CINCH WORKBOOKS · IT DOCUMENTATION

Know the environment. Keep service moving.

The next technician shouldn't have to rediscover what your team already knows. Cinch Workbooks brings customer IT records together, giving MSPs and CSPs a practical reference for support, planning and everyday service delivery.

Assets
Specs, warranties and monitored links.

Networks
Circuits, LANs, wireless and remote access.

Credentials
Per-entry access with audit history.

Documents
Licenses, vendors and file shares.

THE SINGLE SOURCE OF TRUTH

One customer. A more complete picture.

Keep technical knowledge with the organization it belongs to. Bring hardware, connectivity, credentials and reference documents into a shared customer workspace.

Start with the customer

Find the right environment, contacts and technical records in one organization workbook.

Support with context

Connect hardware records to monitored devices and document the networks and services behind them.

Keep important dates in view

Track warranty, circuit-contract, license-renewal and certificate dates alongside the records your team uses.

Give access with accountability

Assign credential access per entry, route requests through admin approval and keep an audit history.

See what the customer is covered for.

The Service Matrix provides a read-only view of the linked customer account's services, scope, status and coverage notes, right beside the documentation.

KNOWLEDGE YOUR TEAM CAN USE

Make the details easier to find.

Give service teams a consistent place to look before they troubleshoot, make a change or plan an upgrade.

01

CUSTOMER WORKBOOKS

A familiar structure for every environment.

Organize records by customer, with section cards, record counts and quick access to contacts, locations and shared passwords. Staff can choose which sections each organization needs.

02

HARDWARE & SUPPORT

Understand the asset behind the alert.

Record device specifications, location, technical contacts, support contracts and warranty dates. Link an asset to its monitored N-able device to move from documentation to monitoring details.

03

SHARED CREDENTIALS

Give access with accountability.

Keep shared credentials in the customer's workbook. Assign access per entry, generate strong passwords and handle requests through admin approval. Views and access decisions are recorded in audit history.

04

NETWORK & CONNECTIVITY

Know how the customer connects.

Document circuits, LANs, wireless networks and remote-access methods. Keep provider, location, contract and primary/secondary ISP details together, with filters for active, expiring and archived circuits.

05

DOMAINS & CERTIFICATES

Keep external services in view.

Record domains, run WHOIS/DNS lookups and document email configurations. Track SSL/TLS certificate issuers and validity dates so your team can plan renewals.

06

SOFTWARE & REFERENCE

Preserve the details behind delivery.

Document applications, owners, business impact and support details. Track license entitlements and renewal dates, and keep documents, vendors, file shares and directory information within reach.

CONNECTED TO YOUR STACK

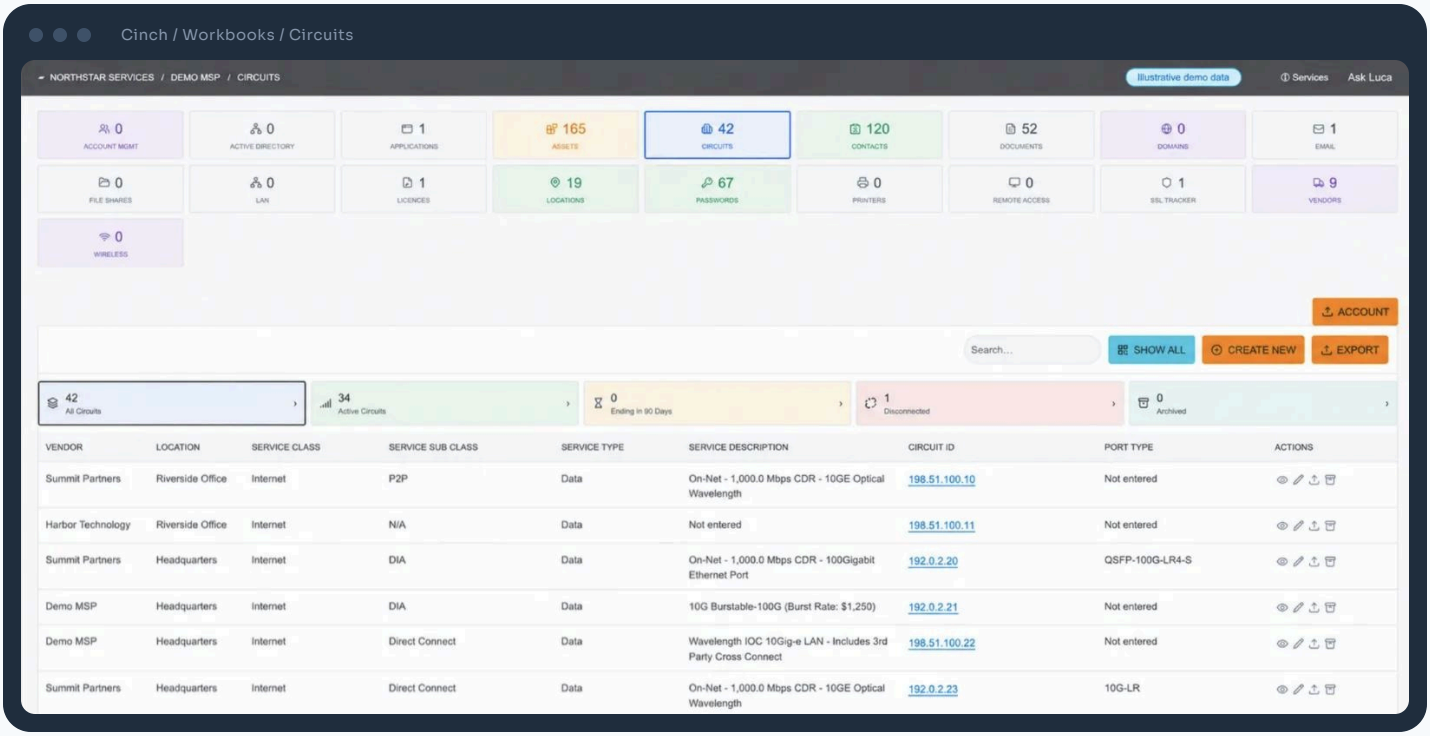
Your tools. Working together.

