



# Assistance PSA for Microsoft Dynamics CRM 2011™

# 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 2011™ 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.



### 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 later in the year at *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**. More information: [www.xrm.com](http://www.xrm.com)

### 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.

### Time registration integrated with Microsoft Outlook™

We can't make it any more fun, but we can make it easier! Things are so much easier with **Assistance PSA**: enter your appointments from Outlook™ and, hey presto, your hours are registered! But it does not end there. We also integrate our resource planning with your Outlook™ environment.

### Expense registration

You can book not only your hours to your projects, but your expenses as well. The integration with workflow makes it child's play.

### Invoice your projects with a single mouse click

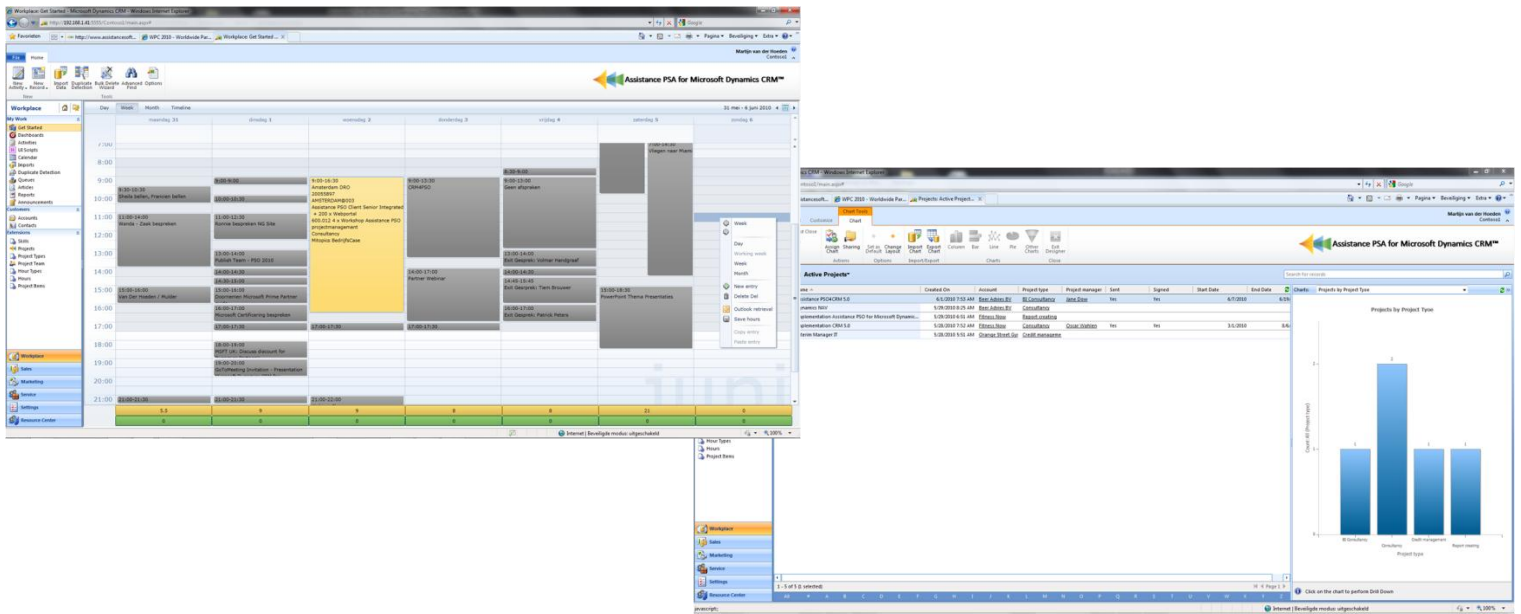
With a single click of the mouse you can generate invoices that are ready for your financial department.



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Version Overview	Platform Microsoft Dynamics CRM™	Time Sheet registration	Expense registration	Project Management	Invoicing	Project Budgeting	Resource Planning	Batch Invoicing	Integration with Dynamics ERP*	Multi-Company	IC-Company functionality	Purchase Order functionality
Assistance PSA For Microsoft Dynamics CRM™ Standard	✓	✓	✓	✓	✓							
Assistance PSA For Microsoft Dynamics CRM™ Essentials	✓	✓	✓	✓	✓	✓						
Assistance PSA For Microsoft Dynamics CRM™ Advanced	✓	✓	✓	✓	✓	✓	✓	✓	✓			
Assistance PSA For Microsoft Dynamics CRM™ Enterprise	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

\*Dynamics ERP integration is available for NAV/AX/GP



## The Assistance PSA for Microsoft Dynamics CRM 2011™ Roadmap

This roadmap shows you when the different versions will be available.

