



# Get more from your PSA, RMM & IT documentation tools

## Integration checklist

Modern IT teams are under pressure to deliver faster service, tighter security and better results, often with disconnected tools that claim to “integrate” but don’t deliver.

This interactive checklist will help you cut through the noise and evaluate whether your

PSA, RMM and IT documentation platforms are truly working together to drive real outcomes like fewer errors, faster ticket resolution and more efficient teams. Use it to assess your current setup, identify integration gaps and see what’s possible when your tools are unified.



The integration between IT Glue and Datto RMM is second to none. Just one workflow alone, password injection, has been a massive time saver. It saves each technician six hours per month, totaling 30 hours saved across the team every month. That’s nearly four full workdays we’ve reclaimed to focus on resolving issues instead of searching for credentials.

**Chris Swecker, Director of Managed Services,  
Appalachia Technologies**

## 1 Unified data: Stop double entry and get everyone on the same page

Most integrations sync a limited dataset, like devices from your RMM into your PSA. But that's just the starting point. A mature integration involves two-way, real-time sync of assets, users, locations and more, ensuring the same information flows cleanly across your entire stack.

When your tools update each other instantly and consistently, your team can finally rely on one version of the truth. That means faster onboarding, fewer errors and reduced rework across the board.

### What to evaluate

Are you eliminating double-entry today by closely integrating your key tools?

Do changes made in one tool reflect across your entire stack in real time?

Does everyone on your team know where to access or update asset data or do they still tool-hop?

Is there a central source to track changes and reduce version confusion?

Are your data syncs truly real time, or are you relying on manual or delayed updates?

Can you instantly see all software installed on a device and all devices running a specific application?

When you close an alert or ticket in your RMM or PSA, does it automatically close in the other system?

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### What changes with true integration?

#### Before

- ✗ Manually entering or updating data in multiple tools
- ✗ Conflicting records across platforms create confusion

#### After

- ✓ Real-time, two-way syncing across PSA, RMM and docs
- ✓ Single source of truth, trusted across the team

## 2 Context on demand: Bring knowledge to the work

Basic integrations allow technicians to manually search for documentation. Advanced integrations on the other hand surface what's needed automatically, when and where it's needed. This helps ensure your team stays in flow, resulting in faster resolutions and less frustration.

### What to evaluate

When a ticket is opened, does relevant documentation auto-surface in your PSA without requiring search?

Can your RMM show linked documentation before joining a remote session?

Can your RMM securely inject credentials during a remote session without leaving the interface?

Does your documentation platform prompt the team when key info is missing from a ticket, asset or client?

Can your team automatically generate SOPs during a remote session, without needing to document steps afterward?

Can you track time directly while working in a remote session through your RMM?

### What changes with true integration?

#### Before

- ✗ Technicians waste time searching for documentation
- ✗ Credentials are retrieved manually from a separate tool

#### After

- ✓ Documentation surfaces automatically in PSA and RMM workflows
- ✓ Credentials are injected securely mid-session; no copy/paste required

### 3 Secure automation: Maintain speed and security together

A strong integration shouldn't make you choose between speed and safety. Credential injection, access logging and permission control help streamline technician workflows without compromising security.

While ticket context isn't currently included in password audit logs, user-based activity is logged with timestamps to maintain accountability. The result is faster, more secure operations as well as peace of mind that your documentation and credential practices are compliant.

#### What to evaluate

Can technicians securely inject credentials into remote sessions without needing to copy/paste or break workflow?

Is each password access logged with who accessed it and when?

Are permissions for documentation access governed by role, location or time-based rules?

Is your team consistently using the vault and automation, or do risky workarounds still happen?

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#### What changes with true integration?

##### Before

- ✗ Credentials are copied manually or stored outside the system
- ✗ Audit trails are missing or hard to maintain

##### After

- ✓ Vault-based access with secure injection and full logging
- ✓ All credential access is tracked by user and timestamp

## The trifecta in action: Real results from real IT teams

Many IT teams are already seeing measurable gains by using the fully integrated Kaseya stack: [IT Glue](#) (documentation) + [Autotask](#) (PSA) + [Datto RMM](#) (RMM).



Here's what they have to say about the difference true integration makes:



We are leveraging the integration with Autotask in IT Glue, which has allowed our technicians to be much more productive and avoid jumping from tool to tool. They can work a ticket and have access to credentials and documentation from a single pane of glass — something every technician wants — while we continue to cut out that wasted time between tools.

**Dave Clipp, President and CEO,  
Atom Creek**



At no point did we feel that we couldn't service our clients during the PSA migration. Now, more than one year in, our technician utilization rate had a 35% increase. Our ticket resolution time dropped by roughly 26% and triage SLA compliance is greater than 95%.

**Koby Dudley, Director of Managed  
Services, BECA**

## See what true integration can do for your team

When your PSA, RMM and IT documentation tools are truly integrated, the results go far beyond convenience. You'll unlock faster service delivery, tighter processes and more time for high-value work.

### Teams using the Kaseya stack experience:

- ✓ 30 to 60 minutes saved per technician per day
- ✓ Fewer errors and escalations through consistent, standardized workflows
- ✓ Faster onboarding and ticket resolution with real-time access to key context
- ✓ Improved compliance and audit readiness
- ✓ Greater technician satisfaction and stronger client trust



Request a demo to see how the trifecta (**IT Glue, Autotask and Datto RMM**) can help your team work smarter, faster and more securely.

[Request a demo](#)

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