



## EFFICIENT PROJECT MANAGEMENT WITH AUTOMATED ACCOUNTING IN ONE SINGLE SYSTEM

Service industries, such as consulting, software or engineering companies, operate in an increasingly demanding environment. Projects have to be processed quicker and in a more efficient and competitive way. Customers want precise professionally formatted cost reports delivered on-time. Project managers require a quick overview of their projects to ascertain profitability and the need for intervention. These requirements are no longer satisfied in a heterogeneous software environment. Using separate programmes to record hours, plan projects, manage customer data, create invoices and do the bookkeeping is too slow, too error-prone and too expensive!

A more effective approach which more and more service industries are choosing is to use a project management solution that is integrated with an ERP system. That's why they choose ProjectManagement for SAP Business One.

### **Uniform user interface**

ProjectManagement is an integrated, affordable project management and accounting solution specifically designed for the needs of small and midsize companies. The project management solution caters for the entire workflow of these companies through a uniform user interface, from planning and data recording to data clearance and financial analysis. The solution provides authorised users with on-demand access to all the critical information they need to make better business decisions. ProjectManagement is not only an easy to use and affordable solution, but also highly customisable and feature-rich.

### **Direct access to all project data**

Based on a complete management system for employee, material and contract data etc., the solution enables the user to plan projects, to calculate and quote on costs, to update and manage the project's status, to invoice projects and to post the respective data to the financial system. In addition, the programme allows authorised users direct access to all critical data.

### **Affordable solution with a short implementation time**

Implementation of the solution takes only a few days. User acceptance is very high as a result of the intuitive user interface and the familiar Windows environment. The entire system runs on one single server thus reducing initial and on-going maintenance costs. Simple, yet powerful; the solution can be easily customised to customer-specific business processes by the addition of fields, data types, documents or requests.

### **Efficient price calculation and proposal management**

During the proposal stage, a preliminary project is created. ProjectManagement allows the user to accurately calculate prices and costs by taking into account resource pools, employees, materials and travel expenses. Preliminary projects can be easily transformed into a quotation which can be processed within Sales Opportunities as part of CRM. For instance, the sales probability of a quotation can be assessed and quotations can be linked to activities.

## Project planning with multiple versions and phase structure

If the proposal is accepted and the order placed, the planning needs to be reviewed: ProjectManagement allows for the creation of different planning versions, such as preliminary project planning (blocked), preliminary project planning, primary planning and current planning as required, for example, for the calculation of work in progress according to international accounting standards. Project-Management allows users to create different process scenarios in the respective planning version, from overall planning (no particular resource is selected) to detailed day planning (resource pools or employees are selected). The project manager can also simplify large, complex projects by creating a hierarchical phase structure.

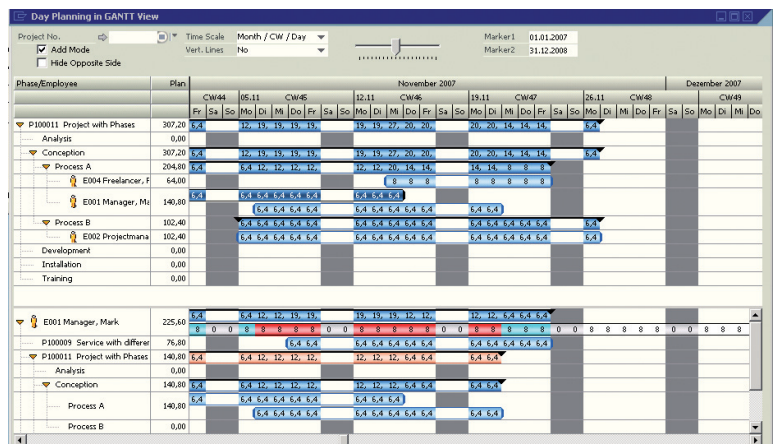
## Flexible GANTT planning for resources and phases

ProjectManagement supports project planning through graphical GANTT charts. Changes can quickly and easily be made to planning through 'drag & drop' of planned resources to different time lines or project phases. Utilisation is perpetually evaluated and colours are used to highlight utilisation exceptions for individual employees or pools.

## Data exchange with MS Project

A two-way connection to MS Project enables the synchronisation of phase structures, planned values and resources at any time through a defined export/import interface. In addition, actual data recorded can be transferred to MS Project.

*The GANTT chart represents planned phases and activities of a project work breakdown structure and uses colours to highlight utilisation exceptions*



## Phase-related purchasing

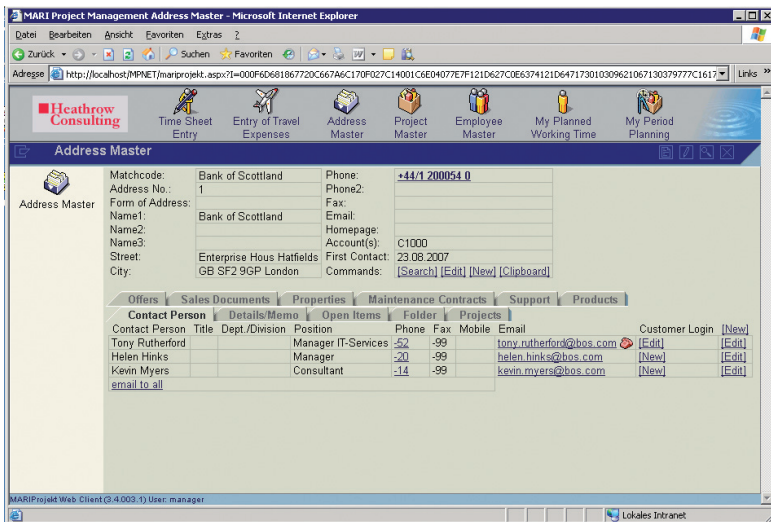
ProjectManagement assists users in the phase-related purchase process – from the quote request at different suppliers to the A/P invoice. Recorded freelancer services can be reviewed when checking the A/P invoice.

