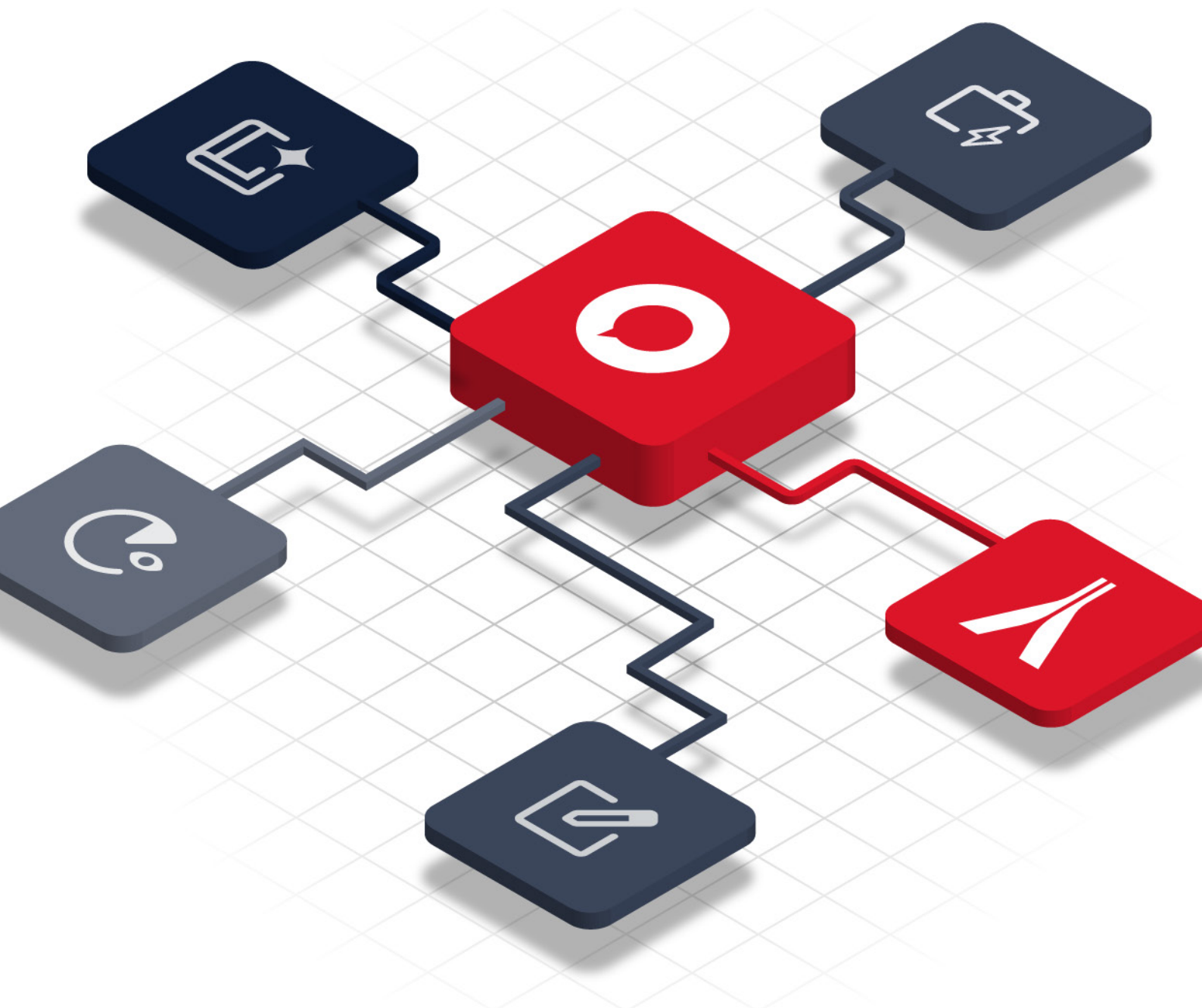




Alternative
Payments

HALOPSA

5 Ways HaloPSA's AI Accelerates Quote-to-Cash Collection



The Quote-to-Cash Frustration HaloPSA Users Don't Realize They Can Fix

Your HaloPSA system is capable of accelerating revenue collection in ways many users haven't discovered. MSPs often remain stuck in manual processes that add weeks to their quote-to-cash timeline.



