

2016 EDITION

TOP 10 PROFESSIONAL SERVICES AUTOMATION SOFTWARE REPORT

Comparison of the Leading Professional Services Automation Software Vendors

Overview of PSA Software Solutions

Professional services automation (PSA) is designed for the lawyer, auditor or consultant in a professional service firm who seeks to better manage projects and resources for clients. This type of solution streamlines business processes to manage documents, record time, bill clients and generate analytic reports to ensure a smooth business for independent contractors. PSA software may also include modules for accounting, client relationship management (CRM), project management and payroll. Similar to an ERP, PSA platforms can act as an umbrella platform to help users throughout all of their operations, increasing efficiency and reducing business risks.

To find the best PSA software and reduce risk of implementation failure, look to solutions that offer seamless module integration with business applications already in place. If you are planning to consolidate other business platforms and use the modules built into the PSA solution, consider the ease of the migration process from one system to the other. Cloud-based and hybrid platforms will offer added flexibility, while features like billing, reporting and project and resource management improve organization and integration with existing operational processes.

Read on to discover pricing and feature comparisons of the industry's best professional services automation solutions in our Top 10 PSA report.

Key Features



SaaS platform



On-premise platform



SaaS and on-premise



Project management



Resource management



Expense tracking



Timesheets



Billing and invoicing



Project accounting



Reporting

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Top 10 PSA Software Comparison

NetSuite OpenAir PSA	Autotask	FinancialForce PSA	Scoro	Unanet PSA
 www.netsuite.com	 www.autotask.com	 www.financialforce.com	 www.scoro.com	 www.unanet.com
\$\$	\$\$	\$\$\$	\$	\$\$\$
Select Customers BearingPoint, Siemens, Software AG, McAfee, SuccessFactors	Select Customers Inbay Ltd, Valiant, TCC Technology Solutions, Tech Guru, Datrix	Select Customers Centerstance, Perceptive Software, Esker, Human Concepts, IRM	Select Customers ClearChannel, Sotheby's International Realty, DPD, DTZ, WSI Digital	Select Customers Adayana Inc, International Center for Research on Women, Digicon Corp
Key Features        	Key Features        	Key Features        	Key Features        	Key Features        
Additional Features <ul style="list-style-type: none"> Promotes on-time project delivery Automates invoicing Automates revenue recognition Increases service visibility with improved time and task management Equips the service team with mobile access Monitor project progress in real time Monitor budgets in detail Forecasting functionality Streamline resource requests and bookings Skills tracking and searching Advanced expense approvals and workflows 	Additional Features <ul style="list-style-type: none"> Integrates through open API with tools such as LogMeIn, IBM and BackupAgent 24/5 support and 24/7 emergency support via telephone and email, with in-person training available Internal help database with webinars, training videos and community forum Set up and manage contracts Performance dashboards Mobile client management CRM and opportunity management QuickBooks integration 	Additional Features <ul style="list-style-type: none"> Sales collaboration with opportunity visibility Notifies users when an opportunity is near the closing stage Service handoff Complete visibility of the complete project lifecycle, from opportunity stages through project completion and billing Track all resources, including internal, external, billable, non-billable, sales and support resources Social project management Bi-directional integration 	Additional Features <ul style="list-style-type: none"> Get a complete overview of each client and project, including time spent and billed, planned tasks and meetings, invoices and expenses, comments and files Manage deals, quotes, billing and expenses Share and access files Advanced reporting functionality with real-time sales margin estimation, filters, groups and trends Integrates with iCal, Outlook, Google Calendar, Dropbox, MailChimp and more Use the full-featured API to build custom integrations 	Additional Features <ul style="list-style-type: none"> Teamwork collaboration Real-time performance management Integration manager to ensure automated data exchange Single sign-on for one entry of username and password Powerful selection criteria for business reports on critical services Government contract solutions and government contract reporting Extensive audit trails for auditors Manage all aspects of project-based business operations

Top 10 PSA Software Comparison

Infor SunSystems PSA	ConnectWise	Changepoint PSA	Projector PSA	Intacct
 www.infor.com	 www.connectwise.com	 www.changepoint.com	 www.projectorpsa.com	 www.intacct.com
\$\$\$\$	\$\$	\$\$\$	\$	\$\$\$\$
Select Customers Astra Zeneca, Raymond James, The London Business School	Select Customers Ciracom, ITConnexx, MyIT, Integrity, INTRUST GROUP	Select Customers Experian, Sage, Open Systems Technology, Stena, Orange	Select Customers BuzzBee, Electronic Ink, iCrossing, Optaros, Tribal DDB, CustomWare	Select Customers Mozilla, Guidewire, Great Books Foundation, Consulting Radiologists
Key Features        	Key Features        	Key Features        	Key Features        	Key Features        
Additional Features <ul style="list-style-type: none"> Improve cash flow through faster and more accurate billing Reduce revenue leakage through time and expense input routines Assign jobs in line with availability, skills and employee preferences Provide full visibility and control of projects by project managers Intra-company charging provides recognition of internal people costs Microsoft project interface helps users manage projects more easily and reduce training costs 	Additional Features <ul style="list-style-type: none"> Features a complete CRM to manage client pipeline Smart contract management Flexible billing options Integrates with powerful accounting tools, including QuickBooks, Microsoft Dynamics GP, Sage and Xero Offers backup and security integrations Offers the ability to track issues Support management with ticketing system that monitors SLA performance Features dashboards and reports with built-in explanations 	Additional Features <ul style="list-style-type: none"> Establish budgets and assign resources Revenue recognition Manage and collaborate with clients and attain feedback Track issues Forecast resource demand Supports entire customer lifecycle Share knowledge across teams Provides organizations with a standardized process for analyzing, tracking and forecasting opportunities Supports multiple languages, currencies and taxation 	Additional Features <ul style="list-style-type: none"> Multi-currency reporting Collaborate with project managers Dashboards and macro-level tools provide answers about supply and demand Match projects with qualified people Day-to-day schedule organization Model, design, assign and display projects Track project performance Customize dashboards Collaborate with clients Email alerts when close to going over budget Access data at all times from multiple systems 	Additional Features <ul style="list-style-type: none"> Designed for QuickBooks graduates who seek a more robust solution Purchasing Cash management Order management Revenue recognition Fund accounting Multi-entity management Multi-currency management Global consolidations Salesforce.com integration Segregation of duties Customizable workflows and transactions Automatic backups Disaster recovery Automatic upgrades