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Functional Modules

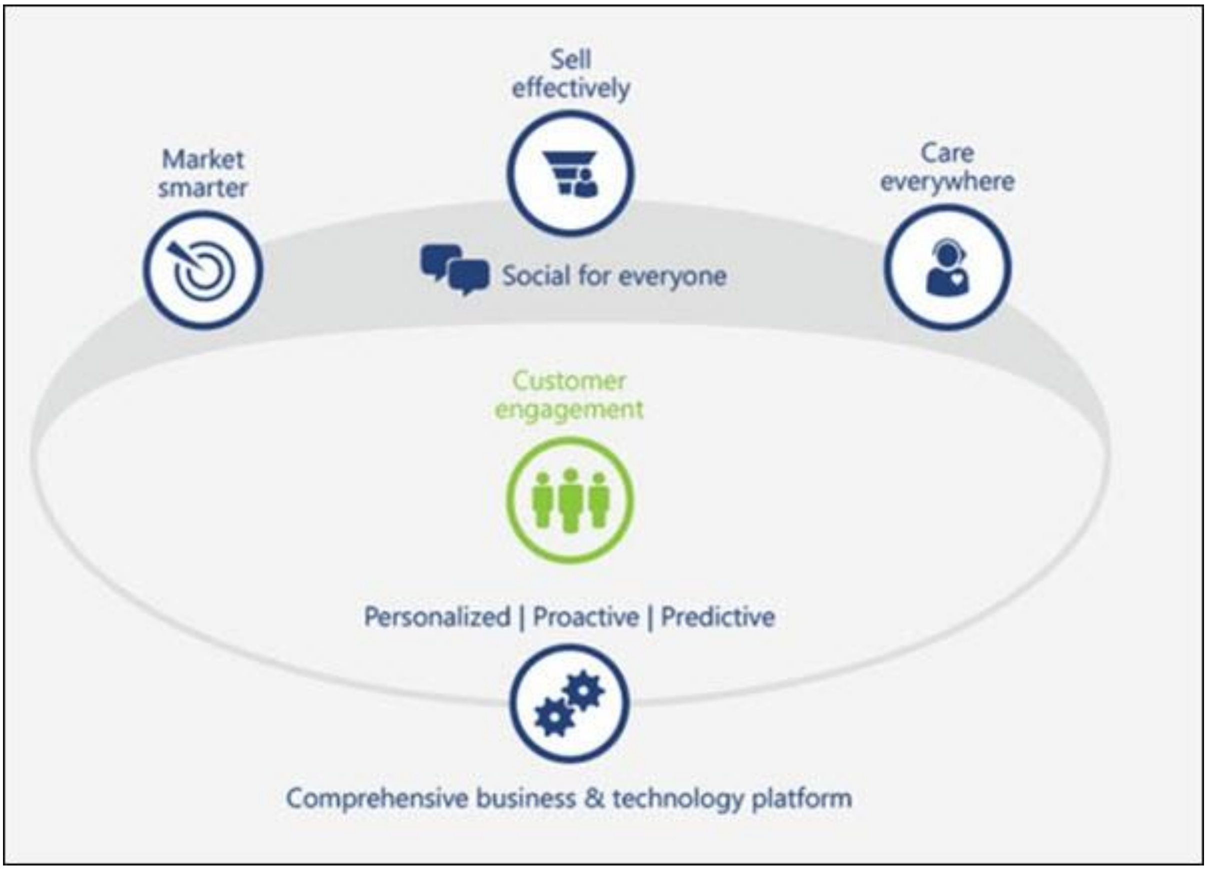
The entire Microsoft Dynamics CRM is designed around the following functional modules.

These functional modules are often called as **Work Areas**.

Understanding CRM Functional Modules

The entire CRM application is divided functionally for different types of users and teams. Hence, if an organization is using CRM to manage its processes, the users from the Sales team would use the functionalities that come under the Sales module, while the users from the Marketing team would use functionalities that fall under the Marketing module.

All these three functional modules come together to drive the entire lifecycle of gaining a new customer (Marketing), selling them the services (Sales) and maintaining the existing customers (Service Management).



To understand this flow in a better way, consider a bank which sells credit cards to its customers. The typical lifecycle of selling a credit card to a customer would be as follows. In each step of this lifecycle, you will see how the Sales, Marketing and Service modules perform their role.

Sales & Marketing − The bank's call center office executive receives data of potential customers; often called as Leads in CRM. These Leads are captured in the CRM system via marketing campaigns, sales drives, referrals, etc.

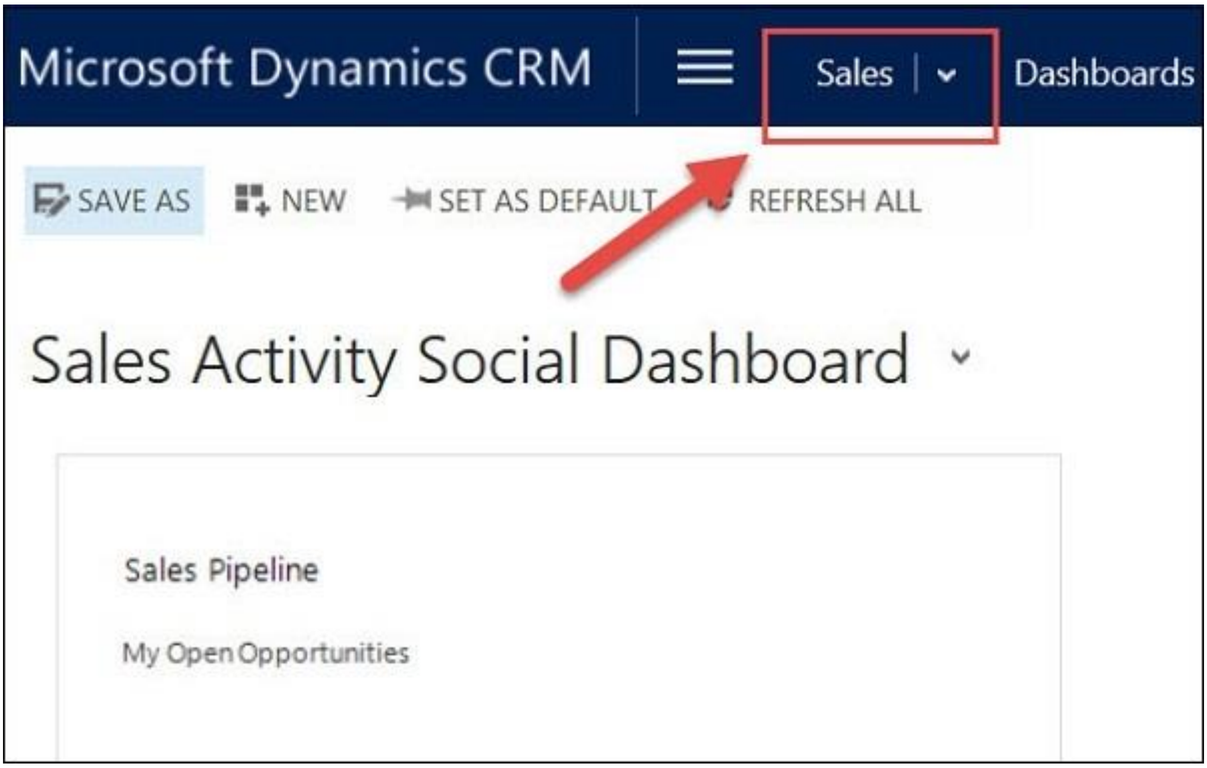
Sales − The call center executive communicates with these Leads either through phone calls/emails/etc. If the customer is interested in the credit card offering, the Lead record will be converted to an Opportunity record (won Lead).

Service − Once a customer becomes a part of the system, the company would assist him/her with payments, billing, refunds, etc. Whenever the customer has any queries or concerns, they will make a call to the call center and raise incidents. The executive will followup to resolve the case with the aim to provide quality service to the customer. These tasks fall under CRM Service Management.

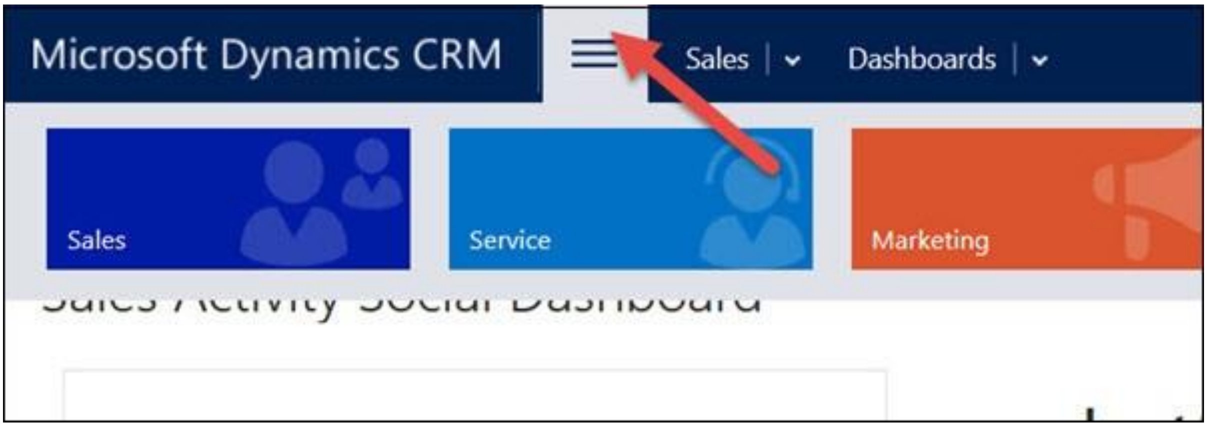
Navigating CRM Work Areas

Step 1 − Open CRM Home Page.

