



Progressus Connect

October 10, 2025

Meet the Hosts



Jeff Suwyn
Director-Solution
Management



Kim Bateson
Senior Product Owner
For Progressus



Linda Contreras
Technical Writer
For IP

Agenda



- Microsoft Resource Pricing
- Bill-by-Task Functionality
- WIP BC% FP Feature
- Power BI Embedded - Available Now!
- New Quick Help Pages

Housekeeping

- Plan to take most of the time on our presentation
 - If time permits, we will open for questions
 - Activate microphone to talk
- Session being recorded for you to share with your teams
- Questions:
 - Type in chat
 - Email us at: progressusinfo@plumblinesconsulting.com
- Meetings on new features
 - [Book Time with Kim Bateson](#)
 - Time slots available



Microsoft Sales Pricing Experience for Resources

Pricing Overview

Microsoft Dynamics 365 Business Central Sales Pricing Experience (Microsoft Pricing) feature for Resources is now available.

This pricing can be used instead of Progressus Resource Pricing.

Feature Benefits

- The benefits of using the Microsoft Sales Pricing Experience for Resource Costs and Prices include:
 - **Unified Pricing Structure:** Combines resource costs, prices, and discounts into a single, streamlined Price List interface.
 - **Flexible Price Calculations:** Supports pricing based on Customer-specific rates, project rates, and other options.
 - **Enhanced Visibility and control:** Centralized overview of all price lists with filtering by customer, resource, and other options.

Cost & Pricing Comparison

	Microsoft	Progressus
True Labor Salary Costs for Resources		✓
Progressus Sales Price Template		✓
Resource Subgroup costs/prices.		✓
Overtime costs and prices.		✓
Customer pricing	✓	
Quantity pricing	✓	
Resources & Item Cost & Prices	✓	✓
Expense Cost & Prices		✓

- Progressus Sales Price Updates in Progressus to modify an incorrect price is not supported with Microsoft Resource Pricing is turned on.
 - To correct a Timesheet posting with the wrong price, reopen the Timesheet and reprocess it.

Implementation Notes

- Turn on Microsoft Sales Pricing Experience
 - Microsoft's Feature Management: Enable Sales pricing experience
 - Progressus Feature Management: Use new sales pricing experience for resources.
- Once Feature Management is enabled:
 - Item Pricing:
 - Progressus Item Pricing cannot be used.
 - Microsoft Item Pricing cannot be disabled.
 - Resource Pricing:
 - You can revert to the Progressus Resource Cost and Pricing using the Progressus Feature Management page.

Demo

- [Microsoft Sales Pricing Experience for Resources](#)

Reference Articles

- https://docs.progressussoftware.com/articles/Resources-Resource_Cost_Price_Hierarchy.html
- https://docs.progressussoftware.com/articles/Projects-Item_Prices.html



Progressus

WIP Budget Completion %
and Fixed Price Calculation

Demo

- WIP Budget Completion % and Fixed Price Calculation



Progressus

Bill Multiple Customers per Project

Bill by Task overview

When Projects involve *multiple customers*,
billing the *correct customers*
for the right Project Tasks
can be challenging and time consuming.

Bill by Task Benefits

- Progressus streamlines billing by letting you define
 - Bill-to customers
 - Sell-to customersfor each project task line directly in the Project Subform.
- This eliminates the need to create a contract and assign separate billing projects, offering a simpler, more efficient alternative.

Bill by Task Feature Highlights

- The Default Task Billing Method field added to the Progressus Project Setup, Invoicing FastTab, applies to all new Projects created.
- The options are:
 - One Customer
 - Multiple Customers
- Choosing Multiple Customers enables the Bill-by Task feature.
- Each Task will be invoiced separately if this selection is chosen on the Project.

Bill by Task Feature Highlights

- Billing Method is added to Project Template
- Automatically sets default for new projects created via:
 - Project Wizards
 - Copy Project
 - Import Project

Bill by Task Feature Highlights

- To support Bill-by-Task, Bill-to and Sell-to fields for tasks are now accessible on multiple pages, including:
 - Project Plan
 - Project Template
 - Project Task Card

Demo

- [Bill by Task](#)



Progressus

Embed Power BI Reports on
Progressus Role Center

Embedded in Role Center

Dynamics 365 Business Central Environment: Sandbox

Progressus Test | Projects ▾ | Resources ▾ | Journals ▾ | Posted Documents ▾ | Time and Expense ▾ | Invoicing ▾ | Contracts ▾ | Subcontract ▾ | All Reports | ☰

Projects | Project Permissions | Timesheet Periods | Open Expense Sheets | Resources | Progressus AI Chat

✕ This is a sandbox environment for test, demo, or development purposes only. Don't show this again.

