

**8<sup>th</sup>Manage<sup>®</sup> PSA** automates the end-to-end process of your professional service business.



## Integrated Business and Project Management

8thManage<sup>®</sup> PSA controls the entire business cycle for both packaged product businesses and customized product businesses. It assists from the initial proposal/quote through to the delivery and satisfaction management phases and beyond, aiding all processes such as approval, bidding, contract establishment, project management, renewal and up-selling. 8thManage<sup>®</sup> PSA tracks performance data from early-on to improve results throughout the business cycle



## Enterprise Revenue Management

8thManage<sup>®</sup> PSA supports the full cycle of revenue planning through the final recording of payments

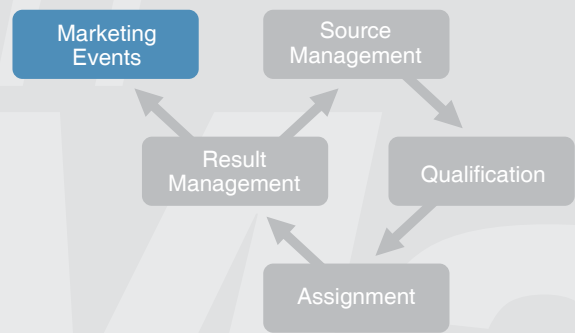
- Revenue planning based on plans, opportunities, orders and deals
- Invoice generation based on order fulfillment and activity completion
- Invoice tracking by client, order, contract, project, territory, currency and time
- Aging mechanism in invoice and full linkage between invoice & payment



# Marketing and Lead Management

8thManage® PSA automates the entire lead generation and management process

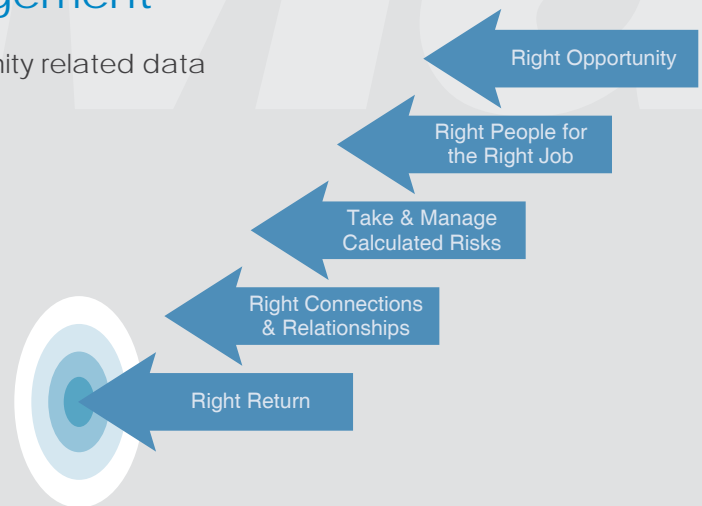
- Web based online lead capture
- Lead source management
- Lead search & merge
- Lead qualification
- Lead conversion
- Lead assignment
- Result management
- Marketing events
- Lead history tracking



# Opportunity and Strategy Management

8thManage® PSA centralizes and tracks all opportunity related data

- Opportunity/strategy proposal
- Competitive analysis
- Scope & milestone planning
- Cost & return planning
- Prioritization & approval
- Scope & milestone tracking
- Issue & risk tracking
- Budget & expenditure tracking
- Confidence tracking
- Linkage to deal/contract management



# Account and Contact Management

8thManage® PSA organizes and maintains a complete account and contact repository

- Client organization chart
- Financial summary
- Contact information
- Topics and events interested
- Reference & up-selling information
- Interactions & results
- Quotation/deal/order/license information
- Delivery & satisfaction information
- Invoice & payment information



# Deal Management

8thManage® PSA supports the entire deal cycle from proposal to closure. It supports both the bidding type of deals and non-bidding type of deals. It also supports deals with multiple revenue streams and different currencies