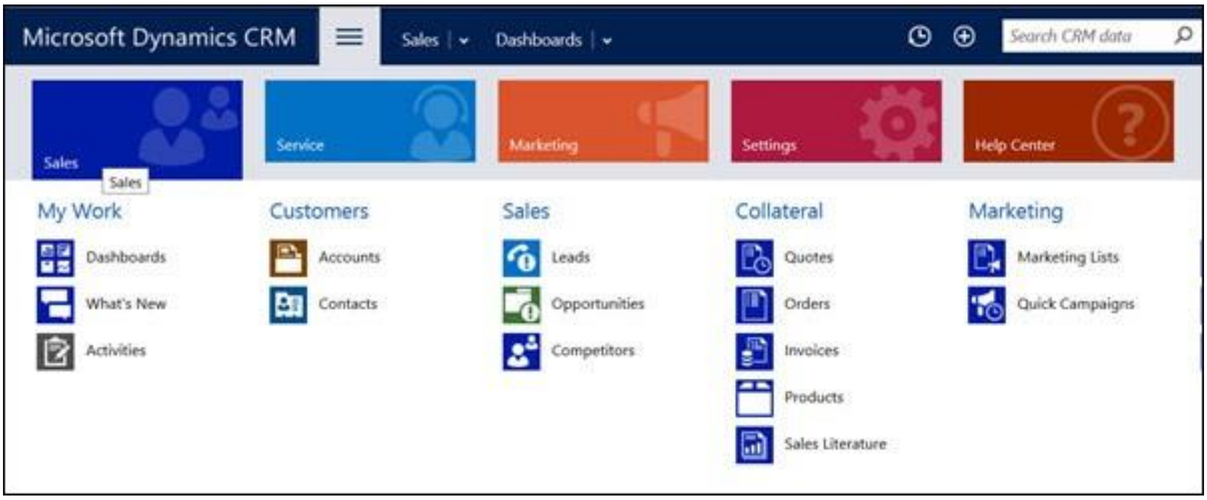
Step 2 − By default, you will see the Sales work area as selected.



Step 3 – To change the work area, click the Show work areas option. You will see the options for selecting Sales, Service, and Marketing.



Step 4 – Click Sales. This will show you all the entities which fall under Sales such as Accounts, Contacts, Leads, Opportunities, Competitors, etc. Each of these entities are categorized by their business process such as My Work, Customers, Sales, Collateral, etc.



Step 5 – Similarly, if you click the Marketing work area, you will see all the entities related to Marketing business functionalities.

Sales Module

The Sales module of CRM is designed to drive the entire sales lifecycle of a new customer. The Sales module consists of the following sub-modules –

Leads – Represents a person or an organization that can be a potential customer to the company in future. This is the first step towards getting a potential customer in the system.

Opportunities – Represents a potential sale to the customer. Once a Lead shows interest in the offering, it gets converted to an Opportunity. An Opportunity will either be won or lost.

Accounts – Represents a company with which the organization has relations. Once an Opportunity wins, it gets converted to either an Account or Contacts.

Contacts – Represents a person, or any individual with whom the organization has relations. Mostly these Contacts are the customers of the organizations (e.g. all credit card customers of a bank). Once an Opportunity wins, it gets converted to either an Account or Contacts.

Competitors – Manages all the market competitors of the organization.

Products − Manages all the products offered by the organization to its customers (Example, all the credit card plans).

Quotes − A formal offer for products or services proposed at specific prices sent to a prospective customer (Example, yearly pricing of a certain credit card plan sent to the customer).

Orders − A quote that gets accepted by the customer turns into an Order (Example, out of all the plans that the organization offers you, you may go for a 6-month subscription).

Invoices − A billed order generates an invoice.

Marketing Module

The Marketing module of CRM is designed to drive the entire marketing process of an organization for its existing and potential customers. The Marketing module consists of the following sub-modules −

Marketing Lists − Provides a way to group your Contacts, Accounts, and Leads and interact with them via sending promotional emails, event details, newsletters and other updates relevant to the target customers. You can define the criteria to create your marketing lists (Example, contacts aged between 25 and 35).

Campaigns − Campaigns are designed to measure the effectiveness and accomplish a specific result, such as introducing a new product or increasing the market share and may include various communication channels such as email, newspaper ads, YouTube ads, etc.

Quick Campaigns − A Quick Campaign is similar to Campaign however it can be related to only one type of activity.

All the above Marketing modules work in close co-ordination with the Sales module.

Service Management Module

The Service Management module of CRM is designed to focus, manage, and track the customer service operations of an organization such as supporting the incident-based services, supporting the customers using service scheduling, etc.

The Service Management module covers the following sub-modules −

Cases (Incidents) − Supports any customer requests, issues, or complaints to be tracked via incidents/cases. A case follows various stages of an issue resolution process and then finally gets resolved and is closed.

Knowledge Base − Maintains a master repository for all the common questions and answers that the customer frequently asks.

Contracts − Contracts work with Cases indicating all the active contracts that the customer has.

Resources/Resource Groups − Represents the people, tools, rooms, or pieces of equipment that are used to deliver a service. These resources can be used to solve a specific customer issue.

Services − Represents all the services that the organization offers to the customers.

Service Calendar − Used to schedule work timings and schedules of the users who work in the organization.

Activity Management

All the modules explained above use the Activity Management module of CRM. An Activity represents any kind of interaction with the customer such as a Phone Call, Email, Letter, etc. These activities can be related to any of the entities explained earlier such as Account, Contact, Lead, Case, etc. By default, CRM provides following types of activities out-of-the-box −

Phone Call

Email

Task

Appointment

Recurring Appointment

Letter

Fax

Campaign Response

Campaign Activities

Service Activity

Custom Activities

Dynamics 365 Customer Service

Dynamics 365 Customer Service! We are delighted to offer you a suite of capabilities to ensure your business can deliver the best customer service experience possible to your customers. We believe that knowing your customers enables you to personalize each experience and optimizes your agents' productivity so you can earn customers for life.

We offer several app experiences for you to choose from, depending on your support organization’s needs, and the data is all stored in CDS, which makes it seamless for you to switch between apps and still be able to work with a customer's existing data across them.

Use Dynamics 365 Customer Service to:

Track customer issues through cases

Record all interactions related to a case

Share information in the knowledge base

Create queues and route cases to the right channels

Create and track service levels through service level agreements (SLAs)

Define service terms through entitlements

Manage performance and productivity through reports and dashboards

Create and schedule services

Participate in chats

Manage conversations across channels

The following capabilities are available in the different app experiences, depending on your needs. Select the app of your choice to read more about the details of the user experience in each app:

TABLE 1

	Customer Service workspace	Omnichannel for Customer Service	Customer Service Hub	Customer Service Team Member	Customer Service app (Deprecated)
Multisession	X	X			
Conversations (with Chat or Digital	(Preview: 09/01/2020)	X			

TABLE 1

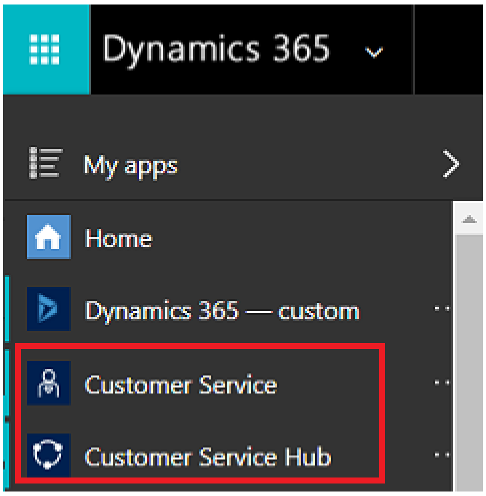
	[Customer Service workspace]	[Omnichannel for Customer Service]	[Customer Service Hub]	[Customer Service Team Member]	[Customer Service app (Deprecated)]
Messaging Offers)					
Channels (with Digital Messaging Offer)	(Preview: 09/01/2020)	X			
Case Management	X	X	X	X	X
Knowledge	X	X	X	Read Only	X
Insights	(Preview: 10/01/2020)	X	X		
Service Scheduling		N/A	X		X
Connected Service with IoT			X		
Extensibility	Channel Integration Framework version 2.0, BYOC	Channel Integration Framework version 2.0, BYOC, Mobile SDK	Channel Integration Framework version 1.0		
Unified Interface compliant	X	X	X	X	
Basic Administration	Customer Service Hub -> Service Management	Omnichannel Administration			Settings -> Service Management
Case Routing & Queue Configuration	Customer Service Hub -> Service Management	Omnichannel Administration			Settings -> Service Management
Add & Configure Channels	Omnichannel Administration	Omnichannel Administration			
Control User Experience for Agent	App profile manager (Preview:	App profile manager (Preview: 09/01/2020)			

TABLE 1

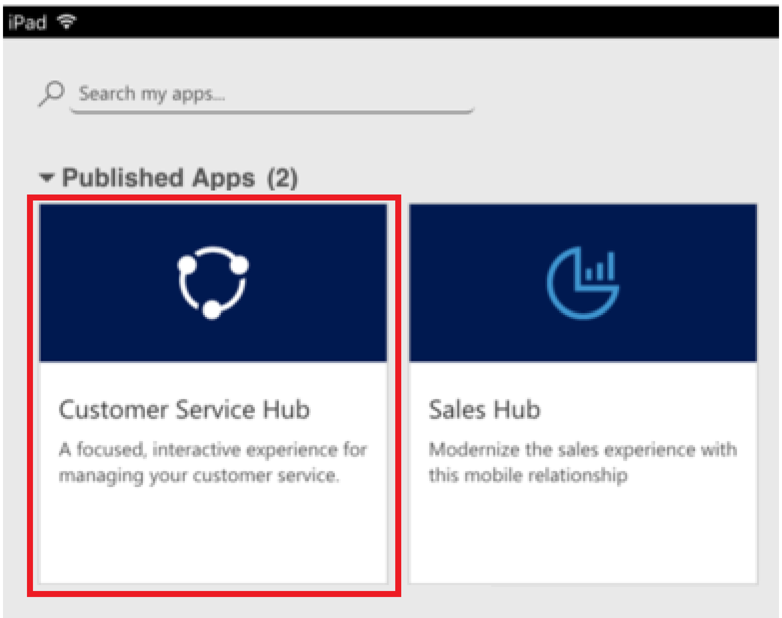
	[Customer Service workspace]	[Omnichannel for Customer Service]	[Customer Service Hub]	[Customer Service Team Member]	[Customer Service app (Deprecated)]
& Supervisor	09/01/2020)				
LICENSING: Customer Service Pro			X		
LICENSING: Customer Service Enterprise	X	X	X	X	N/A
LICENSING: Chat	X	X			
LICENSING: Digital Messaging	X	X			

