Systems Implementation, Inc.

Project Management

Core Component

DEFINE PROJECTS

- Time & Material
- Fixed Price
- Internal

TRACK PROJECTS

- Review project status
- View current profitability
- Capture revenue & costs
  - Equipment
  - Parts
  - Labor
  - Subcontractor
- Allocate revenue & costs
  - By company
  - By shop
  - By department
- Track commissions
  - Multiple salesreps
  - Percentage or fixed amount
  - Split commission between salesreps

BILL PROJECTS

- Take initial deposits
- Control invoicing
  - Interim / Milestone
  - Detailed based on Sales Orders & Job Tickets
  - Lump Sum
- Determine invoice format
  - Freeform text
  - Detailed

CALCULATE WIP

- Post WIP at month-end
- Recalculate each month

Situation

Fueled by the demand for interoperability and diversity, large projects are quickly replacing traditional two-way sales and service as the mainstay of the business. Whether your projects are long or short-term, fixed priced, time & material, or internal, effective tracking and management of each project is essential to your success and profitability.

Everything you need to ensure successful management of your on-going projects is included. From tracking project equipment and labor, to billing the customer, paying your sales reps, and monitoring your profitability, Project Management can do it all, and will save you time and money in the process!

Project Management Highlights

- Integrates seamlessly with other modules
- Tracks profitability and status of project
- Tracks financial info for T&M, fixed price and internal projects
- Provides a central point for managers, technicians, and accounting staff to access and retrieve project info
- Allows milestone (in progress) invoicing
  - User controls invoice format
    - Freeform text
    - Detail based on Sales Orders/Job Tickets
    - Lump Sum
- Links/Unlinks Sales Orders/Job Tickets to a project
- Tracks equipment, parts, labor, and subcontractor revenue and costs
- Tracks change orders
- Allows revenue and costs to be split among shops/departments
- Posts to Work in Progress G/L account at month-end
- Tracks Commission
  - Multiple salesreps
  - Commission % or fixed amount
  - Can be split among salesreps

Contact Us Today!

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