## Bidding, Proposal and Quote Management

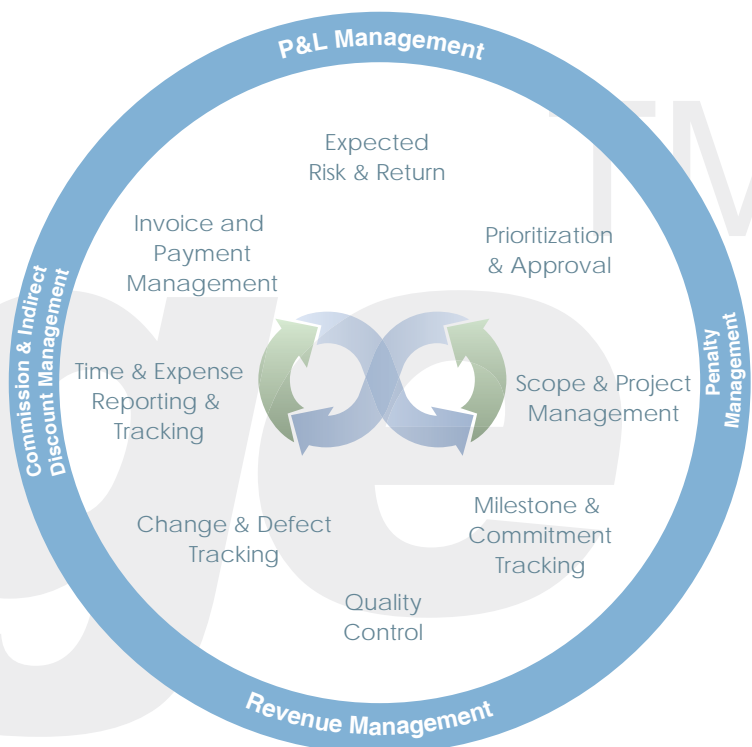
8thManage® PSA provides complete bidding management for contracts. It helps your organization schedule, coordinate and control responses to RFI, RFP and RFQ. 8thManage® PSA tracks each bidding opportunity and the creation, reviews, approval and submission of its response documents. It also tracks results and manages conversion of quotes to contracts



## Contract Management

8thManage® PSA supports full contract management and will assist you in:

- Upfront expected risk & return analysis
- Prioritization
- Quote planning and control
- Contract establishment and approval
- Scope management
- Milestone and commitment management
- Quality policy and control
- Change and defect tracking
- Contract accounting and P&L management
- Termination and renewal management



# Engagement Management

## Real-Time Service Level Agreements

8thManage® PSA enables you to set up the following elements of real-time trackable service level agreements with your client:

- Milestones
- Costs
- Deliverables Quality
- Service availability
- Service capacity
- Defect rate



## Cross Enterprise Project and Program Management

8thManage® PSA supports all 9 areas of project management practices defined by PMI®



It also supports the advanced management practices

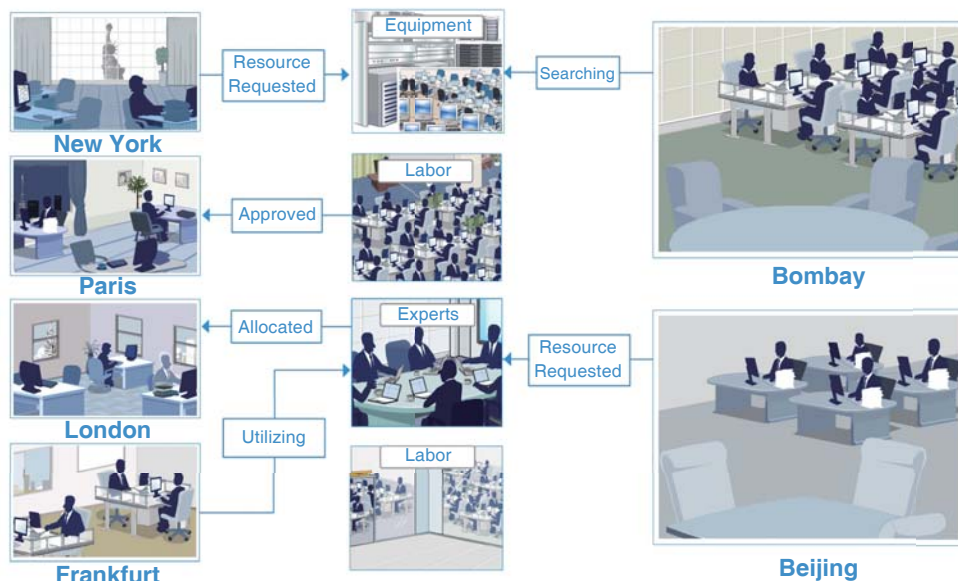
- Iteration planning & management
- Commitment planning & management
- Reinforcing self-management

