



Plan for Profitability From the Start

Powered by Microsoft Dynamics 365

Enable Growth with Progressus Advanced Projects

Project-driven organizations face constant pressure with tighter margins, growing customer demands, and complex operations that slow teams down. Progressus Advanced Projects, powered by Microsoft Dynamics 365, helps you cut through the noise with a single solution built for project success.

From smarter resource utilization to real-time insights and secure quote-to-cash integration, Progressus gives you the tools to plan, track, and deliver projects profitably without the headaches of disconnected systems.

Dynamics 365 Business Central is the foundation. It is an all-in-one business management system trusted by small and mid-sized businesses worldwide.

With Progressus layered on top, you get the project visibility, control, and scalability your business needs to move faster and grow with confidence.



Move to the cloud faster with confidence

Adopt new business models faster with flexible deployment, reliability, security, and an adaptable solution that grows with you.



Boost sales and improve customer service

Take better care of customers by managing the entire sales process from within Microsoft Outlook, and deliver better outcomes with connected service operations.



Unlock productivity and business insights

Connect people, processes, and insights to make better decisions faster with embedded guidance, dashboards, and interoperability with Microsoft 365 and Microsoft Teams.



Finish projects on time and under budget

Ensure successful project execution and profitability with planning, resourcing, tracking, costing, billing, accounting, and real-time intelligence.



Increase financial visibility and performance

Accelerate financial close, improve forecasting, and get real-time performance metrics while fostering compliance and security across subsidiaries.



Optimize inventory and supply chain management

Deliver products on time and adapt to changing business models with visibility across purchasing, manufacturing, inventory, and warehouses.

FORRESTER[®]

162%

ROI with Dynamics 365
Business Central
over three years

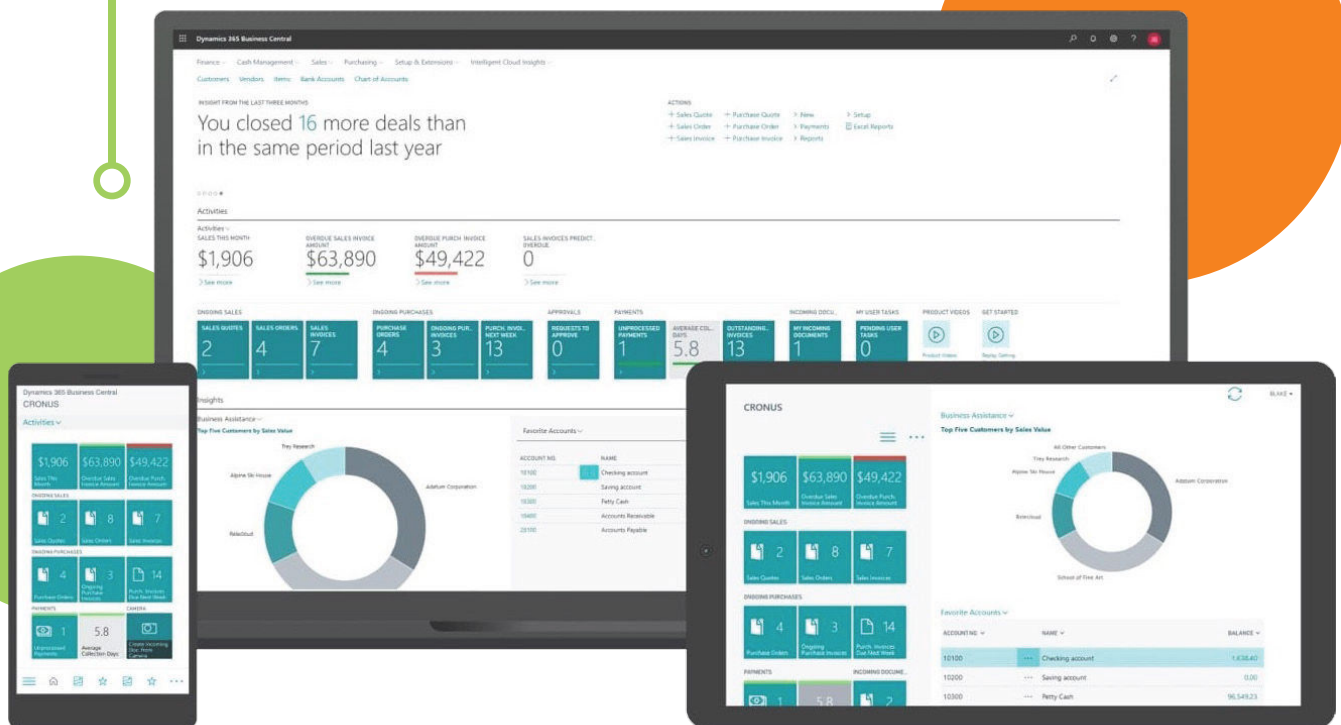
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Less than a
year to pay
back

10%

Reduction in finance
and operations
hiring needs

Microsoft Dynamics 365 Business Central Capabilities



Adapt as Your Business Grows



Manage your business on the Go

Work wherever your business takes you, with full capabilities on desktop, tablet, or mobile, on premises or in the cloud, across Windows, macOS, Android, and iOS devices.



