Kantata OX

Kantata develops vertical SaaS technology, purpose-built for the highly specific and complex needs of professional services organizations, with a comprehensive suite of market-leading capabilities that deliver clarity, control and confidence at every step of the professional services project lifecycle.

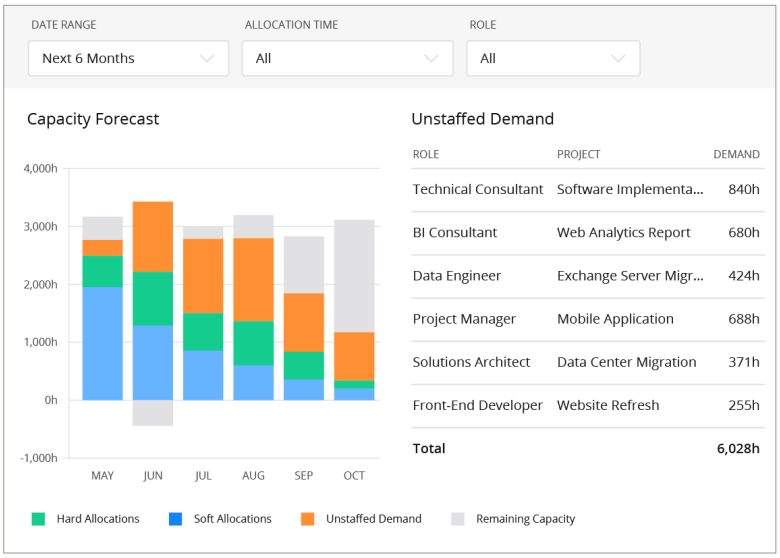
Kantata OX, built on an open architecture to give resource-driven organizations the flexibility to adopt new tools, build processes and reinforce existing best practices at all stages of business growth. It offers category-leading capabilities while enabling you to integrate every data source and drive more value out of mission-critical solutions already supporting your growth.

