

Autotask PSA



Autotask PSA is an intelligent IT business management platform that centralizes operations to deliver the mission-critical tools needed to run an IT managed services business. A single pane of glass view provides full visibility into services, internal operations, customers, and prospects to improve efficiency and service with workflows optimized for MSPs to help resolve tickets faster—and make data-driven decisions to improve efficiency, accountability, and profitability.

Why MSPs Choose Autotask PSA to Run their Business

Maximum Uptime with a Secure, Cloud-based Platform

Autotask PSA is a 100% SaaS application which means there is no hardware to test, maintain, or update. Autotask PSA has a proven track record of consistently delivering enterprise-grade, 99.99% uptime. Autotask PSA also offers a secure platform, with Datto requiring two-factor authentication, undergoing routine penetration testing and infrastructure hardening, and actively monitoring for unauthorized access attempts.

Centralized Operations for Increased Efficiency

Autotask PSA is the central hub for any MSP, and Datto's open platform and API enables it to integrate with more than 200 critical applications such as remote monitoring and management and accounting solutions that an MSP needs to run their business. The single pane of glass increases efficiency and productivity with intelligence to quickly identify relevant solutions from the knowledge base to solve issues more quickly and optimize workflows for MSPs to save time on every ticket.

Data-driven Decisions

Autotask PSA enables MSPs to work faster and easier with customizable dashboards for each individual user, providing an instant understanding of what's happening with widgets that show mission-critical business data in real time. MSPs can track the metrics that matter and dig into the granular reporting that provides intelligence to make the best decisions for the company, such as ticket backlog, service level agreement compliance, resource utilization, and client satisfaction. Widgets are completely configurable to elevate helpful information based on each ticket

or task so that it can lead the user to make smarter, data-driven decisions and be more efficient.

Seamless Onboarding

Having transitioned thousands of partners onto Autotask PSA, Datto has the experience and know-how to successfully guide the transition with minimal disruption to your business. Whether implementing your first PSA solution or transitioning from another PSA tool, Datto is committed to ensuring you start strong and stay strong. Get up and running fast with product training, a vibrant online community of PSA users, and an experienced implementation manager who sets up the system based on your requirements and industry best practices. After your successful implementation, we offer ongoing training, professional services, and award winning, 24/7/365 direct-to-tech support to meet your evolving business needs.



Unify People, Processes, and Data Service Desk

The Ticketing module is ITIL-aligned to help ensure technicians hit their service level agreement (SLA) targets. Tickets are a single system of record for all support issues, service requests, incidents, and emails. MSPs can create customized ticket interfaces, called Ticket Categories, which display ticket information that is critical for a particular workflow or a specific stage in the ticket lifecycle. The intelligent PSA platform automatically identifies relevant solutions

from your knowledge base and suggests tags for incoming tickets. Technicians also benefit from a visual ticket timeline that represents the SLA, a ticket checklist to prescribe steps and help ensure standardization, and ticket insights that give additional information about the account or device that could help close the ticket faster.

Project Management

Autotask PSA's Task user interface helps ensure projects come in on-time, on-budget, and on-spec, with categories, predecessor-successor timelines, checklists, and insight widgets. The Project Management module automates project workflows to hit targets with increased visibility into event tracking. Users can connect with colleagues instantly with integrated email and put the right people on the right tasks. Finally, MSPs can meet billing milestones, assess project profitability, and control factors impacting cost and efficiency.

Account Management

The Autotask Customer Relationship Manager (CRM) module allows users to manage their sales pipeline by creating and tracking opportunities. Various quotes can be added to each opportunity that include defined products or services. Once the opportunity is won, workflow rules can run predefined automated processes such as installing the quoted product to a client's configuration items. Also, different company types allow MSPs to distinguish different clients, leads, prospects, vendors, and partners in their database. Finally, account dashboards provide a quick, real-time glance at the health of each account, which can come in handy for quarterly business reviews.

Time Tracking & Billing

Autotask PSA allows MSPs to track the time employees spend on jobs for billing. Users can also track customer-facing time and internal time directly on the ticket or task assigned to them and these time entries will automatically appear on their timesheet. Autotask PSA keeps track of the days the business is closed, and manages time-off benefits for employees. Autotask time tracking creates a complete record of both billable and non-billable resource time. Finally, users can approve and post directly from a widget with one click, and once posted, billing items can then be invoiced in many customizable ways.

Contracts

Autotask contracts are optional billing arrangements that provide flexibility in setting labor rates, billing methods, and managing prepayments for services. Autotask PSA allows MSPs to manage a multitude of contract types, terms and billing options to help ensure compliance, service quality, and a reduced billing process. Options include time and materials, fixed price, block hour, per ticket, retainer, and recurring services.

Document Manager

Autotask PSA's Document Manager improves efficiency by providing quick and easy access to standardized documentation so technicians spend more time resolving issues. Document Manager also improves productivity by outlining processes/procedures per

client, enabling MSPs to quickly develop standard procedures, and easily reference knowledge base articles and support manuals.

Resource Management

Manage security levels, time off, work groups, and dispatch calendar to keep the entire team organized and on-task. Display all calendar items such as service calls, to-dos, and appointments, and establish and track weekly billable hours goals, manage workgroups, and track skills, degrees, and employee certificates. There is also efficient and straightforward scheduling with a drag and drop dispatcher workshop.

