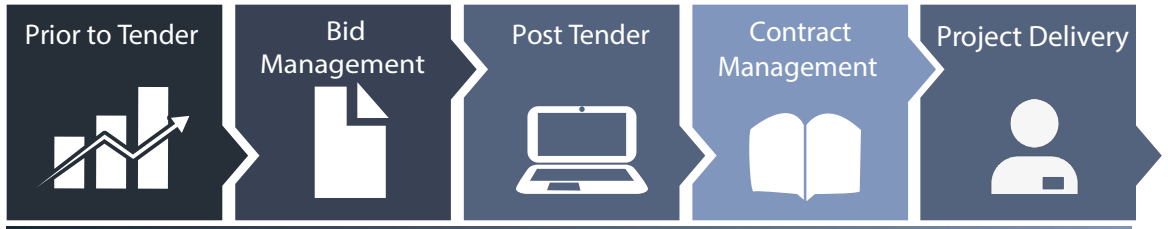




Project Management for Dynamics CRM

Track the entire customer contact process from sales force automation and tender management through to project delivery and ongoing account management.



Bid management

Automation and seamless integration of all sales and marketing business processes for both pre-sales and post sales, from winning new customers to billing. During the pre-sales bidding process the sales team benefit from stage status reviews, customer insight, improved collaboration, increased sales productivity and project estimation functionality. With bid analysis functionality the sales team can assess win rate probability and determine whether to proceed with bids in order to use their teams time efficiently.

Key features:

MANAGE YOUR SALES & MARKETING PROCESSES

- > Targeting & campaign management
- > Mailing lists
- > E-shots
- > Campaign analysis
- > Historic tender/bid processes
- > Win/loss breakdown
- > Successful sector analysis
- > Pipeline forecast reports
- > Identify key decision makers
- > Bid/no bid risk assessment

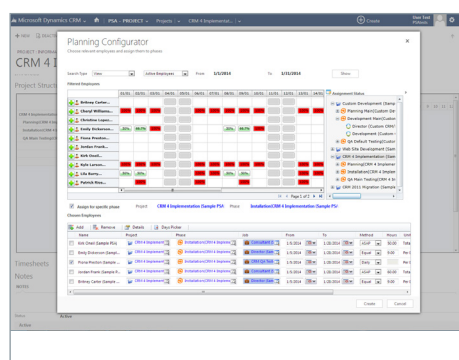
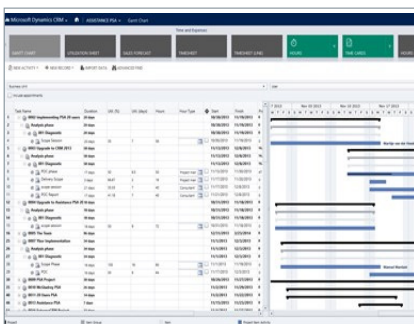
Streamlined projects

An end-to-end solution to plan, monitor, visualise, report and invoice projects. Allowing teams to be more accurate and productive resulting in higher profitability and cash flow.

To run your service company and drive its portfolio of projects, your executives need accurate and online information. This solution gives executives visibility into all professional service aspects of your projects: planning, contracts billing and invoicing, accounting, resource utilisation and profitability information. The solution is highly configurable and can be adjusted to the company's way of working with projects.

COMPLETE VISIBILITY INTO:

- > What's due? What's billable?
- > What needs to be scheduled?
- > Which projects exceed their budget?
- > Which employees are under-utilised?
- > How long specific tasks are taking
- > Which clients are most profitable?



Plan your projects

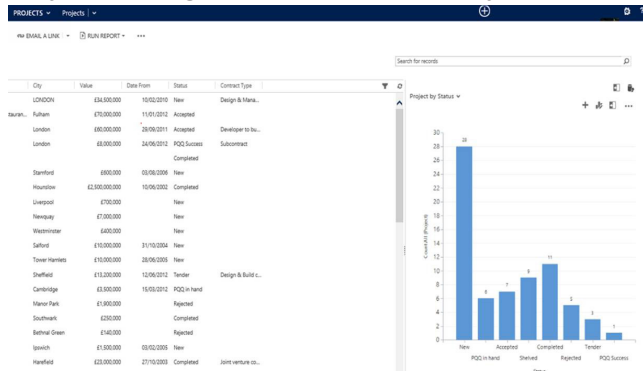
With the PSA solution the creation of new projects, building budgets and project plans, as well as allocating resources is significantly simplified. The dashboard helps project managers control, manage, document and plan all projects and tasks.

MANAGE RESOURCE UTILISATION AND STAFF PLANNING

Use the planning module to plan your project phases and tasks and view your team schedule to allocate resources depending on their skill, cost and availability.

Keep your projects on track

The PSA solution gathers project management, time registration and invoicing management, project managers are at any given time, able to get an updated overview of the future progress and finance of the projects – both the expected and the real contribution margin. The project managers' access to the projects can be restricted if necessary.



Easy invoicing for project managers

Project managers can be put in charge of preparing the invoices with the PSA solution. In many cases they have an excellent insight into what can be invoiced and a company's turnover and precision in invoicing has frequently been seen to increase solely because of this.

Be a project manager - not an administrative assistant

Many project managers spend more time on administering projects than managing them as excessive time is used to assemble information on time consumption, budgets and project plans from multiple sources. The PSA solution is constructed so that all project data is presented in one centralised display. This enables project managers to best use their competencies on what's important – managing projects.

Project reports and documentation

With PSA Solution the project manager can retrieve precise reports and deliver updated documentation for progress or customer meetings in just a few minutes and save hours of preparation.



ABOUT US

Founded in 1989, Prodware Group is an international leader in creating and deploying IT solutions for business. As the largest Microsoft Dynamics partner in the EMEA region, Prodware has 1,700 employees and 20,000 clients across 15 countries. Supported by significant investment in R&D, worldwide strategic alliances and a wealth of experience in delivering international IT solutions, the group aims to deploy its Prodware Adjust offering globally.

Prodware UK | Prodware House, Waterfold Business Park, Bury, BL9 7BR | T: 0161 705 6000 | www.prodware.co.uk | info@prodware.co.uk

SELF-SERVICE PORTAL FOR YOUR EMPLOYEES

Your employees can rapidly and easily submit their timesheet and expenses through a secured self service portal. Eliminating the process of submitting data by using multiple methods paper, email spreadsheet, telephone. Employees can view timesheet and expense approval status and also their utilisation and additional metrics.

INTEGRATED WITH DYNAMICS CRM SALES MODULE

One of the key benefits of implementing the PSA solution based on Dynamics CRM is the automation and integration of all sales and marketing business processes (leads, opportunities, quotes and invoices) from winning new customers to billing. This gives you a full 360° view of your business metrics, in real time.

BILLING AND INVOICING PROCESSES

The PSA solution is built on a strong security model that gives your employees access only to the projects that are assigned to them, rules and policies can be set for submitting timesheets and expense forms per each project or phase. Built-in processes gives your project managers the ability to approve/reject timesheets and expenses for billing and invoicing and bill specific projects or items.

INTEGRATION WITH MICROSOFT PRODUCTS

- > [Dynamics NAV](#), [Dynamics AX](#)
- > [SharePoint](#) (Project Documents)
- > Microsoft Project (export and import)
- > [Microsoft Outlook Calendar](#) (planning and timesheets)
- > [Skype for Business](#)
- > Visual Studio Team System (report work items as timesheets)