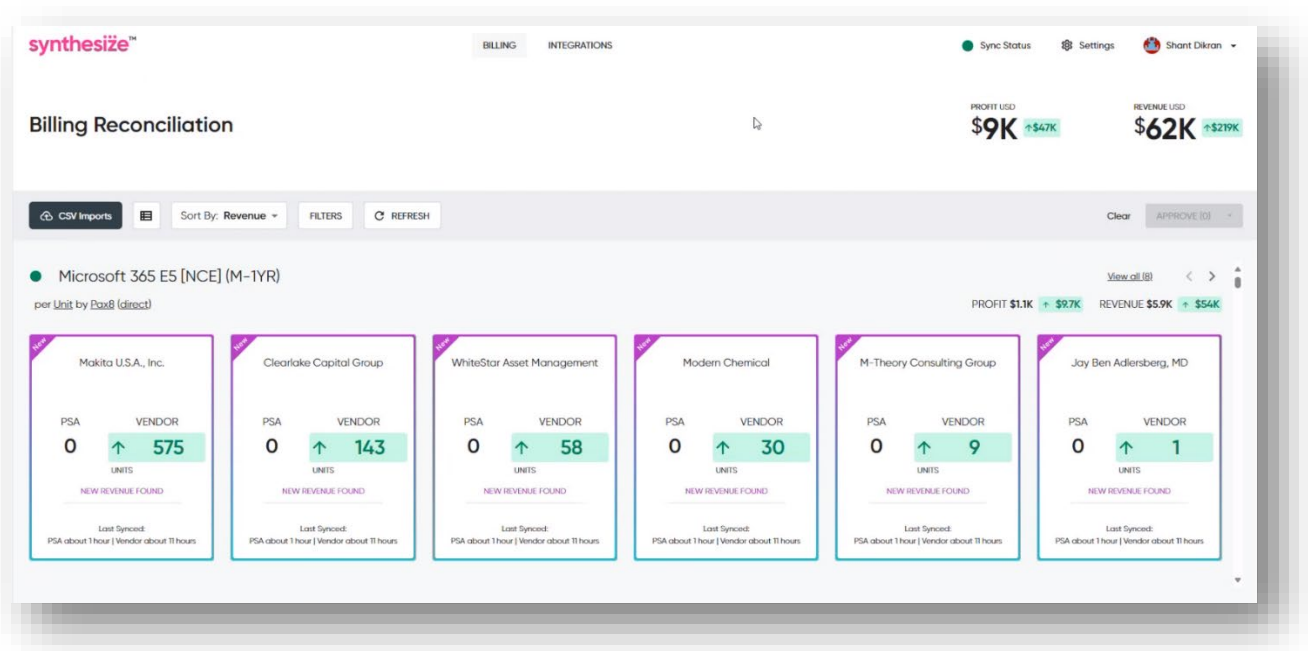


Configuring Autotask and Synthesize Billing for MRR

The Synthesize billing platform integrates with AutoTask to manage monthly license counts. (This platform is also referred to as “Gradient.”) Once initial configuration has been completed, a series of cards will be presented that displays the number of licenses on record in AutoTask, and compares this number to the number of licenses on record with the license vendor. These totals can be adjusted or approved as needed.



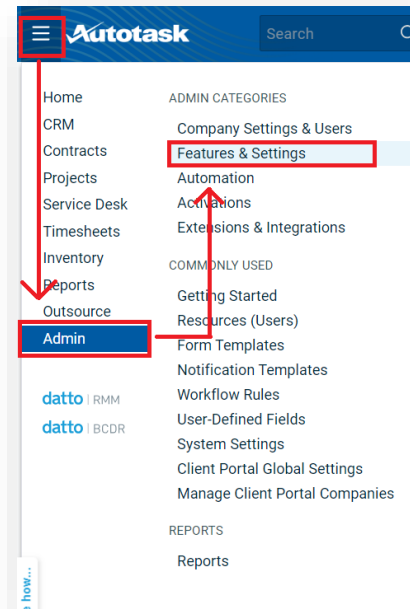
These cards will only be displayed once the initial setup process has been finished, configuring the AutoTask/Synthesize systems for this integration. There are two phases to this setup process:

- Enter Services, and Billing Codes into AutoTask
- Map Autotask Clients and Services to their vendors through Gradient

This document will cover entering services and billing codes into AutoTask.

