Microsoft Dynamics SL User Wishes

DISCOVER WHAT'S NEXT: CLOUD TECHNOLOGY CAN MAKE YOUR DREAMS COME TRUE

Microsoft Dynamics 365 Business Central & Progressus Advanced Project Accounting - the powerhouse solution for project-based businesses.

As a Microsoft Dynamics SL User, you've been leveraging one of the top project-based on-premise business applications in the industry to run your business. You know what you are used to, and what you want. With Cloud technology accelerating the pace at which new capabilities come to market, *have you seen the next generation?*
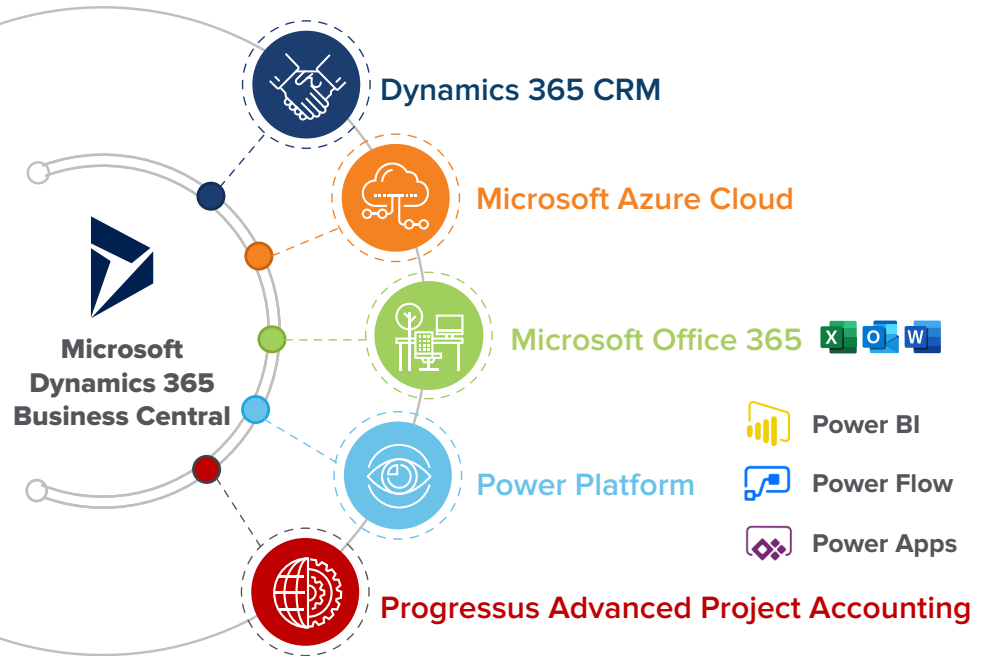
Microsoft Dynamics 365 Business Central helps organizations build an intelligent decision platform that automates data delivery to each person in a way they can use it. With centralized data, employees have access to relevant insights, giving them a broader perspective so they can respond quickly to challenges and opportunities. By connecting people, resources and processes across the organization, informed decisions can be made quickly and collaboratively.

In this eBook, we'll showcase a collection of **wish list** scenarios from experienced Microsoft Dynamics SL users. And the best part? Velosio can make these wishes come true with Progressus Advanced Project Accounting for Microsoft Dynamics 365 Business Central.

Advanced Project Accounting is built on Business Central and native to the Microsoft Intelligent Cloud. As a professional services firm or project-based business, you are continuously striving to maximize utilization, deliver your projects on time and on budget, and optimize your project portfolio.

In addition to project accounting and project management capabilities, the solution provides productivity tools and process automation capabilities, plus the visibility and business insights to improve the performance of staff, leaders, and the organization as a whole. Advanced Project Accounting is built for the people who use it every day and works with the tools your employees already know, like Microsoft Office 365. Supporting today's mobile workforce, users can work from wherever they are, whenever they need, on any device, and tailor their work experience to fit their individual or team needs, including creating automated workflows to help them be more productive with their time.

Benefit from an entire ecosystem of *integrated products and technology platforms* designed to support your NEXT **every step of the way.**

Dynamics 365 CRM

Microsoft Azure Cloud

Microsoft Office 365

Microsoft Dynamics 365 Business Central

Power Platform

Power BI

Power Flow

Power Apps

Progressus Advanced Project Accounting

What's next after Dynamics SL?

So what's next? A modern, project-centric business application that delivers what users just like you have wished for to support their growing business. Over the years, we've collected process flow and capability improvements our Microsoft Dynamics SL client community have repeatedly asked for. Review what's now possible with Microsoft Dynamics 365 Business Central and Progressus Advanced Project Accounting - wishes can come true!

One solution – that can be accessed on ANY device (phone, tablet, or desktop) for Time, Expense AND Project Management.

We all have a love/hate relationship with remote access to Dynamics SL and with SL Web Apps. Deployment of remote desktop solutions have their limitations and challenges. As a first-generation solution, Web Apps provides limited remote access, but like Dynamics SL, is hosted locally on servers and requires additional overhead to ensure secure remote access. Project access and Time and Expense is a 'norm' for project-centric companies. There has to be a better way!

