![progressus®]

Plan for Profitability from the Start

Enable growth with Business Central

Project-driven businesses can be extremely complex and, at times, daunting. The world is moving quicker, customers are demanding more, and margins are shrinking. Technology is challenging the way we do business—reframing accepted orthodoxies and delivering customer delight with blazing speed and incredible efficiency.   With solutions from Microsoft, you can turn data into insight, transform ideas into action, and turn change into opportunity.

Dynamics 365 Business Central is an all-in-one business management system designed for small or medium-sized businesses. The robust out of the box functionality empowers businesses to reach and exceed goals by proving the tools each department needs:.

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.
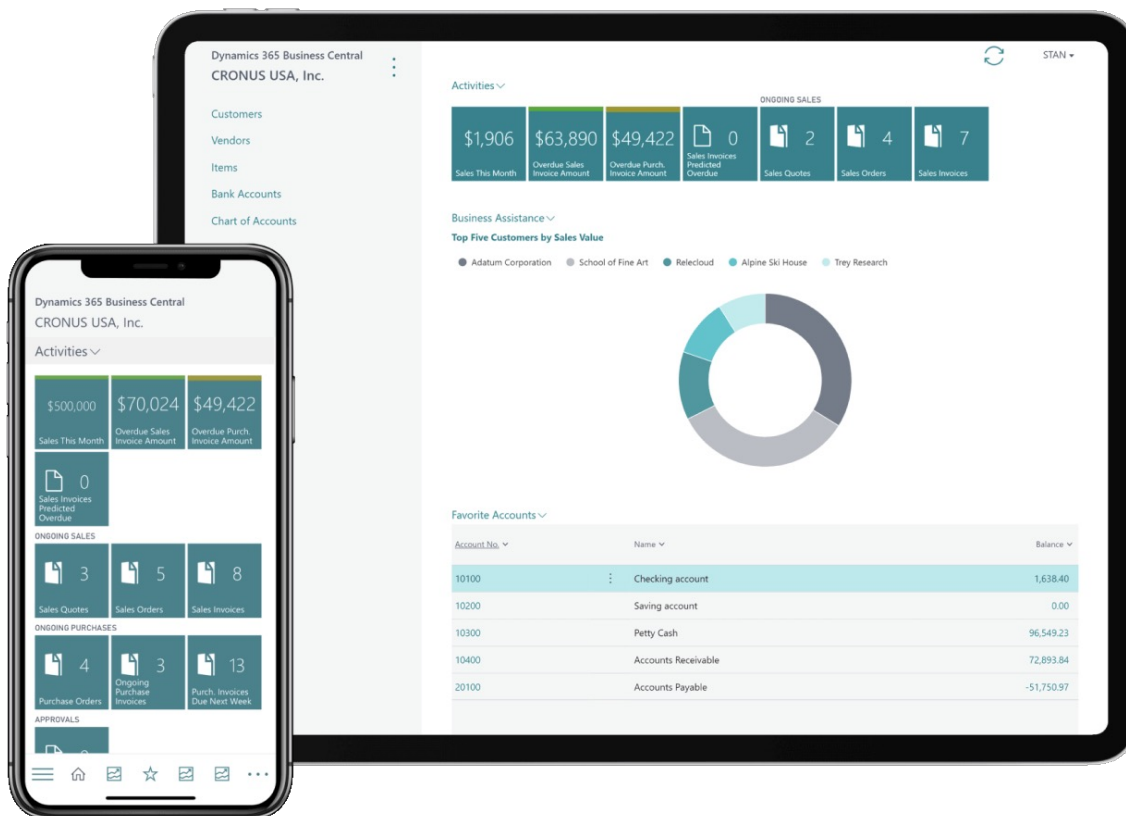
FORRESTER®

162%
ROI with Dynamics 365
Business Central
over three years

‹1 YEAR
To payback

10%
Reduction in finance
and operations
hiring needs

Business Central Capabilities

Adapt as your Business Grows

Take 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.

Extend with Industry Leading Apps like Progressus

Get purpose-driven extensions, like Progressus. You can also find other business applications on Microsoft AppSource to meet your unique vertical or business-specific requirements.

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.

