

Cross-PSA Integration Checklist

A practical checklist to help channel vendors build, test, and scale integrations across Autotask, ConnectWise, HaloPSA, Syncro, Pulseway, and Kaseya BMS.

1. Authentication & Security

- Support OAuth 2.0 where available.
- Securely store and refresh tokens.
- Scope permissions to least-privilege access.
- Ensure compliance with SOC 2, GDPR, and partner requirements.

2. Data Mapping & Normalization

- Map core objects: tickets, accounts/companies, billing, and assets.
- Handle PSA-specific field differences (naming, IDs, custom fields).
- Abstract workflows to minimize one-off code per PSA.

3. Event Handling & Sync Strategy

- Use webhooks/events where supported (real-time sync).
- Fallback gracefully to polling where needed.
- Deduplicate events and manage idempotency.
- Log sync activity for partner visibility.

4. Error Handling & Observability

- Provide human-readable error messages.
- Expose logs and troubleshooting steps in partner-facing UI.
- Alert on failed syncs and degraded performance.
- Support self-service resolution where possible.

5. Partner Experience

- Simplify setup with wizards and sensible defaults.
- Provide PSA-specific setup guides and FAQs.
- Offer workflow recipes tailored to each PSA (e.g., Usage → Billing, Alert → Ticket).
- Run community-led activation clinics.

6. Testing & Validation

- Test against sandbox and live PSA accounts.
- Validate workflows end-to-end (tickets, billing, assets).
- Run beta programs with trusted MSP partners.
- Instrument metrics: activation, TTFV, usage, errors.

7. Enablement & Scale

- Create enablement packs (guides, videos, FAQs).
- Publish marketplace listings with screenshots and clear CTAs.
- Launch campaigns in PSA communities and peer groups.
- Track adoption, retention, and expansion metrics.

Standard Closing CTA

MSPCentric helps channel vendors accelerate their PSA integration roadmap. From Autotask and ConnectWise to HaloPSA, Syncro, Pulseway, and Kaseya BMS - we know the APIs, the workflows, and your partner expectations. Better yet, we've already built the integrations for you - you just need to tap into the platform.

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