



Member of the JOVACO group

CAPABILITIES GUIDE

THE *perfect*
PROJECT MANAGEMENT
FOR MICROSOFT DYNAMICS 365
BUSINESS CENTRAL

The background of the slide is a solid yellow color. It is decorated with several large, semi-transparent geometric shapes in a slightly darker shade of yellow. These include a large circle in the top-left corner, a large square in the top-right corner, a large semi-circle at the bottom, and a vertical rectangle on the right side. The shapes are arranged in a way that they overlap and create a modern, abstract design.

OMZY provides 360° visibility into all business operations throughout the lifecycle of a project.

Centralize data and improve the user experience by managing every aspect of your projects in a single application that is fully integrated with Microsoft Dynamics 365 Business Central and designed with the needs of professional services firms in mind.

Designed to grow with your business, OMZY supports project structures ranging from the simplest to the most complex as well as multi-company environments. This provides a solid foundation to help any organization manage its project-oriented business.

Why OMZY

WE TALK PROJECTS

Original application built in Dynamics GP

More than 500 implementations over the years

DESIGNED FOR SERVICE FIRMS

Concepts designed to meet the needs of service companies

Based on industry best practices

BUILT IN BUSINESS CENTRAL

All operations within the Business Central platform

Easily scale operations yourself using the Power Platform

Process for firms that manage projects



The full list of features

Project Creation

- Estimating and budgeting
- Management of contracts and commitments
- Managing the Project Hierarchy
- Price management by resource classification
- Resource Planning

Cost tracking

- Timesheet and Workforce Management
- Expense report management and expenses by project
- Contractor management
- Project-based procurement management
- Other costs allocated to the project

Project Management

- Version management and budget revisions by project
- Monitoring of project indicators
- Resource Capacity Management
- Gantt chart

Detailed invoicing

- Managing Time Types
- Job Category Management
- Billing by contract type
- Automatic invoicing process

Operational management

- Branch management
- Managing financial analysis dimensions
- Cost, Productivity, and Profitability Tracking
- Multi-currency management



Estimating and budgeting

- Create your project plan with initial budgets, cost types, and proposal-based pricing.
- Follow the development of your proposal with estimated versions for your project.
- Maintain multiple versions of the budget as the project evolves.
- Include various pricing models based on project, phase, or resource classification.

Management of contracts and commitments

- Build your projects according to criteria included in the original contracts.
- Change billing methods, rates, and payments based on phases and types of activities.

Project Prioritization Management

- Build a hierarchical and flexible project plan to monitor project progress, evaluate profitability by tasks and manage invoicing.
- Classifying project parameters according to the hierarchy of tasks and project phases.

Price management by resource classification

- By resource classification: Include different billing rates depending on the level of the resource.
- By activity type: Associate a price based on the activity type rather than by the named resource or resource class to add flexibility in selecting availability.
- Named Resource Specific: Some resources can be coded at a special rate, regardless of their level, class, or resource type.
- Build the different invoicing rules in your project templates.

Resource Planning

- Creation of a project plan based on project templates and budgets.
- Automatically calculate the time and effort required to complete a task and plan over time.
- Time automatically distributed according to start and end dates, taking into account days not worked.
- Time view of resources allocated by project, broken down by phase and task.

Gestion multi-compagnies

- Keep access to your financial and project information aligned with your started business guidelines.
- Build multi-company environments so that project resources can be shared without having to share all financial information across multiple companies. Only companies within the same Domaine will have access to share project setups, information and resources.



Timesheets and workforce management

- Increase your project's analytics potential to include: accounts payable expenses, contracted workers, internal expenses, equipment and materials.
- Use different business rules depending on the task or project phase: billing rates, types of available hours to be charged.
- Include comments for internal use or to display in the invoice.
- Automatic transfer of time and tasks to invoicing with the project structure.
- Automate and manage the approval process.

