Business central for professional service

2020-04-28, Jan Forsberg

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01

Market Situation Overview

Process for ERP&PSA solution

ESTABLISH

BUDGET

CONSUME

BILLING & PR

CONTROL & ANALYZE

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Challenges

- Core processes are split up and require manual management for completion
- Extensive time spent on administration and manual management of processes
- Poor data quality and limited access to the necessary data
- Lack of control over projects and the overall

ESTABLISH **BUDGET** **CONSUME** **BILLING & PR**

CONTROL & ANALYZE

PSA

Sales & setup Budgeting Planning Resource Mgmt

Sub-contraction Project tracking Time Entry Expenses Approvals

PROJECT FINANCIAL

Revenue Recognition Invoicing WIP Labour Costing Sch. Billings

Cost tracking Intercompany Reporting Analyse & Forecasting

ERP

G/L Sales Purchase Cashflow

AP / AR Inventory Service Manufacturing

Challenges

01 ESTABLISH

02 BUDGET

03 CONSUME

04 BILLIING

05 CONTROL & ANALYZE

ESTABLISH
"It is time-consuming to establish projects and is done inconsistently, which affects both the data quality and follow-up"

BUDGET
"It is difficult to get an accurate overview of the workload and availability of the travel users and skills needed. Resource planning is time-consuming and difficult to update with all the changes that are going on"

CONSUME
"Registration of timesheets and travel bills is a time-consuming and an administrative burden that takes time from debitable work. We don't charge for all the work done when hours are missed or forgotten"

BILLING & REVENUE RECOGNITION
"Billing is a time-consuming and administrative burden that takes time from debitable work. The amount of time records makes it easy to miss inaccuracies, resulting in credit memos and disgruntled customers."

CONTROL & ANALYZE
"We do not have full insight and control of the projects and our overall standards. This makes it difficult to take action on time and initiate the right change work."
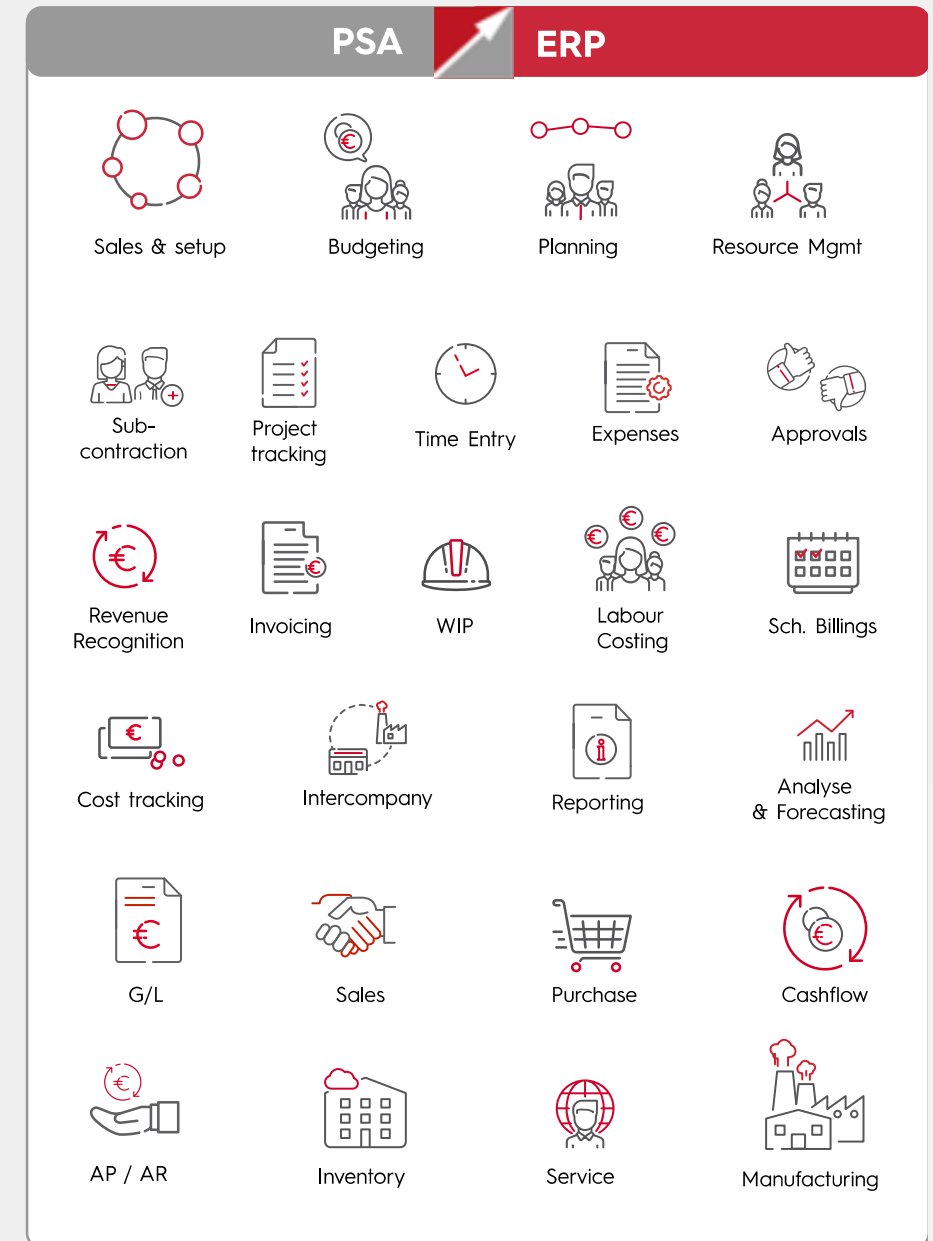
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Ideal Solution

Creates the prerequisite for growth and increased profitability through increased productivity and efficiency for both operational and administrative activities.

