



# Professional Services Management for Microsoft Dynamics AX

**Automate and Simplify the management of your professional services teams.....**

## INCREASE RESOURCE EFFICIENCY

The importance of efficiently automating complex, multi-project, multi currency resource and expense management systems can hardly be overstated. Every step is important. Inefficiencies in resource and expense management can be difficult to quantify, but their impact is critical to your business success.

If you're in the business of selling professional services, the speed, accuracy and efficiency of each resource makes a difference. Eliminating blind spots and eradicating wasted steps can have a major impact on your bottom line.

Yellow Professional Services Management Solution includes comprehensive opportunity tracking, resource allocation and timesheet and expense management functionality. The solution is highly flexible, quick and easy to use and offers a rapid return on investment regardless of your business model, sector or size.

Our Professional Services Management software consist of the following key functional areas:

- Project Opportunity Tracking
- Project Resource Allocation
- Timesheet Management
- Expense and Management
- Issue Tracking

## PROJECT OPPORTUNITY TRACKING

***Experts estimate that 70 to 90% of sales opportunities get lost in the channel. Opportunity tracking software helps you find them and convert them into sales.***

Yellow Professional Services Project Opportunity Tracking is designed for tracking, managing and discussing all facets of a given business opportunity. The Yellow Professional Services Project Opportunity Tracking solution captures all of the critical elements of a sales opportunity for organizing, tracking and analyzing deals and quotes. In fact, you get the information you need to improve the return on investment of your lead generation efforts and to turn sales opportunities into loyal, repeat customers.

### **Opportunity Tracking Benefits:**

- Provides information on project performance, quote acceptance, and project forecasts.
- Increases sales by enabling intelligent routing of accepted work to qualified resources



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- Improves operations by increasing the accuracy of customer profiles
- Increases the ROI of marketing campaigns
- Manage a pipeline of opportunities until they turn into sales, from lead to close. Automatically roll up forecast information. Easily share information between resource teams. Create multiple sales cycles with stages and track progress. Track lead sources for contacts and opportunities.

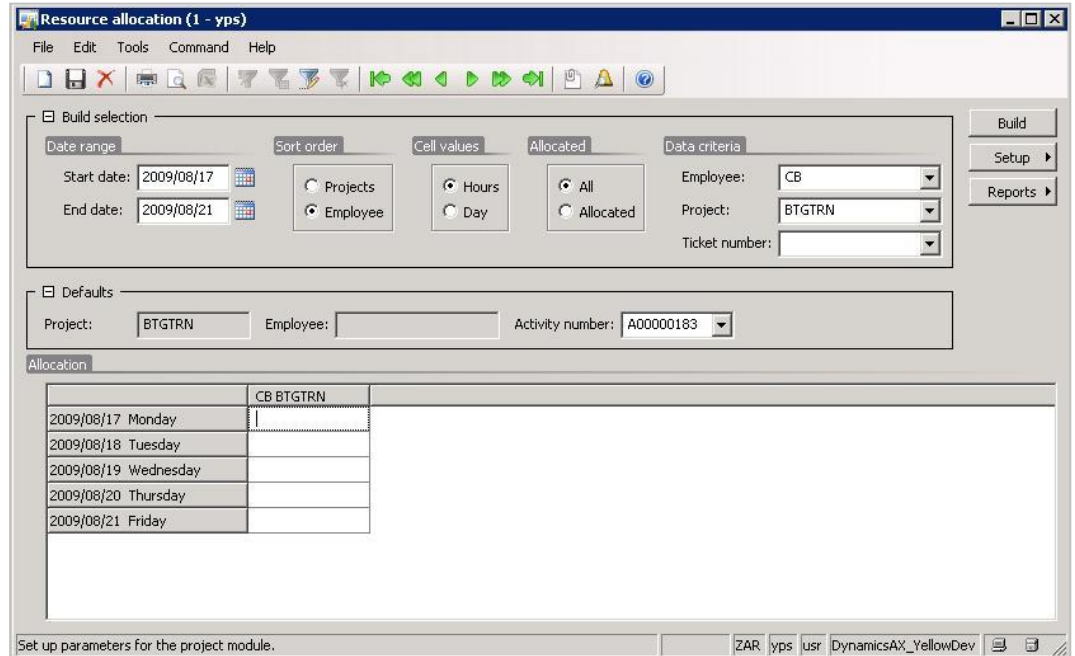
# PROJECT RESOURCE ALLOCATION

Yellow Professional Services provides a comprehensive resource scheduling and allocation solution enabling you to effectively manage

individuals, teams, departments and projects with our intuitive multi view resource allocation. Easily servicing resource requests, identifying resourcing conflicts and analyzing daily, weekly and monthly utilization levels.