Actions
+ Create + Setup > Processing Projects Reports Resource Reports Resource Planning Progressus Power BI Reports

Activities

Approvals and Activities

Time Approval	Expense Approval	Budget Approval	Retention Invoicing	Contract Chang... Approval	Subcontract Ch... Order Approval	Pay. Request Approval	Subcontract Pur... Invoice	Subcontract Retention

Invoicing

Invoice Pending Approval 0	Approved Sales Invoices 0	Invoice Suggestions 0.00
>	>	>

Time and Expense History

Previous Timesheets 0	Previous Expense Sheets 0
>	>

Insights

My time entries ▾ Project Profit ▾ Project Actual to Budget Cost Chart ▾

— Fcst. Earning — Fcst. Customer ● High Value ● Low Value Cust.
● Low Value Int. ● Capacity

There is nothing to show in this view.

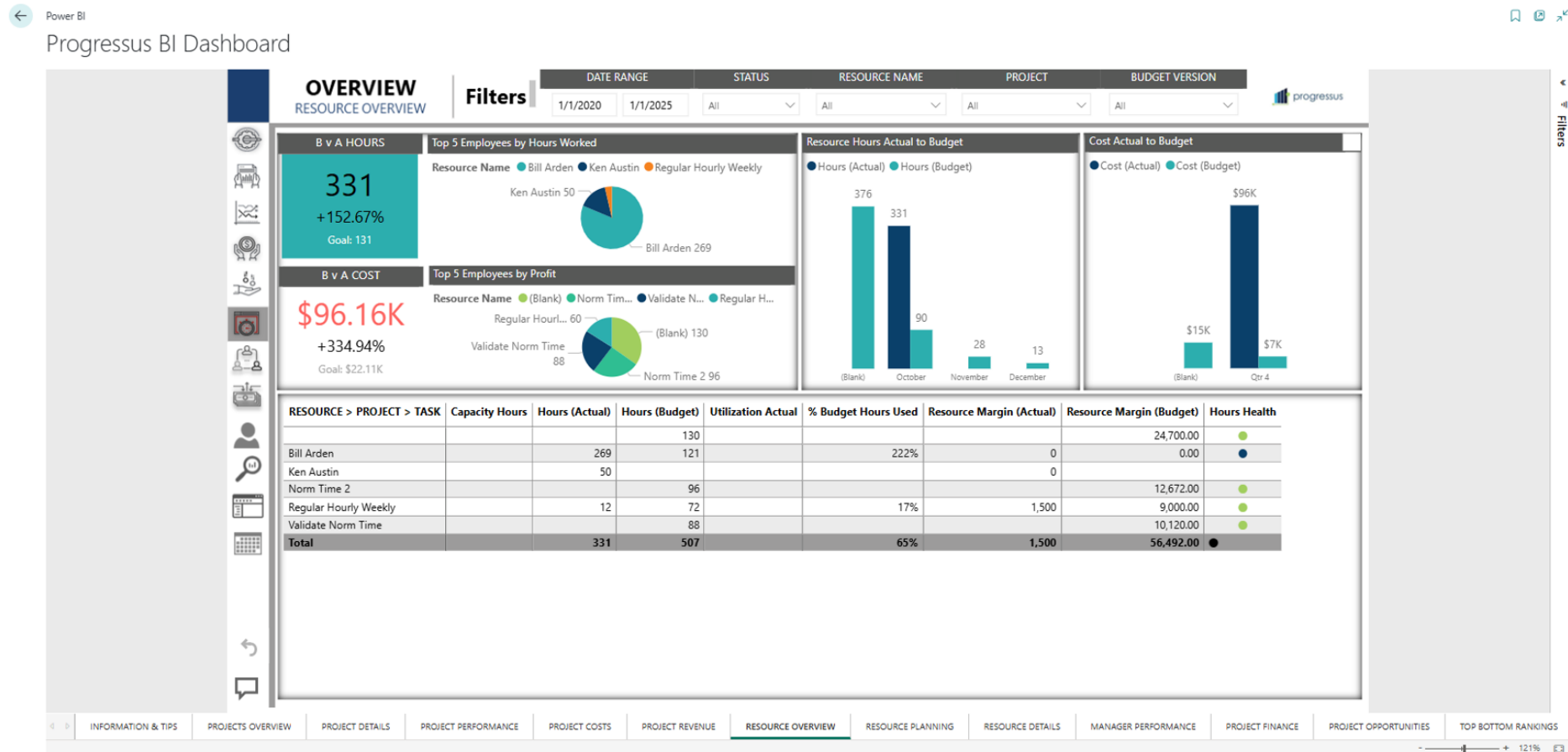
Progressus Power BI Reports

- Progressus BI Dashboard
- Progressus BI Quick Reports
- Progressus BI Report
- Project Overview
- Project Details
- Project Performance
- Project Costs
- Project Revenue
- Resource Overview
- Resource Planning
- Resource Details
- Quick Project Overview
- Quick Resource Overview
- Overall Business Report
- Hours by Task
- Time Entry by Resource

