Autotask Multi-Contract Update Wizard

Select. Update. Review. Quickly and easily modify multiple Autotask contracts with a simple three-step wizard.
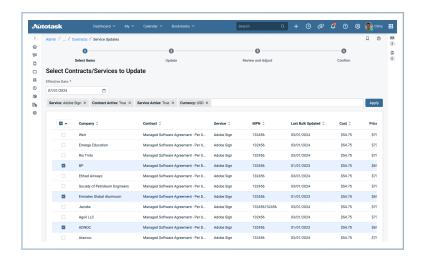
Make contract updates in minutes instead of hours! Maintain consistent margins by uniformly applying service contract updates for multiple customers at once.

- Maintain consistent margins by uniformly applying service contract updates for multiple customers at once.
- Quickly adjust margins when resold service costs change by easily updating all related contracts.
- Confidently add annual price increases in your customer agreements without worrying about the administrative burden of manually updating contracts.

Multi-Contract Update Wizard Details

The wizard guides you through four steps to update multiple contracts at once:

1. Search for the contracts to be updated by using 25+ filters including attributes of the service, contract or customer to select the contracts to be modified.

2. Pick the updates to be applied to the contracts, including:
   - Setting specific cost and/or price for the service.
   - Defining an increase to the cost and/or price based on a value (eg. dollar amount).
   - Defining an increase to the cost and/or price based on a percentage.
   - If you're only updating the cost, a "preserve markup" option is available to adjust the price according to the new cost.

3. Review your changes to see the previous and new costs and prices, along with the calculated profit.

4. Updates are completed in the background as a batch job, so you can continue to work in Autotask while the updates are made.

At-a-Glance Benefits

- Easily apply service contract updates for multiple customers at once.
- Improve margins and understand the impact to your changes before you make them.
- Bulk changes process in the background while you continue to work in Autotask.

Getting Started

Visit the Autotask Help Documentation for detailed step-by-step instructions to make bulk updates to contracts.

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

Interested in Autotask?

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