The Hidden Bottlenecks

Account managers and technical staff spend 3-4 hours crafting statements of work, either in external documents or within HaloPSA's opportunity tickets, coordinating details across departments. Some have built templates or turned to tools like Quoter and QuoteWerks, not realizing HaloPSA can generate comprehensive SOWs in under 30 seconds using AI.

After every approved quote, someone has to manually build the project structure. Task lists, team assignments, timelines—it's 2-4 hours of administrative work that delays project kickoff. HaloPSA's AI can read the approved statement of work and automatically generate this entire project framework.

The handoff problem hits during active tickets. A technician discovers an upsell opportunity but has to break momentum with email chains to sales. HaloPSA lets them create connected opportunities instantly within the same platform, but most don't know this capability exists.

Payment collection becomes a manual burden across multiple systems. Reminder emails, deposit reconciliation, invoice tracking—finance teams spend hours on tasks that can be automated completely from invoice generation through bank deposit.

The Difference

The difference between MSPs achieving 1-7 day quote-to-cash cycles and those stuck at 3-4+ weeks isn't their market or customer base. The difference is knowing which HaloPSA features to activate and how to automate the payment collection process.

The MSPs getting paid faster have figured out how to eliminate these bottlenecks entirely.

HaloPSA's Hidden Power - More Capable Than You Realized

Your HaloPSA system is capable of accelerating revenue collection in ways many users haven't discovered. MSPs often remain stuck in manual processes that add weeks to their quote-to-cash timeline.

The Untapped Capabilities

Your HaloPSA system already includes CRM functionality, opportunity management, automated project creation, client portals, and billing systems. Most MSPs are only using a fraction of what they're paying for.

The AI features alone can eliminate hours of manual work from your quote-to-cash process. Statement of work generation, project task creation, and workflow automation happen automatically based on your templates and business rules.

HaloPSA's Payment Capabilities

HaloPSA excels at managing the operational side of your business—from initial client contact through project delivery and invoicing. It can even process basic payments through a very popular Stripe integration.

However, HaloPSA wasn't designed to be a comprehensive accounts receivable platform. While it can mark invoices as paid, it doesn't handle the sophisticated AR automation that high-volume MSPs need: automated payment reminders, intelligent auto-pay rules, fee management, or seamless accounting reconciliation.

The Complete Solution

MSPs achieving 1-7 day quote-to-cash cycles follow a two-part approach. First, they activate HaloPSA's advanced internal capabilities to eliminate manual bottlenecks in quote generation and project setup. Second, they integrate with a specialized AR automation platform to handle payment collection and accounting reconciliation.

But knowing the approach is only half the battle. The MSPs getting these results have activated five specific capabilities that most HaloPSA users don't even know exist.

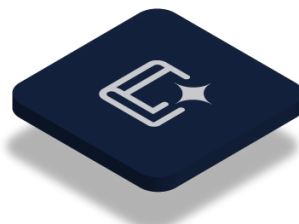
5 Ways to Accelerate Quote-to-Cash Collection



1. The Untapped Capabilities

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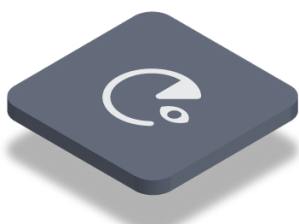
2. AI-Powered Statement of Work Generation

Create reusable SOW templates for common services—server migrations, managed service implementations, security assessments. Each line item on your quotes links to these templates through your product catalog.

Here's how it works: Raise an opportunity ticket, create a quote containing all required products/services, then use the "Generate SOW" action. HaloPSA's AI automatically consolidates SOW templates from all quoted products into a unified, professional document using customizable prompts that match your company's style.

Multiple service SOWs get combined automatically with clear separation by product, so customers can see which services relate to which SOW sections. The AI maintains consistent formatting across all templates while creating a cohesive final document.

What used to require 3 hours of coordination between sales, technical, and project teams now happens in 30 seconds. The generated SOW automatically appears in your customer's quote approval portal.



