Datto Business Management
Powering the Business of IT
Autotask PSA + Datto RMM

Setting the standard for intelligent IT service delivery

Efficient and effective delivery of IT support services is central to managed service providers’ (MSP) success. That’s why we believe a unified professional services automation (PSA) and remote monitoring and management (RMM) experience is fundamentally required by modern day MSPs. Datto’s strategy is aligned around a truly unified, cloud-based solution. Combining Autotask PSA and Datto RMM goes beyond integration—and the real-time asset information coming from Datto RMM into Autotask PSA elevates MSPs to higher levels of insight, productivity, and profitability.

Assets in Datto RMM are synced into Autotask PSA with 360 degree monitoring, alert-to-ticket synchronization, and seamless navigation between the platforms. Additional layers of capability have also been built to increase efficiency, profitability, and customer satisfaction. This unified experience provides clear insight into your estate from a single pane of glass, so you can avert previously unforeseen issues, help shave minutes off of every ticket, and resolve client issues more quickly than ever before.

Datto’s unified platform also helps unlock business opportunities—easily identify new revenue opportunities, quickly assemble a contract compliance report, prepare quotes to clients for the replacement of outdated hardware, and build campaigns to migrate end-of-life operating systems.

“The combination of Autotask PSA and Datto RMM has greatly improved our service delivery. We have greater visibility to make informed business decisions, manage resources, and respond much more proactively to our clients’ needs. Thanks to the extensive integration, we can create PSA tickets from a wide range of third-party services and, of course, Datto RMM, which allows us to move seamlessly between resolving tickets and connecting straight into a client’s network to fix issues faster than ever.”

Paul Burns, Chief Technology Officer
Synergi
An intelligent platform to improve efficiency of service delivery

The unified Autotask PSA and Datto RMM platform provides relevant, real-time data and actions in front of your technicians to triage tickets faster, improve front-line fix rates, and resolve issues faster.

- Every asset and ticket in PSA is packed with rich, real-time information on the asset directly from RMM. Instant insight and identification of relevant solutions from your knowledge base speed up troubleshooting and drive down fix times.
- One click from the PSA ticket straight to RMM—to the relevant device, or directly to a remote support session—improves technician experience and response times.
- All remote support activity is automatically synced with the relevant PSA ticket when the session is closed to improve record-keeping and reduce time required to write up support actions.
- Tickets raised via RMM arrive in PSA associated with the relevant asset and end user to provide valuable context for technicians and a better client experience.
- RMM monitoring alerts are intelligently routed into PSA according to type, severity, and class, so technicians can focus on the higher-priority issues that matter.
- Intelligent alert-to-ticket engine reduces noise and strips out duplicates, identifying repeat and related alerts, and updates tickets with any status updates.

Improve the management and profitability of your business

The unified platform combines the device-centric data in Datto RMM with the ticket-driven information, customer and contract information, and powerful reporting capabilities of Autotask PSA to provide a complete view of your business.

- Improve accessibility to rich asset and alert information for anyone in the organization, from services to sales, with Autotask PSA’s dashboards.
- Enable staff to work faster through consolidated device analytics and alert activity to immediately take informed action.
- Improve invoicing accuracy with device addition, deletion, and change synchronization.
- Reduce billing leakage and increase revenue by automatically identifying devices that are supported in RMM, but not under contract and billed for.

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

To learn more about Autotask PSA, please visit www.datto.com/products/autotask-psa/.
Datto Remote Monitoring and Management (RMM)

As an intuitive, powerful, and affordable cloud platform, Datto RMM helps MSPs manage the complexity, costs, and risks associated with supporting every device they are contracted to support—from on-premises to cloud-hosted, from server to network device, and everything in between. Whether managing one single endpoint or 100,000 endpoints, Datto RMM helps MSPs keep their supported estate secure, patched, stable, and functioning.

Next Generation RMM for the Modern MSP

Secure, scalable, and always on

As a true SaaS platform, Datto RMM is easily accessible and allows MSPs to focus on managing their customers. The platform’s enhanced security posture, with mandatory two-factor authentication, routine penetration testing and infrastructure hardening, and active monitoring for unauthorized access attempts, help maintain its proven track record of 99.99% uptime. And since it’s a truly scalable, cloud-based platform, there is no limit to the number of devices you can support.

