

Autotask 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
Cooper Copilot	Smart Ticket Summary	N/A	✓
	Smart Writing Assistant	N/A	✓
	Smart Resolution Summary	N/A	✓
	Smart Ticket Triage (Coming Soon!)	N/A	✓
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	✓	✓
	Co-managed Licenses	Available	Available
	Company & Contact Management	✓	✓
CRM	Opportunity Management	✓	✓
	Asset Management	✓	✓
	Exchange / Microsoft 365 Contact & Calendar Sync	✓	✓
	Active Directory User Sync	✓	✓
	Quoting	✓	✓
	Document Manager	✓	✓
	Domain & SSL Certificate Tracking	✓	✓
Finance	Contract Management	✓	✓
	Billing Automation	✓	✓
	Multicurrency Support	✓	✓
	Inventory & Procurement	✓	✓
	Automatic Tax Calculation powered by TaxJar	✓	✓
Operations & Integrations	Quickbooks Integration	✓	✓
	Operational Dashboards	✓	✓
	Workflow Automation	✓	✓
	Mobile App	✓	✓
	Integrated Customer Billing (ICB)	✓	✓
	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

Cooper Copilot - AI Features

Smart Ticket Summary: Instantly distills long ticket threads into clear, actionable summaries, highlighting the issue, actions taken and suggested next steps.

Smart Writing Assistant: Converts technical jargon, shorthand and informal notes into polished, professional responses that promote understanding and trust.

Smart Resolution Summary: Instantly generates clear, step-by-step wrap-ups based on ticket activity, ready to share with clients.

Smart Ticket Triage (Coming Soon): Streamlines service operations by automatically categorizing and updating ticket details based on historical data, finding related and/or duplicate tickets and intelligently routing issues to the most qualified technicians.

Service Delivery

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.



Descriptions

CRM

Company & 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 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 & 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.

Finance

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

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.

Integrated Customer Billing (ICB): Drastically improve service delivery efficiency by integrating to other Kaseya tools, 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.



[Request pricing](#)

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