Autotask PSA

Find the right fit for you

Autotask PSA is a powerful and intuitive cloud-based platform providing a singular view of their entire business—enabling Managed Service Partners to centralize business operations to drive efficiency, insight, and accountability. Whether you have 2 Technicians or a team of hundreds, Autotask PSA can scale to your needs.

Modules / Features	Essentials	Premium	Ultimate
Operational Dashboards	●	●	●
Up Time / Availability	99.9%	99.9%	99.9%
Service Desk, Timesheets & Dispatchers Workshop	●	●	●
Project Management	●	●	●
CRM and Opportunity Management	●	●	●
Contracts and Billing	●	●	●
Service Level Agreement Management	●	●	●
MS Exchange and Outlook Connector	●	●	●
Standard Reports	●	●	●
RMM Integration	●	●	●
Workflow Automation	●	●	●
Web Service API and SDK Access	●	●	●
Mobile Application	●	●	●
Email-to-Ticket Service	Available	●	●
Quickbooks Integration	Available	●	●
Client Access Portal	Available	●	●
Active Directory Integration	Available	●	●
Multi-Currency Add-on	Available	Available	●
Document Manager		●	●
Domain and SSL Certificate Tracking		●	●
Inventory and Procurement Extension		●	●
Outsource Management		●	●
Custom Report Engine		●	●
Change Management		●	●
Performance Workbooks		Performance Analytics Workbooks	Performance Analytics Advanced Workbooks
Opportunity Assessment		Available	●
Data Warehouse		Available	●
Taskfire License(s)	Available	Available	Available
Wallboard License(s)	Available	incl 3 users	incl 5 users

Descriptions

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

Service Desk, Timesheets & Dispatchers Workshop: Capture time entries and notes on tickets, and schedule time for your technicians

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

CRM and Opportunity Management: Enable sales forecasting and quoting for customers and prospects. View all of your accounts in one convenient location.

Contracts and Billing: Set labor rates and manage billing arrangements

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

MS Exchange and Outlook Connector: Synchronizes contacts and calendar items between Autotask PSA and your MS Exchange Server, and any applications connected to it (Outlook, mobile devices, etc.)

Standard Reports: Out-of-the-box available reports

RMM Integration: Integration with Datto RMM and third-party RMMs

Workflow Automation: Drive efficiency by automating processes and notifications

Web Service API and SDK Access: Build integrations into Autotask PSA

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

Email-to-Ticket Service: Integrate email into your workflow to streamline communication and create Tickets, add notes, add time, and capture updates

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

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

Active Directory Integration: Create or update PSA contacts from Active Directory

Multi-Currency Add-on: Support multiple currencies for purchasing, quoting, invoicing and expense tracking

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

Domain and SSL Certificate Tracking: Automate the process of tracking domains and SSL certificates

Inventory and Procurement Extension: Quote, purchase, track & manage product orders with ease

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

Custom Report Engine: Create custom reports to supplement pre-built reporting

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

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

Opportunity Assessment: Provides guidance on where additional sales focus is needed and creates a structured sales approach to better qualify and grade your opportunities

Data Warehouse: Create custom reports on demand through 3rd party applications with read-only access

Taskfire License(s): An extension to the client portal providing a secure, internal service desk for your clients' IT staff

Wallboard License(s): Share critical metrics internally with real-time data feeds