Available anywhere, on any device

If you're using a desktop browser, you'll see the various Customer Service apps in the app switcher as shown here:



If you're using a mobile device with Dynamics 365 for phones and tablets installed, you'll see the app tiles in the app switcher as shown here:



Dynamics 365 Customer Service helps you serve your customers with the right tools to resolve cases faster and increase customer satisfaction. Dynamics 365 Customer Service's tools help you manage caseloads, generate service-related activities, and proactively help agents find the best resolution to a customer’s problem. Dynamics 365 Customer Service also provides complete case management solutions to improve the personalized support you provide for your customers.

It's important that you understand your customers when they request support. For example, some customers are entitled to different levels of service. Based on the customer and what they've purchased, you may have to adhere to quicker response times. Other customers may have contracts that allow them to open a specific number of cases for their products. Failure to meet those promises can affect your customer satisfaction and retention.

To optimize response times, drive faster, accurate case management and resolution, and meet important KPI goals, Dynamics 365 Customer Service includes the following entities and components:

Cases: Cases are items that you need to resolve. Cases can include questions, problems, or anything else a customer may ask about.

Queues: Queues are containers for similar cases that are waiting on a response from an agent. You can organize cases by similar topics, levels of difficulties, or other custom rules.

Entitlements: Entitlements are numeric- or time-based contract records you use to manage how products are serviced, who from a customer account can open cases, and the channels through which you receive a case.

Service-level agreements: Service-level agreements define the level of service or support promised to a customer. They include the KPIs that you need to reach to meet that service level.

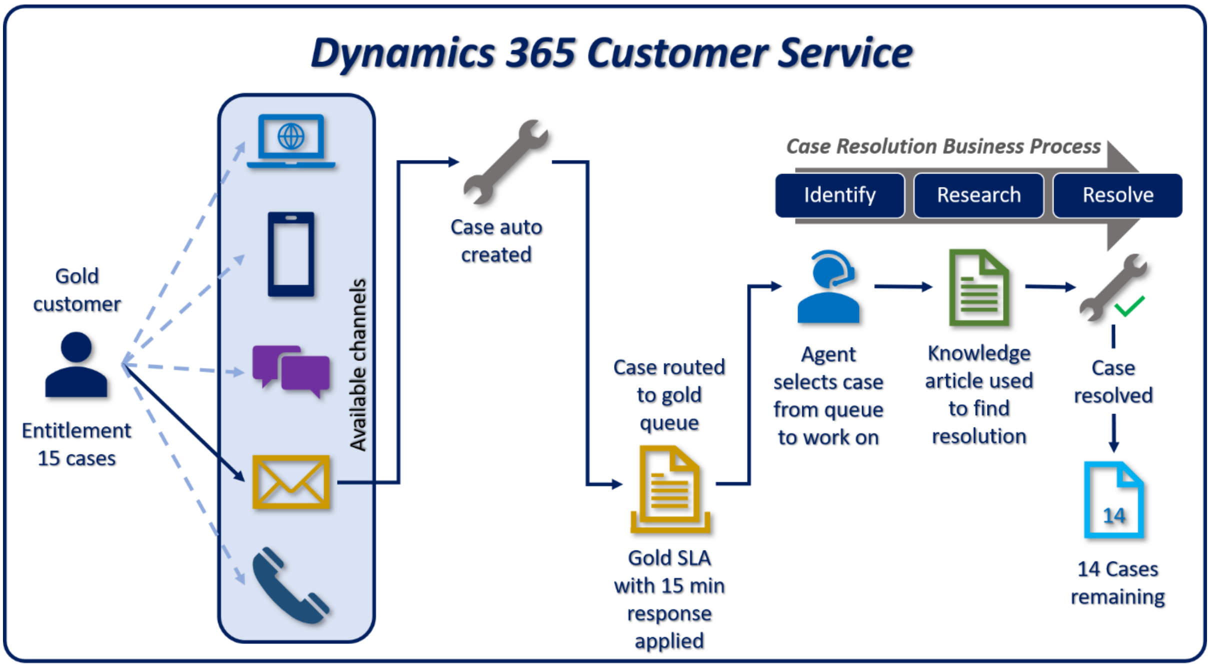
Knowledge article: Knowledge articles are support articles available either internally or externally that customers or agents can reference to resolve a problem.

Routing rules: Routing rules are criteria that decide which queue a case belongs in.

Automatic Record Creation rules: The automatic record creation and update rules primarily help administrators define rules to create any entity record from a set of available activities. For example, creating cases from the emails sent by customers.

Business process flow: Business process flows ensure that users enter data consistently and follow the same steps. For example, creating a customer service process that all customer service members adhere to.

Let's review at an example of how all these different elements work together to provide a complete solution. The following graphic is a typical customer service support scenario where a customer has a support agreement with a service center.



We have a gold customer with a support contract, called an entitlement. The customer is entitled to open 15 cases over a one-year period. They can open cases from multiple channels. In the graphic, the customer sent an email.

After you receive the email, a record creation rule examines the email and the system creates a case automatically.

After Dynamics 365 Customer Service creates the case, a routing rule places it in the gold queue. A service level agreement adds a first response by KPI that shows you must contact the customer within 15 minutes.

An agent from the gold queue picks the case to work on.

Dynamics 365 Customer Service applies a pre-configured case resolution process to the case. It guides the agent through the resolution process. You can define different case resolution processes based on your needs.

During the research stage, the agent searches for a knowledge article that has a potential resolution and emails the article to the customer from the case record. After the customer confirms the information solved their issue, the agent resolves the case.

After the case is resolved, the system updates the customer’s entitlement record, indicating that 14 cases remain on the customer's entitlement.

As your agents work with customers, it is important that they have the necessary data they need, accessible directly in the customer's record. This information includes data like open cases or active service contracts. Past communication with the customer is also available and your agents can generate new communication as needed.

Dynamics 365 Customer Service has multiple components on the account form you engage with and service an account.

Timeline: The timeline aggregates all interactions (activities, notes, and posts) directly in the account form. Agents can see relevant communication from a single point. They can take additional actions, such as:

Managing and closing open activities from within the timeline.

Adding new activities such as phone calls to the account directly from the timeline.

Capturing notes within the timeline.

Related Section: You can see associated records from multiple related entities in a single location.

By taking advantage of configuration tools available in Microsoft Dataverse, you can tailor the account form to include relevant service data—rollup fields that display the total number of open cases for an account, for example.

Dynamics 365 Field Service

The Dynamics 365 Field Service business application helps organizations deliver onsite service to customer locations. The application combines workflow automation, scheduling algorithms, and mobility to set up mobile workers for success when they're onsite with customers fixing issues.

The Field Service application enables you to:

Improve first-time fix rate

Complete more service calls per technician per week

Manage follow-up work and take advantage of upsell and cross sell opportunities

Reduce travel time, mileage, and vehicle wear and tear

Organize and track resolution of customer issues

Communicate an accurate arrival time to customers

Provide accurate account and equipment history to the field technician

Keep customers updated with the status of their service call and when it's resolved

Schedule onsite visits when it's convenient for the customer

Avoid equipment downtime through preventative maintenance

Here are some examples of the types of organizations that use the application to manage their field service:

Manufacturing - A medical device manufacturer sells machines to hospitals and clinics, and uses the application to manage maintenance services over the lifetime of the machines.

Utilities - A fiber optic cable utility company uses the application to respond to outages by dispatching technicians to problem areas.

Health care - An in-home health care service provider uses the application to schedule and dispatch healthcare workers to administer medicine and other care to multiple patients.

Equipment maintenance - A facilities manager uses the application to deliver maintenance and repair services for heating and cooling equipment.

Key capabilities

Field service capabilities include:

Work orders to define the service work needed primarily (but not exclusively) at customer locations.

Scheduling and dispatch tools to manage resources and equipment needed for customer service, visualize onsite appointments, and optimize service schedules with efficient routing and resource skill matching.

Communication tools to enhance collaboration between customer service agents, dispatchers, field technicians, customers, and other stakeholders.

An easy-to-use mobile application that guides technicians through schedule changes and service work.

Asset management capabilities to keep track of customer equipment and service history.

Preventive maintenance by automatically generating recurring maintenance appointments for equipment.

Inventory, purchasing, and returns capabilities to manage truck stock, purchase order requests and fulfillment, and product returns.

Billing capabilities to generate invoices based on products and services delivered to customers.

Time tracking to help you track how resources are spending their time, whether they're traveling, on break, or working.

Analytics for reporting on key performance indicators for managing work orders, scheduling activities, and interacting with customers.

Field Service roles

The Field Service application provides tools for these key roles on your service team:

Customer service agents triage incoming requests and determine when to create work orders for onsite visits. Agents primarily use the application through a web browser.

Service managers track performance metrics and oversee service delivery, finding ways to increase efficiency and standardize processes. Service managers primarily use the application through a web browser.

