



## Plan for Profitability from the Start

### Profit doesn't just happen.

It requires the perfect intersection of planning and execution from assigning resources to tracking every project dollar to identifying the moment a project gets off track. Disconnected accounting systems and point solutions limit your ability to see all the components that contribute to profitability in real-time. The result is a backward view of profitability. One that is too late to fix.

### Progressus provides what professional services firms need to plan for profitability from the start.

Flexible project forecasting. Powerful project planning, estimating, and budgeting. Easy mobile time and expense entry. Added to the robust core accounting and business management functionality of Dynamics 365 Business Central, you get a solution that provides everything you need to put profitability first, not last.



#### Shine a light on hidden costs

Easily track, view and analyze costs. Get instant expense visibility before the end of an accounting period. Record items or inventory against a project. See information in easy to view dashboards and reports.

#### Take the guesswork out of budgeting

Get unlimited budget revisions. Budget generic resources as placeholders. Copy budgets from previous projects. Register materials consumption directly on the project. Compare budget details with actuals to the task level.

#### Knock down sales and delivery silos

Enable teams with Outlook integration, CRM functionality and easy-to-use workflows. Centralize data for an accurate and real-time view of business. Create quotes and budgets for internal review. Use project-analysis dashboards to view data.



### Start with profitability!

Ask your Microsoft Partner about combining the extensive functionality of Progressus with Dynamics 365 Business Central.

## Project Setup

### Project Setup Wizard

Create projects in a few clicks using the Project Setup Wizard to start a quote or project. The wizard ensures that the project is correctly created with required information entered and validated.

### Pre-activities

Start the project process before a customer commits to the project. Create Quotes that may or may not become projects to create budgets and record work against. The project and budget can be weighed according to the pipeline probability.

### Group Projects

Designate parent projects and child projects and maintain relationships through budgeting and portfolio management.

### Customizable dimensions

Load existing or create new dimensions to record information for a project.

### Activity Templates

Previous Project plans or defined templates can be applied to a project from a fully user-configurable library of templates. Combine multiple templates into one larger template so the project develops as it progresses. This helps ensure the structural integrity of the projects, methods & processes and keeps the overhead low.

### Flexible Project and Task Structure

Design projects to fit the way you do business by defining a flexible nested task structure. Project structures can include factors such as client, job, phase, task, work breakdown structure, and work types to allow better visibility into project performance.

### Task dependencies

Setup dependencies between tasks to influence budget creation.

### Pricing Discounts

Discounts levels can be setup for resources, customers, items and expenses.

### Flexible Invoice formats

Choose from predefined invoice formats or create custom formats based on the customers' needs.

## Project Budgeting

### Budget Matrix

Budget Matrix displays the tasks for a project and allows for budgeting at the level required. (Examples: daily, weekly monthly, quarterly, etc.). The matrix makes it easy to make budgets based on quantity and to see available capacity while creating a budget. Possible to split a resource group budget to resources or resource groups.

### Resource and Scenario-based Budgeting with Excel Integration

Compare budget detail with actuals at the completion of your project down to the task level. By measuring the accuracy of your budget and evaluating the impact on your profitability, you can easily fine tune your bidding process to ensure future competitive bids.

### Resource Pools and Availability

Manage resource pool and evaluate resource availability with the ability to modify the resource pool to meet budgets.

### Flexible Forecasting

Project Estimates can be dynamically controlled using budget revisions with full integration to the sales order where it is possible to generate orders based on specific activities and estimates.

### Integration to Quotes

Generate Sales Orders based on specific activities and estimates created by budgets and budget revisions.

### Unlimited Budget Revisions

Unlimited Budget revisions for Estimate to Complete and forecast are easily tracked and automatically update project statistics such as net profit and margin percentage. Pre-activities such as time, expenses and items can be entered on a project with a separate budget revision, in addition to the ability to set a separate status for activities and the project(s).

## Project Resource Management

### Flexible Resource & Qualification Definition

Project resources can range from human capital and equipment to inventory items. Define resources and setup different skills to plan out the labor budget against a project.