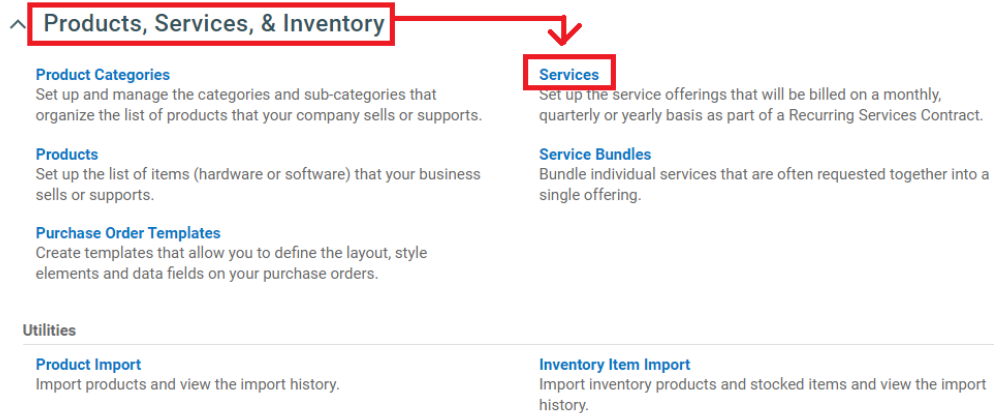
Step One: Enter Contracts into AutoTask

From the Autotask Home Menu, Choose Admin and then Features and Settings.



1.

From the page of options presented, open the *Products, Services, and Inventory* category, then select *Services*.



No services will initially be displayed. Press Search to display all current services. To register a new service, press “New.”

The screenshot shows the 'Services' page with a 'Search Filters' section at the top. A red box highlights the 'Search' button, and a red arrow points from it to the 'New' button, which is also highlighted with a red box. Below the buttons is a table of services.

Service Name	Description	Invoice Description	Service Level Agreement	Vendor	Period Type
Desktop Monitoring					Monthly
Server Monitoring					Monthly
Hosted Email					Monthly
Website Hosting					Monthly
Taskfire					Monthly
Server SLA Support					Monthly
PC SLA Support					Monthly
Hosted Exchange					Monthly

The new service window appears.

The 'New Service' window is shown with two main sections: 'General' and 'Billing'.

General Section:

- Name***: Text input field.
- Description**: Text input field (400 characters).
- Invoice Description**: Text input field (1000 characters).
- Service Level Agreement**: Dropdown menu.
- Vendor Name**: Text input field with a search icon.
- Active**: Checked checkbox.
- Manufacturer/Service Provider**: Text input field.
- Manufacturer/Service Provider Product Number**: Text input field.
- Catalog Number/Part Number**: Text input field.
- Service SKU**: Text input field.
- Internal Service ID**: Text input field.
- External Service ID**: Text input field.
- Service Link (URL)**: Text input field.

Billing Section:

- Unit Cost**: Text input field (0.0000).
- Unit Price***: Text input field (0.0000).
- Markup %**: Text input field.
- Period Type***: Dropdown menu.
- Service Code***: Text input field with a search icon and a plus sign.

Here is a full list of the fields to set up a new service:

New Service	
Field	Description
Name*	This field should be descriptive enough to ensure the correct service is being added to the contract. Important Note: this name must exactly match the name of the service as presented by the vendor. If there is a mismatch in the name, the service will not map correctly.
Active	Selected by default. Clear this check box to make the service inactive. Inactive services cannot be added to contracts or service bundles, but existing contracts or service bundles are not impacted.
Description	Enter a detailed description of the entity instance, the issue with which the customer needs help, or the service that they requested.
Invoice Description	Enter the description that will appear on invoices. This description can be modified at the contract level to add more information (domain names, etc.).
Service Level Agreement	The point of an SLA is standardization. A service level is a performance standard that defines the time frame in which an issue will be resolved, based on its severity and impact. A service level agreement is a minimum set of service levels that your company defines to meet the service needs of one or more customers. For example, you promise your customers that critical tickets that impact multiple contacts will be resolved within 8 business hours 90% of the time. You should rarely have to manually select an SLA. If they are correctly set up, SLAs should be applied automatically.

