

Xerox PagePack™ Administrator Quick Start

This guide walks you through the 3-step process to get Xerox PagePack™ extension up and running:

STEP 1: Set up Autotask to support Xerox PagePack™

STEP 2: Create a Recurring Services Contract for each PagePack customer

STEP 3: Import your Xerox XML invoice

Are you a Xerox Reseller, and the Xerox PagePack™ extension is not enabled yet? Contact us. We'll turn it on, and you'll be ready to import your XML invoice in no time.

Step 1: Set up Autotask to support Xerox PagePack™

- Open **Autotask menu > Admin > Features & Settings > Products & Services > Products** and add a new product for each Xerox printer model you will sell with the Xerox Managed Print Service. Click **Save and Close**. [More...](#)
- Open **Autotask menu > Admin > Features & Settings > Finance, Accounting & Invoicing > Billing Codes > Material** and add a separate billing code for color overage and mono overage for each printer model. [More...](#)
- Open **Autotask menu > Admin > Extensions & Integrations > Other Extensions & Tools > Xerox PagePack™ Import** and, for each Xerox printer, select a PagePack Mono Material Code, a PagePack Color Material Code, or both. This mapping tells us which material code to use when creating the mono or color contract charge for a specific installed printer. [More...](#)
- Open **Autotask menu > Admin > Features & Settings > Products & Services > Services** and add a Service for each printer model you will use to bill the monthly Base Services and Supplies fee. [More...](#)

Step 2: Set up a Recurring Services Contract for each PagePack customer

- Open **Autotask menu > Contracts > Contracts** and create the Recurring Service contract.
- Add the Services you have set up to bill the monthly Base Service and Supply Fee for each printer model the customer has licensed. [More...](#)
- Optionally, add the **Charge Defaults** for the Contract Charges used to bill the overage for this contract. This is only necessary if, under a special contract, the default prices set up on the Material Codes list (see Step 1 second bullet) do not apply. [More...](#)
- Lastly, on the **Configuration Items** page of the contract, create a Configuration Item for each printer and select the service or bundle used to bill the Monthly Base Price. The Configuration Item and its Serial Number are what allows us to map the data from the XML import to the Contract and Service that cover the billing, and to import the Contract Charges that cover the overage. [More...](#)

Step 3: Import your Xerox XML file

- Go to your Xerox Partner web site and download your PagePack invoice in XML format. Save the file to your PC.
- Open **Autotask menu > Admin > Extensions & Integrations > Other Extensions & Tools > Xerox PagePack™ Import**.
- Click **Browse** next to the File field, and navigate to the XML file you downloaded.
- Click **Import**. The file will only be imported if there are no validation failures. You will see a success message. Click **OK** to continue. The mono and color overage for all customers and all printers covered under the PagePack Agreement is added to each contract, ready to approve and post. [More...](#)
- Open **Autotask menu > Contracts > Approve and Post > Charges** and approve all contract-related charge items.
- Open **Autotask menu > Contracts > Approve and Post > Recurring Contracts** to approve the services used to bill the monthly Base Service and Supplies fee. You are now ready to bill your customer.

Additional resources

Refer to the Autotask online help for detailed, step-by-step instructions on all aspects of setting up and using Xerox PagePack extension. Search for Xerox to quickly find the topics.