Expense statement management

- Include comments for internal use or to display in the invoice.
- Automatic transfer of time and tasks to invoicing with the project structure.
- Management of different units, currencies and types of expenses.
- Automate and manage the approval process.

Contract management

- Time posted to the project in the same way as an employee, except that transactions can appear in a different General Ledger account.
- Scheduling their time with the same visibility as employees.

Project-based procurement management

- Expense allocation: Expenses entered through purchase orders (POs) and accounts payable can be assigned to projects. This allows managers to review incoming costs and associate billing surcharges based on the type of contract and the associated pricing schedules.
- Tracking commitments: POs generate a commitment to the project, allowing managers to review incoming costs and ensure they are factored into the project budget.
- Cost markup: All costs entering the project can be increased to be re-invoiced to the customer, depending on the type of contract and the associated price lists.

Other costs allocated to projects and costs per project

- To facilitate the standardization of cost allocations according to templates for the use of machines and other internal costs. This can be a cost per use, hour, or other unit value.



Version management and budget review

- Previous versions are saved for visualization and reporting of the project's progress.
- Track your change requests in your different project phases.
- Ability to create change approvals with Power Automate.

Monitoring of project indicators

- Business Central home page that includes key metrics as soon as you enter the product.
- Real-time: You don't have to wait to transfer information to see how much time needs to be billed.
- Access to dashboards in Fabric (PowerBI) for information specific to firms managing projects.

Gantt chart

- Views to make it easier to visualize different types of assets: employees, machines, and more.
- Access to the different calculations: effort, available capacity and level of utilization.

Resource Capacity Management

- Pull real-time timesheet data from Business Central to improve planning accuracy.
- Automatically calculate the time and effort required to complete a project.
- Review employee utilization rates on a weekly, monthly, or quarterly basis.
- Easily view capacity and utilization rates by resource.
- Employees can track their own usage level in their calendar.
- Access to PowerBI for all data to be shared with management and other stakeholders.



Managing time types and work categories

- Hour and category types help with invoicing in OMZY by providing a structured way to categorize and track different types of work and expenses.
- This allows for detailed analysis and reporting, ensuring that all billable, free, and non-billable hours are accurately recorded and billed. For example, billable hours are categorized under regular or overtime, while non-billable hours include vacation and travel expenses.
- This categorization helps manage costs and revenue effectively, and supports various billing methods such as detailed, lumpsum, calendar, progress, and milestone invoicing.
- Allow flexibility in invoicing processes: choose the level of detail to share with the client and manage complex projects with multiple tasks.
- Reports to review billing status and compare with budgets.

Automatic invoicing process

- Extract all invoices from the date of the last billing cycle and choose which ones you want to invoice
- Include an approval process for amounts and comments to be included in the invoice
- Automate the type of invoice template to include for the customer

Work in Progress Management

- Work in progress (WIP) is essential in project management because it helps track and account for the costs and revenues associated with ongoing projects. WIP is calculated on a transaction-by-transaction basis and can be recorded in the general ledger.
- Recognize revenues at transaction and recognize expenditures based on project deliverables, such as plans and specifications, design, and reporting.
- Configurable revenue recognition depending on the type of contract
- WIP provides real-time visibility as soon as time is allocated to the project via the timesheet.

Billing by contract type

- Combine different billing methods and include customer specifics
- Include different types of invoicing in the same invoice to the customer
- Types of billing available; time and material, flat-rate, by date, by milestone or percentage of progress.



Branch management

- Visibility of the project across all collaborating companies in Business Central.
- Share the same project information and resources across different companies.
- Automate multi-company transactions and markups based on the employee's primary company and project owner.
- Create templates for the company and business rules when creating projects,

Managing financial analysis dimensions

- Used to define your business according to different criteria; Project manager, region, type of service.
- Filtering available for better analysis of accounts, projects, and costs.
- Combine multiple dimensions for more detailed information.

