

Efficiently and effectively optimize your professional services resources.

PRODUCT BRIEF

SOFRAX PSA

Softrax PSA enables you to manage your professional services organization like a profitable consulting practice.

Softrax Professional Services Automation (PSA) provides flexible, fully integrated control over your professional services resources. Providing business-critical functionality with tools for software, Internet and content companies, it automates critical business processes and enhances delivery of professional services from contract to invoice. By enabling you to track time and expenses more completely, deploy resources and manage projects more effectively, and generate services invoices more promptly and accurately, Softrax PSA establishes an unsurpassed platform for maximizing the return on your professional services delivery.

IMPROVE CONTROL OVER TIME AND EXPENSES

Rapid and effective time and expense management is essential to any professional services organization. Softrax PSA simplifies time and expense reporting with a powerful, integrated system that offers a single point of time and expense entry and ensures prompt submission, verification and approval of individual staff members' data. It also allows consultants to enter time and expense information via the Web. And for easier expense management, Softrax PSA lets you quickly route expense reports for approval and ensure that expenses are applied to the appropriate general ledger accounts.

MAXIMIZE RESOURCE DEPLOYMENT

Softrax PSA makes it easy to maximize your professional services organization's most valuable commodity – billable time. It lets you quickly evaluate staff availability, search for a particular skill, and monitor the utilization and productivity of consultants. As a result, you have the information you need to make the most of new and existing opportunities.

DELIVER PROMPT, ACCURATE INVOICES — THE FIRST TIME

Invoice generation can be a time-consuming challenge – but not with Softrax PSA. Its integrated invoicing capabilities dramatically shorten your payment cycle by including account managers – and even clients, via the Web – in the invoicing process. By providing ongoing visibility into invoice development, it ensures that invoices are prompt, accurate, and, most important, in line with client expectations.

Manage Your Professional Services Organization Like a Profitable Consulting Practice

MONITOR AND CONTROL TIME AND EXPENSES

- Track expenses at the project level
- Configure expense categories and items with rules and guidelines to enforce adherence to corporate or departmental standards
- Route expense reports for approval
- Manage travel expenses and ad hoc requests from managers
- Provide single entry point for time, expenses and approval workflows
- Track billable and non-billable hours
- Monitor time submission compliance at any time

OPTIMIZE CONSULTANT UTILIZATION

- Automate voucher creation for reimbursable employee expenses
- Scan resource availability by role, department and name
- Search resources by workgroup, skills, personal availability and project workload
- Provide mobile users with full access to data and functionality via the Internet

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- Foster improved collaboration by allowing team members to create team folders for sharing ideas and documents
- Automate distribution of role-based information that gives staff members only what they need – and are authorized – to see
- Enable offline time and expense entry and project management, using a browser

STREAMLINE INVOICE PROCESSES AND PAYMENT

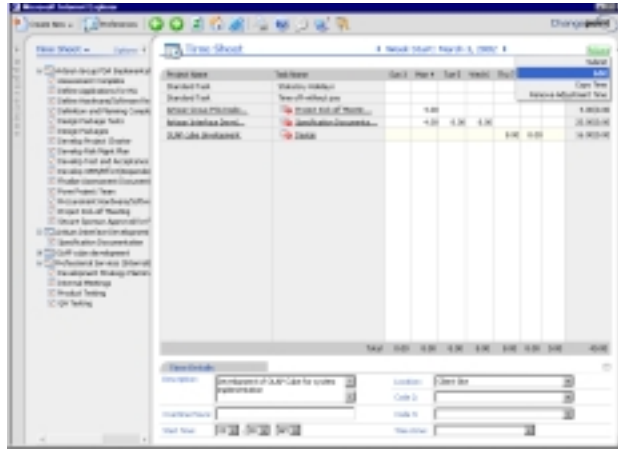
- Centralize storage of approved time, expenses, company and billing information
- Include account managers in the invoicing process
- Support fixed-fee, time and material, and combined billing
- Provide appropriate managers with reminders associated with the invoice process
- Create invoices and process approvals through an easy-to-use interface
- Monitor payments, invoice status and outstanding approvals

ENHANCE CLIENT SERVICE

- Define billing arrangements with a single engagement entry
- Store important engagement information, such as billing rates, fixed-fee schedules, and the client contact with time/expense approval authority
- Maintain project-level information, including overall budget, initial start/end dates and planned hours
- Require a project task status report with each time submission
- Define an unlimited number of project tasks, indicating whether each is billable, non-billable or part of a fixed-fee arrangement
- Manage projects using a bi-directional link with Microsoft Project

INCLUDE CLIENTS IN SERVICE DELIVERY

- Provide “guest access” to clients via the Internet
- Give clients access to project plans
- Keep clients apprised of project progress through online project status charts
- Permit clients to join team discussions
- Allow clients to view pending invoices on the Web



Integrated time tracking ensures that time data is accurate, on time, and approved.

PRODUCE COMPREHENSIVE REPORTS

- Produce reports for selected individuals or for staff members with specific roles
- Develop a variety of standard reports, including vacation time taken, project slippage, project profitability and work in progress
- Create custom reports with simple HTML editors
- Support multiple billing offices
- Allow individual billing offices to maintain their own default currencies, billing roles and rates, daily and hourly rates, invoice numbering systems, invoice formats, and approval workflow

ABOUT SOFTRAX

Softrax Corporation is a leading enterprise software company providing revenue management solutions that fundamentally change the way technology companies manage, analyze and predict their revenue streams. Expressly designed for the dynamic software, content and Internet sectors, Softrax systems are the best products to meet the complex revenue management business requirements of these industries. Softrax delivers business-critical solutions to hundreds of customers. Headquartered in Canton, MA, Softrax Corporation is privately held. Further information is available at www.softrax.com or 1(888) 4SOFTRAX.



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