## Simple and Effective Online Resource Allocation

The intuitive nature of the system makes resource allocation quick and easy. The system provides an intelligent method of allocation by allowing you to build a comprehensive skills database, allowing your resource plans to be matched with best fit resources based on role, skills, availability, location or any other user-defined filter.



## Comprehensive Resource Scheduling Screens

The allocation screens provide up to date information about your resource utilization levels directly to your desktop, in a simple format. Resource schedules can be viewed in monthly, weekly and daily formats, enabling you to identify and schedule resource requests and highlighting any resourcing conflicts. The online resource allocation screen allows employees to

view project allocation by a user-defined variable colour code by project, tentative/confirmed and utilization.

Home > Project > Timesheet allocation

### Timesheet allocation

From date: 2009/08/01 Show all projects

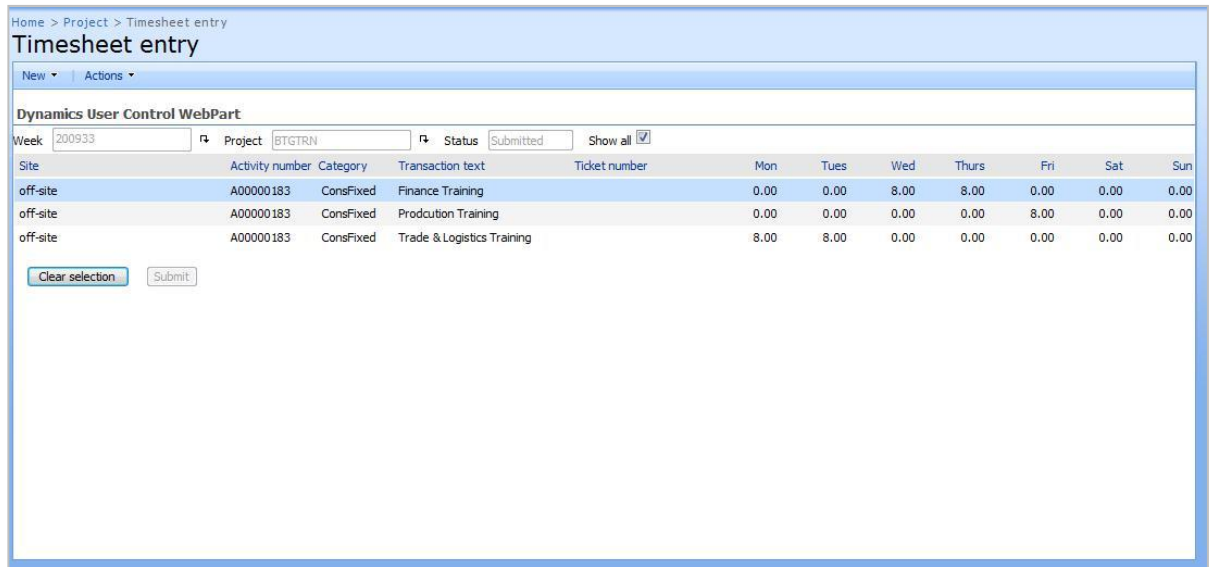
Project	01 Aug	02 Aug	03 Aug	04 Aug	05 Aug	06 Aug	07 Aug	08 Aug	09 Aug	10 Aug	11 Aug
EQSIMP			8	8	8	8	8				8
KHMSUP	8	8									



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# TIMESHEET MANAGEMENT

Yellow Professionals' timesheet management solution is a multiple-user timesheet entry application that allows employees to quickly enter the time spent on various projects. Explore how your organization can improve productivity, profitability, utilization and cost control with Yellow Professionals' timesheet management solution. Utilize multiple timesheet entry views, intuitive user time entry and approval mechanisms to implement an easy to use timesheet system.