Dispatchers review and schedule work orders, and assign them to resources on the schedule board through resource availability searches, and through a fully automated resource scheduling optimization add-in. Dispatchers primarily use the application through a web browser.

Field technicians manage their assigned work orders using the mobile app on a phone or tablet, and perform maintenance and repairs onsite at customer locations.

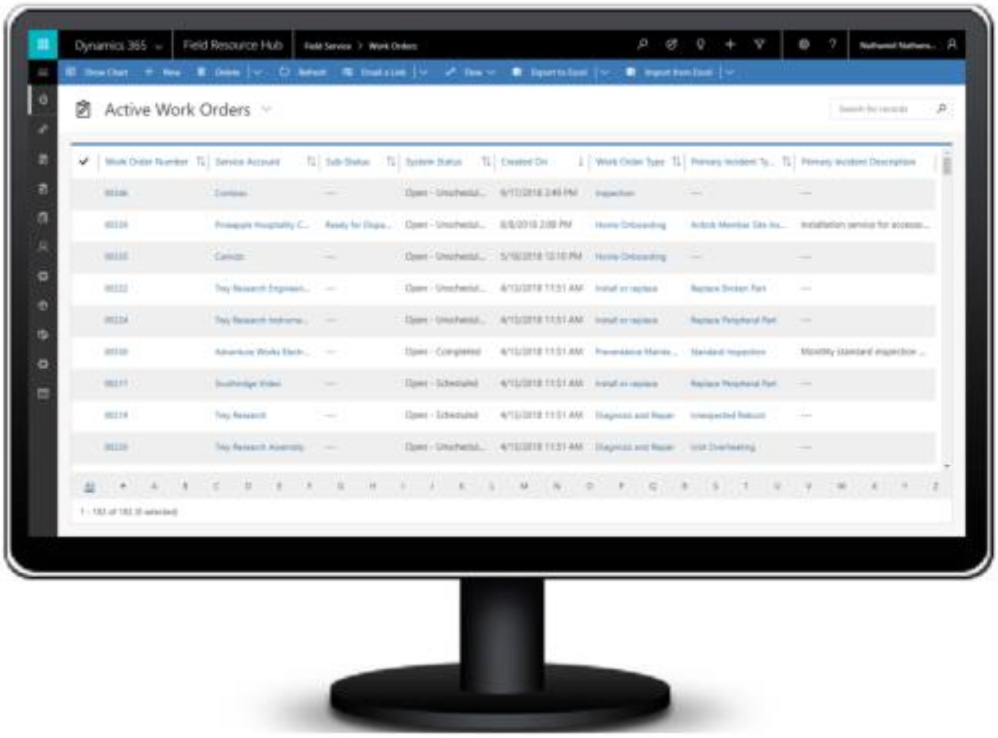
Inventory managers ensure field technicians have what they need to complete their service calls. Inventory managers also handle product returns and purchase new inventory. Inventory managers primarily use the application through a web browser.

Using the Field Service application

Work orders describe the work that a technician needs to perform at a customer location. In the Field Service application, a typical work order lifecycle looks like this:

Work orders generate from service cases, sales orders, emails, phone calls, service agreements, web portals, or Internet of Things (IoT) data and then display in Field Service. Work orders are typically grouped by geographical territory and lines of business. Work order details consist of a checklist of tasks, parts to use, labor to bill to the customer, and skills required.

Most work orders also include a location based on the related customer account and/or equipment that needs attention; this location routes the field technician from job to job. Finally, incoming work orders that are marked as ready for assignment are passed along to a dispatcher for scheduling.

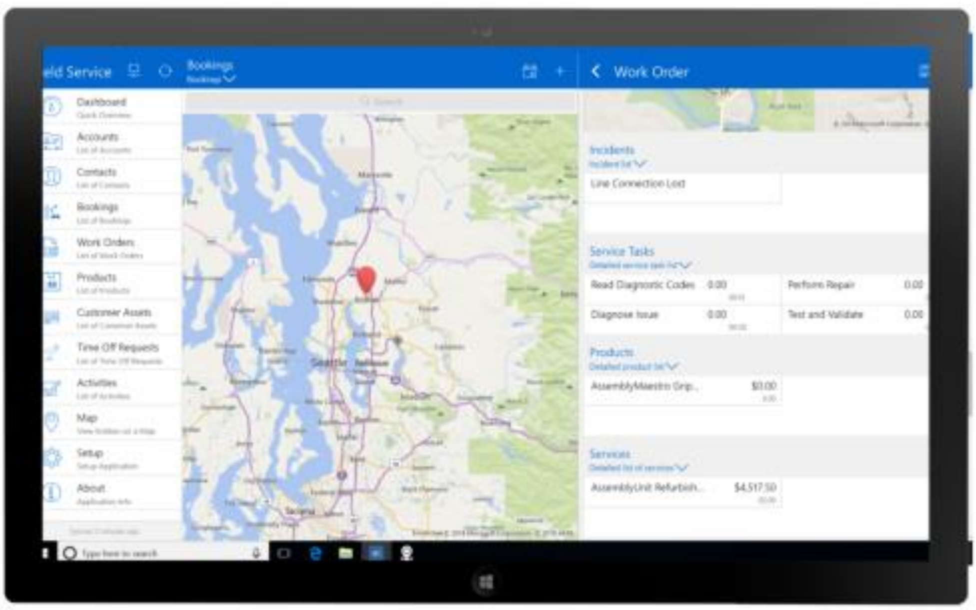


An interactive schedule board helps dispatchers assign work orders to the best resources based on location, availability, skill set, priority, and more. This is done via a manual drag-and-drop method, a semi-automated scheduling assistant, or fully automated with Resource Scheduling Optimization.

The schedule board displays each resource--whether an employee, contractor, or equipment--and their scheduled work orders. Resources and their assigned jobs are also displayed on a map along with routes and traffic patterns in real time. The schedule board is extensible and can be used to schedule anything within Dynamics 365, including work orders, sales orders, projects, and custom entities. Additionally, Microsoft 365 integration allows for emailing and skype calling to available resources.

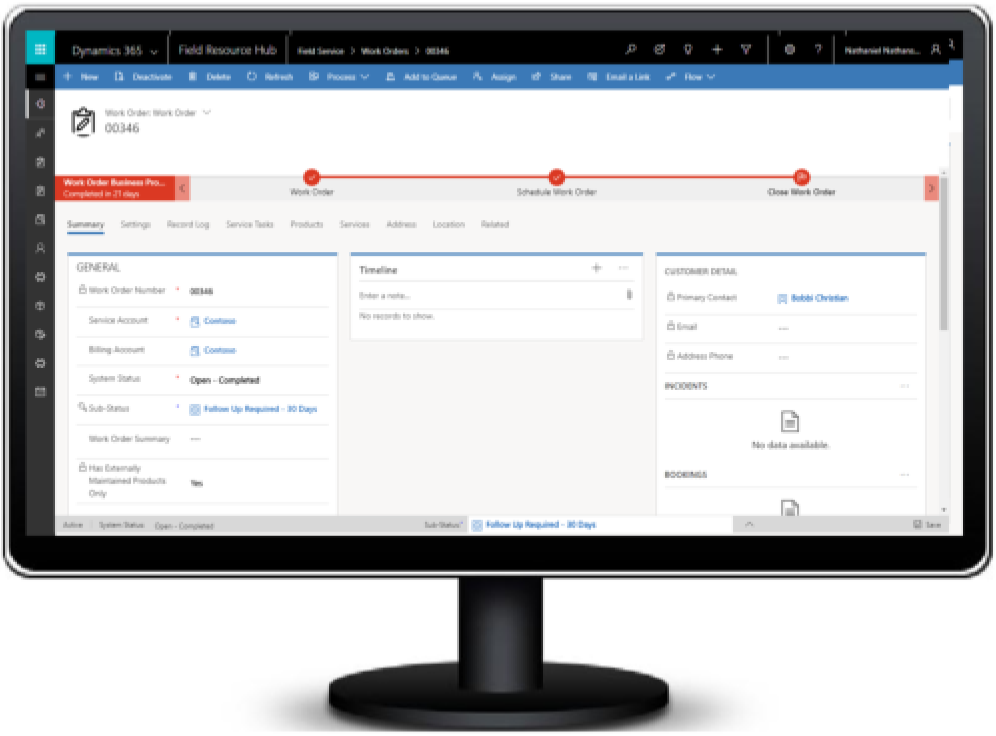
An easy-to-use mobile app for iOS, Android, and Windows devices guides field technicians through the process of resolving assigned work orders. For each work order, the field technician can view important information such as location, step-by-step instructions, customer assets, and service history, and can use their device to take pictures and videos or record a digital customer signature. Field technicians can also automatically download important information to their devices for offline work when internet is not available.

After performing the work, the technician can mark the work order as complete or as requiring a follow-up; the dispatcher can then see this change on the schedule board.



As technicians submit completed work orders, equipment service history and inventory levels update automatically. This allows service managers to manage and track inventory needed, as well as track movement of parts from order to inventory to onsite installation.

For example, if an equipment part is installed at a customer's location during an installation or repair, the system will document a reduction in inventory from the related warehouse or truck and document the part as a new customer asset along with installation/repair details. Closing a work order will then generate an invoice for any used parts or labor.