- Integrated processes
- Automated processes
- Complete access to data
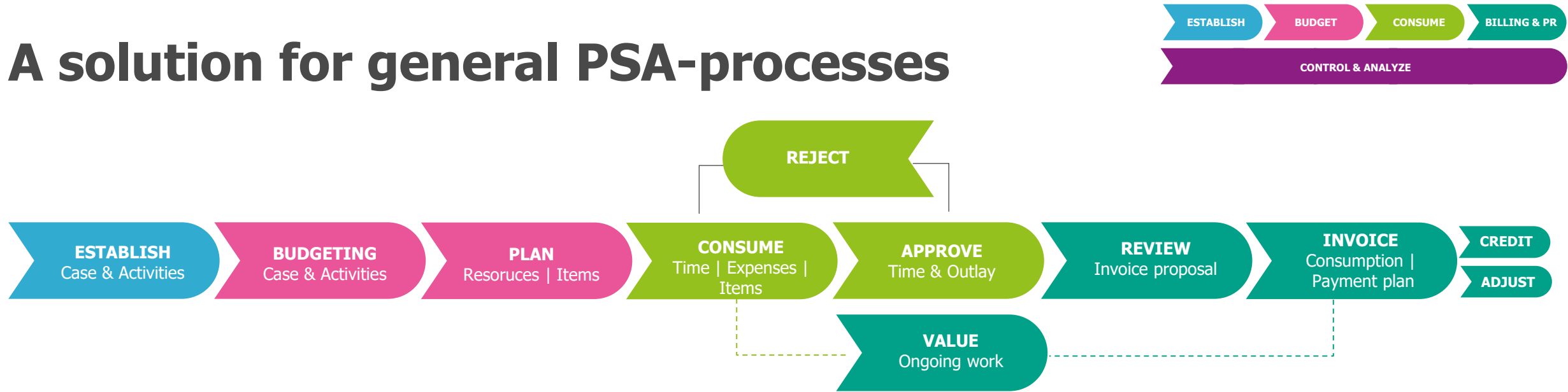- Full control over projects and the overall activities

ESTABLISH | BUDGET | CONSUME | BILLING & PR

CONTROL & ANALYZE

PSA | ERP

Sales & setup	Budgeting	Planning	Resource Mgmt
Sub-contraction	Project tracking	Time Entry	Expenses	Approvals
Revenue Recognition	Invoicing	WIP	Labour Costing	Sch. Billings
Cost tracking	Intercompany	Reporting	Analyse & Forecasting
G/L	Sales	Purchase	Cashflow
AP / AR	Inventory	Service	Manufacturing

02

Business central for professional service from Sopra Steria

SOLUTION OVERVIEW

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A solution for general PSA-processes

REJECT

| ESTABLISH Case & Activities | BUDGETING Case & Activities | PLAN Resoruces \| Items | CONSUME Time \| Expenses \| Items | APPROVE Time & Outlay | REVIEW Invoice proposal | INVOICE Consumption \| Payment plan | CREDIT / ADJUST |

VALUE Ongoing work

CONTROL & ANALYZE

ESTABLISH

Quick and easy

Consistent set

< 1 min

BUDGETING & PLANNING

A smooth process

Insight and overview

Integrated with OUTLOOK

CONSUME

A nice experience

Part of the DAILY work tools

Integrated with booking

BILLING & REVENUE RECOGNITION

Efficient and flexible

Grouped & summed up as needed

Meets IFRS

CONTROL & ANALYZE

Full access to data

Complete project accounting

Visualized as needed

Build on Microsoft Dynamics 365 Business central

INTEGRATED SOLUTION "PSA & ERP all-in-one"
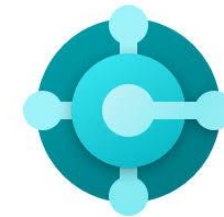
Integrated and automated processes with complete access to the necessary data

PART OF MICROSOFT ECO-SYSTEM

A common platform and data model where processes can flow through different applications

PROCESSES & EMPLOYEES "end-to-end"

What the employee and business needs to succeed
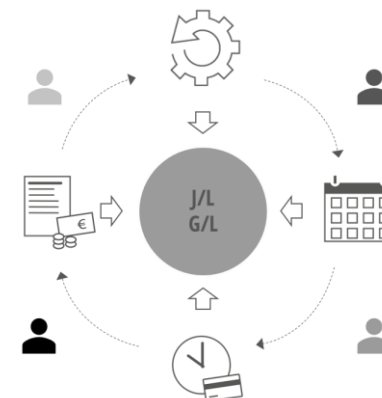
Contact

Christer SODERHOLM

Business Owner Business Applications

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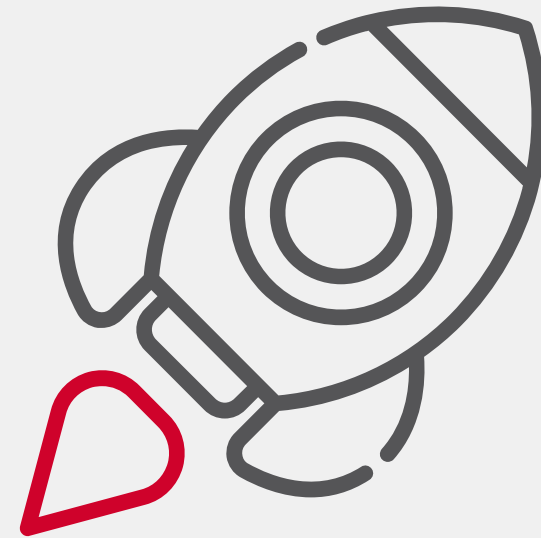Vasagatan 38
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Thanks

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