Simple onboarding, easy adoption

Even with a broad, powerful feature-set, Datto RMM is easy to set up, deploy and use with pre-configured functionality, an intuitive user experience, and modern user interface. Having onboarded thousands of MSPs to Datto RMM, Datto has the experience and know-how to support you in every step of the onboarding process whether you are new to RMM or migrating from an existing RMM platform. Built-in wizards simplify the implementation process by providing contextual product walk-throughs, automatically configuring key features, and delivering comprehensive on-the-job training for your technicians.

In addition, Datto offers a range of accessible resources to help your team fully utilize the platform. From Datto Academy certifications, ongoing education and training, and Datto’s award-winning, 24/7/365 direct-to-tech support, Datto is committed to helping you start strong and stay strong.
Drive Efficiency and Automation into your Service Delivery

Datto RMM has robust, MSP-centric features in a fully-integrated SaaS platform. With monthly release cycles, constant improvement and innovation, Datto RMM is designed to help MSPs support the IT environments of today and prepare for those of tomorrow. Some key features of Datto RMM include:

- **Discovery and Asset management**: Real-time visibility of every asset under contract—where it is, status, condition, and compliance.
- **Monitoring**: Know what’s going on with every device with real-time notification of alerts and automated responses to reduce device downtime.
- **Management**: Keep devices secure, patched, and optimized through proactive, centralized, policy-based device management delivering automation at scale.
- **Remote Support**: Secure, fast remote access to devices with an array of powerful remote support and screen share tools.
- **Reporting**: Showcase the value you’re delivering to clients with scheduled reporting that provides insight on devices, customer health, and activity.

Additionally, Datto RMM includes pre-built monitoring policies and scripts, third-party access rights, wide-ranging integrations into other key platforms such as PSA tools, antivirus, warranties, and documentation management to provide the ideal blend of capability, usability, security, and performance.

Flexible, Automated Patch Management

Datto RMM helps MSPs deliver efficient, effective, policy-based patch management for Microsoft and third-party software, a critical service to maximize security and minimize downtime. It also provides critical compliance information to customers by automating the reporting of patch status and compliance.

Automation and Scripting

Whether you are just starting out with RMM or are a mature MSP supporting tens of thousands of devices, Datto RMM offers a wide range of powerful automation capabilities that are easy to set up and manage. Dynamic device targeting functionality coupled with a flexible scripting engine means you can streamline service delivery with scalable automation. Additionally, the Datto RMM ComStore offers hundreds of free, pre-built scripts and automation policies to streamline your technical support.

Real-Time Monitoring

Datto RMM monitors all of your devices in real-time—servers, VMs, ESXi, PCs, laptops, network devices—instantly informing you of current issues and flagging potential problems. Powerful auto-responses to alerts resolve problems automatically or simplify troubleshooting by providing technicians with useful diagnostic information. The ComStore comes complete with dozens of best practice monitoring components to reduce the complexities of monitoring today’s complex IT environments.
RMM Ransomware Detection

Datto RMM monitors for crypto-ransomware on endpoints using behavioral analysis of files, and receives automatic alerts when a device is infected so the end user doesn’t have to report it. Automated responses attempt to kill the ransomware process while Datto RMM isolates the device automatically to prevent spread of ransomware while still maintaining contact with RMM. This allows technicians to take effective action and recover with integrated Datto Continuity products by restoring the impacted endpoint to a previous state.

Rapid Remote Support

Datto RMM enables your engineers to rapidly and securely connect to any device, regardless of location. Our range of remote support tools enables efficient troubleshooting and assistance without interrupting the end user. Should screen share be required, Datto RMM has its own fast, effective HTML5-based remote control built into the platform, meaning your technicians can access any supported device.

Flexible Reports and Dashboards

The ability to effectively report to customers on performance, health, and security is critical for MSPs. Datto RMM comes with modern, configurable dashboards that provide insight and understanding, as well as reporting capabilities that provide client-facing reporting on critical metrics, activity, and status. A robust, accessible REST API offers further reporting options.