Microsoft | Veeam | VMware | N-able | XCP-ng | Zerto | Zoho | Salesforce

FROM DOCUMENTATION TO SERVICE CONTEXT

Knowledge belongs beside the work.

Customer records are more useful when your team can connect them to the environment it supports. Workbooks sits within Cinch's connected platform alongside CRM, Service Desk, PSA and cloud operations.



Workbook circuit inventory · sanitized illustration with fictional demo data.

Documentation that works across the platform.

IN THE TICKET

Context for every technician.

Desk brings Workbooks into the support conversation, so the next technician can pick up the work with customer knowledge in reach.

AT THE DEVICE

From record to monitoring.

Link an asset to its N-able monitored device and follow the link from the asset record to the device's monitoring details.

IN THE ACCOUNT REVIEW

Dates that drive renewals.

CRM uses workbook warranty dates, license renewals and certificate expirations to inform refresh and renewal discussions.

BUILT BY AN MSP. DESIGNED FOR THE MSP.

Put customer knowledge to work.

Explore how Cinch Workbooks fits the environments your team supports.

Getting started is simple

01 Start free
Create your account and explore Cinch at your own pace. Free for up to 5 provider users, with no credit card required.

02 Watch the demo
See how Cinch Workbooks works alongside the rest of the connected Cinch platform.

03 Learn the platform
Use the Cinch user guides and walkthroughs for module overviews, workflows and setup.

04 Grow with your team
Choose the provider-user capacity you need as you grow. Schedule a meeting to talk through your service model.

EVERY PLAN INCLUDES

- The full Cinch platform
- Luca and Cinch AI tokens
- Support included
- Customer end users free

Workbooks, in practice

Can we tailor a workbook to each customer?
Yes. Partner and staff users can show or hide section cards for each organization, keeping its workbook focused on the records relevant to that environment.

How is shared password access managed?
Access is assigned per credential. Users request access with a reason and admins approve or deny it. Views and decisions are recorded, with emergency access restricted to permitted roles.

Can we link documentation to monitored devices?
Yes. An asset can be linked to its N-able monitored device, so technicians can follow the link from the asset record to the device's monitoring details.

ONE PLATFORM · SIX CONNECTED MODULES

Desk	CRM	PSA	Workbooks	Cloud	Business Operations
Service delivery & devices	Sales & account growth	Projects, time & capacity	IT documentation & assets	Provisioning & operations	Shifts, effort & reporting

Customer knowledge. Ready for the next ticket.

Turn the details of each customer's environment into a shared reference your team can use.

Start Free →

(484) 679-2324 support@cinchsoftware.io

Free for up to 5 provider users · No credit card required · Customer end users are always free. Doylestown, Pennsylvania · AICPA SOC · Member, MSP Association of America.