



Why Autotask Users Are Switching Payment Processors

A Faster, Easier Way to Collect Payments in Autotask

The Strategic Framework MSPs Use to Fix
Underperforming Payment Processes



The Hidden Cost of Underperforming Payment Processes

Most Autotask users hit the same wall: payment processes that should be driving results but aren't delivering what the business needs.

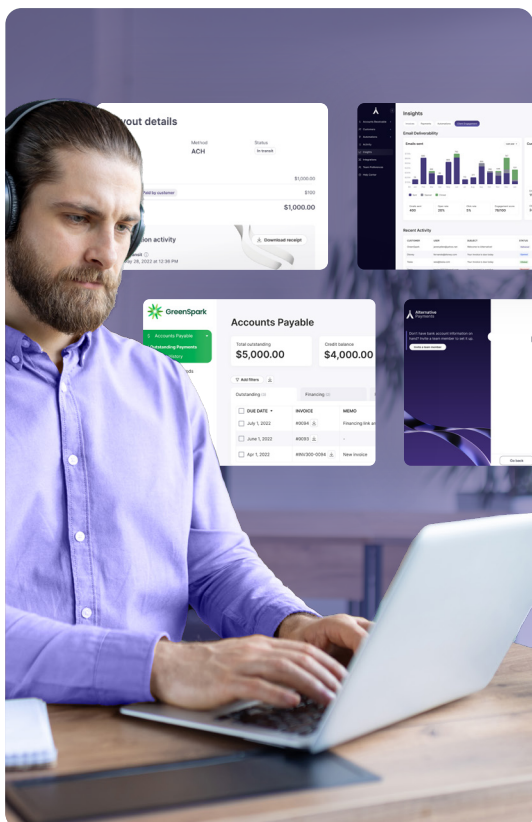
Some are stuck at the 40% adoption plateau, spending 5+ hours every week on manual reconciliation work that should happen automatically. Others are getting hammered by fee pile-up from multiple vendor relationships with no control over who absorbs processing costs.

Gary Allen at TeamLogic IT Utah Valley put off switching for months because of one fear that keeps most MSPs stuck:



"I dragged my feet for nine months on switching payment platforms. I was afraid that all my clients would have to give me their credit card information again."

Gary Allen
TeamLogic IT Utah Valley



Gary's fears turned out to be completely unfounded—but first, let's talk about the real costs you're probably already feeling.

The real cost isn't just the time. It's the cash flow impact of those extra 15-20 days it takes to collect payment. It's the mental overhead of tracking which payments synced properly with Autotask and which ones need manual fixing. It's the opportunity cost of your most valuable resources doing data entry instead of growing the business.

If this sounds familiar, you're not alone—and you're probably closer to switching than you think.

The Autotask users who break through these limitations all figured out the same four things.

Here's how they did it.

The Proof Behind Better Results

The numbers tell the whole story

Metric	Typical Autotask User	Optimized Autotask User
Payment Adoption Rate	40%	70%+
Days Sales Outstanding	50+ days	<30 days
Weekly Manual Work	5+ hours	<1 hour
Vendor Management	Multiple bills/relationships	Single integrated platform

Real Results from Real MSPs

Cash Flow

Transformation:

Simple Communications was carrying \$80K in receivables—money that should have been in the bank. Two months after switching, that number dropped to \$4K:

"My receivables went from \$80K to \$4K in two months. The difference in cash flow has been dramatic."

Eric Peterson
CEO at Simple Communications



Cost Reduction:

Valiant Technology was juggling multiple vendor bills and fluctuating fees every month. The switch eliminated that complexity entirely:

"We saved between 75 and 80 percent of our monthly processing and platform fee all rolled into one."

Stephen Kaupp
COO at Valiant Technology



Activation Success:

SkyTide Group's old platform had customers abandoning the payment process. The new platform more than doubled their success rate:

"Everything flows seamlessly between systems. Our activation rate went from 36% to 81%."

Brian O'Shaughnessy
CEO at SkyTide Group



Here's what we noticed when we looked at the MSPs hitting 70%+ adoption rates: they're following the same four-part approach that addresses where most payment platforms fail Autotask users.