Automation of Service Delivery

Set up event triggers that will automate an action, update data, or send a notification with Autotask's Workflow Rule Engine to drive automation across the entire platform. Automatically update an entity, take action, and notify customers. Use Checklists in the ticket to prescribe steps, standardize processes, and enforce accountability. Workflow rules help ensure techs are working on the right tasks at the right time so nothing falls through the cracks and everyone stays informed.

Reports

Autotask PSA offers a wide array of reporting capabilities. Dashboards and widgets provide a real-time view of business metrics and allow for immediate action with a single click. The LiveReports custom report engine is a powerful but easy-to-use tool that allows authorized users to copy and edit pre-built reports or create new ones. The Report Data Warehouse allows users to access the organization's Autotask PSA data for use in another report creation tool. Finally, Performance Analytics workbooks track business performance over time, identify trends, explore the cause and effect of those variants, and apply what is learned to improve future performance.

Inventory and Procurement

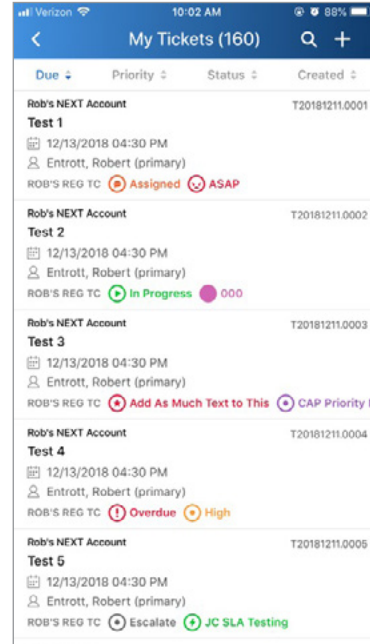
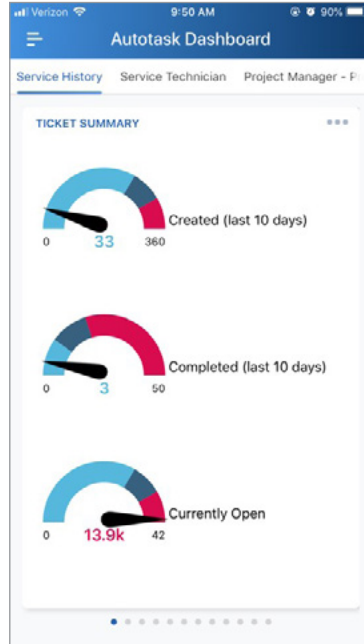
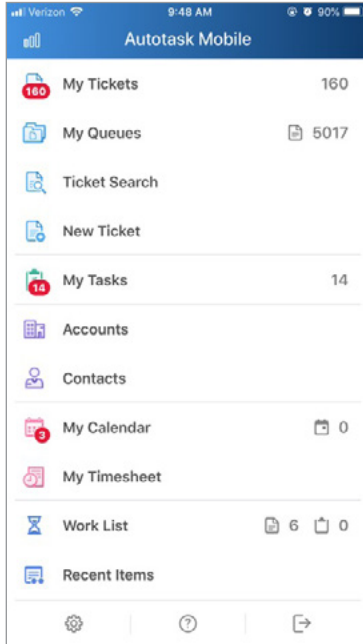
Autotask Inventory models the entire workflow from purchasing to installation at the customer site. Set up and manage inventory in various locations; check availability, reserve, or pick inventory items; generate and manage purchase orders; and more. Enabling Procurement streamlines purchasing, receiving and delivery of items, and creates a workflow that integrates sales with the final delivery of items.

Integrations

Autotask PSA has partnered with over 200 MSP-centric applications including RMM, CRM, accounting, email protection, managed print, business continuity, and cloud storage solutions. These integrations are developed to simplify workflows—from customer acquisition and management to service delivery, resolution, and billing. Autotask PSA also has a full REST and SOAP API, making it easier for developers to build integrations into Autotask PSA and increasing the speed at which third-party integrated solutions are available to MSPs. For the full list of Autotask PSA integrations, please visit www.datto.com/integrations.

LiveMobile App

MSPs need flexibility to manage client demands and get work done while away from their desks. Autotask LiveMobile enables employees to access their necessary work while on-the-go. Technicians can log in first thing in the morning to see if any alerts came in overnight. Project managers can track the status of projects and tasks. Sales managers can access their sales dashboards and drill into lists of opportunities. Finally, CEOs can keep their finger on the pulse of the organization, all from the convenience of their iOS or Android device.



Due	Priority	Status	Created
Rob's NEXT Account			T20181211.0001
Test 1			
12/13/2018 04:30 PM			
Entrott, Robert (primary)			
ROB'S REG TC	Assigned	ASAP	
Rob's NEXT Account			T20181211.0002
Test 2			
12/13/2018 04:30 PM			
Entrott, Robert (primary)			
ROB'S REG TC	In Progress	000	
Rob's NEXT Account			T20181211.0003
Test 3			
12/13/2018 04:30 PM			
Entrott, Robert (primary)			
ROB'S REG TC	Add As Much Text to This	CAP Priority M	
Rob's NEXT Account			T20181211.0004
Test 4			
12/13/2018 04:30 PM			
Entrott, Robert (primary)			
ROB'S REG TC	Overdue	High	
Rob's NEXT Account			T20181211.0005
Test 5			
12/13/2018 04:30 PM			
Entrott, Robert (primary)			
ROB'S REG TC	Escalate	JC SLA Testing	



2020 CRN Annual Report Card (ARC) Award
for Managed Services Software of the Year:
RMM/PSA categories

To learn more about Autotask PSA, please visit
www.datto.com/products/autotask-psa

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