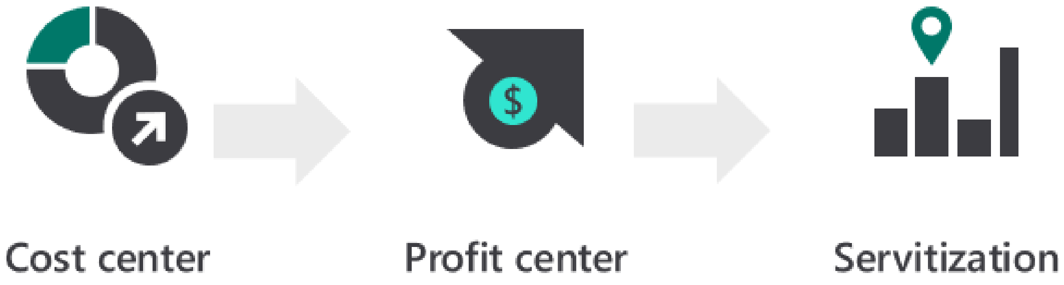
Dynamics 365 Field Service empowers your service organizations to deliver exceptional customer experiences by leveraging built-in intelligence to detect and resolve issues before the customer is aware of the problem. It delivers advanced scheduling and resource optimization to help you consistently dispatch the right technician with the right experience and resources to successfully resolve the issue the first time.

Dynamics 365 Field Service assists organizations to migrate from a costly break-fix model to a never-fail service model by providing advanced analytics, mixed reality, and IoT capabilities. This unique combination delights the customer while ensuring technician success with high first-time fix rates.

When a field service technician fixes a broken piece of equipment, the repair used to be a cost against the original equipment sale. As companies evolve in their technology maturity, Field Service operations are moving from cost centers, to profit centers where warranties or repair charges are greater than the cost of repair.

In some cases, companies are evolving their field service operations towards servitization, where they are essentially selling “outcome as a service.” In many ways, the product is now a platform that is used to deliver a service, while maintenance and repair are operating expenses. This shift has enabled companies to use field service technologies to offer "outcome-based'' businesses to their customers, resulting in increased and more consistent revenue streams.

This transition from cost center, to profit center, to servitization is supported at every step by Dynamics 365 Field Service.



Proactive service: getting ahead of the customer's needs

By integrating IoT signals across the enterprise, Dynamics 365 Field Service helps your organization predict and resolve customer issues before they become problems. This hassle-free and pre-emptive service ensures consistent and dependable customer operations.

Prevent service calls by remotely detecting and resolving issues using IoT.

Automatically create and schedule work orders based on IoT triggers.

Communicate proactively with automated voice and text appointment reminders.

Increase transparency and trust by sharing quote, contract, and scheduling information with customer through a personalized client portal.

Get customer insights by sending personalized surveys after service calls with Power Automate.

Resource scheduling: putting technicians when & where they're needed most

To help your organization deliver an exceptional on-site customer experience, Dynamics 365 Field Service is designed to intelligently aid in dispatching the right talent quickly, efficiently and reliably; all while optimizing company resources and operational costs.

Intelligent scheduling optimization with manual, semi-automated, and fully automated scheduling to match the best technician for the job.

Dispatch the nearest right technician, with the right experience, and the right parts and tools at the right time.

Enhance customer interaction and transparency with real-time technician tracking of service calls, and automated voice and text appointment reminders.

Create a seamless call triage and technician dispatch process with Dynamics 365 Customer Service to ensure a unified workflow and reduce operational costs.

Technician success: empowering technicians to solve and resolve

The moment of truth is when your technician arrives to solve the customer problem on time, equipped with the right tools, information, and scheduled time to resolve the issue the first time.

The Mobile app empowers technicians to manage appointment schedules and access turn by turn routes, bookings, assignments, parts, and customer job data.

Use bots to assist in locating customer and product information (Guides) while onsite.

Provide new technicians with access to more experienced technicians through Dynamics 365 Remote Assist, video calling, etc.

Dynamics 365 Customer Voice

Dynamics 365 Customer Voice is an enterprise feedback management application you can use to easily keep track of the customer metrics that matter the most to your business. With deep integration from the Dynamics 365 line-of-business applications and built on Microsoft Forms, Dynamics 365 Customer Voice adds rich insights by feeding real-time survey data into customer records. Dynamics 365 Customer Voice provides an easy and friction-free experience, from creating surveys to generating actionable insights based on customer feedback with minimal setup time. It helps you to keep a pulse on what customers value and how they view your products and services, so you can rest assured that your data is supported by Microsoft security and compliance policies.

Dynamics 365 Customer Voice introduces project management capabilities. A project contains multiple surveys that share common metrics and settings to simplify survey management. When you sign in to Dynamics 365 Customer Voice, you land on the All projects tab. The All projects tab displays a list of the projects you created, and is where you create new projects and manage existing ones. It also displays the survey-related data for the project. More information: Create a project

Two other tabs are available in Dynamics 365 Customer Voice—Home and Reports:

On the Home tab, you can create a project, open recently accessed projects, and view satisfaction metrics. It provides a personalized experience, enabling you to collect customer feedback and get relevant insights quickly and easily, all in a few clicks. It also includes tips and tricks to help you get started and learn more about the application.

Use the Reports tab to view satisfaction metric dashboard and responses to your surveys. More information: Work with reports

Dynamics 365 Customer Voice availability on US Government Community Cloud

The dependency services used by Dynamics 365 Customer Voice are available on US Government Community Cloud (GCC). Dynamics 365 Customer Voice is built on top of Microsoft Forms, so the limitations of Microsoft Forms features on GCC hold true. In addition to those, note the following difference in functionality for Dynamics 365 Customer Voice on GCC:

Dynamics 365 Customer Voice on GCC uses your Microsoft Exchange mailbox to send the survey. For information about Exchange mailbox limits, see Exchange Online limits.

Before you create a survey, consider planning it beforehand to ensure that it's as effective as possible. If a survey is too long, respondents might not complete it due to lack of time or frustration. If a survey is too short, it might not be possible to gather effective or valuable insight from the responses that are received.

Think about the purpose and desired outcome of the survey, and then consider the following questions:

Is the survey at a logical point in the customer journey or after a *moment of truth*?

What type of information do you need for the purpose of the survey? Only request information that you need. In other words, don't ask for personal data if you are asking for feedback on the closure of a case.

Will the survey take more than five minutes to complete? People are time deficient. Asking them to complete a survey that takes too long will cause them to stop responding to any future surveys that you might invite them to complete.

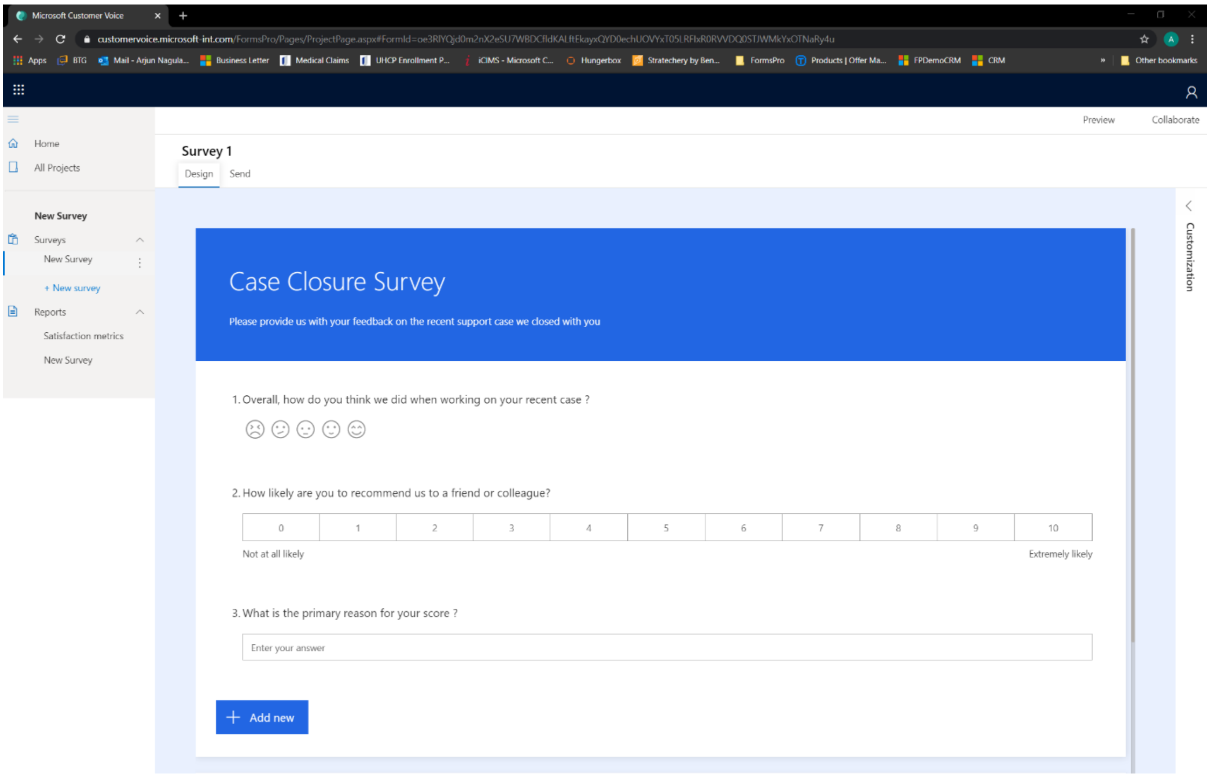
Could a prize drawing be offered for a survey to anyone who responds? This approach might not be appropriate for all surveys, but it could be a good incentive if you are gathering customer feedback on a larger survey once or twice a year.

After you have determined the answers to the questions and have confirmed the purpose of the survey, you can create it. The title of the survey will help explain the reason for it and will be visible to all respondents. A survey also includes a survey alias. Additionally, the alias will be used as an identifier if you are using Microsoft Power Automate and the Dynamics 365 Customer Voice connector. Therefore, make sure that the alias is internally relevant for those who create the surveys and that it makes sense to anyone who completes the survey.

The following question types can be used on a survey.

