

Unit4 PSA Suite in IT Services



Driving operational excellence in IT Services firms

Manage your client relationships and project delivery: 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 Client satisfaction is the lifeblood of any IT services firm. So your top priority as a business is to provide value to your clients by consistently delivering projects within budget, on time and on scope. Seamless integration across systems and a smooth handover process from Sales to Services teams is essential for success; as is the opportunity to boost productivity by automating your organization's processes.

The modern IT professional requires the best tools to manage their everyday business. With the Unit4 PSA Suite, you can: track all communication and e-mails, book time and expenses on the go; so that budgets can be properly managed and billable time doesn't leak

away; create new opportunities and cases 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 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 sales to cash, in one single solution

Product capabilities for IT Services firms

As a stand-alone solution, the Unit4 PSA Suite delivers great value for your business out-of-the-box. The built-in best practices are based on our extensive experience with IT Services firms similar to yours. You get the right tools to maximize your employees' productivity and a 360-degree view on your customers. 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 clients
- Manage opportunities; forecast sales and revenue
- Use the embedded case management tools, including timesheet functionality
- Coordinate your efforts with embedded marketing automation tools
- Utilize integrations with O365, SharePoint, LinkedIn, Company Info and D&BB

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 scheduling board and visualization of resource utilization
- Use the employee portal with HR integration

Execute profitable projects

- Gain more insight into your customer support contracts with incorporated time entry and billing options
- 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 and case, 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
- Utilize the subscription billing engine and retainer 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