# Engagement Management

## Cross Enterprise Resource Management

8thManage® PSA provides features for searching, requesting, allocating and tracking of resources in multiple sites, groups, PMO, projects and activities

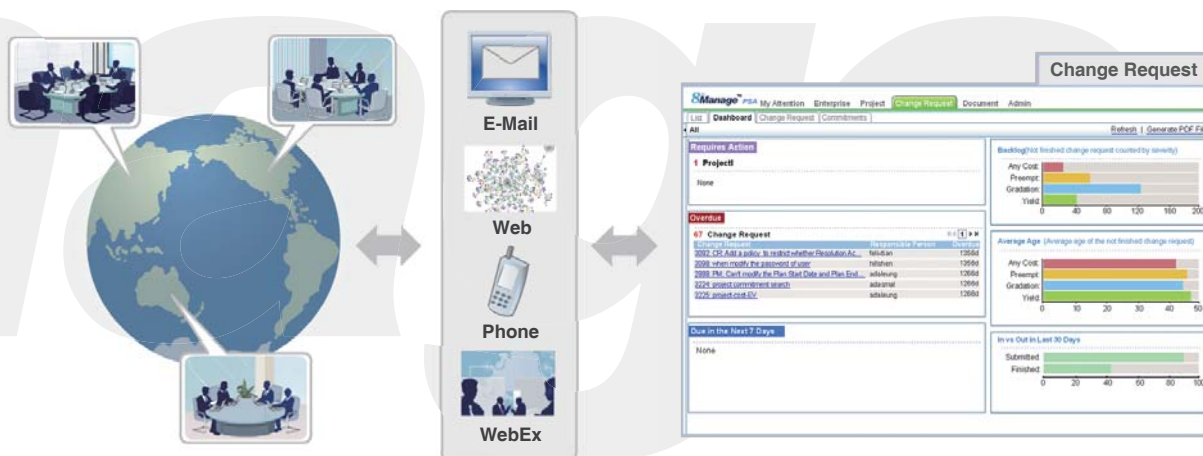
- Multiple resource types with searchable attributes
- Automated planning, allocation and utilization recording of resources
- Tracking allocation time vs. actual utilization time
- Tracking planned resource cost vs. actual resource cost
- Detection of overloaded and inadequate resources
- Resource plotter for dispatching large amount of resources