Activate Financial and Business Insights

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

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.
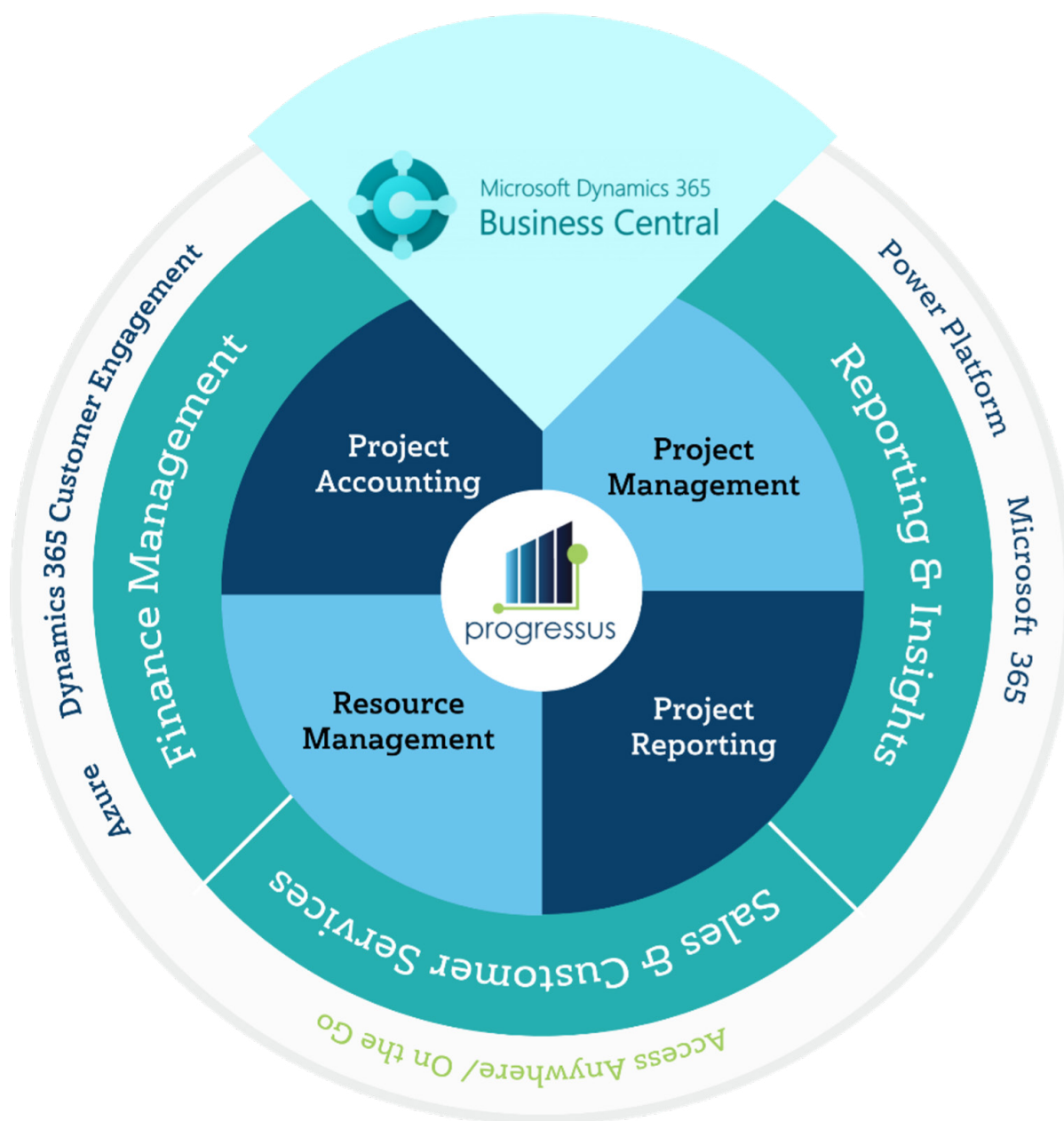
Enhance Project Team Productivity

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 Capabilities Integrated Directly Into Business Central

Industry capabilities are the cornerstone of Progressus, 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.

