



Exact e-Synergy for Professional Services Applications

" The fact that field specialists will be able to enter and access all customer data via the Internet is a great efficiency improvement."

Whether you're a consultant, engineer, lawyer, marketing manager, accountant or contractor, you work in an industry that provides a service and bills your time by the hour. When working in this environment, every minute needs to be recorded and tracked to insure corporate profitability, audit ability and seamless communication.

At Exact Software™, we realize that not everyone conducts business in the same way. No matter what service industry you're in, Exact PSA is fully tailored to fit your specific needs. Time tracking, project management and billing features provide the functionality you expect from a PSA solution. However, what sets Exact PSA apart from our competition is that it includes e-Synergy®, Exact Software's Web-based, front-office business management platform.

Exact PSA is a fully integrated, Web-based solution for the professional services industry:

- Timesheets/Planning
- Invoicing
- Account Information
- Project Billing
- Reporting
- Knowledge Sharing

Timesheets/Planning

Making sure you track every minute of your productivity over the course of a business day is imperative for profitability. With 20 unique predefined rates per professional available, information is easy to enter and allows organizations to bill by client, task or professional. All you need to do is indicate the project, the client invoiced, and enter the number of hours worked. Actions, transactions and documents will then be linked to the appropriate accounts and projects for complete control, efficiency, and visibility. Everybody, including customers, can access content based on their security level.



Benefits of Exact PSA...

- Reduce back-office support calls by 50%, with a Web-based self-service portal, providing immediate access to FAQ's, workflow and customer information.
- Allocate the right resources for the job, based on project history tracking.
- Accurate billing with real-time project entry. No more untracked expenses.
- Project management and forecasting of billable and non-billable hours.
- Single entry of timesheet data, saving time, money, and repetition.

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If turned on, a “project tracker” can appear in the corner of your computer screen to accurately record the amount of time you spend working on a specific project. Upon completion of the task, this information can be automatically updated with in your timesheet, providing both accuracy and time savings.

Time Savings Example (based on 20 work days)

Staffing	Efficiency Gain	20 Days
5 Office Staff:	60%	480 hours
10 Field Specialists:	10%	160 hours
Total corporate efficiency gain and hours freed up for customer relations	26% overall	640 hours

Everyone in the field raises simple questions pertaining to credit, AR, status of orders, etc... For every 10 specialists, calling in such questions consumes the support of three fulltime employees. By having all information available to the field specialists in real-time, via a Web-based portal, their productivity is improved by 10 percent, and back-office staff are no longer interrupted to answer the inquiries from the field.

*Statistics based on PMB Research Study.

Project Billing

As new customers are entered into Exact PSA, a project with a specific, predefined billing rate is created within your records. You have the option to have everyone who works on this project bill at the same rate, or bill at their own personal rate. By predefining up to seven categories of billing, and utilizing your 20 unique rates per professional, you can insure that projects are being invoiced as contractually agreed upon. Information is obtained quickly and easily.

With the ability to understand and evaluate employee rates and experience, organizations have the power to select the right resource for the right project.

Invoicing

After information is entered into the system, invoices can be generated in real-time. The inclusion of expense arrangements with your customers are tracked within Exact PSA, allowing for automation of the billing process. Invoice templates can be customized by client with personalized logos and customer specific contractual payment information, giving your organization a professional and consistent image.

Upon invoice generation, an editable electronic version of the invoice can be displayed provided to the project manager, for review and online modification prior to release. No more paper waste, and no more inaccurate information. Just one quick step to invoice precision.

Account Information

By integrating with back-office systems, Exact PSA is able to access customer account information and history directly from your accounting/financial solution. All client contact is centrally stored and easily accessible to those who need it, when they need it. With the appropriate security level, clients can access account history to perform self-service functions, such as billing inquiries, updating profile information and initiating support requests. With multi-currency and multi-lingual functionality, international organizations are able to consolidate their world-wide operations and streamline global communication.

Reporting

With Exact PSA reporting functionality, you are able to generate a list of total employee hours spent working on specific project over time, and segment that further by task. This is a great tool for managers to better understand how their time and resources are being spent, and gives them a means to better plan for growth within their organization.

Exact PSA Integration with e-Synergy

The power of Exact PSA integration with e-Synergy enables all workplace information to be stored in one centralized database, putting information at your fingertips via the Internet. As meetings are entered into your e-Synergy planning calendar, workflow engines automatically update your timesheet base on the project, employee and rate information provided. While documents, such as invoices and contracts, can be linked directly to customer projects for tracking and review. This collaboration unites your business, providing one solution and one view of your workplace information that minimizes man-hours, increases accuracy, and insures total business integration.

For more information on how Exact PSA can assist your company, please call 1.800.468.0834, Ext. 2650.