



## Driving operational excellence in architecture firms

Manage your customer projects: from the first 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.

Within your architecture firm, your focus is on converting your customers' dreams into beautiful design. As an architect, you are always looking for new opportunities and innovative projects; trying to maximize the time worked on projects and minimize time spent on administrative work.

Modern professional design firms require the best tools to efficiently manage their everyday 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 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 designed specifically for architecture firms
- 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

“ 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**

## Product capabilities for architecture

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 professional design firms similar to yours. You get the right tools to maximize your staff's efficiency and effectiveness by automating your firm's processes, and a 360-degree view on your clients. 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

### Execute profitable projects

- Use the built-in resource 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

### Make optimal use of resources

- Match people and projects via a built-in matching engine
- Access the skills engine directly from the resource schedule
- Use Resource Sheets to manage professional/technical staff
- Get a visualization of the firm's resource utilization rate
- Use the employee portal with HR integration
- Retrieve scheduled work directly from Outlook agenda into your timesheet

### 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 installment billing and forecasting

## Adding extra value

### Combine the best of PSA and ERP

The stand-alone Unit4 PSA Suite can also be integrated with the financial back-office solution of Unit4 Business World On! or 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

## About Unit4

Unit4 is a leading provider of enterprise applications empowering people in service organizations. With annual revenue of close to 600M Euro and more than 4200 employees worldwide, Unit4 delivers ERP, industry-focused and best-in-class applications. Thousands of organizations from sectors including professional services, public services, not-for-profit, real estate, wholesale, financial services and education benefit from Unit4 solutions.

Unit4 is in business for people.

**unit4.com**

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