New Service	
Field	Description
	If an entity is created from or associated with multiple entities that can default in a service level agreement, the more specific SLA is prioritized over a more general one: 1. Manual selection (or applying a form template, which counts as manual selection) 2. SLA on the device 3. SLA on the recurring contract service or service bundle 4. SLA on the contract This applies also to tickets created in the Client Portal.
Vendor Name	A vendor is an organization whose primary business relationship with your company is to provide goods and services. • Products can be associated with multiple vendors, one of which is designated as the default vendor. • All other entities that reference a product vendor are associated with one specific vendor (the one from which the item was actually purchased). The field will default to the Product Default Vendor, but additional Product Vendors (associated with the product) and Other Vendors (not associated with the product) are available from the dropdown menu. • Services can only have one vendor. If you change the vendor of a service, contracts that include the service will reference the new vendor as of the next billing period. NOTE When you associate a service with a vendor and provide a Unit Cost, you can track profitability by vendor and report on vendor payments.

New Service	
Field	Description
Manufacturer/Service Provider	This is an optional field that you can use to track a manufacturer or service provider, which may be different than the vendor who supplies the service.
Manufacturer/Service Provider Product Number	This is an optional field that you can use to track a manufacturer or service provider product number.
Catalog Number/Part Number	This is an optional field that you can use to track the catalog or part number.
Service SKU	This is an optional field that you can use to track the service SKU.
Internal Service ID	This is an optional field that you can use to track an internal service ID.
External Service ID	This is an optional field that you can use to track an external service ID.
Service Link (URL)	This is an optional field that you can use to provide a link to a website for the service. The text will appear as a hyperlink.

Billing	
Field	Description
Unit Cost	This field allows you to capture costs of providing a service, such as licensing fees. Unit cost can be edited on the Recurring Contract > Services page. You can enter up to 4 decimals.
Markup %	This field appears on entities that are part of the billing workflow. It is hidden from users who do not have permission to view internal cost data. It indicates the difference between Unit Cost and Unit Price as a percentage. When you select the item name, the Markup % field is populated but it can be edited.
Unit Price*	This is the default price for the service per billing period and unit. You can enter up to 4 decimals, but note that the Extended Price field on quotes and invoices will be rounded to 2 decimals.
Period Type*	The choices are Monthly, Quarterly, Semi-Annual, and Yearly. When the service/bundle is assigned to a contract, the period type will be used in conjunction with the contract period type to determine the time interval at which the service will be billed. • If the service/bundle has a longer billing period type than the contract, the service/bundle will be billed in its entirety. If the service/bundle period type is quarterly and the contract period type is monthly, the service/bundle will be billed for the entire quarter on the next contract billing date.

- If the contract billing period is longer, the service/bundle will be billed for the number of times that would have occurred since the last billing. For example, if the service/bundle period type is quarterly and the contract period type is semi-annual, service will be billed twice on the next contract billing date. The table below illustrates the combinations of monthly and quarterly periods for services/bundles and contracts.

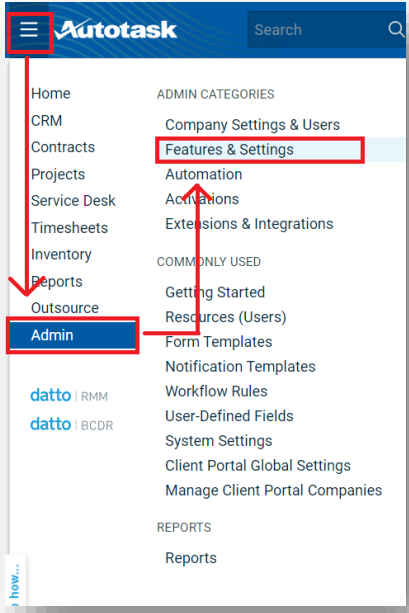
Billing Period	Price per Period	Contract Billing Period	Due on Jul. 1	Due on Aug. 1	Due on Sep. 1	Due on Oct. 1
Monthly	\$10	Monthly	\$10	\$10	\$10	\$10
Quarterly	\$10	Monthly	\$10	-	-	\$10
Monthly	\$10	Quarterly	\$30	-	-	\$30
Quarterly	\$10	Quarterly	\$10	-	-	\$10

Also note that if services are added to a bundle, the bundle's period will always override the periods of the services added.

