

Unit4 PSA for IT Services firms



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 Professional Services Automation (PSA) built on the powerful Microsoft Dynamics 365 CRM platform.

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 in 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 Unit4 PSA you can: track all communication and 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 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 cloud solution.

Unit4 PSA delivers

- Pre-defined project templates and built-in legislation support
- Built-in industry best practices
- Increased efficiency/performance and a reduction in admin time
- Synergy – end to end collaboration from sales to cash

Product capabilities for IT Services firms

Unit4 PSA 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 like yours. You get the right tools to maximize your employees' productivity and a 360-degree view of your customer projects. It can help you achieve operational excellence - essential to helping you accelerate your business and stay ahead of the competition.

Win more business

- Track client communication, manage your pipeline and engage with your clients
- Manage opportunities; forecast sales and revenue
- Use embedded case management tools, including timesheet functionality
- Coordinate your efforts with embedded marketing automation tools
- Utilize pre-built 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
- Sync scheduled work directly from Outlook Calendar 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 in Gantt Charts
- Check project health with built-in 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)
- Consolidate 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

Unit4 PSA can be integrated with any 3rd-party ERP to complete your true enterprise business platform.

Leverage your Microsoft investment

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



To learn more about how Unit4 PSA powers IT Services businesses like yours, contact us at psasales@unit4.com

