

Cepheo Solution for Project Industries
for Microsoft Dynamics 365

Cepheo Advanced Project Management

Enhanced capabilities to enable end-to-end business processes for project-centric businesses.

It can be time-consuming and complex for project-centric companies to achieve the level and quality of planning, monitoring and reporting they need to be in full control of their project portfolios. Cepheo Advanced Project Management enhances Microsoft Dynamics 365 with capabilities that extend and optimize critical business processes from project quotation and calculation, through project creation and execution to final delivery and invoicing.

Make faster, more accurate sales and project calculations

Project quotation extensions, together with rich calculation capabilities provided by the Project WBS feature, help you make accurate and flexible quotes and project calculations with seamless transitions from estimate to project execution.

Project WBS is fully integrated with Dynamics 365 Project Quotations and Project Management and Accounting capabilities and enables creation of quotation lines, project structure, forecasts and item requirements, on-account transactions and work breakdown structures with activities.

Simplify project start-up

Create and set up new projects quickly – regardless of size and complexity – and be ready for project execution faster.

Flexible project set up options – including the option to set selected sorting fields and individual dimensions as mandatory prior to project creation – help you meet specific business requirements and ensure data quality for project reporting. You can also save time at project start-up by copying attachments directly from quotations into the new project.

Optimize your project procurement

With the Create item feature, you can create and use project items from multiple locations in the project space and at any time during the project process.

Advantages

- Efficient and reliable project execution across the business and throughout the entire operating process
- Fast and efficient creation of projects and sub-projects
- Make faster, more accurate sales and project calculations
- Save time and resources with simplified project procurement processes
- Accelerate project invoicing with advanced and flexible capabilities.
- Benefit from Cepheo's depth of industry knowledge and co-creation with industry-leading project industry customers
- Future-proof your approach with a solution that is built on extensions and compatibility-tested with standard Microsoft Dynamics 365 versions

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Cepheo Advanced Project Management capabilities are created to enable standard business processes that are documented in the Cepheo Business Process Modeler for Project Industries

With the Project procurement plan feature, you can be in full control of project procurement processes from planning, through purchase requisitions, request for quotes, purchase orders and item requirements.

You can ensure that you place orders on time, follow-up on all your deliveries, react quickly to status changes and monitor consumed and committed cost against forecast - with one consolidated view of the entire project logistics.

You can also add purchasing documentation easily to new requisition lines, request for quotation lines and purchase order lines using document handling capabilities in Project procurement plan.

Execute efficient, reliable projects

Be confident that you are using the correct rules and validation processes in your projects with parameterized configuration and pre-defined project templates and ensure that revenue recognition is based on updated forecasts by using enhancements in Project budget and through the improved interface between Project Managers and Controllers.

Project Managers can use Hour journal approval for hourly journals, follow-up on transactions per employee with Hour overview and Time balance and get easy access to all posted transactions from all their individual projects.

They can also use the Project overview tab on the project form to get fast, detailed insight into a project's financial status and forecast.

In addition, the Production status form is a dashboard of valuable information about production order status and deviations, so you can monitor all your production orders and make modifications and corrections where needed.

Your business will also benefit from numerous smaller enhancements throughout the entire project process, including smart filters, references and links in Projects, Master planning and extended Production control capabilities.

Professionalize project delivery and documentation

With Project packing slip, you can create professional documentation that summarizes how your project deliverables are shipped. You can build and configure individual shipping packaging (e.g., boxes, pallets, containers), include the actual transactions consumed in the project and add additional lines manually as required.

You can then view and print the Project packing slip, with full details of the complete shipment, as well as Package specifications documents with details of the content of each individual package.

You can also produce a commercial invoice manually from the project, or simply transfer the data from a Project Packing Slip and complete it with the additional customs information necessary to export the project deliverables.

Streamline project invoicing

Accelerate project invoicing with advanced and flexible capabilities including an out-of-the-box, customized Detailed invoice report.

You can get full control of your projects through the extended Project invoice control overview and ensure that you have included all the transactions in a project with the correct prices by enabling a variety of notifications and alerts in the invoice proposal, as well as on a variety of Project stage checks.

You can also optimize your invoicing processes with pre-configured project invoice layouts, for example for a specific customer, and by copying project attachments directly from document handling of the relevant project and using them as attachments on your invoice proposals.

Features

- Advanced project quotes and calculation, including data transfer to projects
- Project budget and forecast enhancements
- View budgets, forecasts and actuals – incl. consumed cost and revenue, committed cost, cost to complete and variances – in one overview
- Create, execute and follow-up on all logistics requirements from a central project procurement plan
- Efficient, accurate invoice creation, including notifications and alerts through advanced project invoice control
- Simplified copying of invoice attachments from project documents to invoice proposals
- Advanced project invoice configuration per company, customer or invoice
- Custom workspaces designed for project managers
- Mandatory report sorting and financial dimensions to improve data quality
- Time balances and Hour overview per employee

Read more on cepheo.com

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Cepheo empowers businesses to adapt and succeed in a changing world. With locations across the Nordics, and decades of experience in implementing and evolving industry-specific solutions powered by the Microsoft platform, we help our customers use technology and data to make more informed decisions, optimize daily operations and bring out the very best in their people. Learn more at cepheo.com.

The logo for Cepheo, featuring the word "cepheo" in a bold, lowercase, sans-serif font.