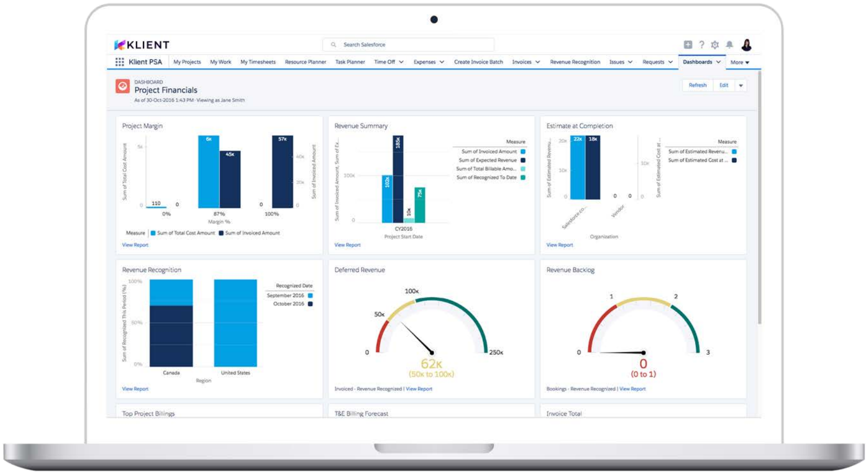
Klient Professional Services Automation

Today's service organizations face mounting pressures to deliver on-time projects, increase profitability with razor-thin margins, and ensure customer success with every engagement.

At the same time, most professional services automation applications operate in silos with disconnected solutions, poor customer visibility, substandard resource planning, revenue leakage, and the inability to plan and forecast important projects initiatives.

Klient Professional Services Automation (PSA) is the Customer-Centric PSA solution built 100% native on Salesforce, designed with customers at the core. Klient provides a way for project teams to work hand in hand with customers from sales through services delivery.

Klient PSA supports the complete billable projects lifecycle, including proposals and contracts, project and resource management, time and expense tracking, project billing, revenue recognition, project accounting, and analytics—all within a single, unified solution.



Klient PSA

The easiest way to manage services with **one unified platform.**

Klient Software is **100% native to the Salesforce.com platform.** It seamlessly integrates into the Salesforce user experience—including the Salesforce's Lightning Experience.

It's sophisticated enough for a professional project manager, yet simple enough that anyone in your organization can use it.

It's also **highly customizable**—providing a variety of tools to help your team work better, together.

Klient delivers **pre-built integrations** to accounting & productivity systems including Intacct, Sage, Netsuite, Quickbooks, Xero, JIRA, Slack and more.

Get up and running in days and weeks instead of months with our robust implementation methodology and **100% focus on customer success.**

Features & Benefits

100% Native to Salesforce

Klient Software is built 100% native on Salesforce.com's cloud platform—the largest and most stable cloud platform on the market.

For customers using Salesforce.com's CRM, Klient Software integrates seamlessly into the Salesforce.com—giving you the ability to automatically create projects from opportunities, accounts, cases, all from a single login.

Managers have complete visibility to services pipeline and the status of every project, including the ability to forecast services and resources before a deal is closed. The single platform also gives sales reps unprecedented visibility into customer projects, allowing them to see the status of every customer account—even long after a deal has been closed.

Proposals & Contracts

Create configurable project proposals and statement of works, synchronizing details back to the project. Generate branded proposals to send to clients. Automatically create customer contracts for projects, including change requests and multi-project contracts.

Project Management

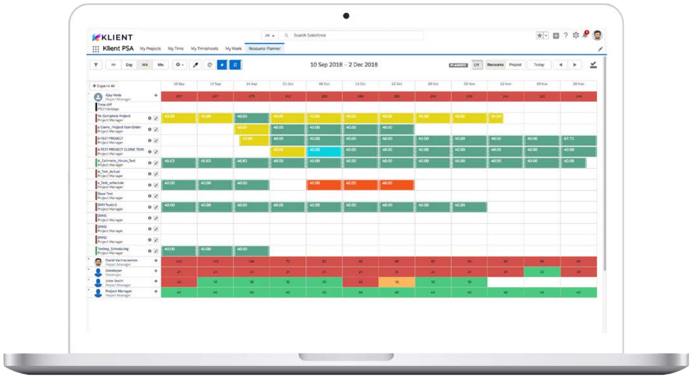
Klient Software provides project management tools powerful enough to manage even the most complex professional services projects.

This includes Gantt charts, Kanban workflows, and calendar views—all available with a single click—no add-ons or complicated integrations required.

Resource Planning

Review who's booked to capacity and who has time to take on more work—with just a glance.

Plan projects and resources by dragging and dropping tasks and resources in a unique resource planning view. Provide complete visibility into all the work that's happening—both in your sales team and in your service delivery team.



Time & Expense

Adding Klient Software to Salesforce.com allows you to charge hours or expenses directly to a project or an account within Salesforce, without having to switch to a different time-tracking application.

Easily track time cards, billable or non-billable time, enter time directly from tasks, enter time from the Salesforce1 mobile app, and add custom fields to track time for the unique needs of your business.

Billing and Revenue Recognition

Manage complex billing and invoicing situations by configuring rules that completely automate project billing—including fixed fee, billable rates, milestones, installment agreements, and recurring billing types. Users can also manage vendor bills and payments with ease.

