**Production & Job Management**

Streamline Financial Operations with Seamless ERP and Accounting System Integration

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**Dashboards – KPIs and Call to Action**

* • KPIs (Key Performance Indicators): Real-time visibility into key performance metrics that are critical for business growth and success. Examples include client & project profitability, resource utilization, financial health, etc.
* • Call to Action: Prompting users to take action where necessary, such as approving documents, responding to requests or updating information.

**Project and Resource Management**

* • Project Workflow: A defined structure for managing tasks and progress within a project lifecycle.
* • Capacity Analysis: Ensuring enough resources (staff, budget, time) are available to meet project demands.
* • Staff Planning: Assigning the right team members to the right projects based on skills, availability and project needs.
* • Estimating/Budgeting: Forecasting and tracking the costs and time needed for projects and tasks.
* • What-If Analysis: Scenario planning, allowing decision-makers to see the impact of different variables or changes on projects.

**WIP (Work in Progress) and Cost  
Accounting**

* • Timesheets: Tracking hours worked on specific projects and tasks for accurate cost allocation.
* • Rules-Based Expense Reports: Automating employee expense reporting, including integrations with corporate credit card providers (AMEX, VISA, MasterCard).
* • Unbilled/Pending Billing/Received Costs: Analysis of expenses incurred but not yet invoiced or billed to clients, ensuring accuracy.
* • Purchase Order and Vendor Invoice Management: Automating purchase orders and vendor invoices through rule-based workflows.

**Billing**

* • Billing Types: Supporting various billing structures such as retainers, pre-bills, progressive billing and ad-hoc billing.
* • Media Billing: Specific to media agencies, managing programmatic billing models and handling actual delivery-based invoices.
* • Prebills and Reconciliation: Handling estimated pre-bills with the ability to reconcile actual costs and deliverables.

**Automated Revenue Recognition**

* • Rules-Based Revenue Recognition: Aligning with different methods such as straight-line, percentage complete or earned basis.
* • ASC 606 Compliance: Ensuring revenue recognition processes comply with the ASC 606 accounting standard.

**Client and Project Profitability**

* • Tracking profitability at both client and project levels by comparing revenue and costs, providing insights for better decision-making.

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