With Microsoft Dynamics 365 Business Central and Progressus, IT server and security management activities are eliminated. Entry and approval of time and expenses is executed from within one application, on any device, from anywhere that does not have to be deployed or maintained locally. Project managers and employees have the same remote access to the information that they need to do their jobs, no matter where they are located.

An ability to share project information – across internal and external resources – easily, confidentially, and securely.

Projects involve all types of resources, including internal and external resources. Each have different types of project information needs. Providing information across project resources, allowing project stakeholders visibility into project milestones, ensures successful project completion.

Imagine assigning select resources the ability to update information on projects or tasks; restrict or give permissions to create or update budgets; assign additional approvers when needed -imagine the process improvements and increased productivity of the project team! With Advanced Project Accounting for Business Central, you can set permissions and restrictions across project stakeholders as required, but overall provide more information and visibility to all project resources to support a successful project completion. Nothing is "installed", users simply access Progressus and Dynamics 365 Business Central where and when they want, from any device.

Flexibility to easily manage the many variables associated with handling multiple time entry and approval processes.

Projects and project resources come in all shapes and sizes. One department's time entry needs do not automatically determine another department's needs. As an example: daily vs weekly time sheets, or Sunday vs. Monday weekly start dates. In addition to mitigating the challenges of users needing to enter time at different intervals, let's not forget to layer in the added complication of overtime. Different users might even have unique timesheet requirements.

Once "time" is captured, next is the approval circus. With Advanced Project Accounting, creating different time periods and approvers in a company, across different types of users, with the ability to support different timecard entry requirements by user type delivers the robust flexibility project-based businesses require to manage today's time capture and multi-level approval demands.

ONE STOP for all things Time: Entry, Management and Approval.

Often time entry functionality is narrowed down to the capture of time related to a project. Real-life includes the need to request and record time-off and vacation time - IN ADDITION - to project-related work. Our Advanced Project Accounting's robust time entry system, integrated into the back-end accounting/ERP system, delivers end-to-end time capture for employees, in a single system.

Ability to easily capture and process credit card expenses for projects.

Credit cards are a standard currency for today's business. Advanced Project Accounting streamlines processes by eliminating redundant data entry with our credit card import process with direct entry against your projects. Reduce AP processing and manual entry errors as the project and ERP systems are always connected.

Control pricing variances and discounts across projects.

While you may not promote or offer a discount - everyone always asks. For whatever reason you negotiate a discount, no matter what it is, you have flexibility on how you price your projects - down to the project level! Support a percent discount on one project, another percent on the next project and no discount on the next. Easily manage your price negotiations as required for all your projects.

A budgeting approach that supports project-based businesses.

Often system parameters drive the budget process versus you controlling the budget. Advanced Project Accounting provides the ability to have unlimited budget versions allowing different budget views with multiple variants including what if's, timeline, and change orders with the ability to revert to the original, if needed. Comparisons of all budgets are easily done to track change throughout the lifecycle of a budget.

Simplified and standardized creation of projects.

You live in a project-based world. Imagine project creation wizards that speed up the process based on responses to preset questions. With Advanced Project Accounting, streamline project entry with project wizards that give you a standardized process approach that captures the required information at the start, increasing efficiency with templates for projects, tasks and invoices which speeds your project setup.

Multiple invoice formats, that are easy to use, to accommodate different billing approaches.

No two customers are completely the same. The need to accommodate billing requests, providing invoices for Fixed Fee, Time and Material, Percent Complete scenarios is ongoing. Advanced Project Accounting provides the ability to have multiple, flexible invoice formats for whatever type of billing required. These formats are built with tools you already know (Microsoft Word and Excel) streamlining both your learning curve and your processing time.

Ability for project managers to track resources' actual versus budgeted hours.

Tracking your project against budget is a daily activity. With Advanced Project Accounting, project managers can see resource activity based on actual hours entered versus budgeted or planned hours. Budgets can be for a specific date, and budgets can be compared against each other as often as necessary. Comparisons, along with Power BI dashboards and project specific reports, can be viewed at any time in REAL TIME to keep projects on track and on budget.

Easily create a budget quote without assigning resources.

Project managers need to create a project quote, using "real numbers" for resources and items but not assign specific resources. With Advanced Project Accounting forecast a new project, create the budget based on the types of resource required to provide accurate quote/rate projections and assign actual resources at time of project engagement.

One invoice for customers with multiple projects.

When working on multiple projects for a customer, having an ability to link projects to a "main" project or contract to produce a single invoice would simplify processes. With Advanced Project Accounting you can link projects to a main project. When projects are linked, all the information from the associated projects are rolled up and visible as totals on the main project. This includes budgets, actuals and invoicing. There is also drill down capability to all transactions associated to a main project. This also allows you to group the associated projects to specific tasks on the main project and bill the customer for all work on one invoice.

Visibility into budget and date impacts due to slippage or change.