Be ready for growth

Scale and perform as you grow using modern technologies built on the Microsoft Cloud, such as machine learning, IoT, and generative AI, to help you adapt to market dynamics.



Store and transmit data across your systems

Take control of your mission-critical business data and help protect it from unauthorized access with automatic Microsoft datacenter encryption.



Work Smarter and Faster



Get Insights Within the Flow of Business

Access business intelligence when and where you need it, with real-time dashboards and KPIs for each user role.



Drive Continuous Process Optimization

Improve outcomes and productivity with real-time system suggestions, based on historical data, to guide employees through workflows.



Automate Workflows and Processes

Optimize performance using easy-to-create workflows, customizable Microsoft Power Apps and Power Automate templates, audit trails, enterprise-level security, and AI.



Connect your Data with Microsoft 365

Link your business data with productivity tools such as Microsoft Outlook and Excel to improve the customer and employee experience with workflows such as quote-to-cash.

Adapt as Your Business Grows

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- ✓ **Take control of financial data**
Better manage your cash flow, bank reconciliations, fixed assets, budgeting, and project costing while shortening cycle times with the late payment–prediction extension.
- ✓ **Easily synchronize company records and data**
Save time by copying and synchronizing one company’s setup records (such as chart of accounts) and master data (customer, vendor, and items) to another company in the same environment.
- ✓ **Accelerate financial closing and reporting**
Reduce month- and year-end closing times with connected general ledger, accounts receivable, payables, and fixed-assets data. Streamline approval workflows using Power Automate.
- ✓ **Maximize financial visibility**
Use built-in reports, Excel, or Microsoft Power BI and unlimited data dimensions to get real-time cash flow, identify financial patterns, analyze trends, and improve business planning.
- ✓ **Make more profitable financial decisions**
Connect reports, charts, and Power BI data from accounting, sales, purchasing, and inventory teams to get accurate insights and make financial decisions with confidence.

Accelerate Sales Processes

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Prioritize leads based on revenue potential

Keep track of customer interactions and get guidance on the best upsell, cross-sell, and renewal opportunities throughout your sales cycle.



Improve cash management

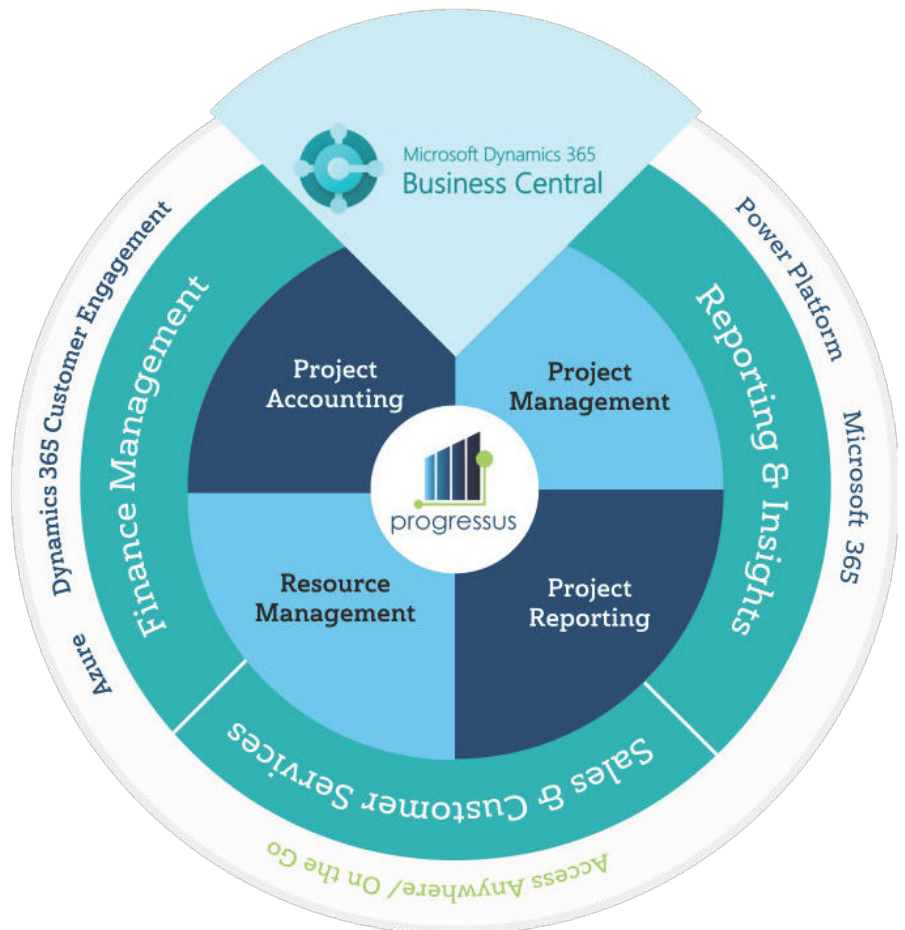
Increase your cash flow by rightsizing inventory and maximizing the lifespan and governance of asset capitalization.