Multi-currency management

- Manage costs and revenues in multiple currencies, and report on project monetary values in the currency of the project, company or consortium of companies.
- OMZY allows you to manage costs and revenues in multiple currencies.
- Projects can be reported in project currency, company currency or consortium of companies.
- The system stores four currencies at all times: the original currency of each transaction, the company currency, the project currency and the domain currency. A fifth currency is also retained in the case of a multi-company

Filling the gaps in *Business Central*

MICROSOFT DYNAMICS 365 BUSINESS CENTRAL MODULE DE JOB		OMZY
INVOICING	Billing is usually done as a lump sum once the task or work is completed. Timesheet transactions cannot be retrieved from the subledger for inclusion in an invoice	A key module of the product. It allows tasks to be grouped at different levels in order to summarize them or detail them on an invoice. Ability to combine different billing methods within a single invoice, based on the time and activities entered in the timesheet.
BUDGETIZATION	It's possible to create a budget to record billable costs and revenue for each task, but no version control is available. You can budget for: resources, items, general ledger accounts, based on hours/quantities, costs, and billable amounts.	Multiple revisions can be tracked through numbering, allowing the different iterations to be maintained as the project evolves. It is possible to budget for all types of transactions available, whether it is labor, expenses, machinery, or materials. Each task can be the subject of a detailed budget or an overall budget. An approval system can be integrated into this budgeting process.
