CINCH PSA · BUILT FOR MSPS & CSPS

# Deliver the work. Understand the effort.

Professional services automation should give your team a practical way to manage every commitment. Cinch brings projects, tasks, time and resource planning into the same workspace as your customer relationships and service operations.

**Projects**
Gantt plans, milestones and health.

**Time**
Entries tied to rate cards and roles.

**Capacity**
Workload against staff availability.

**Retainers**
Allowances, carryover and overage.

THE SINGLE SOURCE OF TRUTH

## A shared view. A stronger delivery team.

Give technicians the context to do the work, project owners the visibility to keep it moving, and leaders the information to plan what comes next.

### Know where delivery stands

Track tasks, milestones and project health, with budgeted and logged hours close at hand.

### Make the effort visible

Record time against the work, with billing roles and rates that reflect your customer agreements.

### Plan around your people

See capacity and planned workload across projects before making the next commitment.

### Keep the customer close

Work from customer-linked projects alongside Cinch CRM and Service Desk, with notes and documents in reach.

### Luca helps with the communication.

Draft and refine messages from project and task editors, keeping your team in control of what gets sent.

FROM COMMITMENT TO COMPLETION

# Keep delivery connected.

Coordinate the details that shape service quality, team workload and the cost of delivery.

01

PROJECT DELIVERY

## A plan your team can follow.

Organize tasks and milestones in a Gantt view. Set owners, dates and hour budgets, then follow progress and project health. Clone an existing project to give repeat work a familiar starting point.

02

TIME & BILLING CONTEXT

## Make every hour easier to account for.

Log task time in 15-minute increments using the customer's rate card and the appropriate billing role. Billable status lives on the task, keeping the work and its billing context together.

03

RESOURCE PLANNING

## See the load before you add to it.

Compare planned allocations and managed-service load with staff capacity, including approved PTO. Use the team heatmap to spot pressure points, then drill into a person's work across projects.

04

MANAGED SERVICES

## Give recurring work a clear rhythm.

Configure managed-service retainers with period allowances, renewal alerts, carryover and overage rules. Logged task time feeds usage, while recurring task templates keep routine commitments moving.

05

CUSTOMER CONTEXT

## Keep the relationship close to delivery.

Work from customer-linked projects alongside Cinch CRM and Service Desk. Keep project notes, conversations, attachments and linked documents within reach.

06

OPERATIONAL VISIBILITY

## Review the work behind the numbers.

Compare budgeted and logged project hours. Review time across users, accounts, projects and tasks, then export the data to Excel for your own operational analysis.