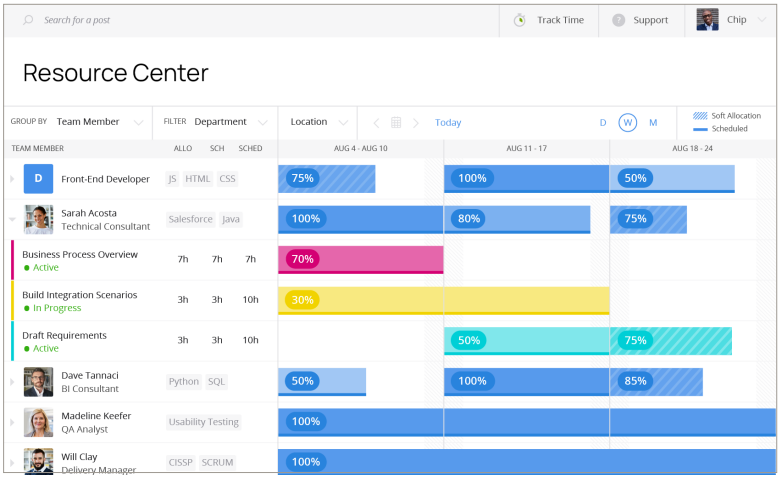
KANTATA™

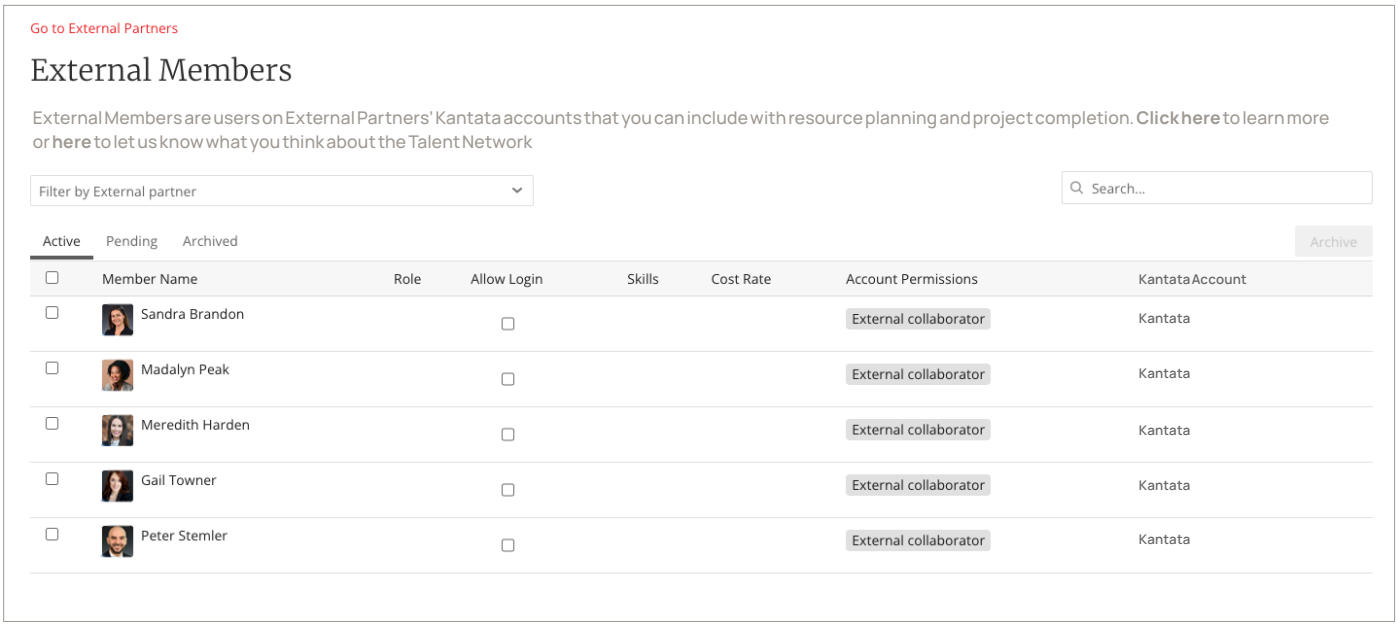
Resource Management — Ensure you have the right people on the right projects for the best results.

Streamline resource management using a single, easy-to-use, visual interface with **Resource Center**. Unbound visibility into your internal and external resources lets you quickly manage change and make better business decisions based on resource supply and demand.

- Manage allocations for all resources throughout your organization.
- **Cross-Project Scheduling** lets you view workloads and availability across multiple projects at a glance.
- Automatically generate resource recommendations to staff entire projects or openings for a specific role with **Team Builder.**
- Easily see how efficiently your resources are being used in projects.
- Adjust resource allocations and track changes to project budgets in real-time.





