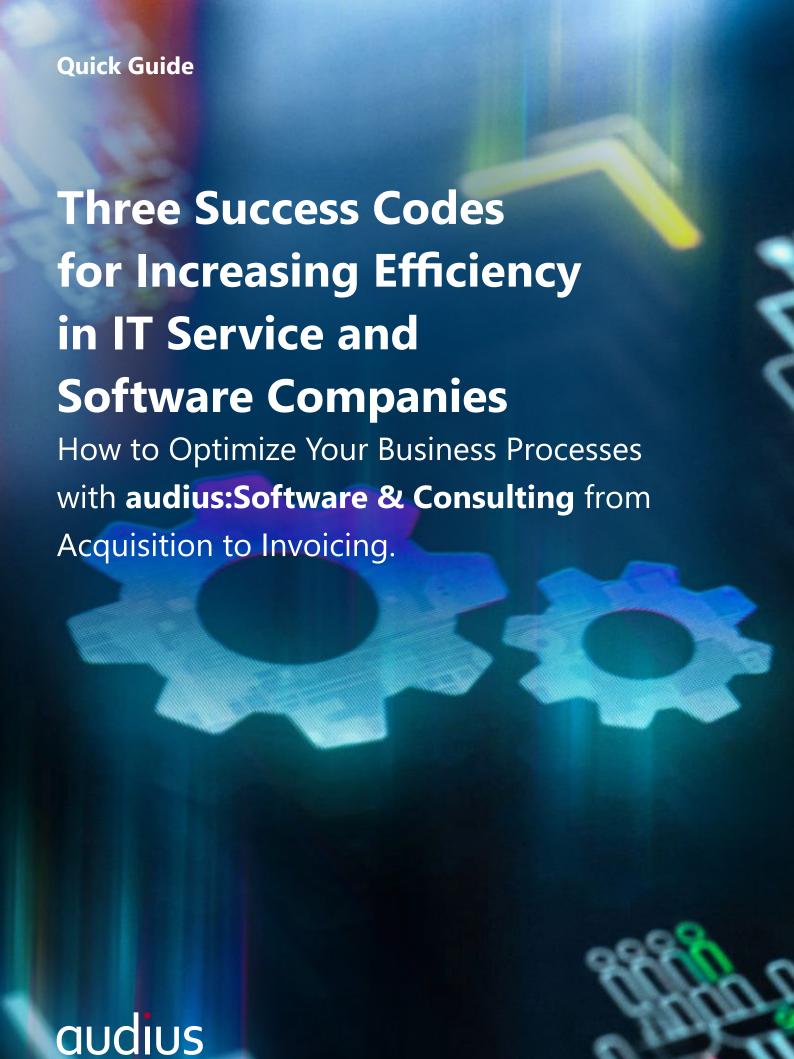# Three Success Codes for Increasing Efficiency in IT Service and Software Companies

How to Optimize Your Business Processes with **audius:Software & Consulting** from Acquisition to Invoicing.

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Your Business is Unique – and so is Your Software

IT, software, and consulting companies operate in a dynamic market characterized by complex projects, individual client requirements, and highly competitive pressure. However, they often lack comprehensive transparency, clearly defined processes, and a unified data foundation.

This is where **audius:Software & Consulting** comes in: The industry solution based on Microsoft Dynamics 365 has been specifically developed for IT service and software companies. It combines traditional CRM functionalities with comprehensive processes for project business, licensing sales, service and maintenance contracts, as well as periodic services such as rental and hosting. With integrated modules, a central partner system including a discount matrix, and scalable add-ons, the solution creates clarity, efficiency, and future-proofing across your entire value chain.

Three Success Codes for Forward-Thinking IT Service and Software Companies:

1 **Create Transparency**
Central data storage and cohesive, consistent processes enable a holistic view of customers, projects, services, and finances. This lays the foundation for informed decisions and targeted management.

2 **Establish Clear Structures**
Structured workflows and industry-specific modules ensure stable, traceable processes – from acquisition through project execution to invoicing and customer support. This minimizes friction and facilitates scalability.

