## FocusLive® PSA Solution for Dynamics CRM

For your Professional Services Organization





# Benefits:

- Giving you complete visibility into:
  - What's due?
  - What's billable?
  - What needs to be scheduled?
  - Which employees are under-utilized?
  - How long specific tasks are taking?
  - Which clients are most profitable?
- 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 the status and approval of submitted timesheets and expense reports and also view their utilization and other metrics.

- Built on Dynamics CRM Platform
- Available on CRM 2011

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

# Project Management, Time & Expense Tracking and Invoicing

Give your project managers and directors the tools they need to manage, not to administer staff.

## Streamlined projects

The FocusLive PSA solution offers a series of tools to plan, monitor, visualize, report and invoice projects. All this makes the job easier for project managers.

To run your service company and drive its portfolio of projects, your executives need information. FocusLive PSA Solution gives executives visibility into all the managed work in your organization.

All the tools can be adjusted to the company's way of working with projects, and can thereby contribute to the spread of a consistent model for project work in the organization.



#### Plan your projects

With the FocusLive PSA solution the creation of new projects, building budgets and project plans, as well as allocating resources is significantly simplified.

The project administration in FocusLive PSA solution is a dashboard dedicated to project manager to control, manage, document and plan all their projects and tasks.







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#### **Benefits:**

 Submit timesheets with Outlook Appointment Integration

Complete, submit and manage timesheets without ever leaving the comfort of your Outlook calendar. Eliminate reporting time to the wrong project by embedding project, activity, category and invoiceable information into your Outlook appointments.

 Manage resource utilization by using built-in dashboards and dashboard wizard

The integrated dashboard wizard gives executives and managers the ability to create and view dashboards and reports on-the-fly.

Strong security model

The FocusLive 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 ability to approve/reject timesheets and expenses for billing and invoicing.

CFMD - Certified For Dynamics CRM

Certified for Microsoft Dynamics ("CfMD") is a solution certification achieved by Microsoft Dynamics partners whose software solutions have met Microsoft Corporation's highest standard for partner developed solutions to deliver comprehensive business management systems

### Keep your projects on track

Because the FocusLive 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 contribution margin and the real contribution margin. The project managers' access to the projects can be restricted if necessary.

#### Let project managers be responsible for invoicing

Project managers can be put in charge of preparing the invoices with the FocusLive 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 a 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 FocusLive PSA solution is constructed so that all project data are presented in one centralized display. This enables project managers to best use their competencies on what's important – managing projects.

#### **Project reports and documentation**

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

Data from reports can be exported to other programs and formats incl. Microsoft® Excel, XML or PDF enabling project managers to continue working on them.



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②+33 979 999 000 □+33 979 999 001 □info@focus-live.com FocusLive is a software solution factory dedicated to building on-premise solutions, Software as a Service (SaaS) for Industry-specific (Vertical) solutions and Add-ons built on the Microsoft Dynamics CRM platform.

FocusLive is a leading provider of medium size/enterprise-level industry specific CRM and XRM solutions, powered by Microsoft dynamics CRM. Focus Live industry specific solutions are designed to quickly and easily get businesses up and running on Microsoft Dynamics CRM - whether it's On Premise, Online, on demand or hybrid delivery models.

Our Focus Live industry solution offering is a unique and powerful delivery model that combines industry knowhow and best practices with advanced Dynamics CRM knowledge and expertise. Our solutions are distributed globally to customers through a strong partner network.