The 4 Non-Negotiables When Switching Payment Platforms

After seeing dozens of Autotask migrations, four things always determine success or failure—whether you're focused on improving adoption rates, reducing costs, or both:

	Why it matters	What to ask vendors	Red flag
Quote-to-Cash Acceleration	Every day between quote acceptance and payment is money sitting on the table. The best Autotask integrations eliminate the quote→invoice→payment delay entirely.	"Can customers pay directly from quotes without waiting for invoice generation?"	If they require you to generate an invoice before accepting payment, you're adding unnecessary friction.
Seamless Data Migration	Re-entering payment information is the biggest barrier to customer adoption, and failed migrations create expensive operational overhead.	"Will my customers need to re-enter their payment information during the switch?"	Complex migration processes that require customers to manually input payment data they've already provided, or vendors who can't guarantee complete data transfer.
Sync Reliability	Sync failures between your payment platform and ConnectWise create hours of manual reconciliation work every week.	"What happens when syncs fail, and how often does it happen?"	Vague answers about "rare sync issues" or mentions of manual override options.
Complete AR Automation	True automation means zero manual intervention from reminder emails through bank reconciliation.	"What manual steps remain in your end-to-end process?"	Any mention of clearing accounts, manual invoice marking, or manual bank reconciliation.



Which of these four areas would have the biggest impact on your cash flow right now?

The Results That Matter

You've seen the framework. Now here's what it looks like when MSPs actually implement it:

Quote-to-Cash Success

S1 Technology was tired of the invoice-to-payment delay. Now they collect payment in days, not weeks:

"Our collections are down to probably about ten, within ten days of invoicing."

Jeremy Roth
CEO at S1 Technology



Migration Success

NW Technologies expected customer complaints and confusion during the switch. Instead, the migration went completely unnoticed:

"The migration was the easiest I've ever done for any system... every thing was seamless. We did not get any complaints. Everyone who received the email was able to sign in."

Justin Best
CEO at NW Technologies



Cost Reduction:

Sky Tide's previous platform had constant sync failures between their PSA and accounting systems. The new platform eliminated those issues:

"Everything flows seamlessly between systems. The migration process was smooth and efficient."

Brian O'Shaughnessy
CEO at SkyTide Group



Complete Automation

TeamLogic IT Utah Valley wanted to eliminate manual payment processes entirely. The results speak for themselves:

"We have not looked back."

Gary Allen
TeamLogic IT Utah Valley



The Pattern

Autotask users achieving 70%+ adoption rates share these four characteristics:

- They eliminated the quote-to-payment delay
- They migrated customers without requiring any customer action
- They achieved reliable, consistent sync with Autotask
- They automated the entire AR process from reminder to reconciliation

Which of these results would have the biggest impact on your business right now?

The companies above weren't outliers—they just knew what to look for. Now it's time to see where you stand.

Your Switching Readiness Assessment

WORKSHEET: Evaluate Your Current State

Step 1: Measure Your Current Performance

Fill in your actual numbers below:

Metric	Your Current Number	Benchmark Target
Payment Adoption Rate	_____ %	70%+
Average days to payment	_____ days	<30 days
Weekly manual reconciliation time	_____ hours	<1 hour
Number of payment-related vendor bills	_____ bills	1 bill

Step 2: Answer These Strategic Questions

Timeline: When are you looking to make this decision?

☐ This month ☐ Next quarter ☐ Still researching

Decision Team: Who else is involved in this evaluation?

☐ Owner ☐ Finance ☐ IT ☐ Other: _____

Pain Point: What's your biggest frustration with your current payment process?

The Framework in Action

This four-part framework is exactly what Alternative Payments built for Autotask environments.

Here's what happens next: If you're underperforming in 2+ areas above, you'll probably see the biggest impact from switching. The companies featured in this guide weren't special—they just followed a proven approach that addresses where most payment platforms fall short.

Ready to see this framework applied to your specific Autotask setup?

"We have not looked back. By the middle of this year I hope we have about 70% of our customers on autopay."

— Gary Allen, TeamLogic IT Utah Valley

See it in Action

