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ADVANCED PROJECTS

ERP for projects & services

Is your project setup time-consuming and inconsistent?

PROJECT SETUP IN LESS THAN A MINUTE

With a **step-by-step guide or pre-defined templates**, create consistent projects in a few clicks. This makes it easier to manage and track projects, allowing Finance to focus on their core responsibilities.

Have full control over **project backlog and forecast** by managing your projects from the quote phase. Start your projects with a quote rather than having to wait for the order.

"Ask the customer what they want and set it up right away."

Steen Nielsen, CFO at LE34

Lacking an overview of all your budget versions?

DETAILED BUDGETS FOR BETTER FORECASTING

Ensure **cost control** and take **corrective actions** if needed to stay within financial targets. Monitor project data on a comprehensive dashboard or get notified by the system when cost approaches budget commitment.

Get **unlimited budget versions** to compare different scenarios.

Make use of the **work breakdown structure (WBS)** and of an **exhaustive Gantt chart**.

"With the rolling budget we easily keep our estimates always up-to-date."

Henriette Frost, CFO at Geoinfo

Struggling with your purchasing process?

AUTOMATED PURCHASE ORDER GENERATION

Easily **generate purchase orders** directly from within the project.

Ensure the quality and profitability of your projects by being in control of your **purchase & subcontract commitments**.

Ensure **compliance with subcontractor arrangements** in terms of insurance, certificates, and contracts. Keep track of change orders and use internal approvals.

Frustrated by not having an overview of the resources?

RESOURCE PLANNING FOR OPTIMAL UTILISATION

Gain full insight into **resource workload and availability** to optimise utilisation. Secure the right resource by filtering based on specific skills or competencies.

Use a single, collaborative, drag-and-drop **resource planning platform** to create or modify work assignments. Easily **reallocate people** to other projects if needed.

Send work assignments to Outlook calendar.
Live data for **resource forecasting** in one click.

"We now have a fantastic overview of who's doing what."
Jytte Beck, Project Coordinator at Geoinfo

Difficulties in getting timesheets and expenses on time?

PAINLESS TIME & EXPENSE CAPTURE

Easy capture of time to avoid that tasks get forgotten or missed. Ensure all time is captured by **updating timesheets** either through direct entry in Outlook calendar bookings and emails, or on-the-go with your smartphone.

Straightforward **expense entry on the go** by taking a quick photo of the receipt and submitting it.

Streamline the invoicing process by implementing **approval workflows up to 3 levels** prior to invoice posting.

"People started entering time even before the training."
Sean Looby, Head of Operations at Cafico International

Is invoicing a time-consuming and administrative burden?

STREAMLINE YOUR INVOICING IN A FEW CLICKS

Effortlessly review what to invoice, make changes, or relocate entries as needed. Keep track of your **milestones and payment plans** and release for invoicing in one click.

When grouping lines, configure your **invoice specification** in order to meet your customers' wishes.

Calculate **Work in Progress (WIP)** automatically.
Project invoicing **fully integrated with Finance**, even when implementing **different invoicing methods**.

"The invoice suggestion is brilliant. Easy and always updated."
Steen Nielsen, CFO at LE34

Lacking insight and control over projects and resources?

CUSTOM-FIT RELIABLE DATA ONE CLICK AWAY

Full access to **trustful data from ONE source** with drill-down functionality. Have an overall view of the project, **identify risks**, and apply **corrective measures** if needed.

Take advantage of **analysis views and dashboards** for full project cost control & profitability, resource performance, or any other performance indicator.

Visualise insights on demand with out-of-the-box standard **reports for Power BI**.

"I've gained a greater understanding of the business only within a few months." Steen Nielsen, CFO at LE34

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ADVANCED PROJECTS

Feature highlights

PROJECT SETUP

- Create Project through Wizard
- Project & Task Templates
- Sales Price Templates
- Invoice Templates
- Project Quote
- Pipeline Management
- Associations
- Team Members
- Approval workflow
- Contract

BUDGETING & PLANNING

- Budget Versions (unlimited)
- Budget Matrix
- Copy Budget
- Budget Approval Workflow
- Scheduled Billings
- Contract Type per task
- Deadlines & Milestones
- Gantt Chart
- Related Tasks
- Subcontractor Management

PURCHASE /PRODUCTION/ASSEMBLY

- Project Replenishment Planning
- Project Purchase Order
- Project Production Order
- Project Assembly Order
- Project Item Prices
- Project Bins & Locations
- Subcontract & Change Orders
- Subcontractor Commitments
- Reserved Purchase on Project
- Purchase Not Invoiced on Project

RESOURCE PLANNING

- Work Assignments
- Drag-&-Drop
- Assign /Re-Assign
- Resource Board
- Project Board
- Individual Planning Board
- Permissions
- Color templates
- Import from Budget
- Send to Outlook

TIME & EXPENSE ENTRY

- Time & Expense Sheet
- Time entry in Outlook
- Time entry in Mobile
- Worktype
- Flex time
- Expense entry in Mobile
- Attach receipts in Mobile
- Approval workflows
- Time & Expense Journals
- Timesheet reminders

INVOICING

- Invoice Suggestion
- Scheduled Billings
- Milestone Billing
- Progress Billing
- Retention Billing
- % Complete Billing
- Subscription Order Billing
- Contract Billing
- Invoice Setup & Specification
- Work-In-Progress

INSIGHTS & CONTROL

- Project Cock-pit
- Project Profitability
- Project Net Profit Analysis
- Project Task Profit Analysis
- Resource Usage Analysis
- Timesheet Status Analysis
- Project Forecast Analysis
- Unbilled Report
- Project Budget Comparison
- Power BI Reporting Package

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