Efficiently and effectively optimize your professional services resources.

SOFTRAX 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, 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 provides 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

SOFTRAX™

- 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

Integrated time tracking ensures that time data is accurate, on time, and approved.
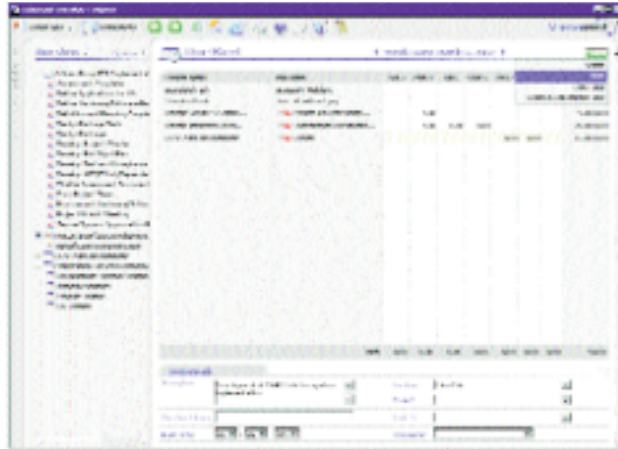
STREAMLINE INVOICE PROCESSES AND PAYMENT

- 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

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 is a leading provider of revenue management and enterprise billing solutions that fundamentally change the way companies manage, report, and forecast their revenue and cash. SOFTRAX solutions automate the entire order to revenue and order to cash cycles, from contract and order management, billing and contract renewals, through revenue recognition, reporting, and forecasting.

Corporations manage billions of dollars with SOFTRAX solutions to optimize their billing, maximize their revenue, reduce operating expenses, comply with revenue recognition regulations and Sarbanes-Oxley requirements, and gain unprecedented visibility into their business performance. SOFTRAX is pleased to have Goldman Sachs & Co. and ABRY Investment Partners as equity partners and investors in the company.

SOFTRAX™

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