CRE8TIVE PSA

Professional Services Automation Fact Sheet

"With Epicor ERP in place, we now have a complete view of our clients' entire lifecycle. Utilizing Epicor ERP with our Cre8tive PSA Industry Solution has provided us with the ability to make better informed decisions quickly, allowing us to be more agile."

– Aaron Continelli
  Cre8tive Technology and Design

ERP Solutions for PSA

Cre8tive Technology and Design (CTND) is a leading provider of Epicor ERP for professional services organizations. We're so confident in our solutions that we use the Cre8tive PSA solution to run our own company. Not only do we offer the best in high-quality services and solutions, we keep up to date about the most recent industry-specific standards for all of our clients when customizing our software.

Our solution is designed for U.S. based, project-driven professional service companies such as management and business consultants, architecture and engineering firms, and IT service companies. Our PSA ERP solution leverages your current investment in Epicor ERP to manage your client from start to finish. It helps you keep up with relationships, resources, time cards, billing, accounting, and analytics.

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technology & design

Our PSA Industry Solution Includes:

Sales Integration and Project Estimation

When you're running a business you need to save time wherever you can, and Cre8tive's sales integration tools help you do exactly that. One of the most convenient features in our PSA industry solution package is the way it integrates seamlessly with your existing SalesForce or Microsoft CRM systems, and this does two crucial things: it lets you automatically synchronize data between CRM and Epicor, and it improves the integrity of all of the data stored on both.

But Cre8tive doesn't stop there. Project estimations can take a lot of time and a lot of steps, and with our Epicor solutions you can save on both. Instead of having to take your new opportunity quote to the various levels of approval it requires, the instant it's finalized, Epicor sends it on whatever path you've defined as necessary within your organization. You can even include email reminders to be sent if the reviewer needs a little push to move the workflow along.

Project Creation and Setup

Just like with the Epicor project estimation features, once that quote is won, a series of actions can be programmed to perform either in Epicor itself or directly within your CRM interface to make that project happen. Whoever needs to start working on the project first gets the notification first, and Cre8tive's Epicor solutions make it easy for them to get the project started.
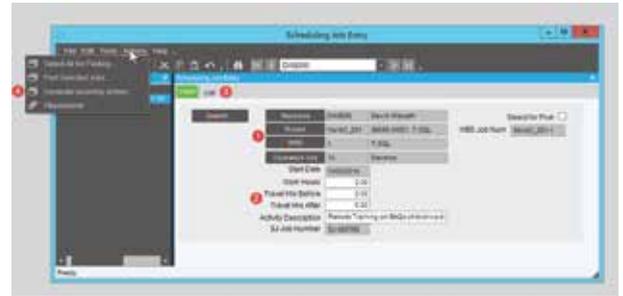

In addition to the defaults like project templates and the ability to paste data directly into the grids of your choice, Cre8tive adds features such as the ability to add the WBS type, supervisor and full path name at the project creation level.

The WBS type you select allows you to group together and analyze WBSs based on this user-defined type code. The supervisor is automatically given permissions to review all the timesheet entries for this WBS to help prevent workflow bottlenecks on projects that require overview by a specific individual. Lastly, the full path name allows you to specify a unique name for your project when the description alone isn't enough to set it apart.
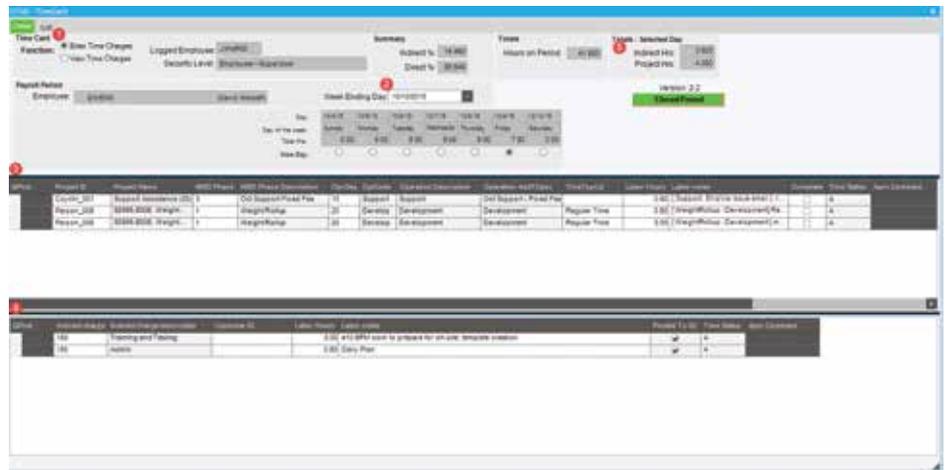
Project Scheduling

