

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 two technicians or a team of hundreds, Autotask PSA can scale to your needs.

	Modules / Features	Premium	Ultimate
Service Delivery	Service Desk & Ticket Management	✓	✓
	Email to Ticket Processing	✓	✓
	Time & Expense Tracking	✓	✓
	Service Level Agreement Management	✓	✓
	Project Management	✓	✓
	Outsource Management	✓	✓
	Change Management	✓	✓
	Client Access Portal	✓	✓
	AI Assistant - Cooper Copilot	N/A	✓
	Co-managed Licenses	Available	Available
CRM	Company & Contact Management	✓	✓
	Opportunity Management	✓	✓
	Asset Management	✓	✓
	Exchange / Microsoft 365 Contact and Calendar Sync	✓	✓
	Active Directory User Sync	✓	✓
	Quoting	✓	✓
	Document Manager	✓	✓
	Domain and SSL Certificate Tracking	✓	✓
Finance	Contract Management	✓	✓
	Billing Automation	✓	✓
	Multicurrency Support	✓	✓
	Inventory and Procurement	✓	✓
	Automatic Tax Calculation powered by TaxJar	✓	✓
	Quickbooks Integration	✓	✓
Operations & Integrations	Operational Dashboards	✓	✓
	Workflow Automation	✓	✓
	Mobile App	✓	✓
	IT Complete Integration Hub	✓	✓
	API Access	✓	✓
	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.

**AI Assistant:** Cooper Copilot uses practical Artificial Intelligence to deliver meaningful, profitable efficiency to amplifying you, your team and your business. From quickly closing tickets to summarizing long complex threads, Cooper Copilot can handle it all with the speed and accuracy to put you on top.

### 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.

## 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.

**Multi-currency:** 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.

### 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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