## Worldwide Support Management

8thManage® PSA provides the following tools for worldwide maintenance support

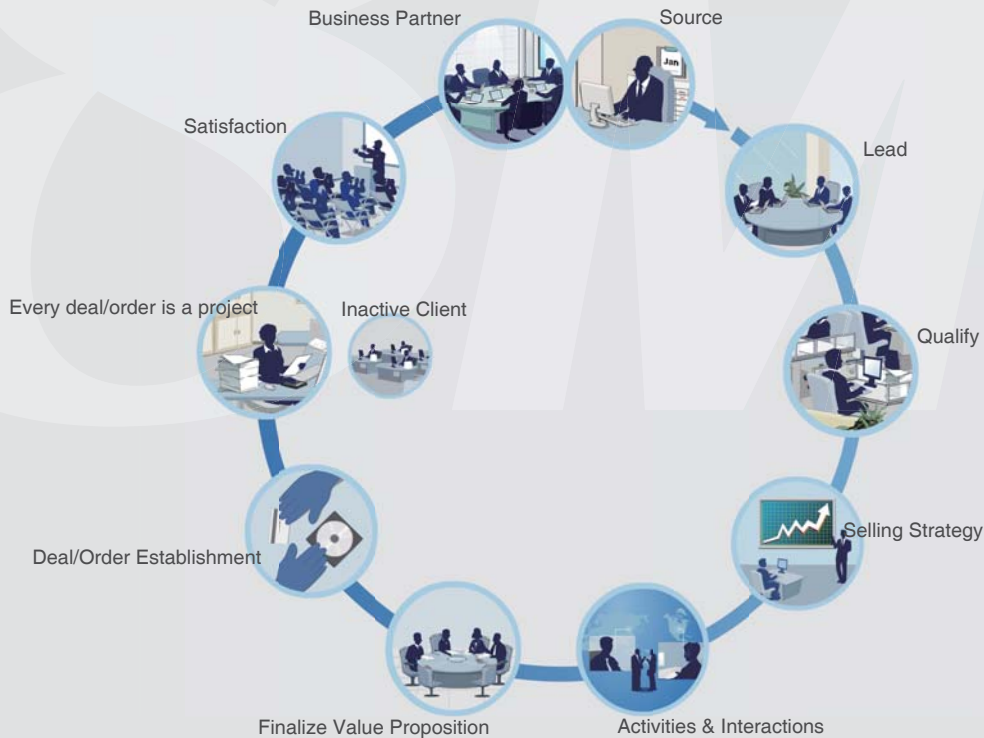
- Web based client support module
- Call log and response tracking facility
- Defect and change tracking system
- Release and patch facility



# Client Relationship Management (CRM)

## Lifetime Relationship Management

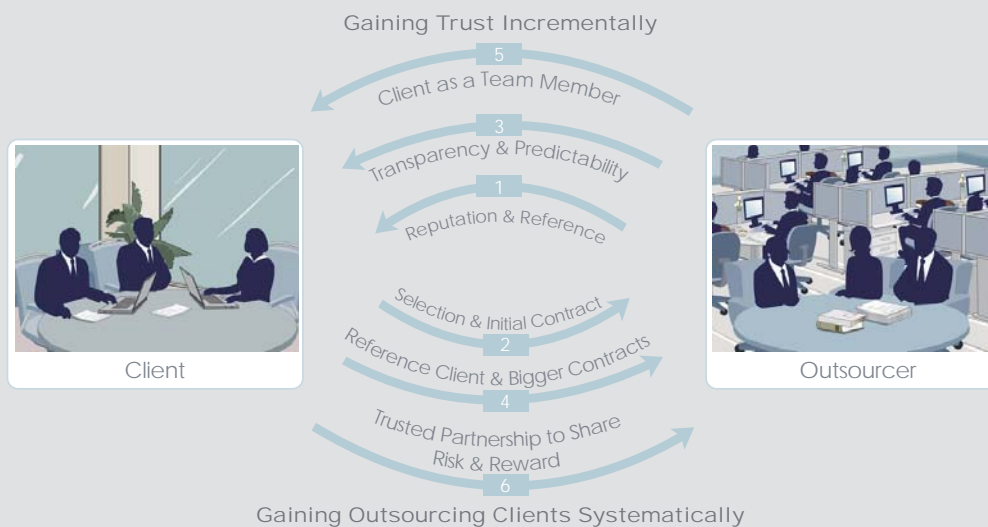
8thManage® PSA provides tools for complete client lifecycle management. In PSA you can document all client correspondence and make current client information available to your entire sales team. PSA provides features to track satisfied clients for up-selling and cross-selling opportunities and identify inactive customers for follow-up



## Outsourcing Relationship Management

8thManage® PSA provides the competitive advantages for the outsourcing business and the framework for PMO

- Multi-organizational accountability
- Information transparency
- Client as team member
- Policy enforcement in enterprise, PMO and project levels
- Scope & milestone management on portfolio of Projects
- Cost management on portfolio of projects
- Issue & risk management on portfolio of projects



# Additional Built-in Features

## Timesheet and Expense Report

8thManage Timesheet: CHM Submission: Event  
johnsonman (2008-02-24 Sun - 2008-03-01 Sat)

Resource: johnsonman Status: Submitted  
Submitted By: johnsonman 2008-03-03 13:58 Mon  
Withdraw Submission: [Withdraw]