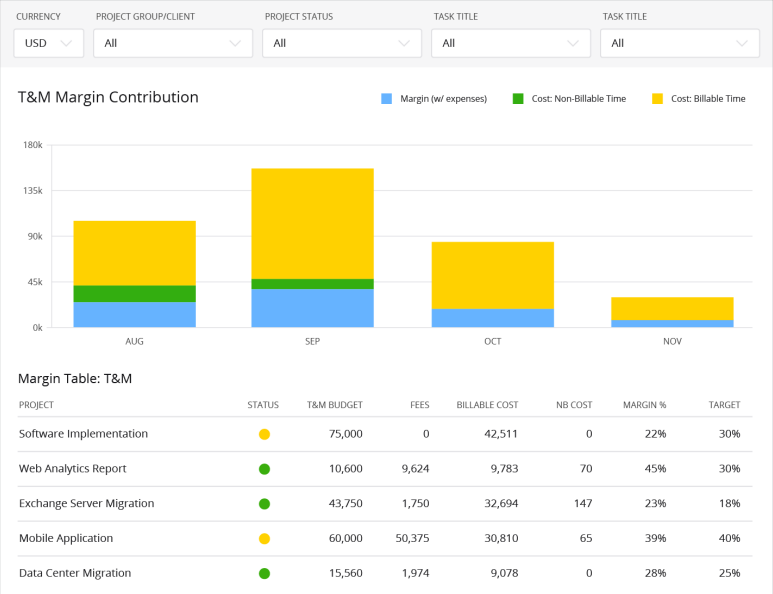


Manage your external contractors and freelancers with **Talent Networks.**

- Onboard external partners to your account, control project access and license usage for every individual.
- Augment your resource pool and optimize staffing decisions by considering all your resources — internal and external.
- Add roles, skills, calendars, cost rates and more for external members to ensure you plan the best available team for every project.
- Simplify timekeeping, utilization tracking and expenses from start to finish across your entire pool of resources.

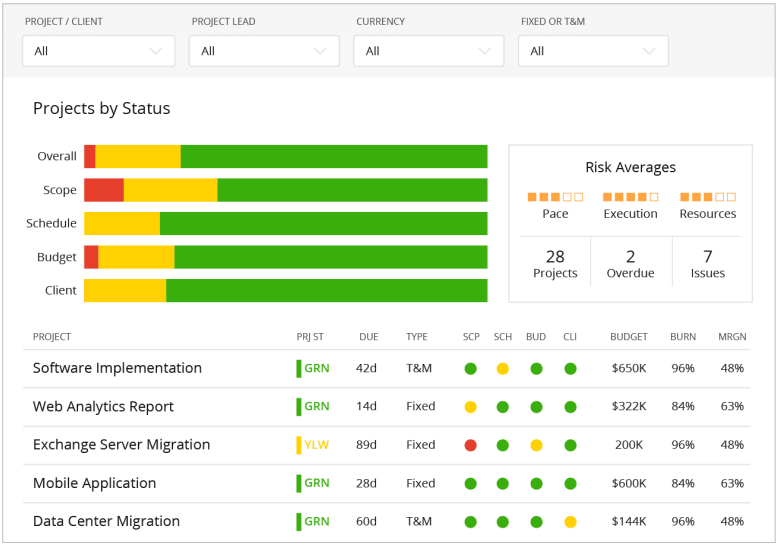
Financial Management — Boost profitability, strengthen margins and enable informed financial decisions.

- Easy to navigate **Billing Module** that supports project-based accounting, time and materials, fixed-fee, retainer and other fee structures helps optimize billing and payments.
- Improve visibility into revenue, margins, costs, estimates with out-of-the-box **Insights Reports** designed for professional services organizations.
- Automated notifications alert managers when an invoice is due, late or paid; ensuring visibility and supporting timeliness and accuracy of invoicing.



Project Management — Keep your projects on track and deliver bottom-line benefits.

- With all your information in one place, you gain total visibility into all of your projects to see the big picture—or drill down into the details.
- Robust project workspaces—with **Task Tracker**, activity feeds and automated **Notifications**—help teams focus on the most important tasks and easily collaborate.
- **Project Health Reports** and **Global Gantt Charts** make it easy to track project progress at the task or subtask level and adapt to changes.

