Create user defined fields

To correlate your Autotask tickets with another ITSM app, you will need to create a Correlation ID field in the table whose data you are sharing out.

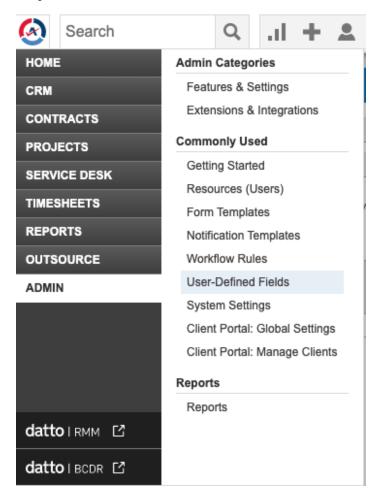
Procedure

To create user defined fields in the table whose data you want to share out of Autotask, follow these steps:



Access Autotask

In your Autotask instance, navigate to Admin > User Defined Fields.





Create correlation ID field

In User-Defined Fields, set Name field as CorrelationId. Then, check the Active box and set the Field Type to Text(Single Line).

(Optional) Set the Description as: ID of the record this ticket is correlated with.

Click Save & Close when you are done.

USER-DEFINED FIELDS Save & Close Save & New **⊗** Cancel Name * CorrelationId Active Description Id of the record this ticket is correlated with Sort Order 1 Field Type Text (Single Line) Variable Name This is for use in Microsoft Word Merge. The variable can only include alpha characters and must be uniqu also begin with 'var' (for example: varMyTestVariable). Appears in Client Portal

Next steps

Bond Autotask with another app