Facilitate Project Success

- ✓ **Improve project costing and accounting**
Better manage projects using timesheets and advanced job costing and reporting. Develop and modify detailed budgets to help ensure project profitability.
- ✓ **Optimize resource levels**
Manage resource utilization by planning capacity and sales. Track customer invoicing against planned or actual costs on orders and quotes.
- ✓ **Drive profitability with project insights**
Get real-time business intelligence on project status, profitability, and resource-utilization metrics.
- ✓ **Enhance project team productivity**
Enable employees to do their best work by implementing role-based access, ensuring that project managers, team members, and warehouse workers are following the processes for their specific jobs.

Progressus Advanced Projects Capabilities

Industry capabilities are the cornerstone of Progressus Advanced Projects, delivering the advanced forecasting, project planning, and time and expense functionality you need to put profitability first. With exclusive, project-focused analytics and insights along with the power to maximize utilization, you can deliver great projects on-time and on-budget and optimize your project portfolio.



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

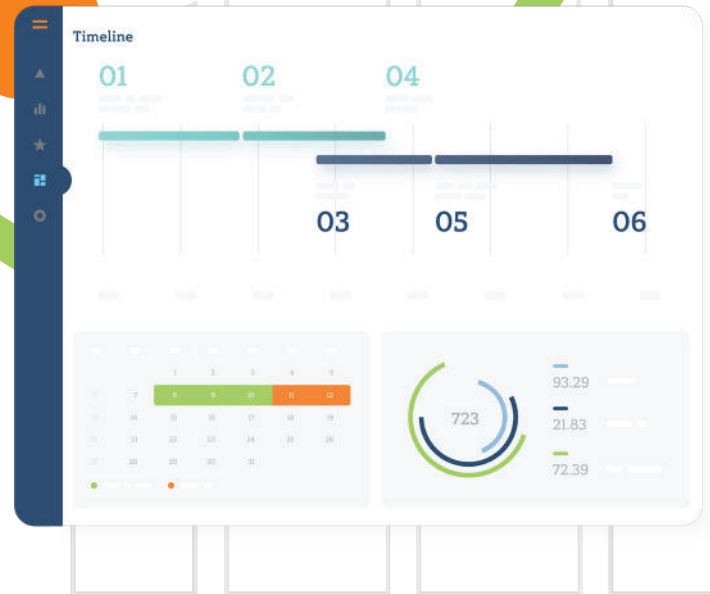
Designate parent projects and child projects and maintain relationships through budgeting and portfolio management.

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.

Subcontractor Management

Change and Payment Administration

Track all project change orders and associated budgets.

Contractor Payment Management

Use Pay When Paid terms and set up retention amounts on projects, tasks, or subcontracts.

Define and Track Insurance Compliance

Track policy numbers, carriers, effective and expiration dates, and amount of coverage. Block payments if policies expire.

Contract Administration

Manage and control submittal and transmittal documents including permits, insurance and safety notices.

Advanced Inventory Management

Serialized Inventory Processing

Use serialized inventory to track specific products to specific owners or for guarantees, warranties and quality control.

Warehouse Bin Tracking

Maintain a unique inventory sub-location for items or assemblies.

Inventory Allocation

Allocate inventory to a project and allow budgeted items on Purchase Orders.

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.

Subscription Billing

Generate deferred schedules for invoicing with revenue recognition in compliance with GAAP standards.

Multiple Rate Structures

Leverage rate structure 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.

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

Third-party Integration

Integrate Advanced Projects for Business Central with software development tools such as Microsoft Azure DevOps and Jira Software.

One solution. One partner. Profitability first.

If you're relying on spreadsheets, juggling multiple tools for project accounting, time and expense, or project planning, or struggling to manage remote teams, it's time to rethink your approach. The more time you spend managing the status quo, the more profitability you leave behind.

With Progressus Advanced Projects and Microsoft Dynamics 365 Business Central, powered by Velosio's expertise, you get a proven combination of modern technology and decades of industry know-how. That means less time firefighting and more time focused on driving profit.

Progressus Advanced Projects is built to help you plan for profitability from day one. Backed by Velosio's rapid deployment approach and a full suite of services — from development and support to managed services — you can go live faster, reduce risk, and scale with confidence.

For more than 30 years, Velosio has helped project-based and professional services businesses succeed. Our commitment is simple: deliver the tools, expertise, and partnership you need to grow profitably.



When you can't afford to guess anymore, choose **Progressus Advanced Projects** with Velosio to put profitability back in your hands.

Contact Us Today



888.725.2555



[Talk to a Projects Expert](#)