

# Autotask PSA

Find the right fit for you



Autotask PSA is a powerful and intuitive cloud-based platform that provides a singular view of your entire business. It enables managed service partners to centralize business operations to drive efficiency, insights and accountability. Whether you have two technicians or a team of hundreds, Autotask PSA can scale to your needs.

	Modules / Features	Premium	Ultimate
<b>Service Delivery</b>	Service Desk & Ticket Management	✓	✓
	Email to Ticket Processing	✓	✓
	Time & Expense Tracking	✓	✓
	Service Level Agreement Management	✓	✓
	Project Management	✓	✓
	Outsource Management	✓	✓
	Change Management	✓	✓
	Client Access Portal	✓	✓
	Co-managed Licenses	Available	Available
	Company & Contact Management	✓	✓
<b>CRM</b>	Opportunity Management	✓	✓
	Asset Management	✓	✓
	Exchange / Microsoft 365 Contact and Calendar Sync	✓	✓
	Active Directory User Sync	✓	✓
	Quoting	✓	✓
	<b>Enhanced Quoting, Procurement &amp; Storefront with Kaseya Quote Manager</b> <span style="background-color: #0070C0; color: white; padding: 2px;">NEW</span>	N/A	✓ *
	Document Manager	✓	✓
	Domain and SSL Certificate Tracking	✓	✓
	Contract Management	✓	✓
	Billing Automation	✓	✓
<b>Finance</b>	Multicurrency Support	✓	✓
	Inventory and Procurement	✓	✓
	Automatic Tax Calculation powered by TaxJar	✓	✓
	Quickbooks Integration	✓	✓
	<b>Accounts Receivable Automation With ConnectBooster</b> <span style="background-color: #0070C0; color: white; padding: 2px;">NEW</span>	N/A	✓ †
	Operational Dashboards	✓	✓
	Workflow Automation	✓	✓
	Mobile App	✓	✓
	IT Complete Integration Hub	✓	✓
	API Access	✓	✓
<b>Operations &amp; Integrations</b>	Performance Workbooks	✓	✓
	Custom Report Engine (LiveReports)	✓	✓
	Data Warehouse	✓ (By Request Daily Refresh)	✓ (By Request Increased Refresh)
	Wallboard License(s)	3 Included	10 Included
	Sandbox	N/A	✓ (By Request)

## Descriptions

### Service Delivery

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**Service Desk & Ticket Management:** Capture requests as tickets, add notes and see insights on the request from one screen as the request moves from inception to resolution.

**Email to Ticket Processing:** Ensure all email communication is captured in the ticket by integrating email into your workflow to create tickets, add notes and capture updates.

**Time & Expense Tracking:** Accurately capture time and expenses incurred against a ticket or project.

**Service Level Agreement Management:** Define standards for service delivery and automatically monitor success in meeting those standards.

**Project Management:** Set steps required to meet a specific business objective, including scheduling with phases, assigning tasks with deadlines, project team, budget and reporting to monitor progress.

**Outsource Management:** Universal ticket-sharing system for building and managing outsource partners and vendors.

**Co-management Licenses:** An extension to the client portal providing a secure, internal service desk for your customer's IT staff.

**Client Access Portal:** Secure web portal enabling client collaboration on tickets, projects, service desk and more.

**Change Management:** Track and manage change requests, approvals and any associated problems or incidents.

### CRM

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**Company and Contact Management:** Manage companies and contacts through the prospect-to-customer lifecycle in CRM.

**Opportunity Management:** Enable sales forecasting and quoting for customers and prospects.

**Asset Management:** Track hardware items, sync them with multiple integrations and associate them with customers and contacts.

**Exchange & Microsoft 365 Contact & Calendar Sync:** Synchronizes contacts and calendar items between Autotask PSA and Exchange or Microsoft 365, and any applications connected to it (Outlook, mobile devices, etc.)

**Active Directory User Sync:** Create or update PSA contacts from Active Directory.

**Document Manager:** Create, collect and reference documents related to a customer right inside of Autotask.

**Domain and SSL Certificate Manager:** Automate the process of tracking domains and SSL certificates including expiration dates.

**Quoting:** Associate one or many native Autotask quotes with an opportunity and manage it through a standard quote lifecycle.

**Kaseya Quote Manager:** Accelerate your hardware and recurring service sales with an all-in-one quoting, selling and automated procurement solution that supercharges your profits. \*Included with 11 or more Autotask Ultimate users in supported regions.

## Descriptions

### Finance

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**Contract Management:** Create contracts to set labor rates and manage billing arrangements.

**Billing Automation:** Completely automate the billing for managed services that are billed a monthly fixed amount per end user or per asset by using Autotask billing rules.

**Multicurrency:** Support multiple currencies for purchasing, quoting, invoicing and expense tracking.

**Inventory and Procurement:** Quote, purchase, track and manage product orders with ease.

**Automatic Tax Calculation Powered by TaxJar:** Includes a subscription and integration to TaxJar to effortlessly determine applicable taxes on products and services in Autotask.

**ConnectBooster:** Invoices out, payments in, instantly. Elevate your business's financial health with ConnectBooster automated accounts receivable. † Included with 11 or more non-discounted Autotask Ultimate users in supported regions.

### Operations & Integrations

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**Custom Report Engine (LiveReports):** Create custom reports to supplement pre-built reporting.

**Operational Dashboards:** Customizable dashboards providing visual insight and instant understanding of the metrics that matter.

**Performance Workbooks:** At-a-glance analytics to historical business performance over time.

**Workflow Automation:** Drive efficiency by automating processes and notifications.

**Mobile App:** Native iOS and Android app for smartphones and tablets provide access to your Autotask PSA system.

**IT Complete Integration Hub:** Drastically improve service delivery efficiency by integrating to other tools on the IT Complete platform, including RMM, Backup, Documentation, Security and more.

**Quickbooks Integration:** Track accounts receivable, accounts payable and general ledger functionality with Quickbooks extension (desktop) or Quickbooks Online.

**Open API:** Integrate with over 200+ third-party solutions, including RMM, or build your own integration with Autotask.

**Data Warehouse:** Create custom reports on demand through third-party applications with read-only access.

**Sandbox:** Test new features, workflows and processes in a separate environment before impacting your production environment.

**Wallboard Licenses:** Share critical metrics internally with real-time data feeds on a display or TV.



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