

Datto Autotask PSA Document Manager



In order to provide high-quality service to clients, managed services providers (MSPs) need to anticipate potential issues and do what they can to prevent them from occurring. When issues do arise, clients expect they will be resolved quickly. However, that is easier said than done, as IT professionals spend significant amounts of time locating information. Oftentimes, knowledge is locked inside someone's head, and processes are not streamlined or repeatable.

For MSPs using Autotask PSA, Document Manager can help streamline documentation utilization and organization to save time and deliver better service.

Drive Efficiency for Technicians

Autotask PSA's Document Manager improves technician efficiency by providing quick and easy access to documentation, reference articles, and assets organized by client so they can spend less time searching for answers. Documentation can be associated with PSA tickets to understand steps required to resolve the issue and improve front-line fix rates. In addition, Document Manager can eliminate the need for a client to reach out to you by allowing clients to access documents themselves for self-help.

Ensure Accountability and Standardization

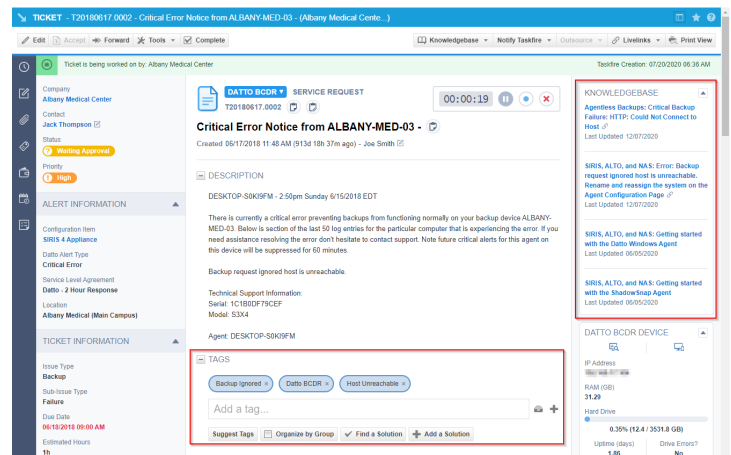
Document Manager can help technicians hit their Service Level Agreement (SLA) targets and ensure standardization of procedures to deliver high-quality service. Quickly and easily create, revise, and approve documents to develop standard procedures, easily reference knowledgebase articles and support manuals, and load checklists into the ticket to create repeatable processes and make it faster to onboard new staff.

In addition, Document Manager enables MSPs to easily manage expiring contracts. Autotask PSA automatically monitors and tracks clients' SSL certificates and domains, and provides automated reminders prior to expiration to help ensure your clients never miss a renewal.

Elevate Insight

Document Manager helps provide an understanding of the relationships between clients, their assets, and configuration items by centralizing critical documentation in a single location. This enables users to quickly locate the right documents and understand the potential impacts of any changes being made.

To learn more about Autotask PSA Document Manager and how your MSP can improve efficiency with effective documentation, [schedule a demo today](#).



datto

Corporate Headquarters

Datto, Inc.
101 Merritt 7
Norwalk, CT 06851
United States
partners@datto.com
www.datto.com
888.294.6312

Global Offices

USA: 888.294.6312
Canada: 877.811.0577
EMEA: +44 (0) 118 402 9606
Australia: +61 (02) 9696 8190
Singapore: +65-31586291

©2020 Datto, Inc. All rights reserved.

Updated April 2021