

Unit4 PSA Suite in Engineering



Driving operational excellence in engineering firms

Manage your projects and client relationships: 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.

Delivering quality projects, so that your clients are satisfied, is the lifeblood of any engineering practice. So, your firm's top priority is to manage the practicalities of projects in the field by consistently staying on plan and within budget. As a business, you are constantly looking at overall productivity, as well as the utilization of equipment and personnel on your projects.

The modern professional requires the best tools to manage their everyday business. With the Unit4 PSA Suite, you can: track e-mails, plan your resources & equipment, book time and expenses on the go, so budgets can be properly managed and billable time doesn't leak away. Create new opportunities simply

and convert them into projects; 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 project templates
- 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 engineering

As a stand-alone solution, the Unit4 PSA Suite delivers great value for your firm out-of-the-box. The built-in best practices are based on our extensive experience with engineering organizations similar to yours. You get the right tools to maximize the productivity of your personnel, their billable time and automate your organization's processes. It can help you achieve operational excellence - essential in a world where it 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 customers
- 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

What made us go for Unit4 was that their solution already has a lot pre-configured but it leaves room for a lot of flexibility to be tailored to our needs. Also the international aspect was very important and the PSA Suite with project management for architects allows us to manage our projects around the world. So even if we are working on very different projects in multiple countries with multiple currencies, we can still manage them all in a single platform.

Mike Pfisterer

Chief Architect at Santiago Calatrava LLC

Make optimal use of resources

- Match people and projects via a built-in matching engine
- Access the skills engine directly from the resource schedule
- Register hours and expenses in advance for outsourced personnel
- 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 projects

- Use the built-in equipment and personnel planning tools
- Measure actuals against budgets and monitor project forecasts
- Create projects and budgets with pre-defined templates
- Plan project schedules through Gantt Charts
- Check project health with built-in performance reports
- Record time, expenses, fees, allowances directly on the project, via web & app

Bill with precision

- Recognize Revenue and Work-In-Progress (WIP)
- Consolidated billing from different projects
- 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

