

## Assistance PSA Suite for Microsoft Dynamics CRM 2013™

## Fact sheet

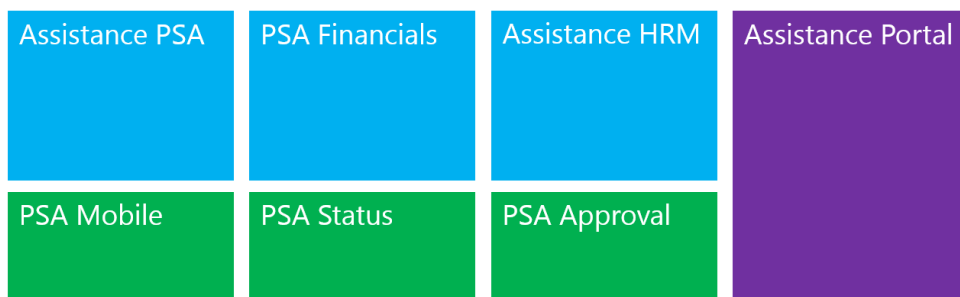
**Assistance PSA** for Microsoft Dynamics CRM™ was developed for the new generation of information workers, who are always online and work wherever and whenever they wish. Can your organization facilitate that? Are you ready for the new generation of information workers? **Assistance PSA** is a completely integrated solution for contemporary information workers. Developed for the latest technology, the Microsoft Dynamics CRM™ platform.

Choose for the future and make sure that you are ready for it! Let us introduce you to **Assistance PSA** for Microsoft Dynamics CRM™, *the* solution for professional service organizations that are looking ahead.

### You prefer to continue working with Outlook™

The vision is clear and simple: you, today's knowledge worker, want to use an application that is easy and user-friendly in a familiar environment. You prefer to continue working with Outlook™, to create projects, make budgets and schedules, all this in your familiar Outlook™ environment. It would save so much time if you had a smart solution that also links to your calendar that allows you to make hour entries and to deal with your resource planning in a way that is integrated with Outlook™. The time has come to choose for efficiency, to start working in the way you would have devised yourself, to move on to a new generation of software that will give you and your organization a significant edge.

### PSA Suite for Microsoft CRM 2013



### Full integration with your Dynamics ERP environment

**Assistance PSA** offers a full integration with your financial platform, the Microsoft Dynamics ERP platform (NAV/GP/AX). This standard integration is delivered out of the box by Microsoft™. In the *front end* section, you manage your customers and contacts with full CRM functionality: **Assistance PSA** adds project management, project calculation, project planning, time and expense registration and invoicing to this basis. All information you need in a single platform, online and offline.

**Assistance PSA** for Microsoft Dynamics CRM™ is available *On Premise*, *SaaS* and *CRM Online*, the choice is yours!

### Assistance PSA is xRM

Assistance PSA is *the* xRM solution for professional service organizations. By making use of the powerful Microsoft Dynamics CRM platform, this technology is fully available within **Assistance PSA**.

From **Opportunity** to Project Marketing campaigns, mailings, turning leads into opportunities: all those things are standard CRM functionalities, but we go beyond standard CRM! **Assistance PSA** allows you to turn opportunities into projects, calculate your hours and plan your projects, all with a single mouse click.

### PSA Mobile App

Book your hours without a pc or laptop. With Assistance PSA Mobile APP, Assistance PSA users can enter their hours using mobile devices like smartphones and tablets. The hours are then automatically saved in Assistance PSA for Microsoft Dynamics.

### Project Status App

Check the actuals of projects on your mobile device. The Project Status App will be a native App for multiple devices. The App will have live tiles to actively warn the project manager on projects that are out of budget.

### Invoice your projects with a single mouse click

With a single click of the mouse you can generate invoices that are ready for your financial department.



# Assistance PSA Suite for Microsoft Dynamics CRM 2013™

The screenshot displays the Microsoft Dynamics CRM interface for the Assistance PSA suite. On the left, a calendar view shows project activities for Mamad Mardani (To be booked 0 - Booked 37 - Still to be booked - 37) from Monday 21 to Thursday 24. Activities include website creation, meetings, and design sessions. On the right, a 'Project Status Report - Webpage Dialog' for project 2013.0078 PSA Implementation 250 seats is shown. It includes an 'Overview in Money' bar chart and a detailed table of financial metrics.

Item Name	Amount	Budget	Forecast	Actuals	Invoiced	% Completed	Budget - forecast	Budget - actuals	Amount - actuals
001 Diagnostic	2100.00	11200.00	12320.00	2100.00	2100.00	0.00	-1120.00	9100.00	0.00
002 High Level Design	25000.00	20000.00	0.00	280.00	0.00	0.00	20000.00	19720.00	24720.00
003 Software licenses	5000.00	0.00	0.00	5000.00	5000.00	0.00	0.00	-5000.00	0.00
004 Deploy	0.00	0.00	0.00	55.00	55.00	0.00	0.00	-55.00	-55.00
004 Deploy	0.00	0.00	0.00	400.00	0.00	0.00	0.00	-400.00	-400.00
005 Project Management	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
006 Project expenses Fixed - Call center	2000.00	1500.00	0.00	0.00	2000.00	100.00	1500.00	1500.00	2000.00
007 Project expenses - actual	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

This screenshot shows the project details for '2014.0175 CRM implementatie'. Key financial metrics are displayed: Project Number 2014.0175, Budget \$14,800.00, and Contract Value \$4,027.50. The interface is divided into sections: IDENTIFY (Active), STAKEHOLDERS, and FINANCIAL. The STAKEHOLDERS section shows project status as '20 In progress' and software implementation as 'Barnabas Health'. The FINANCIAL section shows 'Assistance Software EMIL' as the legal entity.

The Gantt Chart displays the project schedule for '2014.0175 CRM implementatie' from April 11 to May 18, 2014. The chart shows task durations, resource utilization, and dependencies. Key tasks include Analysis Phase (4/25/2014 - 5/17/2014), Design (4/25/2014 - 5/17/2014), Development Phase (5/18/2014 - 5/24/2014), and Implementation (5/18/2014 - 5/24/2014). Resources like Mamad Mardani and various consultants are assigned to these tasks.

## Gantt Chart Activity Planning and Resource Planning

With the built-in Gantt Chart Activity Planning in Assistance PSA, you can Track and Chart Timelines and draw dependencies and define Milestones. Plan your resources with the Outlook integrated Group Calendar.

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	Solutions			APPs			Pricing
	Assistance PSA	Assistance HRM	PSA Financials	PSA Mobile	PSA Project Status	PSA Approval	
<b>SaaS Pricing</b> (per user/ per month)							
Professional	•	•	•	•	•	•	65 USD/EURO
Basic	•			•	•	•	30 USD/EURO
Essentials	•			•	•	•	15 USD/EURO
<b>On Premise Pricing</b>							
Professional	•	•	•	•	•	•	750 USD/EURO*
Basic	•			•	•	•	500 USD/EURO*
Essentials	•			•	•	•	250 USD/EURO*
Assistance Portal							4,500 USD/EURO**