TABLE 1

Question type	Description
Choice	Add options, allow multiple answers to be selected, and display as a drop-down list, if necessary.
Text	Question can capture a short or long answer and be flagged to capture overall sentiment for the survey. F to enforce a number, email address, or if a custom regular expression is entered.
Rating	Ratings can be captured by using numbers or stars from 1 to 10 or smiley faces from 2 to 5 on the scale.
Date	The **Date** field is captured in dd/mm/yyyy or mm/dd/yyyy format based on the default location of the Dy Voice environment. The format cannot be modified.
Ranking	Options are added to the question, and respondents will rank the options in a specific order based on the For example: Rank the following options in order of preference to your organization.
Likert	The Likert scale is like a matrix. A series of statements is provided, and the respondent must select one of or meets the statement.
NPS	The Net Promoter Score is a rating on a scale of zero to 10, asking the respondent if they would recomme organization to a friend or colleague.
File upload	A new folder is created in the user's OneDrive for Business account. Responders will be able to upload the option is not available when the survey is shared externally and the **Only people in my organization can r** off.



A survey can have up to 100 questions. Likert, choice, and ranking questions, along with their options/statements, count toward the overall 100-question limit. Therefore, if you include a Likert question with 10 statements, it will reduce the number of remaining questions to 90. The preceding figure shows a simple survey with a rating (smiley) question, a Net Promoter Score question, and a text field question. For longer surveys, a new section can be added after a question, creating pagination between blocks of questions. This approach can be a way to cleanly break up a survey that asks questions on different topics.

<table>
<tr><td>Design a survey

⍰ Create a project

⍰ Manage projects

⍰ Create a survey

⍰ Manage surveys

⍰ Preview and test a survey</td><td></td></tr>
<tr><td>Distribute a survey

⍰ Send a survey to get responses

⍰ Work with survey distribution settings

⍰ Create a survey</td><td>Analyze reports

⍰ About reports

⍰ View a satisfaction metrics report

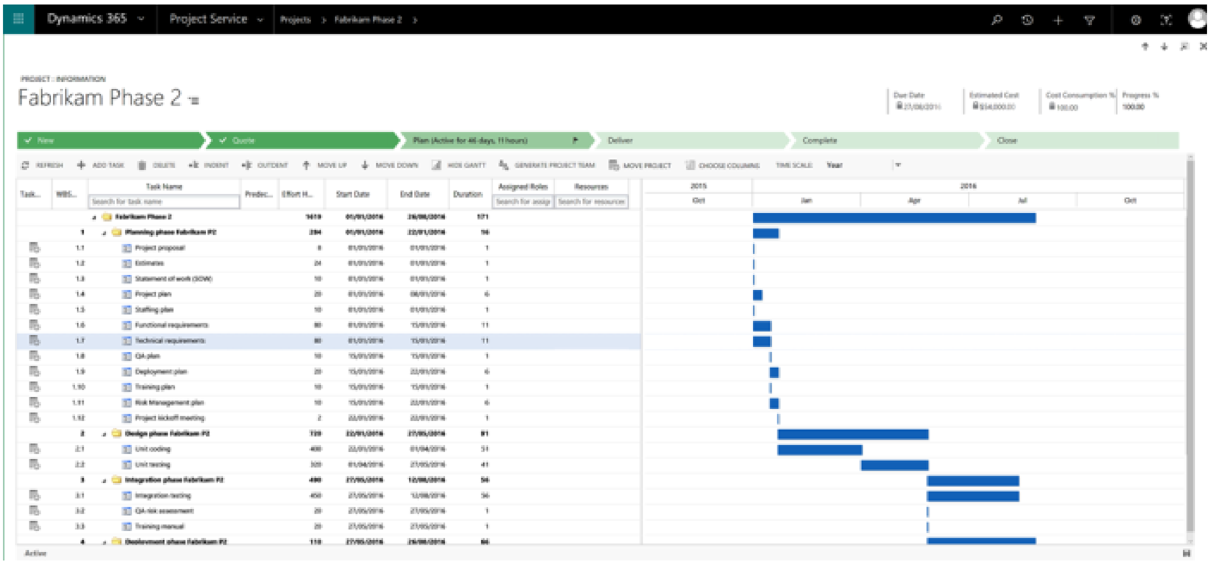
⍰ View a survey response report</td></tr>
</table>

▯ [Create a survey invitation] ▯ [Customize the sender's email address] ▯ [View survey invitations report]	

PSA

As I learn about PSA, I plan to create a series of posts covering all aspects of Microsoft's Project Service Automation application (PSA) for Microsoft Dynamics 365. PSA is a powerful addition to Dynamics 365 that enables project management capabilities in Dynamics 365.

I guess the first pertinent question might be, **why do I need PSA?** After all, we already have Microsoft Project which is an advanced project management tool. Microsoft Project is a great tool for project managers and in some circumstances, might be the only tool you need, PSA won't be for everyone! But you will find that PSA has a slightly different focus, it is not "just" about project management. PSA is more focused on the engagement with the customer. By this I mean it covers the full life cycle of the project right from initial estimate to completion.



PSA can be used in many business types but you may find that is of particular relevance for professional services companies. For example, IT Consulting companies that might be selling a mixture of professional services and product licenses or hardware.

In the professional services scenario, you'll often find that services will be charged either as a fixed price or on a time and materials basis. (Or even a mixture.) These types of engagements are commonly long running and will require a mixture of resources. Resources will typically have differing sales and cost prices depending on parameters like skills, experience, geographical location and employment basis. (For example, companies often make use of freelance development staff who may command a higher cost. Or maybe some tasks are completed by offshore resources which could be cheaper.) As I expand on the capabilities of PSA, I hope you'll appreciate that these types of challenges are ones specifically addressed by PSA.

Some key features include;

PSA Features / Capabilities	
Sales / Opportunity Management	PSA offers extensions to opportunities and quotes to support the management of project based engagements. Including definition of project contracts, track labour rate and generation of a Statement of Work. (SOW)
Project Planning	From very early in the engagement project managers and sales account management can work together to define and refine estimates. Gaining visibility of costs, effort and sales values for your opportunities.
Resource Management	Assign / manage optimal resources based on skills and availability. Resources have the ability to search for and apply directly for open project roles.
Team Collaboration	Office Groups can be used to allow customers and project teams to communicate.
Time and Expenses	Estimated, actual and billed time for resources is tracked, Ability to enter time and expense details via web, office and mobile apps.
Customer Billing	Project managers can review, override and track overruns. And they can approve all costs impacting the project. Supports generation, approval and distribution of accurate invoices to customers.
Analysis and Integration	Interactive dashboards provide insights into resource utilization etc. The powerful reporting capabilities of Dynamics 365 can be leveraged to report on profitability, revenues, expenditure etc.

PSA Roles

Practice managers, Account Managers, Project Managers, Resource Managers and team members all collaborate on projects. Let's consider the main functions of their roles;

Practice Manager

Has overall responsibilities for the practice and would use analysis tools to review profitability to the organisation as a whole or by resourcing unit.

Account Manager

Monitors their pipeline of sales, creates opportunities and works with the project manager to estimate a project.

Project Manager

The project manager will work with the account manager on the original estimate, then will create a detail plan once the work is won. They will then work with the resource managers to resource the project. Project managers will also be responsible for approving time and expenses as the project progresses.

Resource Manager

Resource managers review resource requests submitted by project managers. They then "staff" projects by looking at resource role type, availability and skills.

Team Member

Team members can apply for roles on projects, they can also enter timesheets and record any expenses.

PSA Price Lists

Price lists can be used to define bespoke pricing structures for each customer based upon the roles and organizational division of resources. For example, a developer based in the UK may have a different day rate to one off shore in India. A similar pricing structure can be applied to cost prices, meaning that together this information can be used to show the profit on projects.

Also standard product pricing can be applied to include additional items in quotations. Such as software license fees or any materials required during the project.

Sales Cycle

A project manager will probably be the person that creates an initial quotation and ensures the correct price lists have been selected. Then a quotation is produced that initially contains details of the customer's high level budget expectation for the project plus any products they require. At this point the account manager and project manager will work together to add a high-level estimate into the quotation. Including an estimate on how many hours or days are required of particular resource roles. This information can then be used to present a profit estimate on the project and report if the proposed approach will meet customer expectations.

Following on from the high-level estimate the Project Manager can then create a project and start to build a detailed estimate.

Project Contract

Once a quotation is marked as won a project contract is created. This is effectively the order for the engagement. In-fact PSA uses the Dynamics 365 order entity for Project Contracts, with some significant extensions.

Those extensions include the ability to define billing mile stones and an associated invoicing schedule.

Project contracts start off in a draft state but once you have entered details of the billing schedule the contract can be confirmed. Once confirmed prices on the contract become fixed and cannot be changed.

Invoices / Billing

Invoices are linked to the project contract. PSA contains functionality to generate as few invoices as possible, by this I mean that if you billed expenses and time monthly it will automatically recognise this and put both lines onto one invoice.

A project manager can monitor the invoices for time and expenses to track and manage overruns.

Resource Management

After creating the project and its initial estimate a project team will be created to deliver the tasks defined on the project. This can be done manually or automatically using the generate team option.

Project managers can directly hard book resources. Or submit requests for resources to a Resource Manager who would control a pool of resources.

Additionally resources can request to join projects by searching for projects with vacancies.

Time and Expenses

As the projects progress PSA users / resources can enter their timesheet details and expenses to automatically update the actual effort on projects.

The Project Service Automation (PSA) application helps organizations efficiently track, manage, and deliver project-based services, from the initial sale all the way to invoicing. The app enables you to:

Plan projects, and create estimates and work schedules

Estimate and track project cost and revenue

Forecast resource requirements for projects in the pipeline

Track project progress and cost consumption

Manage quoting, pricing, and billing for projects

Assign and manage resources

Use reports and interactive dashboards to monitor key performance indicators for successful projects

...and more

In addition, to help you monitor and control costs for your project-based work, individual consultants easily enter and track project time and expenses either on mobile or using a web browser.

What's new in PSA

The team is excited to announce our newest updates! Ranging from improvements to the user interface, fixing bugs, and adding important new features and capabilties. You asked; we listened.

