

Autotask Power Tools

Transform Your Autotask Experience with Custom Solutions and Integrations

We provide flexible extensions and integrations for Kaseya's Autotask platform, designed to streamline your business operations. Whether you're looking to automate routine tasks, improve billing accuracy, or unlock deeper insights through advanced reporting, our cloud-based or self-hosted solutions are tailored to meet your specific needs.

Our Autotask Enhancements Include:

Here are just a few of the many ways we have extended the Autotask platform:

- Automated Per-User and Per-Device Billing: Monitor changes in both user and device counts, and seamlessly adjust billing to ensure accuracy and efficiency.
- Recurring Ticket Management: Automatically generate and manage recurring service tickets, ensuring uninterrupted service delivery.
- Accounts Receivable Alerts: Automatically generate tickets when customers are past due, enabling timely follow-up on outstanding balances.
- Tax Liability Calculations: Simplify financial processes with tools that automatically calculate tax obligations based on real-time data.

The screenshot displays the Autotask interface for a company named Versatron Technologies, LLC. The top navigation bar includes 'My IT Co.', 'Companies', 'Onboarding', 'Reports', 'Support', and a search bar. The main content area shows the company profile with 'Location Information' and 'Contacts' tabs. The 'Contacts' tab is active, displaying a table of 17 contacts. The table has columns for 'First Name', 'Last Name', 'Email', 'Cell Phone', 'Direct Phone', and 'Assigned Services'. The 'Assigned Services' column is expanded for the contact Robert Smith, showing a list of services including 'MSP Services - Monthly - 1.01 - User: M-F 8-5 Help Desk' and 'HD User: M-F 8-5 Help Desk'. The table also includes a 'Count: 17' summary and a pagination bar at the bottom.

First Name	Last Name	Email	Cell Phone	Direct Phone	Assigned Services
Robert	Smith	bob.smith@versatron.com			MSP Services - Monthly - 1.01 - User: M-F 8-5 Help Desk
Brendan	Johnson	brendan.johnson@versatron.com			MSP Services - Monthly - 1.06 - User Help Desk - Service Lines Options - Opt IN/OUT
Brian	Williams	brian.williams@versatron.com			MSP Services - Monthly - 1.07 - WatchGuard AuthPoint MFA MSSP (1 to 50 users)
Daryl	Brown	daryl.brown@versatron.com			MSP Services - Monthly - 1.08 - ThreatLocker Endpoint Zero-Trust App Control
Emmanuel	Jones	manny.jones@versatron.com			MSP Services - Monthly - 3.06 - Site Fee - Service Lines Options - Opt IN/OUT
Eric	Garcia	eric.garcia@versatron.com			MSP Services - Monthly - 3.07 - ASN Opt IN/OUT
Jay	Miller	jay.miller@versatron.com			MSP Services - Monthly - 1.00 - Desktop Agent
Jessica	Davis	jessica.davis@versatron.com			MSP Services - Monthly - 3.13 - Additional Network Devices
Jonathan	Garcia	david.jackson@versatron.com	(206) 555-5432		• HD User: M-F 8-5 Help Desk
Jordan	Miller	jordan.miller@versatron.com			• HD User: M-F 8-5 Help Desk

Tax Liability Calculator

Complete the form below to generate a tax liability report.