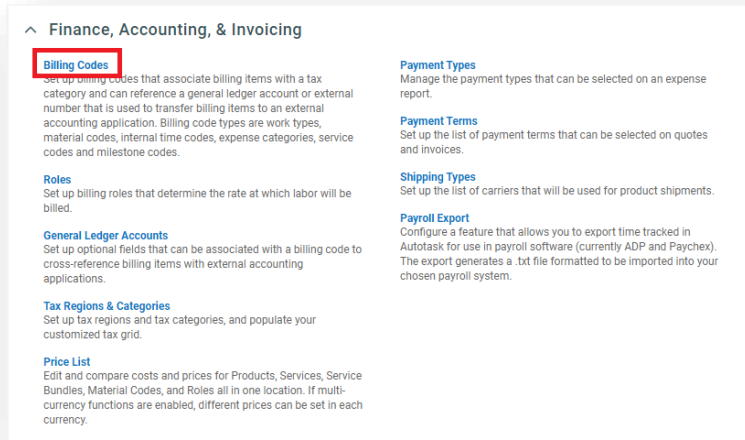
Service Code*

Click the selector icon and select a Service Code.

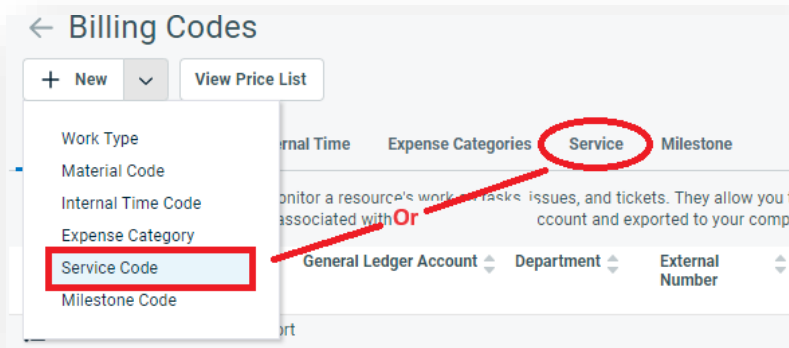
During the process of setting up a new service, it may become necessary to add a new service code, if a pre-existing code is not available. To set up a new service code, take the following steps:

From the Autotask Home Menu, Choose Admin and then Features and Settings.	 The screenshot shows the Autotask Home Menu. The 'Admin' option is highlighted with a red box. A red arrow points from the 'Admin' box to the 'Features & Settings' option, which is also highlighted with a red box. The menu is organized into sections: ADMIN CATEGORIES (Company Settings & Users, Features & Settings, Automation, Activations, Extensions & Integrations), COMMONLY USED (Getting Started, Resources (Users), Form Templates, Notification Templates, Workflow Rules, User-Defined Fields, System Settings, Client Portal Global Settings, Manage Client Portal Companies), and REPORTS (Reports). The Autotask logo and a search bar are at the top.
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From the Finance, Accounting, and Invoicing section, select Billing Codes.



From the Billing Codes screen, select New and then choose Service Code from the drop down menu. Service codes are also available from the Service tab.



The New Service Code window appears.

New Service Code Fields

Field	Description
Name (required)	Enter a unique name.
Active	Select the check box to activate, clear it to deactivate this Billing Code.
General Ledger Account	Select the corresponding General Ledger Account that is used in your accounting software. This will ensure that the item associated with this billing code references the correct general ledger account

New Service Code Fields	
Field	Description
	when it is exported to an external accounting software.
External Number	Enter a reference number or the general ledger account that is used in your accounting software. This will ensure that the billing item references the correct general ledger account when it is exported to an external accounting software. Some integrations use the External Number, and others use the General Ledger Account field for integration with Autotask.
Tax Category	Select the Tax Category from the list.

Once all information has been added, select the Save button. The new code is now available and can be used to set up a new service.