Take a look at the October '19 Release Notes to see our newest enhancements and additions

To track and manage the delivery of products, managers have been using different software tools in the past. With the now popular Microsoft Dynamics 365 for Project Service Automation, you can build your work breakdown structure into a project plan, which is a robust end to end solution. Microsoft Dynamics 365 for Project Service Automation helps to build trusted customer relationship and a solid reputation for delivering outstanding project experiences. Dynamics 365 for PSA also helps service team with their price, plan, staff, and execution of projects on time on budget and building an essential foundation for trusted customer and client relationships.

Project Service Automation extends Dynamics 365 to provide a single system of customer engagement for sales.

Project Service Automation helps,

To deliver the billable projects while managing the timing and budget.

To estimate the quote for the project

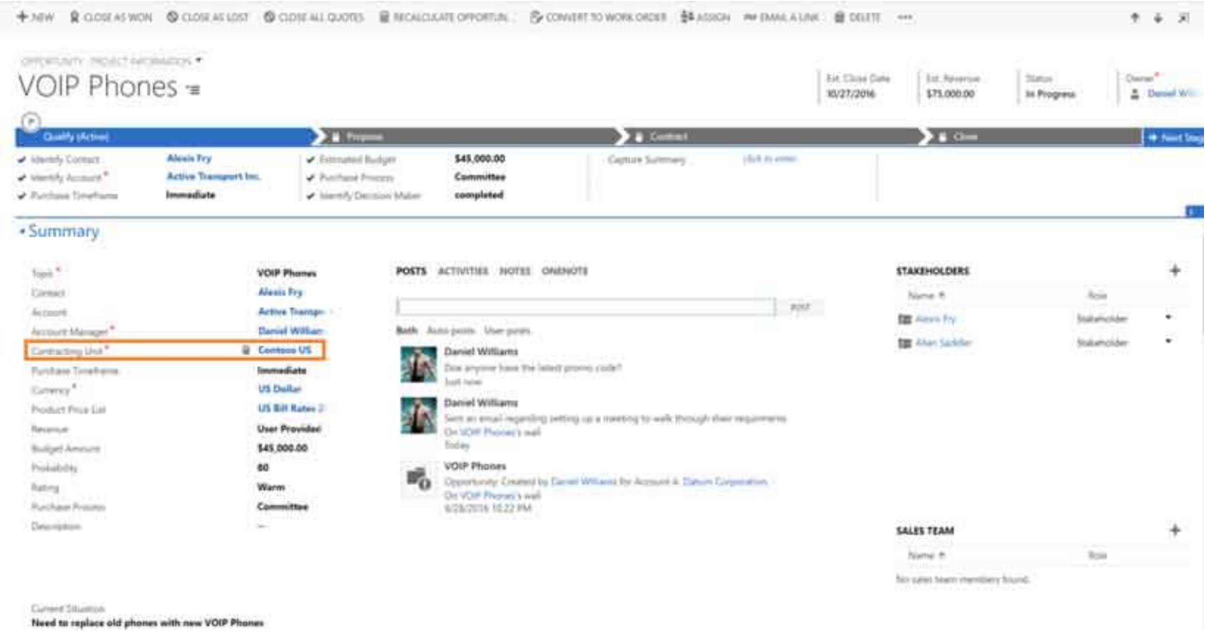
To plan and assign the resources to the project

Enabling communication, coordination, and collaboration within the team.

Capabilities of Project Service Automation:

Opportunity Management:

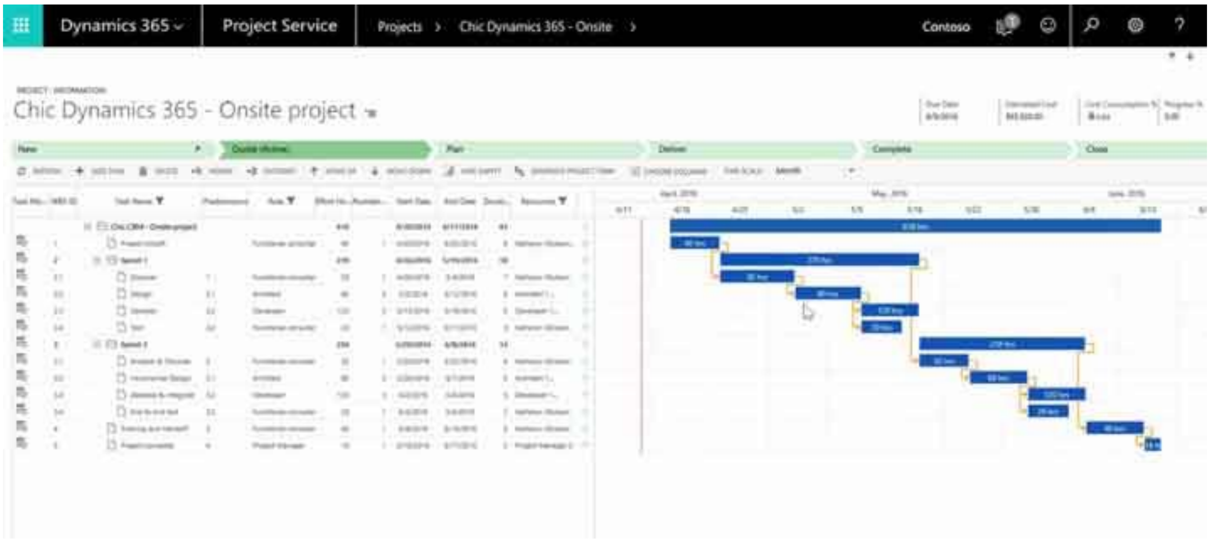
The project service functionality starts with opportunity management. The opportunity project information form helps to manage the deal for a potential project.



It helps the project managers to quickly assess project profitability, create project contracts, track labor rates and generate statements of work. The user can able to choose the contracting unit in opportunity management, which helps to assign the right resources for the project to deliver it on time.

Project Planning:

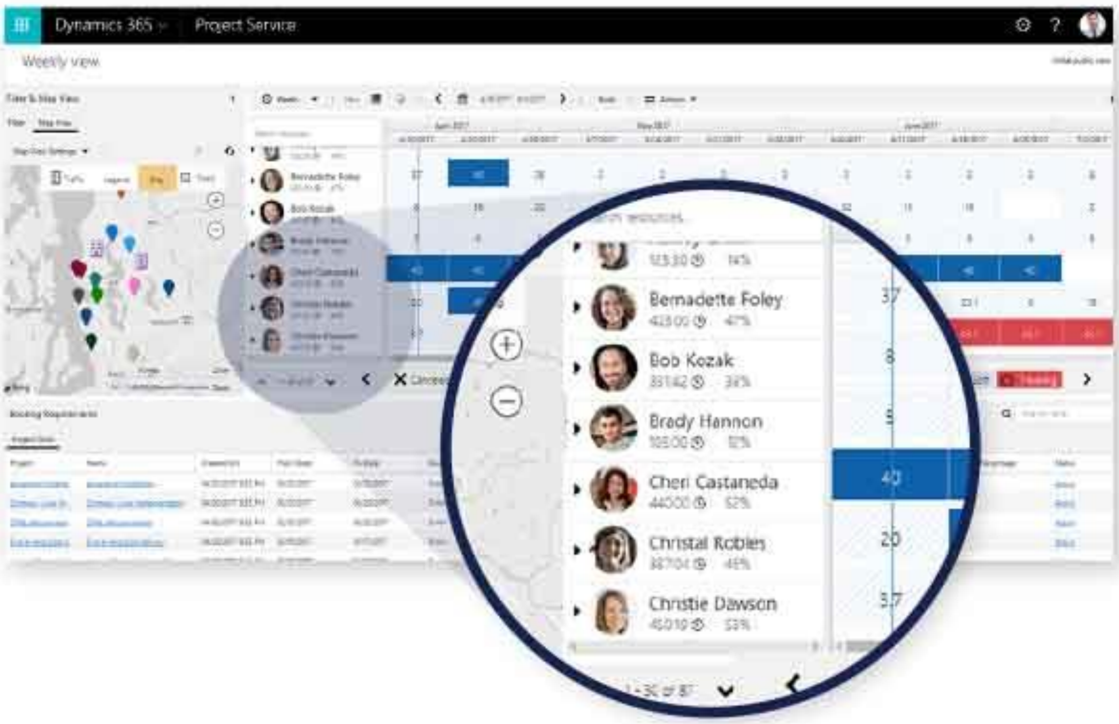
Project planning tools and templates make it easy for sales managers to collaborate with project managers to estimate and define the work upon which the costs, effort, and sales value are clear when the final proposal is submitted.



All the information of the opportunity has pulled over into the project and starts to estimate actual start and finish dates, hours and costs. Work Breakdown Structure provides a breakdown of all the pieces of work that will be required to deliver this project.

Resource Management:

Resource management gives the clear view of what the task is and what to deliver, to which resourcing unit that role belongs to, the duration, how many resources and hours.



Resourcing decisions are based on real-time insight into consultant availability.