Resource Allocation	Allocation Details	Work Category	24 Sun	25 Mon	26 Tue	27 Wed	28 Thu	29 Fri	1 Sat	Total
Bank of Atlanta Engineering			0.0	10.0	0.0	0.0	0.0	0.0	0.0	43.0
2. Requirements Finalization Review	Planned 10.0 hours	Project Work	-	2.0	2.0	2.0	2.0	-	-	10.0
2008-02-21 Tue - 2008-02-27 Thu	Approved 27.5 hours	Project Work	-	0.0	7.0	6.0	6.0	6.0	-	33.0
2008-03-01 Wed - 2008-03-03 Mon			0.0	0.0	1.0	1.0	1.0	0.0	4.0	4.0
Bank of Atlanta Core Banking System	Planned 3.0 hours	Project Work	-	-	1.0	1.0	1.0	-	-	4.0
2007-11-02 Tue - 2012-02-08 Mon			0.0	10.0	0.0	0.0	0.0	0.0	0.0	47.0
Total			0.0	10.0	0.0	0.0	0.0	0.0	0.0	47.0

There are 5 business days in this period, it should normally have 37.5 total hours.

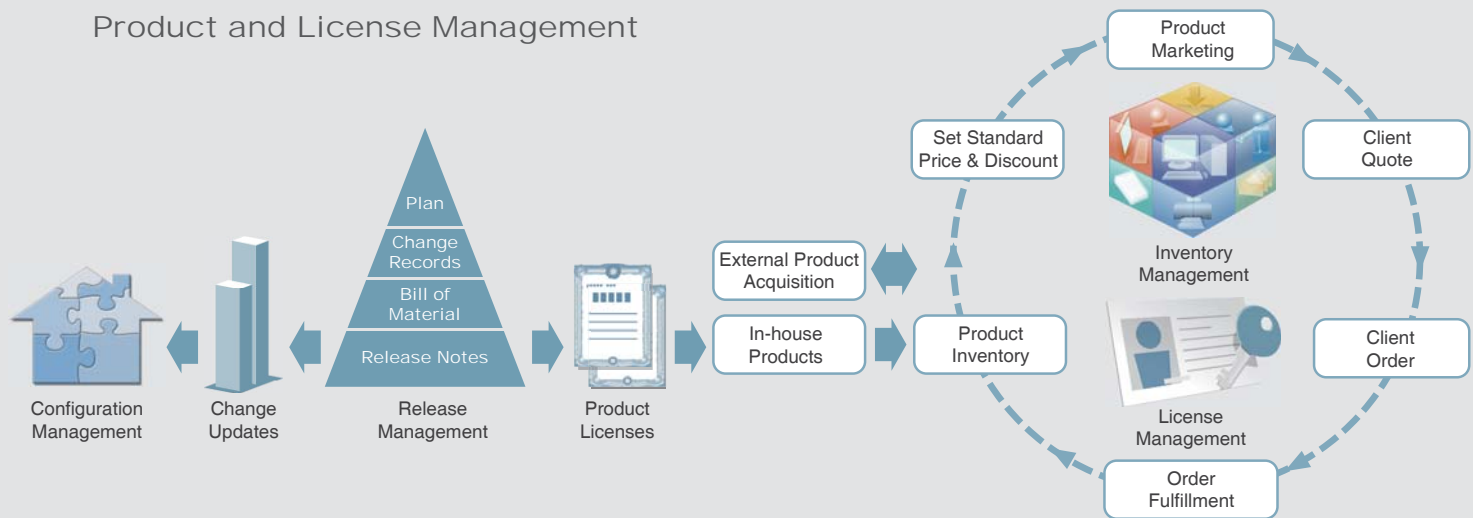
Summary

By Project	Project	Approved Hours	Actual Hours
Bank of Atlanta Engineering		37.5	43.0
Bank of Atlanta Core Banking System		-	4.0
Total		37.5	47.0