STRUCTURES CORPORATE AND PROJECT	Projects are created per company and based on the data entered, and are only available in one company at a time.	Projects are created in a domain that is visible to all companies associated with the database. In a multi-company environment: Projects created in a parent company can automate intercompany markups when costs and revenues are associated with another company participating in the same project.

Filling the gaps in *Business Central*

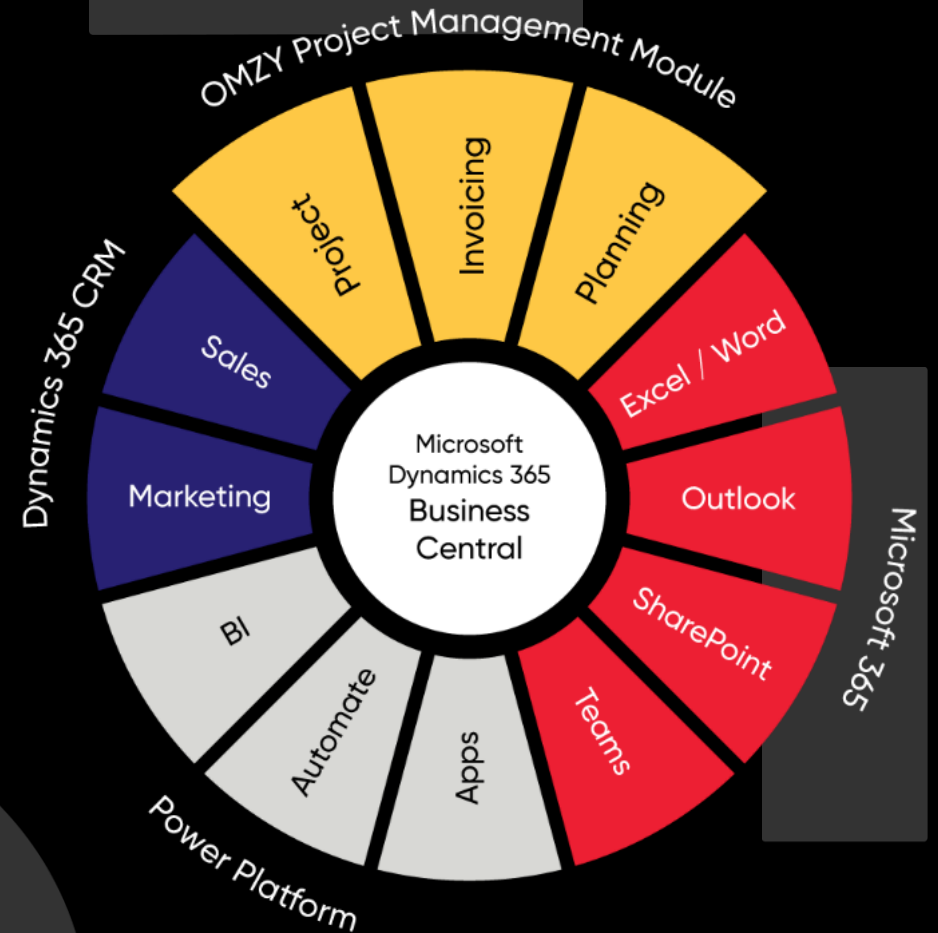
MICROSOFT DYNAMICS 365 BUSINESS CENTRAL PROJECTS MODULE		OMZY
MULTI-CURRENCY MANAGEMENT	It is possible to manage either the cost or the income in a foreign currency, but not both.	It is possible to manage both cost and income in a foreign currency. It is also possible to report on the project's monetary values in the project currency or in the company's currency. Reports can be created in the project's native currency, with an income statement analyzed in the company's currency, and invoices issued in the currency requested by the customer.
TIMESHEET	Employees enter their time in Business Central. Entries are only recorded in the project auxiliary.	Employees enter their time in Business Central, and entries are recorded in both the project assistant and the general ledger. The types of entries available are: costs, benefits, overhead, intercompany (if necessary), and revenue, depending on the contract type and the associated price list.
EXPENSE REPORTS	No expense reporting in the basic app	Employees enter their expenses in Business Central, and the entries are recorded in the project subledger, in the general ledger, and as a transaction in the accounts payable (employee vendor), with a cost and revenue entry (cost markup), depending on the contract type and the associated price list.
PROJECT PLANNING	The budgeted employees are theoretically also planned on the project, but no Gantt view or utilization rate is available.	Planning functionality is built into the software, allowing users to be assigned to tasks, manage efforts, and compare actuals to forecasts in a Gantt view, by project and by resource, in Business Central.