Home > Project > Timesheet entry  
**Timesheet entry**

New | Actions

Dynamics User Control WebPart

Week: 200933 | Project: BTGTRN | Status: Submitted | Show all:

Site	Activity number	Category	Transaction text	Ticket number	Mon	Tues	Wed	Thurs	Fri	Sat	Sun
off-site	A00000183	ConsFixed	Finance Training		0.00	0.00	8.00	8.00	0.00	0.00	0.00
off-site	A00000183	ConsFixed	Production Training		0.00	0.00	0.00	0.00	8.00	0.00	0.00
off-site	A00000183	ConsFixed	Trade & Logistics Training		8.00	8.00	0.00	0.00	0.00	0.00	0.00

Clear selection | Submit

## Better manage time worked

Using Yellow Professionals' timesheet management solution your staff can enter time spent on projects including vacation and sick time. Project managers are able to fully control who is able to enter time for a project. Detailed reports provide information rich data aggregation which allow for easy analysis of how and where time is being spent.

## Reduce management overhead

Staff can only enter time for projects which they are assigned reducing data entry errors. Detailed reports allow managers to always know how much time is spent on projects and by whom.

## Improve efficiency by capturing time worked

An intuitive SharePoint based interface allows your resources to enter their time relative to which projects they worked on.

## Use approval workflows to ensure accuracy

Flexible multi-step approval workflows empower project managers to review and approve / reject time as appropriate. Resources cannot edit time entries once they have approved further ensuring data remains correct over time.

# EXPENSE MANAGEMENT

See how your organization can better control costs with Yellow Professionals' comprehensive Expense Management solution. Easily capture all employee and project expenditure, submit expense claims and automate the expense claim approval, authorization and payment processes.

## Quick & Easy Expense Capture

Expense entry is quick and easy in Yellow Professionals' Expense Management solution. Capture all of your chargeable and non-chargeable expenses through our intuitive user interface. Users can capture lump sum expenses such as hotels and flights, as well as capturing unit based expenses such as mileage. Users can input expenses via the expense entry view or



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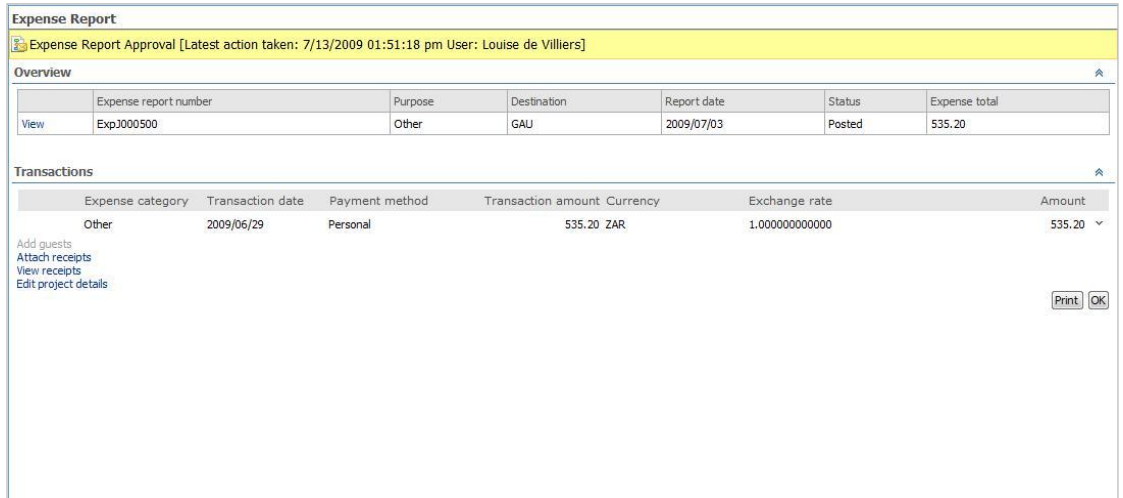
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directly from the user web interface. Expenses can also be categorized in order to account for out-of-pocket, personal and company expenses.