### Distribution & Manufacturing with Project Integration

Consume materials through purchasing with distribution or manufacturing.

### Purchase Reservations

Record items or inventory against a project

### Project Portfolio Management

Tie several projects together in a dynamics hierarchy for Project Portfolio Management. This enables the sending of one customer invoice for multiple projects.

### Enhanced Resource Tracking

Includes Capacity and working hours. Track Resource Utilization and Capacity at the individual and group level.

## Billing

### Customize Invoices with Microsoft Word

Templates can be set up for any type of invoice.

### Flexible Invoicing

Invoicing of any type is supported – Time and Material, Fixed Price, or Cost Plus.

### Milestone Billing

Set up billing schedules based on your determined milestones within the specified project.

### Multiple rate structures

Leverage rate structure based on by project, resource, expense, or item with multiple options for expense billing.

## Revenue Recognition

### Compliant with Current Accounting Standards

Supports AICPA, FASB and SEC regulations (including SOP 81-1, SAB 101, and EITF 00-21) including the requirements for Vendor Specific Objective Evidence or VSOE as well as Sarbanes-Oxley compliance with Section 404. Detail or summary invoices

### Multiple Revenue Recognition Options

Including, Work in Process, Sales, Cost and Budget vs Actual, and Percent Complete.

## Time and Expense Tracking

### Multiple Levels of Approval

Configurable approvals for both time and expense of up to three levels in the organizational structure

### Time Entry with Overtime Tracking

Simple Employee time entry from any device with the ability to calculate and track overtime (with rates)

### Standard and Actual Labor Costing

Flexible costing models to allow you to account for the costs by Standard Costs, or by actual labor costs.

## Analytics

### Customizable, Role-Based Dashboards

Including Project Management view with project plans and statistics

### Advanced Forecasting

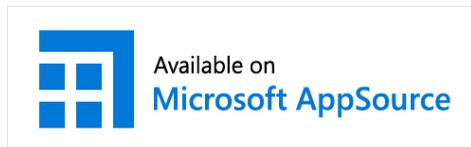
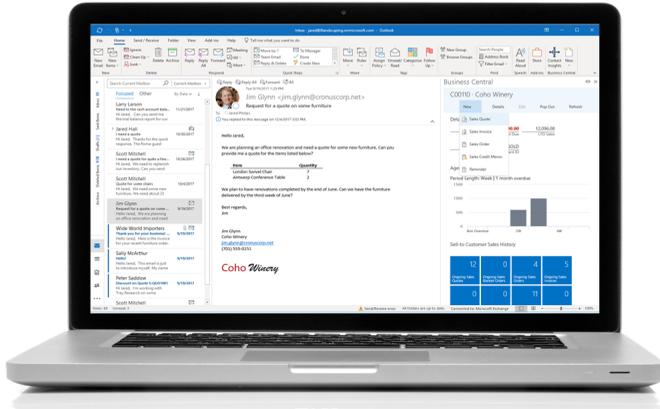
Assign Pipeline close percentages to better forecast future revenue and assign pipeline probabilities to allow weighted averaging. Work in Progress reporting.

### Robust Reporting

Including reports for Project P&L and Budget vs Actual

### Resource Analytics

Review profitability and capacity



- Built to work with Microsoft 365, the world's leading productivity software
- Work from anywhere on any device
- Create your own automated workflows
- Cost-effective, easy to deploy, simple to configure and manage
- Multi-language, multi-currency
- Secure, private and compliant
- Native interoperability with D365 Business Central with no coding or complex integration
- Start with what you need and grow at your own pace with additional Microsoft Dynamics 365 applications



## Ready to put profitability first, not last?

Ask your Microsoft Partner about Progressus.

Progressus Advanced Projects for Business Central is a people-centric, cloud power for emerging professional services firms and project-based businesses who need an enterprise-class, end-to-end business solution without the difficulties of investing in a costly, complex, and disruptive enterprise software project: [www.progressusglobal.com](http://www.progressusglobal.com)