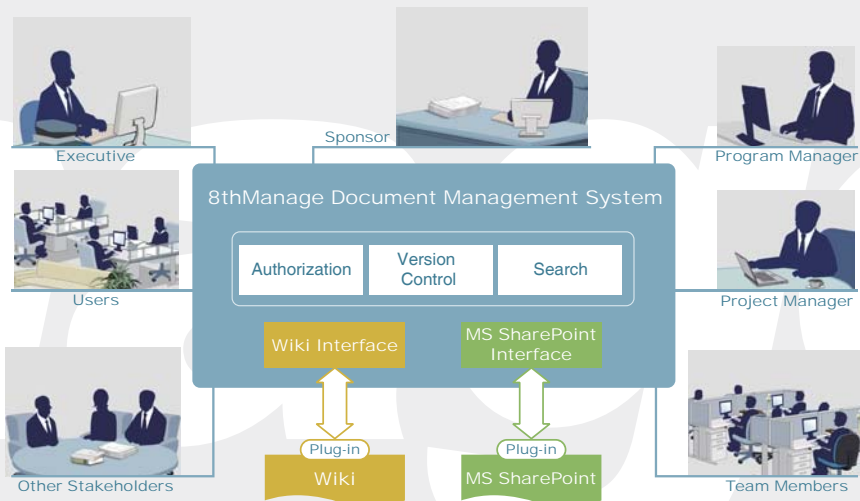
By Work Category	Work Category	Approved Hours	Actual Hours
Project Work		37.5	47.0
Total		37.5	47.0



## Product and License Management



## TM Document Management



## 8thManage® PSA can do the following for your professional service business:

- Better manage your business opportunities
- Better satisfy your customers with real-time SLA
- Better utilize your professional resources
- Better manage your engagements and deliveries



Visit [www.8manage.com](http://www.8manage.com) for more information

### 8thManage PSA Modules:

Requirements	Change & Support	DOC & KM	Release	Dashboard	Risk	Issue
Commitment	Resource	External	Communication	Procurement	Timesheet	PMO
Integration	WBS	Deliverable	Dependency	Cost	Quality	PSA

Wisage Technology is an international software product company with clients in many countries and regions, including the U.S., Canada, China mainland, Hong Kong, Macau, Taiwan, Malaysia and Singapore. All its products are mobile internet ready and can be accessed with IE, Firefox, Safari and Chrome browsers and we also provide different apps on Android and iOS. It offers perpetual licenses for all regions and SaaS in certain regions only for the following products:

<b>8thManage® CRM</b> : Mobile Internet CRM	<b>8thManage® eExpense</b> : Web & Smartphone Expense Report System
<b>8thManage® SPM</b> : Supplier & Procurement Management	<b>8thManage® eLeave</b> : eLeave & Leave Management
<b>8thManage® Simple PM</b> : Simple to Start & Extend PM	<b>8thManage® eTimesheet</b> : Web & Smartphone Timesheet System
<b>8thManage® PM</b> : Advanced Tool for Project Planning & Execution	<b>8thManage® eLearning</b> : Advanced eLearning System
<b>8thManage® PMO</b> : High Performance PMO	<b>8thManage® eSurvey</b> : Easy-to-use eSurvey System
<b>8thManage® Finance</b> : Strong Connectivity with Businesses & Operations	<b>8thManage® eDMS &amp; KM</b> : eDocument & Knowledge Management
<b>8thManage® HR</b> : Human Capital Management	
<b>8thManage® OA</b> : New Generation Office Automation	
<b>8thManage® BI</b> : Point-and-click BI	
<b>8thManage® O2O</b> : B2C, B2B, eExchange, eSettlement & eERP	
<b>8thManage® FAS</b> : Knowledge Enterprise Full Automation Suite	
<b>8thManage® eERP2</b> : Manufacturer eERP2	

**Toronto, Ontario**  
24 West Borough Street,  
Thornhill, Markham, Ontario L3T 4X5  
T: +1 (647) 709-8369

**Asia Pacific**  
2702-6 Lucky Commercial Centre  
103-9 Des Voeux Road West Hong Kong  
T: +(852) 8141 0396

**China**  
Room E1, 16/F China Everbright Bank Building  
689 Tianhe Beilu Guangzhou 510630  
T: +(86) 20 3873 2292

Contact Sales : [sales@wisagetech.com](mailto:sales@wisagetech.com)