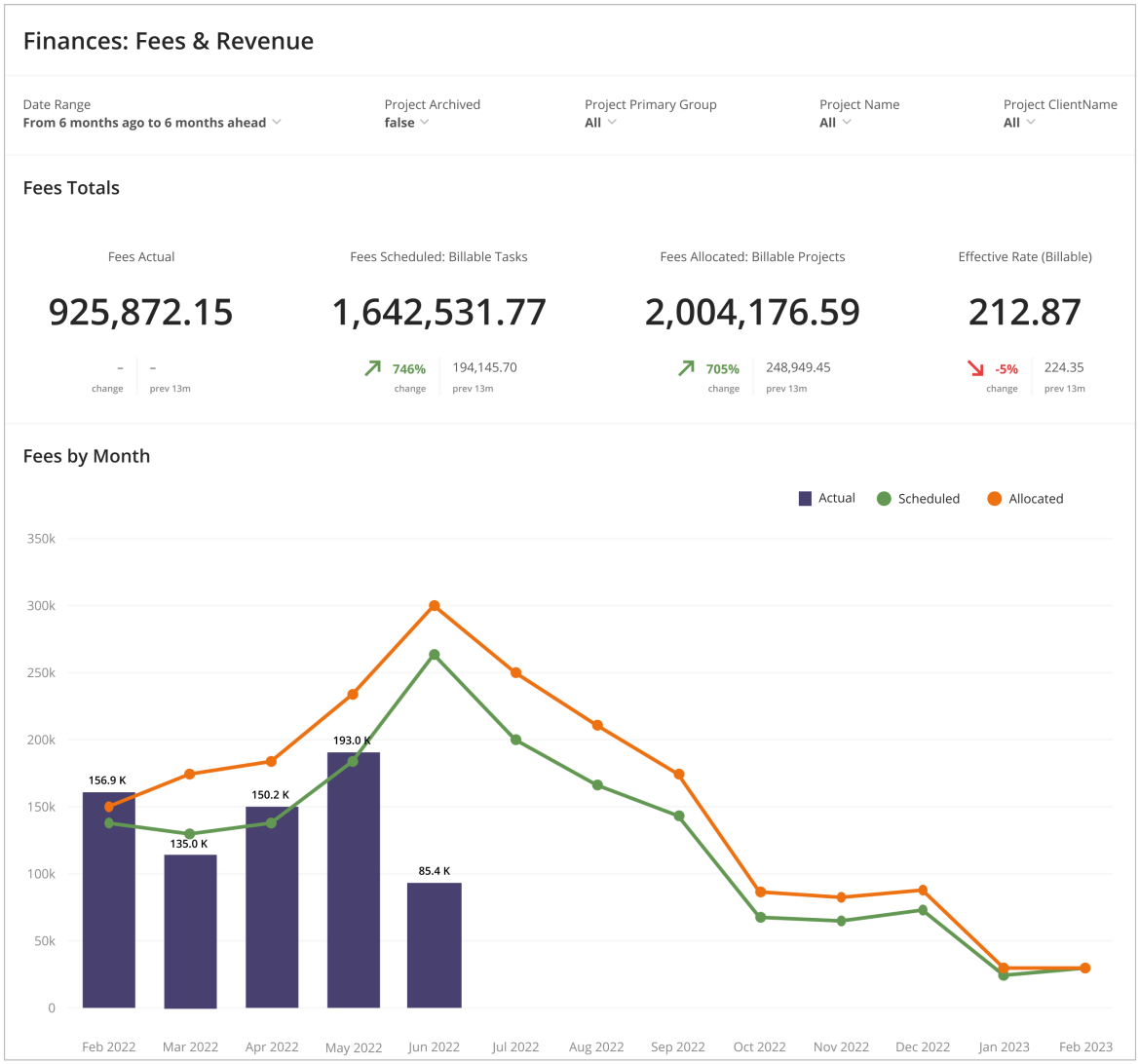


Team Collaboration — Connect people, resources and conversations across projects to improve outcomes.

- Project-level **Activity Feeds** and **Notifications** enable in-office and remote teams...and more.
- Collaborate securely with permission settings that ensure only the 'right' resources (internal or external) are able to see project details.

Business Intelligence — Bring together and visualize all your data to help you make informed decisions, quickly.

- With interactive reports and a powerful custom reporting engine, **Insights** gives you the visibility you need to make swift, informed decisions for projects and staffing.
- Accurately forecast, chart project health, and predict project outcomes with dynamic out-of-the-box or customizable reports.



Integrations and Workflows — Empower your teams by connecting existing systems and data to extend tech investments.

- Connect your financial and project data by turning on pre-built integrations with your ERP or project management systems like Netsuite, QuickBooks, Jira and more, or build your own integrations with API or flat file integration options.
- Import data from CSV files to update new custom fields across existing projects, tasks, users and objects with **Smart Upload Manager.**

Future-proof your operations with the leading provider of purpose-built professional services software solutions. Visit Kantata.com to learn more or schedule a demo today.