Autotask Integration with Microsoft Teams

Stay on top of important activity within Autotask by receiving instant posts to Teams channels.

Organize your notifications and discuss solutions with your colleagues in real time by sending posts to Microsoft Teams channels when an Autotask Workflow Rule is triggered.

» Respond faster to critical alerts with instant notifications in Teams, compared to traditional email.

» Reduce tedious email discussion by collaborating and discussing tickets with your colleagues using the native Teams features, such as @mentions, reactions and attachments.

» Easily act in alerts with contextual deep links to view or edit the ticket in Autotask or add a time entry.

» Customize your process by creating tailored Teams and Channels to segment notifications. Let your creativity run wild with Autotask's powerful Workflow Rules to segment by type, customer, priority, assignee, etc.

Microsoft Teams Integration Details

» In addition to email, Autotask Workflow Rules can post to a specific Microsoft Teams Channel. Use a combination of Workflow Rules and Channels to customize and route your notifications to the right team members.

» Autotask will @mention the primary resource assigned, ensuring accountability for the individual ultimately responsible for the ticket.

» Each post includes concise, relevant details from the ticket to maintain focus. It also provides three contextual deep links for viewing, editing the related ticket in Autotask, or adding a time entry.
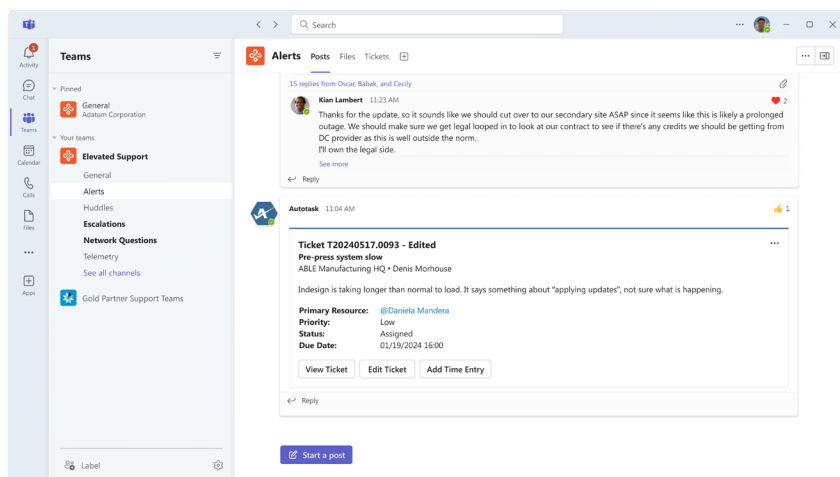
Autotask®

At-a-Glance Benefits

· Cut through the email clutter with concise, instant notifications of Autotask activities in Microsoft Teams.

· Enhance collaboration by discussing resolution with native Teams features.

· Easily act on notifications with contextual deep links to Autotask.

Getting Started

Create new Autotask Workflow Rules or update existing ones to include the "Post in Microsoft Teams Channel" action. Visit the Autotask Knowledge Base for detailed step-by-step instructions.

Autotask customers requiring assistance with the integration can contact support by submitting a request in KaseyaOne.

Interested in Autotask?

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