CONNECTED TO YOUR STACK

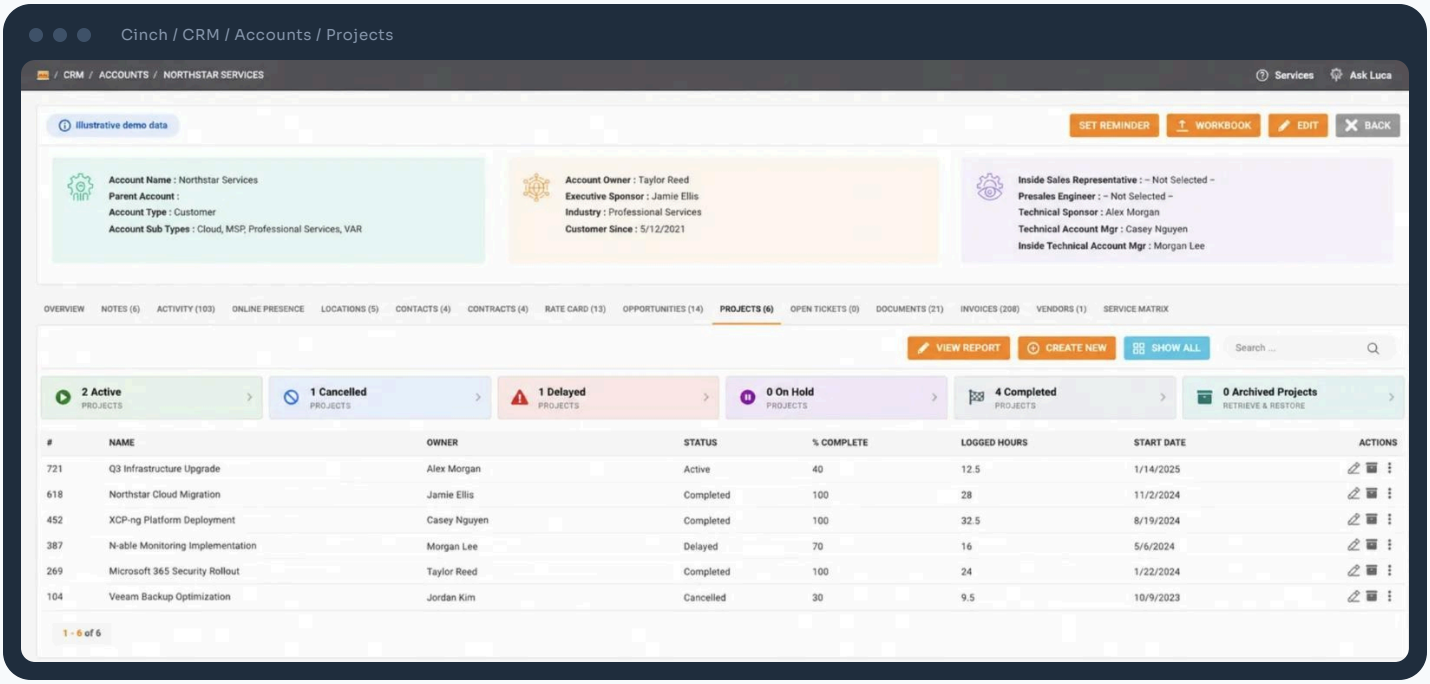
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CUSTOMER WORK. IN VIEW.

# A clearer view of what's moving.

Bring customer projects into the conversation with ownership, status, dates and progress visible together.




Customer projects · sanitized illustration with fictional demo data.

## One workspace for every type of project.

FINITE PROJECTS

### Defined customer engagements.

Plan tasks, milestones, owners, dates and hour budgets, then follow progress and project health to completion.

MANAGED-SERVICE WORK

### Ongoing customer commitments.

Use retainer settings and recurring tasks, with logged time feeding usage against period allowances.

INTERNAL PROJECTS

### Your own initiatives.

Track internal work with the same planning requirements, time entry and visibility as customer delivery.

BUILT BY AN MSP. DESIGNED FOR THE MSP.

# Make every commitment easier to manage.

Let's explore how Cinch PSA fits your team, customers and service model.

## Getting started is simple

**01 Start free**
Create your account and explore Cinch at your own pace. Free for up to 5 provider users, with no credit card required.

**02 Watch the demo**
See how Cinch PSA works alongside the rest of the connected Cinch platform.

**03 Learn the platform**
Use the Cinch user guides and walkthroughs for module overviews, workflows and setup.

**04 Grow with your team**
Choose the provider-user capacity you need as you grow. Schedule a meeting to talk through your service model.

### EVERY PLAN INCLUDES

- The full Cinch platform
- Luca and Cinch AI tokens
- Support included
- Customer end users free

## PSA, in practice

**Can we manage project work and ongoing services?**
Yes. Cinch supports finite projects, ongoing managed-service work and internal projects. Managed-service projects can also use retainer settings and recurring tasks.

**How does PSA connect to billing?**
Task time entries carry roles and rates and feed budget-to-actuals and billing context. Customer invoices sync from your billing system for review; invoice creation and editing stay in that system.

**Can we record customer retainer work separately?**
Yes. Customer-level Retainer Time Entry records covered work, including NOC activity, separate from the retainer settings on an individual managed-service project.

### ONE PLATFORM · SIX CONNECTED MODULES

| Desk | CRM | PSA | Workbooks | Cloud | Business Operations |
|---|---|---|---|---|---|
| Service delivery & devices | Sales & account growth | Projects, time & capacity | IT documentation & assets | Provisioning & operations | Shifts, effort & reporting |

## Your projects, people and time. Working together.

Connect the plan to the people doing the work and manage delivery with greater confidence.

Start Free →

(484) 679-2324 support@cinchsoftware.io

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