**Intuitive Claim Processing**

Yellow Professionals' Expense Management solution includes an intuitive expense claim process. Users can easily create expense claims, by category, at the click of a button. Users can easily attached receipts to claims for auditing purposes. On creation, the claim is automatically passed to designated users for approval, authorization and payment. Throughout each stage of the process the end user is kept up-to date with progress via the user web interface. At the click of a button the user can see the approval status of expenses, claims pending processing, claims in process and authorized claims.

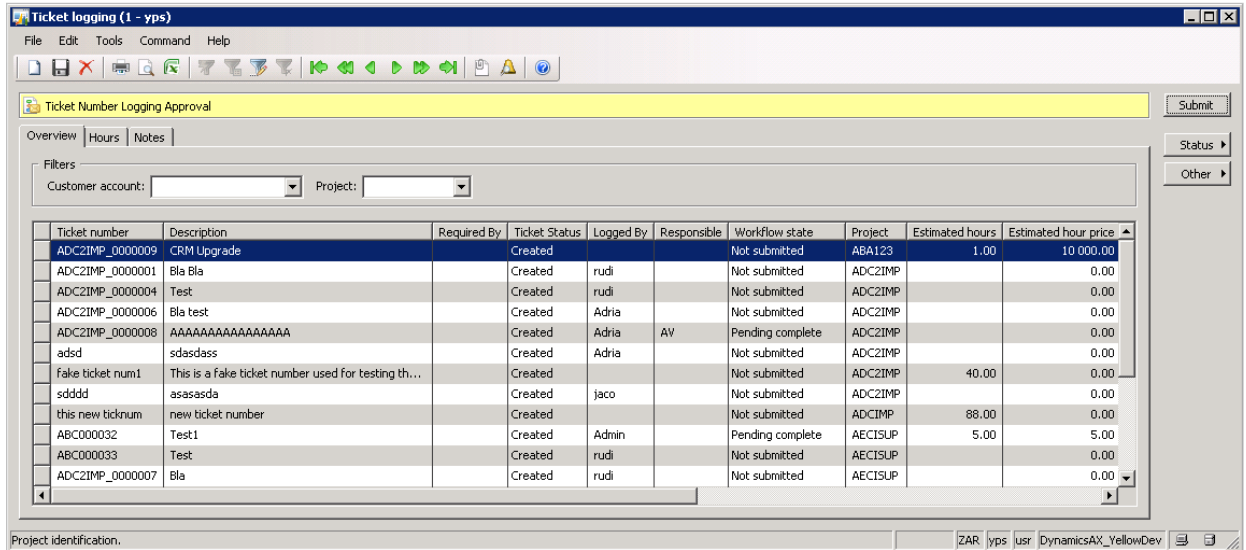


**Reduce Costs and Increase Profitability**

Yellow Professionals' Expense Management solution provides your organization with ability to make significant costs savings by ensuring your expenses are in line with your expense policy.

**ISSUE TRACKING**

Yellow Professional' Issue Tracking tool provides a powerful set of features for managing your issue tracking process. Yellow Professional' Issue Logging tool lets you prioritise, assign, track, report and audit your 'issues,' whatever they may be — from software bugs and help-desk tickets to project tasks and change requests.



Using the Yellow Professional' Issue Logging tool, you can view all of your project issues in one place.



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The Yellow Professional' Issue Logging tool helps you record who it is that needs to resolve each issue and by when. You can list all of the tasks that need to be completed and keep track of their progress.

#### **Some highlights of the Issue Logging application**

- Gives you complete transparency on your projects.
- Web based access allows your users to access the database from anywhere.
- Carefully designed to be user friendly and intuitive so there is little or no training required for end users.
- Email notifications.
- Workflow configurations control who an issue can be assigned to.
- Permission based access to issues and projects.
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We make tracking and managing the tasks and critical issues that emerge during a project easier in achieving project success. Yellow Professional' Issue Logging tool is a task tracking, issue tracking and project management application developed to make this process easier for your team.

It has been designed with a focus on task achievement in all projects. It is instantly usable and highly configurable too.

This solution is build to deliver customers an outstanding out – of – the – box solution which can be extended to any customers' needs.

Learn more about how you can benefit from this solution from Yellow Professional Services.  
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