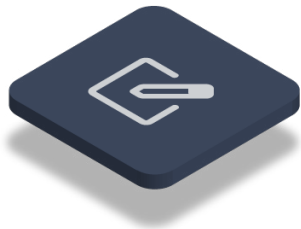
3. Unified Reporting and Visibility

Your service desk, sales team, project managers, and finance team all access the same integrated data platform. HaloPSA includes thousands of stock reports and a custom dashboard builder that pulls data from all departments simultaneously.

Track profitability by customer while seeing which services generate the most support requests. Identify upselling opportunities through service history analysis. Generate executive reports that show the complete journey from initial service request through final payment collection.

The platform includes pre-built dashboards for service desk metrics, sales pipeline analysis, project profitability, and financial reporting. Teams can create custom views tailored to their specific roles while maintaining access to the same underlying data.

Single sign-on for all team members. No switching between systems. Complete visibility across the entire quote-to-cash process.



4. AI Project Task Creation

Once a quote is approved, HaloPSA's AI reads the statement of work and automatically generates the complete project structure. It analyzes each section of the SOW and creates detailed tasks with descriptive summaries based on the SOW headers. Task details include the specific work outlined in each SOW section.

The AI assigns start dates, due dates, and milestones automatically. It can even assign team members based on HaloPSA's qualification matching system, ensuring tasks go to agents with the right skills and certifications.

Project managers who were spending 2-4 hours after each approved quote setting up delivery timelines can now review and refine an AI-generated project in minutes. Projects are ready for execution immediately after quote approval, and any existing project templates will merge seamlessly with AI-generated tasks.



5. Accounts Receivable Automation

The first four solutions optimize HaloPSA's internal processes, but complete quote-to-cash acceleration requires automating the payment collection and accounting reconciliation process.

While HaloPSA can generate invoices and process basic payments through Stripe, it wasn't designed for comprehensive AR automation. High-volume MSPs need sophisticated payment reminders, intelligent auto-pay rules, flexible fee management, and seamless accounting reconciliation that eliminates manual month-end work.

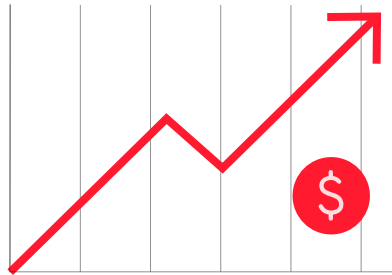
This is where integrating with a specialized AR automation platform becomes essential to complete the quote-to-cash acceleration.

Alternative Payments - Complete AR Automation

Alternative Payments transforms HaloPSA from an operational platform into a complete revenue acceleration system by automating your entire accounts receivable workflow—going far beyond basic payment processing.

Immediate Payment on Quote Acceptance

The fastest way to collect revenue is to eliminate the wait between quote approval and payment. Alternative Payments enables a "Pay Now" button directly on the quote acceptance screen in HaloPSA's client portal. Customers can pay immediately upon approving quotes—no waiting for invoice generation, no separate payment processes.



This isn't just a payment button—it's revenue acceleration. While your competitors wait weeks for payments after sending invoices, you're collecting money the moment quotes are approved.


Comprehensive Customer Payment Portal

Your customers access a white-labeled portal that integrates seamlessly with HaloPSA's client portal while providing advanced payment management capabilities far beyond basic payment processing:


- ✓ View current and historical invoices with complete payment history
- ✓ Add, change, and remove payment methods with bank-level security
- ✓ Set up sophisticated autopay rules tailored to their preferences
- ✓ Pay any outstanding invoices individually or in bulk
- ✓ Access Pay in Installments for large invoices (30-150 day terms at 3-7%)

Advanced Fee Management


Unlike basic payment processors, Alternative Payments gives you complete control over how processing fees are handled:




Pass fees to all customers
Credit card fees automatically added to customer total




Absorb all fees
You pay processing costs for cleaner customer experience



Customer-specific exclusions
Credit card fees automatically added to customer total



Autopay incentives
Waive fees automatically for customers who set up recurring payments



Granular control
Different fee rules for different customer types or service categories

