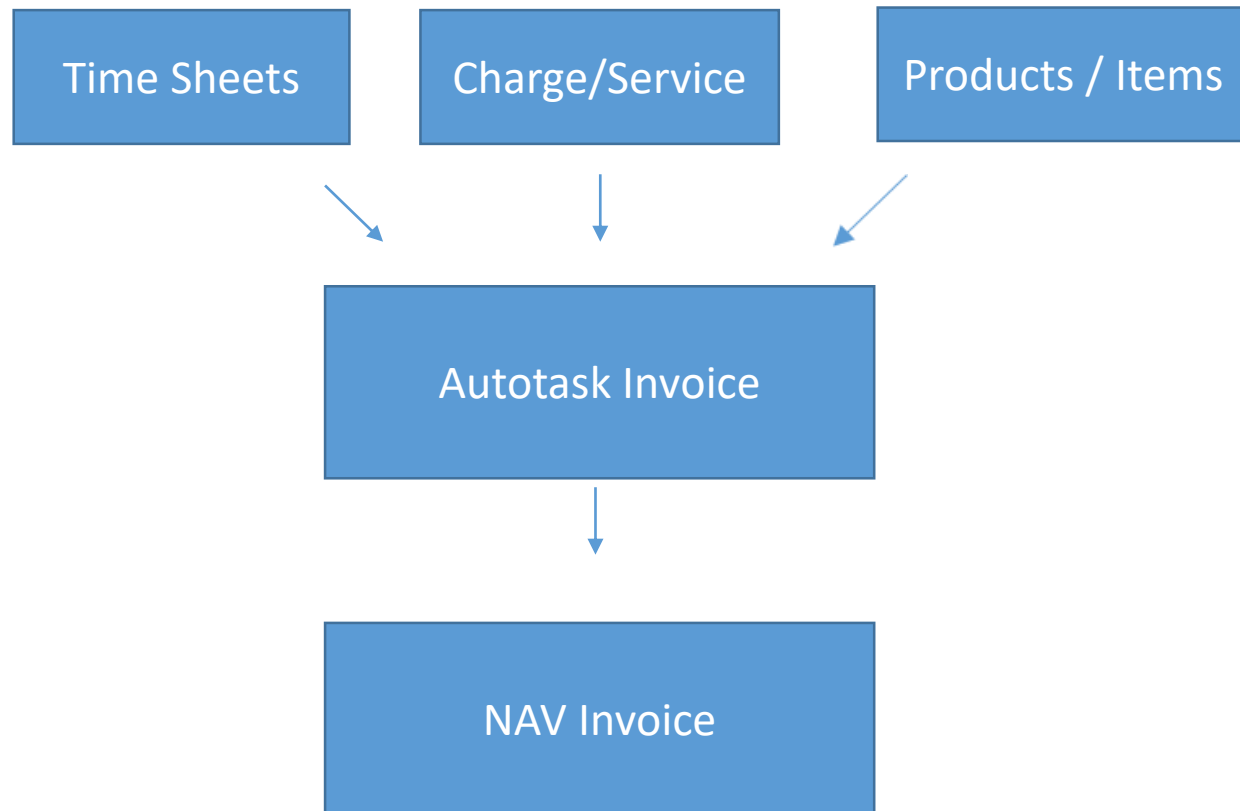
# New Resources And Accounts



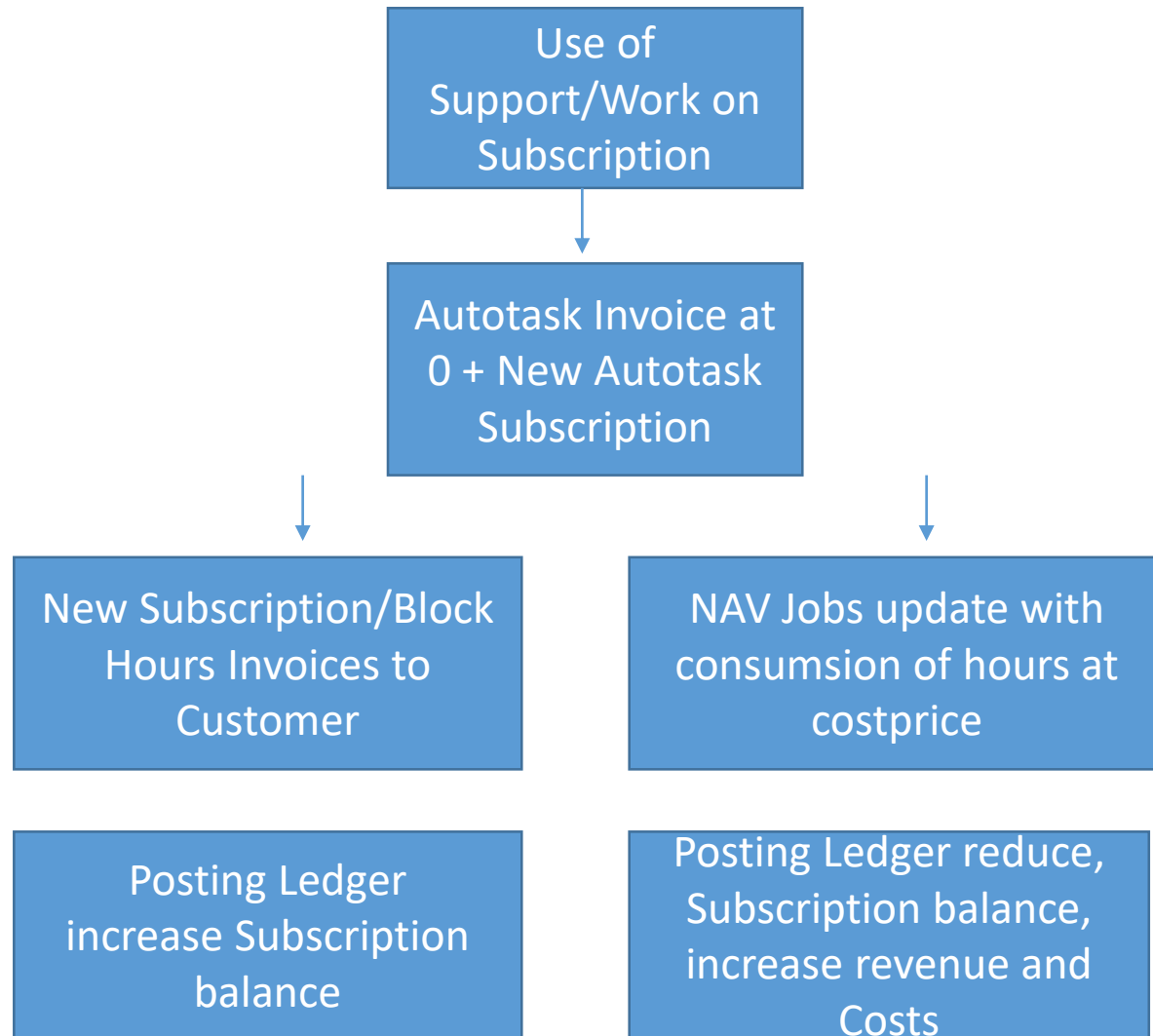
# Purchase and new Items



# Autotask Integration Benefits



# Autotask Integration Benefits





# Partners

Autotask World Leading Software for IT Service Provider

[www.autotask.com](http://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 3<sup>rd</sup> generation of integration to Autotask

[www.macali.dk/autotask](http://www.macali.dk/autotask)

