

BCG Financials Quick Start for Professional Services Organizations

\$9,000

Get your project-based business up and running in weeks, not months, on a comprehensive, yet easy-to-use Business Management solution that brings people, processes, and automation technology together through a unified experience.

This offer includes functionality to facilitate the most common business processes from day one, including quotes, orders, invoicing, purchasing, inventory, cash management, and reporting. Your company will be able to conduct the following financial functions: GL, A/P, A/R, inventory and PO management, and electronic bank reconciliation.

Additionally, Dynamics 365 for PSA provides the ability to sell to customers, develop project plans, deliver services, and invoice customers. Your company will have the following capabilities: project management, resource management, project time and expense, project invoicing, project opportunity management, and OOB project profitability analytics/dashboards.

Dynamics 365 for Financials Scope:

-  General Business Set up
-  Office 365 integration
-  Chart of Accounts
-  Default Financial Statements;
-  GL Posting Groups (1ea) for General Business, General Product, Customers, Vendors, Banking and Inventory
-  Customer Template
-  Vendor Template
-  Yodlee Bank Feeds for Electronic Bank Rec
-  Importing Vendors, Customers and Products
-  Configuration of Power BI Dashboard
-  Online How-to Documentation for all functional areas provided by Microsoft.



Customer must provide the following: Chart of Accounts, Customer Master List, Vendor Master list, Products Master list.

Open A/R and A/P will be entered manually by customer as a part of system training.

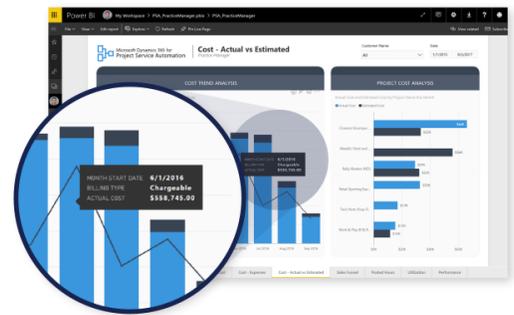
Does not include custom report creation, historical data migration, or custom coding/functionality/integration with other line of business systems.

Project Service Automation Scope:

All functionality that will be configured will be Out of Box. There will be no customization of functionality not included in the system.

The following should be considered in-scope for the Quick Start Project. If it is not listed here, it will be considered out of scope.

- ✎ Setup and configure Office 365 Integration
- ✎ Setup Time Units
- ✎ Setup Currencies and Exchange Rates
- ✎ Create Organizational Units
- ✎ Create Transaction Categories
- ✎ (Optional) Create Products
- ✎ Default Financial Statements that come with the product
- ✎ Setup Work Hours
- ✎ Create Resource Skills
- ✎ Create Project Templates (2)
- ✎ Create/Update Proficiency model
- ✎ Create Resource Roles
- ✎ Create Resources
- ✎ Create Pricelists (Sales and Cost Pricelist Types)
- ✎ Create Role Prices
- ✎ Update Organizational Units
- ✎ Define Resource Scheduling Parameters
- ✎ Define Parameters
- ✎ End User Training (2hours)
- ✎ Online How-to Documentation for all functional areas provided by Microsoft
- ✎ Integration to Financials for Invoice, Account, and Contact



Customer must provide all necessary information formatted in the templates we will provide.

Does not include custom report creation, migration of historical data, custom functionality, coding, or custom integration with other line of business systems.