Intelligent Payment Processing

ACH payments	Completely free (unlike Stripe's 0.8% charges that add up quickly)
Credit cards	2.9% for Visa/Mastercard, 3.5% for Amex with transparent fee handling
Pay in Installments	Transform large invoices into manageable payment plans that get you paid upfront
Smart auto-pay rules	"Charge managed service contracts on due date, wait 3 days for project invoices"

Complete Accounting Integration

This is where Alternative Payments truly excels beyond basic payment processing. The platform handles the complex accounting that HaloPSA's basic payment integration cannot:

Step 1

Step 2

Step 3

Invoices created in HaloPSA automatically sync to Alternative Payments in real-time

Intelligent reminder sequences automatically email customers before due dates, on due dates, and at specified intervals afterward

Smart auto-pay rules charge customers automatically based on your sophisticated criteria

Step 4

When payments are received, Alternative Payments automatically creates payment records in both HaloPSA and your accounting system (QuickBooks, Xero, etc.) with proper fee accounting

Step 5

Deposits are automatically created in your accounting software with fees properly separated and linked to the correct payments

Step 6

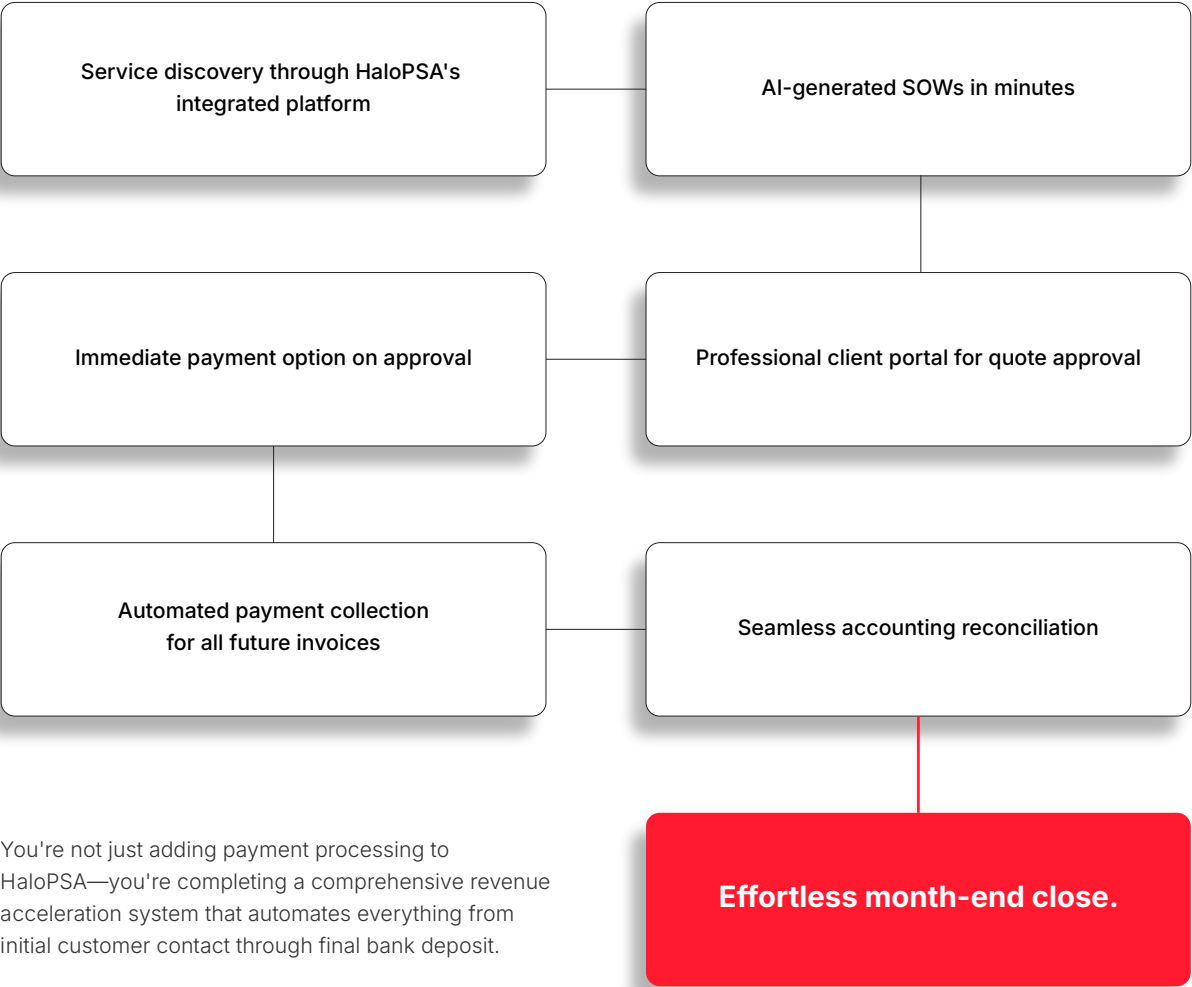
When your bank feed downloads, everything matches automatically—no manual reconciliation required