3 **Invoicing Efficiently**
Automated invoicing for services, licensing models, and flat fees saves valuable time, reduces error rates, and ensures compliant billing. This operational efficiency translates into a real competitive advantage.

Modular, Scalable, Future-Proof: The Architecture of audius:Software & Consulting

The industry solution is based on Microsoft Dynamics 365 Sales, Customer Service, and Project Operations – with integrated AI in the form of Microsoft Copilot – and expands standard processes with best practices. It includes the following modules:

- **Lead and Opportunity Management:** From initial contact to qualified sales opportunities
- **Sales & Order Processing:** Central management of quotes, orders, and pricing logic
- **Project & Service Invoicing:** Project-based time tracking and automatic invoicing
- **License & Inventory Management:** Structured management of complex software products
- **Customer Service & After Sales:** Handling service and support cases with a knowledge base and optional chatbot

The solution is supplemented by powerful tools and connectors based on the Microsoft Technology Stack, such as:

- **Power BI:** Create interactive reports and dashboards at the push of a button and gain in-depth insights
- **Power Apps:** Develop tailored applications quickly and easily, such as customer or partner portals

With the right audius add-ons, you receive proven features that simplify your daily operations with Dynamics 365, including:

- **Report:** Automated document processing for sales and accounting
- **E-Invoicing:** Creation of electronic invoices in structured formats (XRechnung, ZUGFeRD) and automated dispatch
- **Configurator:** Configuration of complex product variants
- **Commission:** Automated commission and bonus settlement on demand

All modules are seamlessly integrated – ensuring continuous processes from initial customer contact to invoice. We will determine which modules suit your business best based on your processes.

Maximize Your Business Impact – Right Here:

Especially in the key areas of **invoicing** and **license management**, efficiency potentials can be realized quickly and measurably:

audius:Invoice – Simplifying Structured Invoicing

In project and licensing business, precise and transparent invoicing is essential. Our audius:Invoice module provides a comprehensive solution – from project-based time tracking to automated periodic invoicing. Create individual invoices and collective invoices efficiently and error-free, even with complex contract models and integrated partner services.

The solution also supports credit notes, intercompany billing, and payments, including dunning processes. With interfaces to financial accounting systems like DATEV or BMD, audius:Invoice can be seamlessly integrated into your existing IT landscape.

➕ **Your Advantage: Structured, scalable invoicing, reduced effort and errors, and improved predictability.**

audius:License – Systematic License Management

Software products constantly evolve – as do the requirements for their management. audius:License brings order to complex license structures and supports the entire lifecycle of your software products. Whether different license types, features, versions, or contract models, you always have an overview.

The solution enables targeted product configuration (optionally with audius: Configurator), automates the management of license keys, and offers flexible pricing models – tailored to the type of license (purchase, rental, or maintenance). By closely linking sales and customer inventory, you create not only efficiency but also trust among your clients.

➕ **Your Advantage: Full transparency, maximum control, and easy, secure management of your software products.**

Quick Check: How Digital Are Your Business Processes Today?

Yes **No**

Do you capture and invoice services on a project basis and in an automated manner?

Do you have a real-time overview of all active license agreements?

Does your invoicing workflow run smoothly, including third-party services?

Are customer data, contracts, and invoicing integrated within a single system?

Do you receive automatic reminders for expiring maintenance contracts?

Can you create in-depth analyses with a single click across multiple data sources?

Even with just two „no" answers, a no-obligation consultation is worthwhile.

Why audius?

- Over 600 successfully completed CRM and ERP projects
- More than 30 years of industry expertise for IT, software, and consulting companies
- Consulting, implementation, and support – comprehensive assistance from project inception to completion and beyond
- Proprietary add-ons for enhanced efficiency
- Qualified Microsoft ISV partner with Microsoft-certified solutions available in AppSource
- Provision of both Microsoft and audius licenses from a single source

Get a Customized and Practical Consultation Today

Schedule an initial meeting with us so we can understand your requirements and goals!

Your Contacts:

Bert Enzinger
Sales Management
bert.enzinger@audius-sc.de
+49 8654/4608-12

Christina Schwarzer
Sales
christina.schwarzer@audius-sc.de
+49 8654/4608-25

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