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
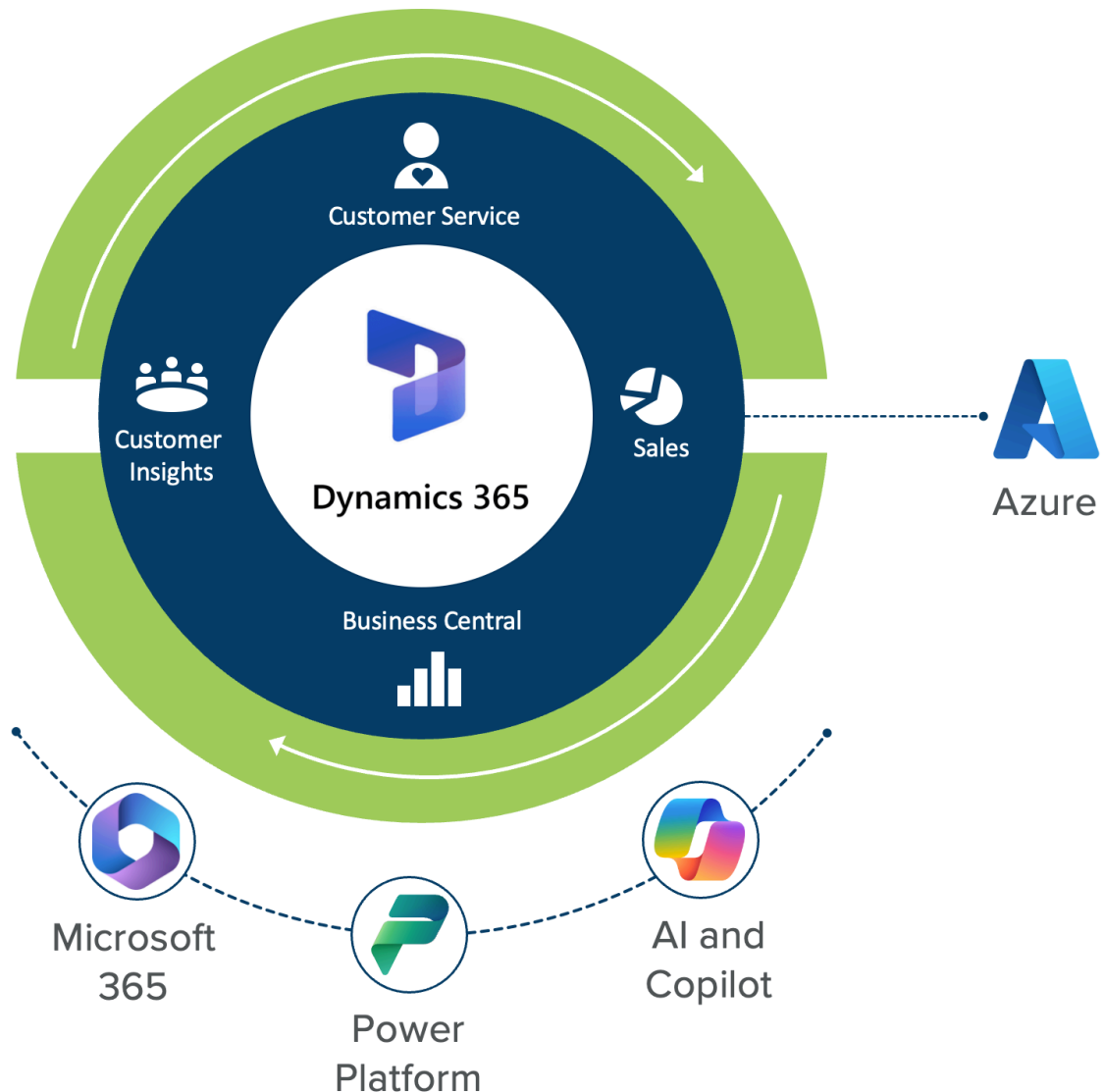
Resource Analytics

Review profitability and capacity

Third-party Integration

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

End to End Solution with the Microsoft Business Applications Stack

Business Central fully integrates with the other modules in Dynamics 365, allowing you to build the best solution for your specific needs, no matter the size of your business.

ONE SOLUTION AND ONE PARTNER PUT YOUR PROFITABILITY FIRST.

If you are struggling to enable remote workers, rely on manual processes and spreadsheets, or are using multiple solutions for project accounting, time & expense, and project planning, it's time to consider a change. The time you spend managing the status quo is costing money — and diminishing your profitability.

When you rely on Progressus and Dynamics 365 Business Central you gain the unbeatable combination of modern Microsoft technology and remarkable Velosio experience, so you can focus on putting profitability first, not last.

Our more than 30 years' experience as a Microsoft partner includes deep knowledge of how project-based and professional services businesses work. In fact, we built the functionality described here that that lets you plan for profitability from the start! You won't find our depth and breadth of experience in professional services or with Business Central anywhere else.

With Velosio, you can fast-track results with our rapid-deployment methodologies, accelerate your time to market with our industry expertise, and enhance implementations with our range of services including development, support, and managed services.

Our team is excited to help your organization succeed. We are committed to your business and value the opportunity to work with you.

If you can no longer afford to operate with a loose grasp of where money is made - or lost - it's time for Microsoft Dynamics 365 Business Central for Professional Services and Velosio.

CONTACT US TODAY!

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