Month-End Transformation

Traditional payment processing leaves you with hours of manual reconciliation work every week and month. Alternative Payments eliminates this entirely by creating properly linked deposits that match your bank statements automatically. What used to take hours of spreadsheet work now happens without any manual intervention.

The Complete Revenue Acceleration System

This integration transforms the entire quote-to-cash workflow:



Your Results and Next Steps

MSPs using HaloPSA's four internal acceleration capabilities combined with Alternative Payments AR automation consistently achieve quote-to-cash cycles of 1-2 weeks instead of the 3-4+ weeks experienced by those using basic configurations.

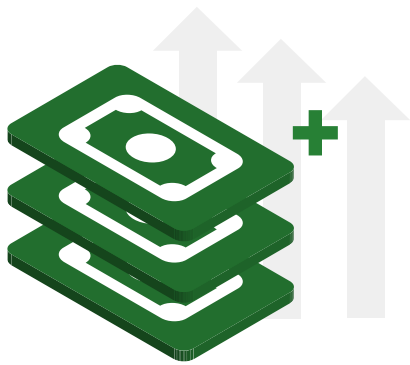
Month-End Transformation

Monthly Time Savings (Based on 7 Quotes/Month):

SOW Creation	21 hours → 3.5 minutes
Project Setup	14-28 hours → 35 minutes
Quote-to-Payment	15-30 days → 1-7 days (same day with Pay Now on approval)
AR Management	5-10 hours → <1 hour

Cash Flow Impact

HaloPSA's internal capabilities compress quote and project creation from weeks to minutes. Alternative Payments then accelerates the payment collection timeline from weeks to potentially same-day for quote approval payments and days for regular invoices.



For an MSP with \$100K monthly recurring revenue, reducing quote-to-cash from 4 weeks to 1-2 weeks means collecting revenue 50-75% faster—equivalent to having an extra \$50-75K in working capital.

Getting Started

HaloPSA's AI features are available now in the stable release. Alternative Payments integration can be configured within hours, though the complete setup including payment processing compliance typically takes up to 30 days to ensure everything meets regulatory requirements.

You're not switching platforms or disrupting existing workflows. You're activating HaloPSA capabilities that accelerate quote and project creation, then adding Alternative Payments to handle the heavy lifting of automated payment collection and accounting reconciliation.



MSPs achieving 1-7 day quote-to-cash cycles use HaloPSA's four internal acceleration capabilities to speed up quote and project creation, then rely on Alternative Payments to handle the heavy lifting of getting paid quickly and automatically.

See Alternative Payments in Action

While HaloPSA's four internal capabilities accelerate quote and project creation, the real transformation in your quote-to-cash timeline comes from automating the payment collection and accounting reconciliation process.

In a 60-minute demonstration, we'll show you exactly how Alternative Payments integrates with your current HaloPSA configuration to automate your entire accounts receivable workflow. You'll see how customers can pay immediately upon quote approval, how intelligent auto-pay rules eliminate manual collection work, and how seamless accounting integration turns month-end reconciliation from hours of work into automatic processing.



Schedule Your Alternative Payments Demo:

Ready to see how Alternative Payments transforms your HaloPSA quote-to-cash workflow? Book a demonstration where we'll show you exactly how to eliminate manual AR processes and achieve same-day payment collection on approved quotes.

See it in Action