## Precise, project-related data recording

After a project has been released for entry, the employees are able to record their project times either by the hour or by entering the exact start and end time. If they have no access to the standard system or the Web Client, administrators can be authorised to record the employees' working times. Recording hours is easy and takes into account different work patterns, working time rules and business calendars with country specific holidays that are assigned to the respective employees. Also material costs incurred during the course of the project can be assigned to the respective project according to the agreed criteria. The feedback on required hours or the completion message per work package assists the project manager in the current planning.

## Precise invoicing and accounting, including travel expenses

Actual data recorded by the employees has to be approved by the project manager. When reviewing data, the project manager decides on the number of hours, materials or travel expenses to be charged to the customer. An accounting wizard assists the user with invoicing according to selected criteria, such as due date, period, milestone, at cost or at fixed price. Data is then seamlessly transferred to the financial system and an open item is generated for the customer. Additionally, employees can be reimbursed for travel expenses incurred by them.



**Customer information in the Web Client**

### Support Desk for software companies

The Support Desk enables support managers to manage, for example, software products with multiple modules and versions. Customer calls or requests for improvement (so-called support or hotline tickets) are recorded in the Support Desk of the Web Client. The Support Desk also allows users to manage different priorities, to add comments to a support event and to track support tickets. The handling time of single tickets can also be recorded. As times are recorded in the same way as for projects, costs can also be assigned to them. These costs can then be accounted for per request or tickets can be accounted for according to handling time. A portal enables the customer to enter new support tickets and to track support events.

### Intra-company and inter-company distribution

In addition to classic customer invoicing, ProjectManagement enables intra-company and inter-company distribution. Services or travel expenses can be distributed between profit centres or between branches or branch offices of a group of companies or a holding company.

### Improved control of finances and resources

Data relating to all active or planned projects and resources is available at any time. ProjectManagement provides formatted user-definable reports, such as Degree of Completion Report, Breakeven Analysis, Project Totals and Employee Totals Report, Target/Actual Comparison, Residual Volume Report etc. Pre-defined authorisation limits for each report ensure that each user gains only access to the data they need.

### Web Client: location independent access to data

Apart from allowing the entry of services, items and travel expenses, the Web Client provides access to a variety of customer, financial and project data, such as contact/address details, quotations, delivery notes, invoices, credit notes, payments, contracts and so on. The Web Client is especially useful for sales employees or project team members if they quickly require particular information at the customer's location or if they want to deliver service reports directly to the customer.

### ProjectManagement with global reach

ProjectManagement spans the global market: ProjectManagement supports the use of multiple languages, multiple companies and multiple currencies. The software is available in different languages and has already been localised for numerous countries. A network of qualified business partners provides customers with local service and support.

*„ The change of all business management processes to SAP Business One has been profitable and is a good return on investment. “*

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## AT A GLANCE

### Summary

ProjectManagement for service industries, such as consulting, software and engineering companies, is specifically designed for the needs of small and midsize businesses. The solution caters for the entire workflow of these industries from proposal management to built-in business analytics. With ProjectManagement, you can instantaneously access a complete and up-to-the-minute view of your business – so you can grow your business more profitably.

### ProjectManagement addresses your needs

- Enables you to plan your projects more effectively
- Helps you to respond faster and more flexible to customer demands
- Built-in analytics allow you to ascertain profitability or the need for intervention
- Allows access to all critical information irrespective of location and time

### Business Benefits

- ProjectManagement is an integrated system and therefore avoids costly, error-prone workarounds across multiple software tools.
- ProjectManagement is a powerful planning tool with sophisticated planning options, powerful interfaces, flexible options to update planning (e.g. Resource Planning, GANTT Planning, and Multi Project Planning) and interfaces for data import and export.
- The Web Client allows you to enter and analyse customer and project data independent of location and time.
- ProjectManagement assists the user in

creating detailed travel expenses. Costs can either be charged to the customer or can only be accounted for internally by the employee. Meal allowances according to German law are considered automatically.

- Powerful controlling and reporting tools, such as Residual Volume Report, Degree of Completion Report or Breakeven Analysis.
- The web-based Support Desk allows managing the entire workflow of support calls, from request and request handling to the successful close. Customers or employees enter requests in the Support Desk; the employee responsible documents all handling steps concerning a request. When a request has been successfully closed, the customer can be invoiced if applicable.
- ProjectManagement is an easy-to-use and affordable solution with a short implementation time.

### More Software Functions

- **Simple Maintenance**  
The entire system runs on one single server thus reducing initial and on-going maintenance costs.
- **Simple Customisation**  
The solution can be easily customised to customer-specific business processes by the addition of fields, data types, documents or requests.

**FIND OUT MORE.  
VISIT:**

[www.maringo.de/projectmanagement](http://www.maringo.de/projectmanagement)



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