Optimize

with Microsoft's comprehensive product portfolio

Built entirely within Microsoft Dynamics 365, use the out-of-the-box features of Business Central to navigate your projects. OMZY integrates seamlessly with the rest of the Microsoft ecosystem.

This means that you can extend and customize your resource scheduling processes using familiar tools such as Power BI and the Power Platform, ensuring that the solution grows with your organization.



Easily scale operations yourself using the Power Platform

Power Automate

- Automate the invoicing process
- Notification of latecomers to submit their timesheets

Power BI / Fabric

- Share project information across the company
- Build dashboards specific to your business

Dynamics 365 for Sales

- Integrate sales cycles into your project concepts
- Visibility to your submissions and

A *clear vision*

FOR THE COMPANY

Monitor and control the risks associated with a project

FOR TEAMS

Take data-driven actions

FOR MANAGERS

Have a global view of their projects

Benefits for every role within a company

FINANCE / ACCOUNTING

- Increased productivity and efficiency
- Optimization of cash management
- Making informed financial decisions

PROJECT MANAGER

- Real-time visibility into costs and revenues
- Proactive decision-making
- Inter-departmental collaboration

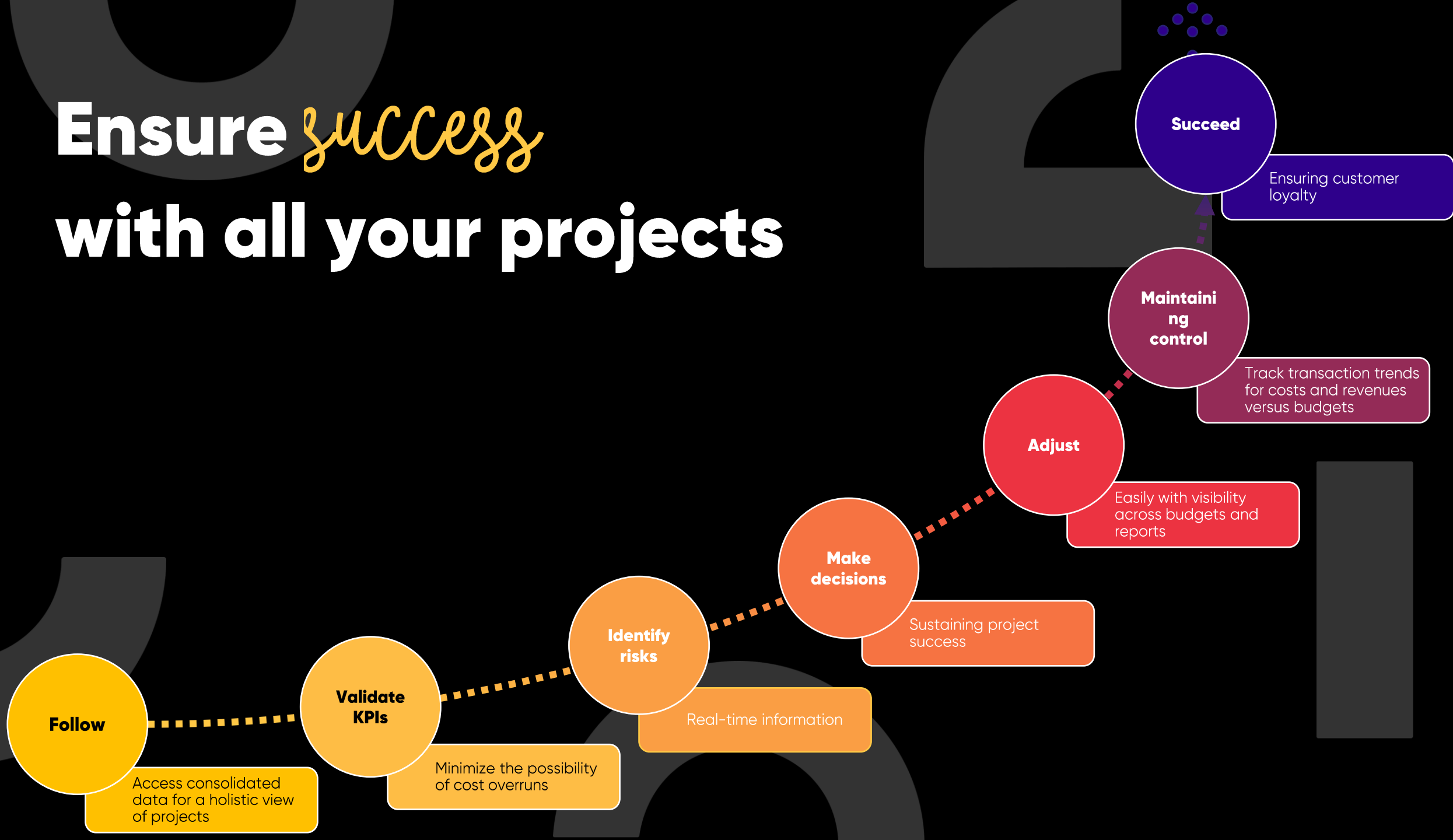
PROJECT TEAM

- Simplified, centralized access to technology
- Effective collaboration
- Focus on value-added activities

BRANCH

- Integration of acquired businesses
- Performance visibility
- Improved profitability and growth

Ensure *success* with all your projects





FINANCE MEETS
OPERATIONS
FOR *perfect*
PROJECT
MANAGEMENT

We talk projects

OMZY helps SMEs in the professional services industry improve project visibility between finance and operations by providing centralized project management tools. With OMZY, companies can optimize their processes and ensure better coordination between different departments.

omzy-app.com