rev.io PSA

As a technology services provider, you have unique needs when it comes to running your day-to-day operations. Rev.io's dedicated PSA solution provides access to critical tools you need to manage your business, empower your team, and grow your revenue efficiently.

FEATURES

CRM & ACCOUNT MANAGEMENT
Real-time customer details and history

MARKETING & LEAD GENERATION
Send and track targeted campaigns

SALES AUTOMATION
Visibility into pipeline and current efforts

PROJECT MANAGEMENT
Track and control projects and materials

PROPOSAL & QUOTE GENERATION
Automated, customized quotes and compelling proposals

SERVICE ORDER MANAGEMENT
Automatically created service tickets with real-time asset details

TECHNICIAN TIME & UTILIZATION
Track billable activities and time logs

EMAIL INTEGRATION
Sync contacts, appointments and to-dos

INVENTORY CONTROL
Manage complete supply chain

SERIALIZED ASSET TRACKING
Manage remote monitoring, content filtering, remote off-site backup and warranties

PURCHASING & RECEIVING
Complete purchase order workflow, delivery tracking and RMA processing

ACCOUNTING INTEGRATION
Eliminate double-entry of data through integrations with top accounting packages

BILLING & INVOICING
Generate and deliver invoices based on service tickets, project status and SLAs

PAYMENT PROCESSING
Auto or one-time with credit card or ACH

REPORTS & ANALYTICS
Accurate, real-time data for financial projections, employee hours, expenses, etc.

EXTRAS

MOBILE
Manage accounts and orders, as well as process payments in the field

ONGOING SUPPORT
Live technical help, ongoing training and community forums

IMPLEMENTATION
Dedicated training and resources for you

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