Recognize project revenue with template revenue recognition templates and calculation methods. Create multiple recognition rules per contract and project.

Integrated with Other Cloud Apps

Integrate with many of the most popular cloud applications on the market including account and productivity applications from vendors Sage, Intacct, Quickbooks, Xero, NetSuite, Zendesk, Slack, and many more.

Customer Communities

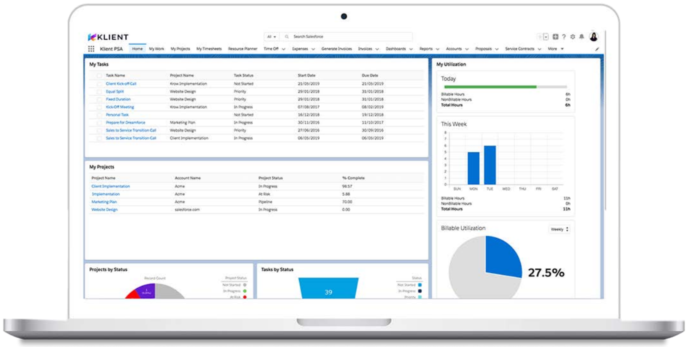
Give clients an unbeatable experience by giving them access to their projects within Klient Software's system. With a few clicks, you can provide clients with real-time access and visibility to their project's process, time & expense reports, and vendor invoicing data. This level of transparency can help you dramatically improve project and customer success.

Reporting and Analytics

Give managers actionable data and easy-to-understand reports—in real time—with just a click of a button. Managers can also easily customize their dashboards with their own KPI's and reports.

Surveys

Create and deliver project and customer surveys including NPS, CSAT, or free-form surveys to analyze client feedback and sentiment, learn from project engagements, and help build long-term customer advocacy to increase retention and expand selling.



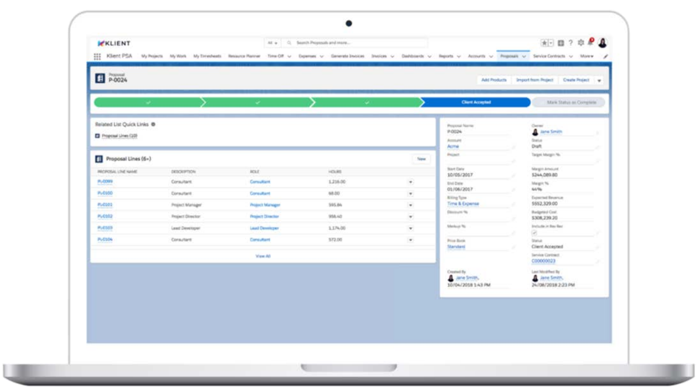
Functionality

100% Native to Salesforce

- Manage accounts, opportunities, cases, and projects from a single login
- Give your team complete visibility into your services pipeline and the status of each project
- Forecast services and resources before closing deals
- Understand the status of every customer account
- Give your sales staff visibility into customer projects
- Give your service delivery team visibility into sales opportunities and future resource requests

Proposals & Contracts

- Create project proposals and generate client SOWs'
- Synchronize proposal changes back to project
- Automatically create contracts and contract lines
- Support multi project, revenue and billing rules



Project Management

- Visualize project performance in real-time
- Use embedded analytics to understand the profitability of every project
- Eliminate the need for static dashboards and Excel reports
- Manage tasks with drag-and-drop ease
- Plan and execute projects using lists, Gantt charts, Kanban workflows, and calendar views

Resource Planning

- Plan projects and resources at a glance
- Plan action items at the project level and at the task level, as needed
- Search and assign resources by available skills
- Show time-off and holidays on the resource plan

Time & Expense

- Easily use built-in timecards
- Track billable and non-billable time
- Enter time directly from tasks using a timer
- Enter time on-the-go through mobile time entry
- Add custom fields to time entry as needed

Billing and Revenue Recognition

- Easily manage complex billing and invoicing situations
- Use configurable billing rules
- Automate project billing events
- Bill by fixed fee, time & expense, milestone, installment, or recurring billing types
- Instantly generate invoices from all billing types
- Manage vendor bills and payments with ease
- Recognize revenue with configurable recognition rules

Integrate with Other Cloud Apps

- Seamlessly integrate with the other solutions that power your business including accounting and productivity
- Use pre-built connectors to integrate with Sage, Intacct, QuickBooks, Xero, Netsuite, Zendesk, Slack, and more

Customer Communities

- Give clients real-time access and visibility to their projects
- Allow clients to see their projects, time & expense reports, and vendor invoicing.
- Collaborate with clients directly through the platform, improving transparency, satisfaction, and customer success

Reporting and Analytics

- Easily find the data you need to make good decisions
- Use real-time reporting to see how your business is doing
- See who's using the tools you've provided by reviewing utilization metrics and analytics
- No need for static dashboard reporting or Excel report pulls
- Managers can easily customize their live dashboards with key performance indicators and other reports

Surveys

- Create NPS, CSAT, or free-form surveys to send directly from a project.
- Encourage bi-directional communication with clients.
- Collect feedback from customers to analyze and make improvements.
- Increase retention and build long-term customer relationships.