Timesheets Due to Close 4

Open Expense Sheets 2

Opens from within the Role Center



Next Steps

- You Tube video: <https://youtu.be/eyEkmbYvyM8>
- Request report and app via Progressus online Help site:
<https://utm.io/ujbuh>



Progressus Help/Training Updates

Linda Contreras
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For IP

Quick Guides

- To simplify your experience, we're building all-in-one Quick Guides covering essential Progressus workflows like Resource Planning, WIP, Resource Setup, and Timesheet & Expense Sheet setup.
- Example: Resource Planning Quick Guide
 - Resource Planning Overview
 - Resource Boards
 - Work Assignments
 - Reports
 - Progressus Bootcamp - links to lessons specific to Resource Planning
 - Links to YouTube videos specific to Resource Planning

Quick Guides

progressus

Enter here to filter...

+ Projects

+ Budgets

+ Timesheets and Expense Sheets

+ Project Allocations

+ Resources

+ Contracts

+ Subcontract

+ Inventory Management

+ MEM and Progressus Multi-Company Integration Documentation

+ Progressus DevOps/Jira Integration

+ Progressus APIs

Progressus AI Chat

Help Documentation

Feedback

Progressus Quick Guide Planning

This Quick Guide is your go-to resource for everything related to planning in Progressus. It's a central hub where you can find all the essential information right here — including helpful training videos, documentation, and more — to make your experience smoother and more efficient, all in one place.

Resource Planning

[Resource Planning Overview](#)

Creating and Assigning Permissions

[Permissions and roles for resource planning](#)

Resource Boards

Resource Type	Description
Project Gantt Chart	The Project Gantt Chart enables you to view and manage resource assignments across projects. It provides functionality and color visualization to help you understand resource usage and create an overview of the project schedule.
Individual Resource Board	The Individual Resource Board provides a detailed view of resource assignments for a specific resource. It shows Work Assignments in a calendar format, allowing you to track resource availability and workload.
Individual Project Resource Board	The Individual Project Resource Board provides a detailed view of resource assignments for a specific project. It shows Work Assignments in a calendar format, allowing you to track resource availability and workload.
Project Resource Planner	The Project Resource Planner is a tool that helps you manage resource assignments across multiple projects. It provides a high-level overview of resource usage and allows you to make adjustments to resource assignments as needed.

Work Assignments

For information on creating new **Work Assignments**, **Project Teams**, or adding **Project Team Members**, see: [Work Permission Set](#)

Reports

[Resource Reports](#)

YouTube videos

[Budgets and Work Assignment Integration](#)

Progressus Lunch & Learn

[Progressus 10/2023 Lunch & Learn on Resource Planning](#)

Progressus Bootcamp - Resources

The **Progressus Bootcamp** is a free, self-paced online course designed to help you master everything from initial setup to advanced processing in Progressus. Whether you're just getting started or looking to sharpen your skills, this course offers step-by-step guidance to support your journey.

Self-Registering for Progressus Bootcamp

NOTE

The Progressus Bootcamp is hosted on the Stratos Cloud, which is part of the Velosio and Progressus ecosystem.

1. Click the following link to register: <https://success.stratoscloud.net/invite?auth=El6wzAGXJ0PdF7Ao>

2. Complete the form and click **Register**.

Welcome to Stratos Success!

To access information stored in Stratos Success, please complete the form below to create a new account.
If you have already registered for an account in Stratos Success, please log in [here](#)

Email:

Email (required)

First Name:

First Name (required)

Last Name:

Last Name (required)

Password:

Password (required)

Confirm Password:

Confirm Password (required)

Register

IN THIS ARTICLE

Resource Planning

Creating and Assigning Permissions

> Resource Boards

Work Assignments

Reports

YouTube videos

Progressus Lunch & Learn

Progressus Bootcamp

3. The Progressus Bootcamp main page opens and you can begin the course from any lesson that interests you.

Quick Guides

- What topics or areas would you like to see in a Quick Guide?
- Currently working on:
 - Resource Planning
 - Resources Setup
 - Timesheet & Expense Sheet Setup & Entry
 - WIP
- Other ideas? Email me: lcontreras@plumblinesconsulting.com

New Videos Published!

- Copy Project
<https://youtu.be/QxTWHjAYXuc>
- BC% FP
<https://youtu.be/Vam9wUtbG20>
- Bill Multiple Customers Per Project
<https://youtu.be/r4aHPSFGXHo>
- Embed Power BI Reports to Progressus
Role Center
<https://youtu.be/eyEkmbYvyM8>
- Microsoft Sales Pricing Experience for
Resources
https://youtu.be/rOn7e5AR_qg

Thank You!

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