Start Date

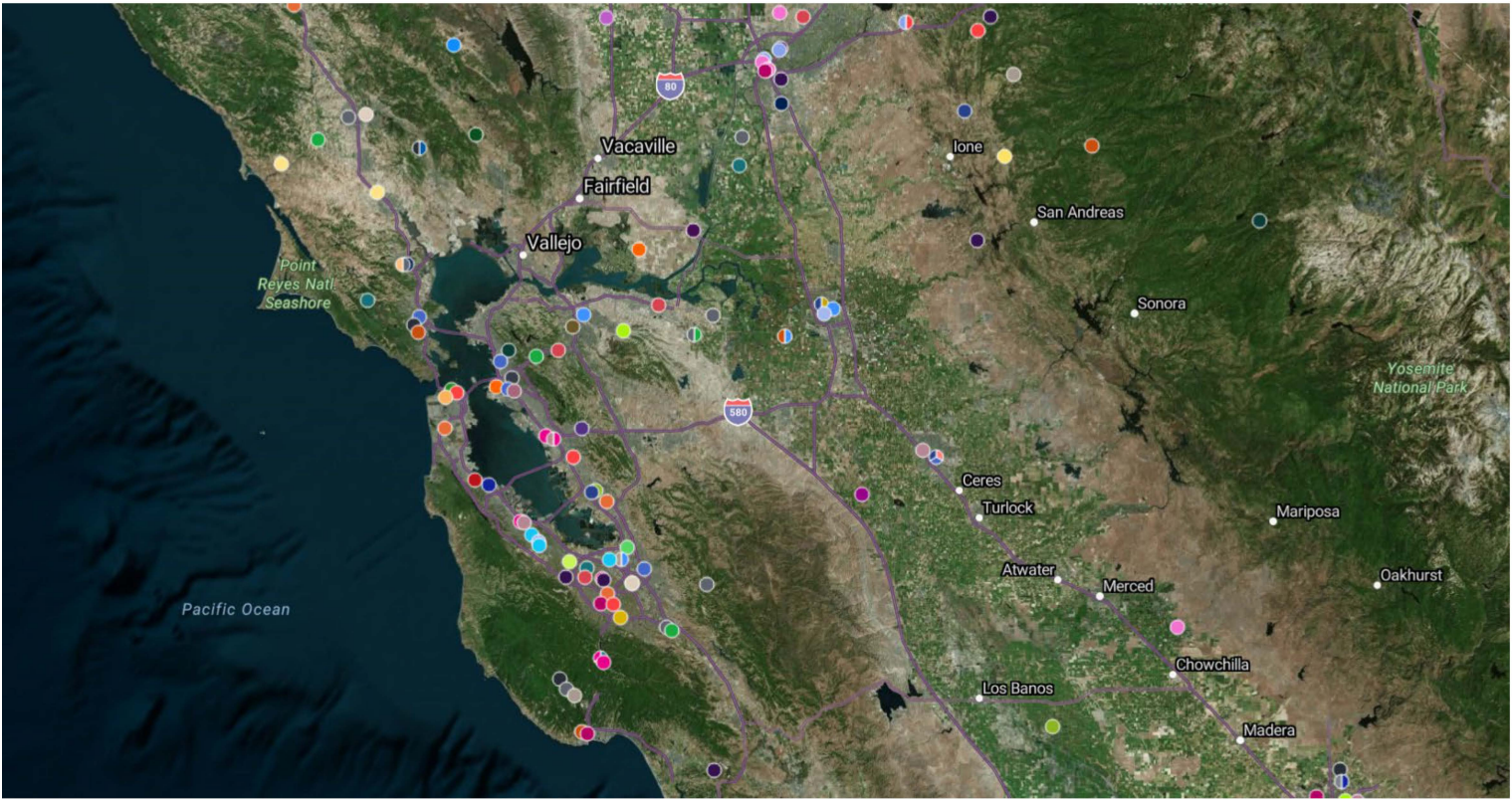
End Date

Generate Report

Powerful Reporting Solutions

Take control of your Autotask data with our comprehensive reporting products. We enable continuous backups of your live Autotask database, with seamless integration into Power BI and SQL Server Reporting Services. Build custom, interactive reports that deliver real-time, actionable insights for your business.





AutoSave Off TaxLiabilityReport_2024-09-01_2024-09-30.xlsx

File Home Insert Page Layout Formulas Data Review View Automate Add-ins Help Load Test Acrobat

Default Normal Page Break Preview Page Layout Custom Views Navigation Gridlines Formulas Bar Show

Zoom 100% Zoom to Selection New Window Arrange All Freeze Panes Hide Unhide Synchronous Scrolling Reset Window Position Switch Windows Macros

Comments Share

Sheet View Workbook Views

A1 Sales Tax Liability Details

Sales Tax Liability Details Generated: 10/14/2024 9:23 AM

Report Period: 9/1/2024 - 9/30/2024

Tax Region	Invoice Number	Company	Invoice Paid Date	Invoice Date	Billed Amount	Non-Taxable Sales	Taxable Sales	Tax Collected	Tax Rate
Bellevue 1704	61295	LuminaWorks	9/9/2024	8/10/2024	\$41.25	\$41.25	\$0.00	\$0.00	0.000%
Bellevue 1704	61385	Driftwood Ventures	9/13/2024	8/30/2024	\$2,070.28	\$0.00	\$2,070.28	\$211.17	10.200%
Bellevue 1704	61387	Driftwood Ventures	9/13/2024	8/30/2024	\$165.00	\$165.00	\$0.00	\$0.00	0.000%
Bellevue 1704	61407	NexusIT Solutions	9/16/2024	9/3/2024	\$1,400.73	\$539.00	\$861.73	\$87.90	0.000%
Bellevue 1704	61426	Petal & Thorn Boutique Florists	9/16/2024	9/3/2024	\$1,326.70	\$0.00	\$1,326.70	\$135.32	10.200%
Bellevue 1704	61439	Voltis Energy	9/13/2024	9/3/2024	\$3,498.73	\$90.00	\$3,408.73	\$347.69	10.200%
Bellevue 1704	61445	CloudSpring Cloud Hosting	9/8/2024	9/3/2024	\$124.80	\$0.00	\$124.80	\$12.73	10.200%
Bellevue 1704	61482	Crisp Cravings Snacks	9/8/2024	9/3/2024	\$280.42	\$0.00	\$280.42	\$28.60	10.200%
Bellevue 1704	61492	Urban Forge Home Furnishings	9/13/2024	9/3/2024	\$662.01	\$0.00	\$662.01	\$67.53	10.200%
Bellevue 1704	61499	VistaVoyage	9/23/2024	9/3/2024	\$3,306.57	\$149.00	\$3,157.57	\$322.07	0.000%
Bellevue 1704	61610	Urban Forge Home Furnishings	9/23/2024	9/16/2024	\$990.00	\$990.00	\$0.00	\$0.00	0.000%
Bellevue 1704	CC3M1HSQQEV	Brew Haven Coffee Co	9/8/2024	10/4/2024	\$7.46	\$0.00	\$7.46	\$0.76	10.200%
				Bellevue 1704	\$13,873.95		\$1,974.25	\$11,899.70	\$1,213.77
Bonney Lake 2701									
Bonney Lake 2701	61197	GreenLeaf Organic Groceries	9/13/2024	8/1/2024	\$72.10	\$0.00	\$72.10	\$6.85	9.500%
				Bonney Lake 2701	\$72.10		\$0.00	\$72.10	\$6.85
Bothell (King) 1706									
Bothell (King) 1706	61439	NextGen Fitness	9/13/2024	9/3/2024	\$975.23	\$0.00	\$975.23	\$99.47	10.200%
				Bothell (King) 1706	\$975.23		\$0.00	\$975.23	\$99.47

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Ready Accessibility: Investigate

Security You Can Trust

We understand the critical importance of security. All data managed by our solutions is fully encrypted, both at rest and in transit. Our integrations are designed to work seamlessly with your existing identity platforms, ensuring secure access and compliance with your organization's security policies.

Optimize your Autotask environment with secure, customizable, and scalable solutions that elevate productivity. Contact us today to learn more about how we can transform your business.

Fidelis, Inc.

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