Create planning budgets at a transaction and date level so that when dates slip, planning budgets reflect those changes. As budgets are date based, any change to budgeted dates due to exact start date versus expected date, or any other date slippage, impact the entire budget schedule. Advanced Project Accounting can schedule at the transaction level, providing an easy way to move the entire budget. Select all or portions of the budget and move them with a relative date.
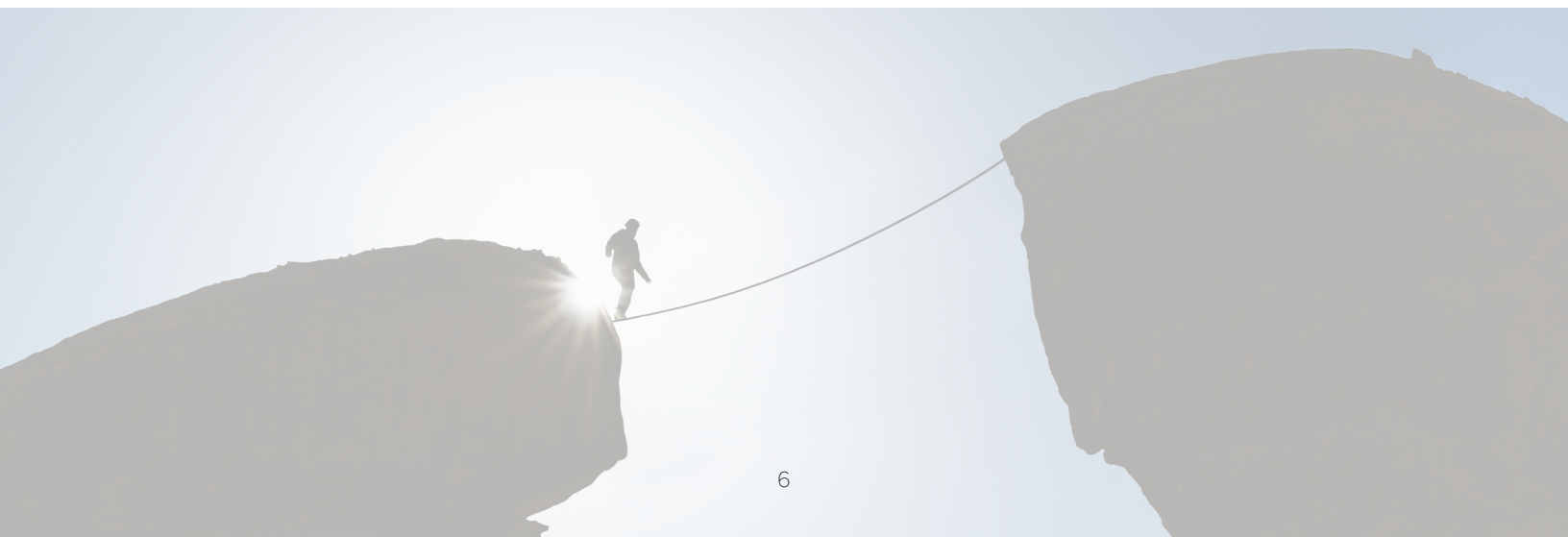
Easily share project information - delivering the visibility needed for each role in your organization.

You have data, but how to provide key performance indicators to different users within your organization. With Advanced Project Accounting project resources can quickly and easily view only what is important to their specific role so they can act immediately. Role Centers are based on project roles and only display what is important to that specific project resource. More than a dozen project related Power BI dashboards can also be shared across designated resources for even greater visibility and detail.

Project reports designed for MY business.

Most companies require more than the standard basic financial reports. Advanced Project Accounting supports interactive dashboards to view high-level information, with the ability to drill down into the details with full mobile visibility at the project level across more than 100 data points related to projects, costs, resources, etc. With personalized dashboards and a host of standard project specific reports designed at the role center level, project managers have the visibility needed to keep their projects on track.

![Velosio logo](Velosio® What's your next?)

Let's discuss how **Microsoft Dynamics 365 Business Central & Progressus Advanced Project Accounting** can make your wishes come true!

LET VELOSIO HELP MAKE YOUR WISHES COME TRUE WITH MICROSOFT DYNAMICS 365 BUSINESS CENTRAL & PROGRESSUS ADVANCED PROJECT ACCOUNTING

Velosio moves you from what is to what is next for your business through expert delivery of business solutions and cloud technologies. With over 30 years of business systems experience, Velosio has deep Professional Service industry experience and is an expert in Dynamics 365 Business Central implementations. We bring innovation to service delivery by streamlining choices that include the most common use-case scenarios at predictable fees.

We will help you realize business value faster, simplify the process of deploying technology so you can support the data-driven decisions and innovation that move your business forward. Beyond our expertise, as a Velosio client you can leverage the Velosio network of peers, external resources, and community events to help you on your journey to what's next powering your business growth.

We empower clients to go from what is to what is possible through innovative technology, specialized expertise and strategic partnerships. *Let Velosio help your business on its journey to next.*

CONTACT YOUR VELOSIO CSM TODAY!

📞 888.725.2555 | ✉ info@velosio.com

5747 Perimeter Dr. Suite 200, Dublin, OH 43017
www.velosio.com