After project set up, typically the manager has to go in and schedule the jobs after the fact and one by one. Since this can take additional time away from your day, Cre8tive has added the resource, additional description and message text fields so that the jobs no longer have to be maintained individually and can instead all be assigned directly within the project itself.

The job scheduling feature allows the user to program a set of complex tasks assigned to a specific job type. For example, if you have a project where you'd like to schedule a project manager only once a week for twenty-four weeks, Cre8tive's Epicor additions allow you to do just that. Projects aren't always regular, so these features help you manage uneven job scheduling.

Timesheets, Timecharge Approvals, and Timecharge Reporting

When you're running a project that's focused on professional services, the area you likely spend the most time on is collecting timesheets and organizing the hours charged to projects. That's why Cre8tive has built in time-reporting features that make this process easier on the approval and reporting levels.

For example, on the Cre8tive timesheet you can either enter them or view them based on your project security level. Your project security level also determines whether or not you can enter time for other team members as needed. When it comes to approving time, Cre8tive has also made a few enhancements. For example, the approval screen will now show the number of hours that remain in their budget. If a time entry was rejected, rather than simply being told it was rejected the actual reason will be displayed.

In terms of timecharge reporting, there are several dashboards that all show the viewer details about time charged to the project depending on their access level. Each is custom built with features aimed at their needs, but all include information about the time charged, user name, date, hours, indirect charge or project data, and notes. The User dashboard gives the user access to just their time, the Supervisor dashboard displays data for all employees underneath them in the Org Chart, and the project manager dashboard can display times for any project they manage. WBS Supervisors display data based on which phase they've been assigned to under Cre8tive's enhanced field entries above, and HR and Accounting managers have access to every entry in one screen. In addition to these screens, a time analysis dashboard has been added, letting the user specify a range of dates where indirect vs direct time can be displayed to help keep individual employees on a chargeable target.

Project Reporting

Cre8tive's custom Epicor dashboards makes managing your project simple and effective. You can immediately view the overall plan versus the actual time charged by your employees and even focus on a specific WBS and operation level to see where any additional time is being spent. The project forecast dashboard mirrors the project dashboard in that you can display your data by project, but it also lets you specify the status and weekly revenue by WBS phases and operations. All results are displayed in dollars and hours, including the budget, plan, actual hours/dollars charged, what remains from the plan minus the actual, what's scheduled further down the pipeline for this project and what's backlogged but not yet scheduled.

PSA Invoicing

While Epicor's built in invoicing system is designed perfectly for manufacturing companies, it can make things a little more difficult when you're running a project that either involves or focuses on professional services. That's why Cre8tive has added in key features such as the ability to bill time separate from expenses and to list both separately by employee. Additionally any notes made at the time of each timesheet entry go directly onto the invoice without having to do any additional formatting when it's created.

CTND's knowledge of the PSA industry allows us to offer robust goal-oriented solutions for every level of your company's production and development process. Contact us today to find out how we can help your business cut back on waste, improving your bottom line.

Contact

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Cre8tive Technology and Design is a leading provider of Epicor ERP. We utilize our extensive experience and ERP expertise to create customized solutions for businesses of all shapes and sizes. Trust our staff to deliver effective, industry-specific solutions on time, and within budget.