Progressus PSA:
Capabilities That Drive Your People to Perform

It's All About the People

Progressus PSA is people-centric, cloud power for emerging professional services firms and project-based businesses who need an enterprise-class, end-to-end business solution but don't want to invest in a costly, complex, and disruptive enterprise software project. Progressus drives your business with the **Power of P³**, combining people-centricity and end-to-end process automation with the feature-rich Microsoft intelligent cloud as a solution platform.

Your business is based on getting the most out of your people. Success means giving them the tools and technology to maximize their personal performance, enable them to excel as teams, and drive performance across the organization. Progressus PSA was created to leverage Microsoft's world-leading productivity, collaboration, and cloud technology platform to power performance in people-centric industries.

Industry Capabilities

Industry Capabilities are the cornerstone of Progressus PSA. We've extended Microsoft Dynamics 365 Business Central and Microsoft Office 365, leveraging the resources and services of the Microsoft Cloud, to deliver the project accounting and project management functionality you need to drive your professional services firm or project based-business to success. We've combined industry know-how with technical expertise on the platform to provide you with exclusive, project-focused analytics and insights delivered in-context during work processes as well as on-demand through role-based dashboards. Progressus PSA gives you the power to maximize utilization, deliver great projects on-time and on-budget, and optimize the 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.

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

Core Business Capabilities

Unlike many alternative solutions, Progressus PSA doesn't require integration to additional systems to deliver a full business solution. We leveraged the robust core business capabilities of Microsoft Dynamics 365 Business Central to provide the foundational business functionality that professional services firms and project-based businesses need to succeed. Progressus PSA includes and includes full-featured, native financial management and customer relationship management functionality. You get the advanced tools and insights you need to beat the competition, drive excellence in strategic planning, sales and marketing, operations, finance and administration and to deliver the best customer experience possible.

Customer Relationship Management

Contacts

Maintain an overview of your contacts and record your contact information for all business relationships.

Campaigns

Organize campaigns based on segments of your contacts that you define.

Opportunity management

Keep track of sales opportunities, section your sales processes into different stages, and use this information to manage your sales opportunities.

Enhanced CRM with Dynamics 365

Connect with additional Dynamics 365 modules in a few easy steps to for more robust marketing, sales, or customer service capabilities.

Financial Management

Basic General Ledger

Set up a company and start posting to the general ledger, chart of accounts, general journals, VAT facilities, recurring journals, and source codes.

Budgets

Work with budgets in general ledger accounts.

Deferrals

Set up deferral templates that automate the process of deferring revenues and expenses over a pre-defined schedule.

Basic fixed assets

Keep track of fixed assets and related transactions such as acquisitions, depreciations, write-downs, appreciations, and disposals.

Basic receivables

Post sales transactions in journals and manage receivables; register customers and manage receivables using general journals.

Audit trails

The system automatically assigns audit trails and posting descriptions to every transaction. In addition, users can define reason codes to create complementary audit trails.

Bank account management

Create, operate, and manage multiple bank accounts for catering to your diverse business needs and across different currencies.

Reconciliation

Reconcile your bank statement data automatically to open bank account ledger entries end keep track of all your bank statements.

Dimensions

Add unlimited dimensions to any ledger for advanced transaction analyses.

Currencies

Manage multiple currencies throughout the system, including payables and receivables, general ledger reports, resource and inventory items, and bank accounts.

Optional Business Capabilities

Many professional services firms and project-based businesses need capabilities beyond financial management, customer relationship management, project management, and project accounting. For businesses who also need to manage the manufacture or distribution of physical products, or who have more robust field service or support requirements, we leverage the greater capabilities of Microsoft Dynamics 365 Business Central Premium Edition, Microsoft Office 365, plus additional resources available in the Microsoft Intelligent Cloud, to provide you with native support for service order management, supply chain management, and manufacturing. The Power of the Platform means these additional capabilities will function seamlessly with your project-based processes with no additional integration.

Service Order Management

Service orders

Register your after-sales issues including service requests, services due, service orders, and repair requests.

Service price management

Set up, maintain, and monitor your service prices.

Service item management

Record and keep track of all your service items, including contract information, component management, and BOM reference and warranty information.

Service contract management

Record details on service levels, response times, and discount levels, as well as on the service history of each contract, including used service items and parts and labor hours.

Planning

Assign personnel to work orders and log details such as work order handling and work order status.

Dispatching

Manage service personnel and field technician information, and filter according to availability, skills, and stock items.

Supply Chain Management

Sales order management

Manage sales orders, blanket sales orders, and sales order processes.

Purchase order management

Manage purchases, blanket orders, and purchase order processes.

Locations

Manage inventory in multiple locations that may represent a production plant, distribution center, warehouse, showroom, retail outlet, or service car.

Item transfers

Track inventory as it's moved from one location to another and account for the value of inventory in transit at various locations.

Warehouse management (Basic and Advanced)

Warehouse functionality in Business Central can be implemented in different complexity levels, depending on a company's processes and order volume. The main difference is that activities are performed order-by-order in basic warehousing when they are consolidated for multiple orders in advanced warehousing.

Assembly Management

To support companies that supply products to their customers by combining components in simple processes without the need of manufacturing functionality, Business Central includes features to assemble items that integrate with existing features, such as sales, planning, reservations, and warehousing.

Manufacturing

Production orders

Create and manage production orders and post consumption and output to the production orders.

Version management

Create and manage different version of the manufacturing bill of materials and routings.

Agile manufacturing

Plan rush hours, make exceptions, and handle last-minute changes to your processes with multiple planning options.

Supply planning

Plan for material requirements based on demand, with support for master production scheduling and materials requirements planning.

Demand forecasting

Plan and create production and purchase orders, taking into consideration the demand forecast together with the level of available inventory and parameters of requirement planning.

Capacity planning

Add capacities to the manufacturing process. Set up routings and use these routings on production orders and in material requirements planning.

Machine centers

Manage capacity on several levels; on a more detailed level for machine centers and on a consolidated level for work centers.

Finite Loading

Take capacity constraints into account so that no more work is assigned to a work center than the capacities can be expected to execute during a given time period.

Subcontracting

Allows companies to send raw materials, unfinished goods, or partially finished goods for further processing elsewhere.

Take the first step!

Contact Progressus to assess where you are, where you need to be, and how you'll get there this year with the Power of P^3.

Learn more at https://progressussoftware.com