

# Unit4 PSA Suite in Accountancy



## Driving operational excellence in accountancy firms

Manage your client relationships and engagements: from the first client contact through to invoice and cash collection, with a Project Service Automation (PSA) and Finance system built on the powerful Microsoft Dynamics 365 CRM platform.

Client satisfaction is the lifeblood of any accountancy practice. So your top priority as an accountant is to provide value to your clients by consistently delivering the best service and advice. In a world ruled by deadlines, you have to carefully manage competing priorities from your many client engagements and demands.

The modern professional requires the best tools to manage their day-to-day business. With the Unit4 PSA Suite, you can: track e-mails, and book time and expenses on the go, so that budgets can be properly managed and billable time doesn't leak away; create new opportunities simply and convert them into engagements; combine

these with flexible forecasting, so you have visibility of business performance, and get all of this in one single solution in the cloud.

### PSA Suite delivers

- Pre-defined engagement templates and built-in legislation support
- Built-in industry best practices
- A significant increase in efficiency/performance and a reduction in admin time
- Synergy – end to end, from funnel to cash, in one single solution

### Product capabilities for accountancy

As a stand-alone solution, the Unit4 PSA Suite delivers great value for your accountancy practice, out of the box. The built-in best practices are based on our extensive experience with firms similar to yours. You get the right tools to maximize your employees' productivity and a 360-degree view of your clients and engagements. It can help your firm achieve operational excellence – essential in a highly competitive world, where success is all about accelerating your business and staying ahead of the field.

### Win more business

- Track client communication, manage your pipeline and engage with your clients
- Manage opportunities; forecast sales and revenue
- Coordinate your efforts with embedded marketing automation tools
- Utilize integrations with O365, SharePoint, LinkedIn, Company Info and D&B

**Thinking about the processes, collaboration and communication at the front-end makes our business run on a higher standard and that is what this practice management for accountancy solution does for us. All automated, shared with colleagues and clients, based on the Microsoft Platform.**

**Robèrt Molenaar**

Partner at Witlox van den Boomen.

**Make optimal use of resources**

- Match people and engagements via a built-in matching engine
- Access the skills engine directly from the resource schedule
- Retrieve scheduled work directly from Outlook agenda into your timesheet
- Get a visualization of the firm's resource utilization
- Use the employee portal with HR integration

**Execute profitable engagements**

- Use the built-in Risk & Compliance checks
- Measure actuals against budgets and monitor engagement forecasts
- Create engagements and budgets with pre-defined templates
- Plan engagement schedules through Gantt Charts
- Check engagement health with built-in performance reports
- Record time, expenses, fees, allowances directly on the engagement, via web or app

**Bill with precision**

- Recognize Revenue and Work-In-Progress (WIP)
- Consolidated billing from different engagements
- Get single invoice billing and batch invoicing
- Select from 9 contract types for billing
- Use E-invoicing

**Adding extra value**

**Combine the best of PSA and ERP**

The stand-alone Unit4 PSA Suite can also be integrated with any other 3rd-party ERP to form a true enterprise business application.

**Leverage your Microsoft investment**

- Built on Microsoft Dynamics 365 CRM
- Standard integrations with Office 365 apps
- Cloud hosting by Microsoft

