



xRM- Projects Module

Keep track in a single point of view.

Plan, structure, monitor projects - simple, clear and efficient

Our xRM module projects are deeply integrated into the functionalities of the standard CRM, which means that you use all the existing advantages of the system and benefit from the extensions of the project module.

Plan and manage your projects and link them to offers, orders, time records, delivery notes, and invoices.

Your projects are the central point of the entire module. From here you can manage and monitor all work of the project staff as well as the commercial parameters of your projects.

A project bundles the following information:

Quotes, contracts, orders, invoices, delivery notes, orders, service and support, and related documents and reports. Comprehensive overviews in the individual stages of the project facilitate the summary. At any time you have the opportunity to see which offers have been created for the project, what is the current order volume of your project or how the status of the billing is.

All commercial project data, regardless of whether offer, order or invoice can be converted into Word and/or PDF documents with a few clicks and transmitted to your customers.

But with the administration and evaluation of the commercial data, your options are far from exhausted!

With the help of time recording, you are always in a position to keep track of the planned and budgeted tasks with the corresponding times.

Unplanned timeouts in the project are a thing of the past. They recognize in advance when planned, and actual expenses get into disproportion and can take countermeasures in time.

"Forgotten" or delayed time registrations are no longer available, as you can use the integrated time recording function to find out at any time which project member is at what stage of his / her tasks.

Our Projects xRM module supports you so that you can plan your projects comprehensively with little effort and have the financial and time budgets under control at all times.

Let your customers and your project teams benefit!

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Project Planning:

- Creating projects, assigning multiple contacts, resources, times and budget directly in Microsoft CRM
- Assignment of project terms, conditions, and agreements as well as terms of payment, valid for the entire project
- Overview at the project level of project values (forecast, turnover, yield, effort)
- Status change according to detailed process steps incl. (Individual definitions for your company can be mapped)

Project implementation / commercial

- Creation and/or assignment of offers, quote calculation directly in Microsoft CRM, issuing offer documents
- Transfer of quotation items to the order, automatic creation of order items, issue of order confirmations or contract documents
- Transfer of order items for invoicing, production and output of invoices or delivery notes
- Transfer of order items to a single or collective order, issue of the purchase order document

Performance and time recording

- Project time recording: by quotas and by individual partial orders. Fast entry per day, recording by task, by order, by an employee. The output of a report, automatic extension of time quotas and overview of target / actual time budgets
- Time recording for external service providers, mobile and offline possible (extension)

Evaluation and reports:

- Target / actual comparisons possible at all levels.
- The Collaboration with Microsoft CRM "Goals" and "Goal Metrics"
- Appearance via dashboards integrated into Microsoft CRM
- Status display in various views

Documents: Optional

- Integration of the AddOns DCP (Document Core Pack) from PTM
- Automatic assignment of documents to the various processes
- Optional: automatic file server storage of documents in individual structure or in Sharepoint.
- Optional: Use of LinkConverter (storage of a link in CRM and document in FileAblage.
- Extension by contract and document module possible at any time.

Interfaces

- Transfer to DATEV via the option DATEV interface of the company Donaubauer
- Transfer to our xRM financial module (outgoing, incoming, cash, cost centers and banks, monthly lists)
- If desired, transfer to other financial accounting systems or modules (NAV, SAP)

Extensions

(other possible functions)

- License management
- Fees
- Traveling expenses

Functions Overview

Benefits:

- The Projects xRM module is 100% integrated with Microsoft Dynamics CRM
- No additional CRM licenses required
- No AXIOMA licenses required
- No client installation required
- No additional database
- Quickly migrate to your Microsoft CRM environment as an xRM solution
- Freely selectable designations possible, adjustments within your project possible
- OnPremise and in the BerlinerCloud (www.berlinercloud.de) available

Project Management:

- We offer a workshop to coordinate your requirements
- These requirements are recorded in a project definition in addition to the technical documentation
- The implementation takes place either in a standard Microsoft CRM system (new) or in an existing Microsoft CRM system. The possible migration of existing data from other systems is carried out.
- After installation or installation and migration of data, the individual PDF templates are set according to your corporate design, unique requirements, interfaces and the like. Completed, test, handovers completed.
- Briefing in the system.
- (Test) the phase for all employees of your company, if necessary fine-tuning, corrections, desired changes are carried out
- Clarification of individual maintenance & support needs

We are a certified Microsoft Silver Partner specializing in development and CRM and advise, implement, install, maintain and optimize CRM and information systems

The middle class is our target group, the optimization of your processes the focus of our work

A system launch is designed to bring you value in having your timeframe set, to be simple and

clear, delivering what you expect and ultimately achieving the goals you are pursuing with us

We discuss this together with you before starting any project

Your success is ours too.
We look forward to meeting you

If you are interested in this module or other solutions, we will gladly send you an overview of our CRM system.

You will always receive further information in a personal conversation.