Network Topology Mapping

Network and IoT devices are everywhere and need to be managed—and managing the network starts with understanding what’s out there. Datto RMM’s Network Topology Maps help MSPs better manage their clients’ networks by continuously discovering and identifying every device on the network, generating a visual layout of the network to show how devices are connected to each other, and quickly identifying where issues are.

Integrations and Open Ecosystem

Datto RMM and Autotask PSA are a unified platform. That means synchronized assets, full bi-directional sync of alerts with tickets, integrated data and reporting. Datto RMM is also fully integrated with Datto BCDR and Datto Networking. However, our commitment to an open ecosystem maintains out-of-the-box integrations with a broad range of MSP-centric solutions. The powerful API also allows MSPs to integrate Datto RMM into their other key business systems, further streamlining business processes and data sharing.

Supported Platforms

Datto RMM operates on Windows, Linux, MacOS, VMWare, and SNMP Devices.

To learn more about Datto RMM, visit www.datto.com/products/rmm.
SUCCESS STORY

St. Louis MSP Doubles Revenue with Autotask PSA and Datto RMM

The Miller Group, a managed service provider (MSP) from St. Louis, Missouri, started out as a software training and software development company. It was not long before they quickly realized more of their customers needed computer support services. This soon turned into supporting entire networks and an opportunity to begin adding to the team. They hired several technicians following the Y2K problem and almost exclusively offered break-fix services. In 2013, the Miller Group started leaning toward managed services, but they faced many challenges with the shift and were uncertain about how to continue to grow the business in this new model.

The Miller Group was using a homegrown Microsoft Access database to manage time entries. They used spreadsheets to store company passwords, public folders and drive shares for clients’ data, and a third-party tool for remote control. The systems in place became an inhibitor to growth and the decision was made to move their business operations to a professional services automation (PSA) tool. That is when they discovered Autotask PSA. In 2016, they evaluated the RMM market and made the decision to migrate their existing RMM tool to Datto RMM.

Now, the combination of Autotask PSA and Datto RMM has helped the Miller Group to double in size but without the need to add any new technicians. “Our technicians were really good, but we didn’t have any standards. We would do a lot of work that might not be billed for, and there were no checks and balances. It seemed like we were working really hard but we were just breaking even,” said Joe Svoboda, CEO of the Miller Group.

With Autotask PSA and Datto RMM together, all of the data is in one place. Every person in the company uses their own customized dashboard and understands what is going on in real time. Svoboda said, “It used to be really hard to gain any kind of traction without any real insight into what was going on. Now each of us has live data at all times and we know exactly what’s going on within our company. This allows us to make quick decisions based on actual data.”

“The biggest thing for us was the service desk—which is really what runs the business here. We receive a hundred tickets on average per day and the combination of having Autotask PSA and Datto RMM integrated means we don’t have to jump back and forth between tools to look up a ticket, then to get into another system to a remote control, and then to go back and track your time. It saves a couple of minutes on each ticket. That really adds up.”

The deep database-level integration between Autotask PSA and Datto RMM unlocks rich asset data directly within the PSA ticket. Access to this information is now critical for The Miller Group because the ticket is the first record the techs look at before beginning work. They have instant access to the entire device history and relevant details to complete the work. “We can see the five previous tickets from an asset or the last five tickets from that company, then look at the snapshot of current activity, and instantly remote control the device directly from the PSA ticket,” said Svoboda.

For the Miller Group, the powerful automation delivered by the seamless integration of these two critical business solutions is the equivalent of a full-time employee for the company. “It automates workflows, assigning checklists, triaging work, and assigning it to the right people—it’s really powerful,” said Svoboda. With all of the added efficiencies, The Miller Group was able to grow and create new roles in the company such as a chief financial officer, project manager, marketing director, and business development manager—all who have helped lead to an overall increase in size and business valuation.

Looking back, I don’t think I would have done it differently in the beginning, but now that Autotask and Datto RMM run our business it has become our line of business application that we would be lost without”

Joe Svoboda, CEO
The Miller Group