Benefits:

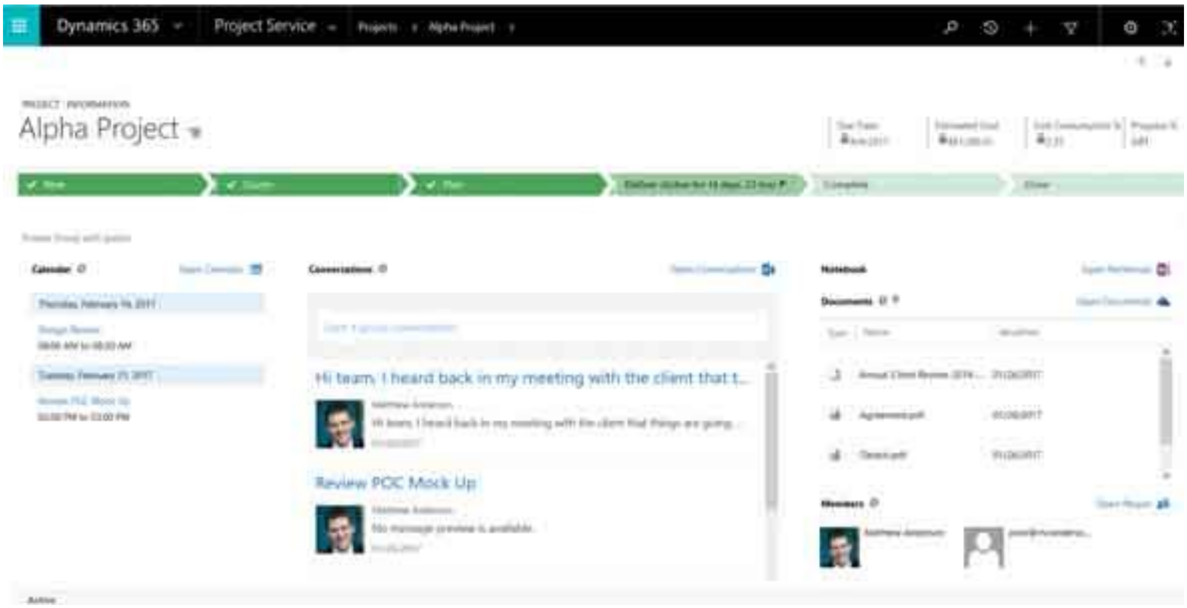
To get better resource visibility

Can maximize the utilization of our employees which leads to getting better returns on investment.

Can save time and money by utilizing the right amount of resources.

Team Collaboration:

Office 365 simplifies the collaboration process by connecting to people, information and tools need to get work done together.



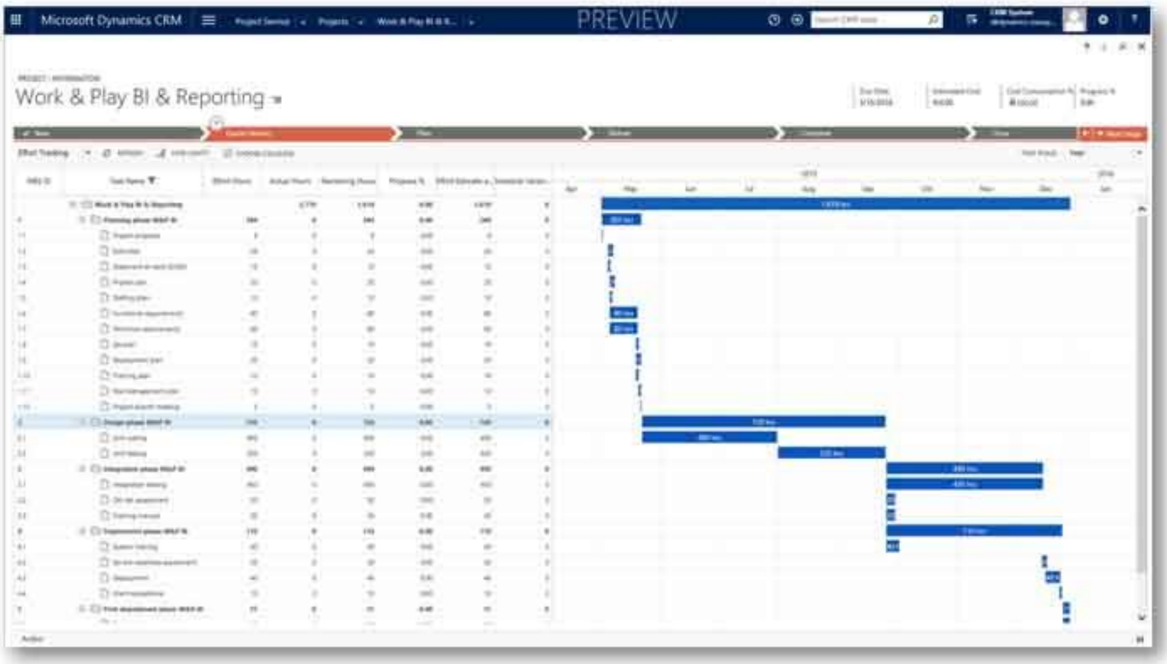
Project teams and customers can connect in many ways,

Communicate and share the latest project details

Track documents, deliverables, and productivity with office 365.

Time & Expenses:

It allows the employees to track their work efforts and occurred costs for assigned project tasks in the form of time and expense entry.



It allows the users to specify the start and end time of tracking entity.

It helps employees plan and controls their progress with the project.

Web, Office and Mobile apps make time and expense entry quick and easy.

Customer Billing:

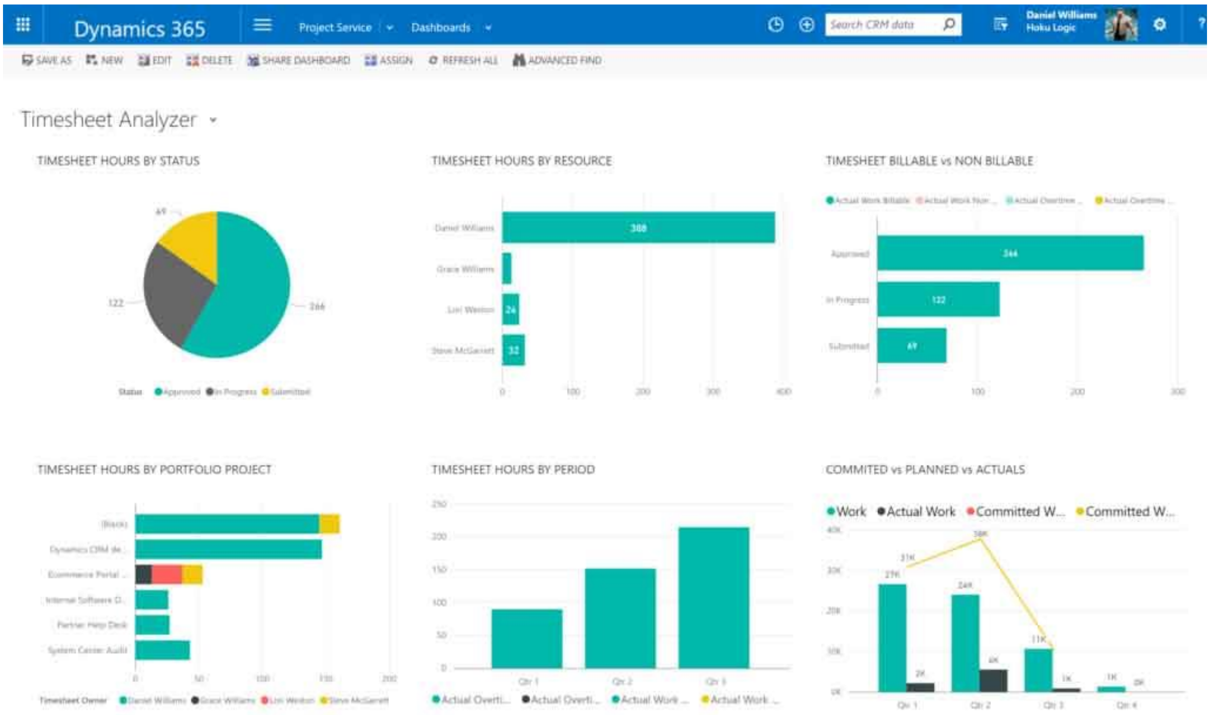
Project managers can review override, track overruns and approve costs all in one place with the help of customer billing tools.

When it's time to invoice, everything is in place to get accurate invoices to be given to customers.

Product ID	Product	Quality	Price	Sub Total
Dynamics 365 Professional (sample)	Dynamics 365 Professional (sample)	$10.00	$20.00	$200.00
Dynamics 365 Professional (sample)	Dynamics 365 Professional (sample)	$200.00	$10.00	$2,000.00
	Consulting	1.00	0.00	$0.00
	Development	1.00	$500.00	$500.00
		Total Tax:		$0.00
		Total		$2,700

Analysis & Integration:

Uniform tracking of financial events that affect profitability, revenues, accrual, and expenses provides a strong basis for reporting, integration and analytics and interactive dashboards.



More than just a project management tool, Microsoft Dynamics 365 PSA helps to ensure an organized and standardized workflow as well as it offers full reporting and management capabilities for the delivery management team across the project. It helps keep the project flow in an absolute and coordinated way from sales till delivery

What is Microsoft's Dynamics 365 Retail?

Dynamics 365 Retail (currently Dynamics 365 Commerce) is an end-to-end retail solution delivering unified commerce across all channels encompassing sales, mobility, intelligence, and productivity to help retailers and workers achieve more in a cloud first, mobile first world. Dynamics 365 Retail is a modern SaaS solution hosted and managed by Microsoft (with support for hybrid deployment) built on state of the art, cloud engineered, secure, and flexible architecture. The solution includes a cross platform unified Point of Sale (POS) application, integrated call center capability, Retail experience app (for your customers), and integration with 3rd-party e-commerce websites. What are the benefits of using Dynamics 365 Retail?

The solution offers comprehensive support to operate a broad range of business processes, including merchandising, inventory and channel management capabilities, while providing immersive customer experiences across all touchpoints. Uniform business logic across the touchpoints enables operational efficiency and ensures consistent and accurate information.

Some key capabilities of Dynamics 365 Retail:

Deliver a seamless, unified shopping experience

Connecting digital, in-store, and back office operations on an omnichannel commerce platform.

Create and manage sales promotions

Work across all channels, organize promotions by store, catalog, or customer affiliation with accurate, real-time data.

Personalize customer experiences

Make sure you exceed customer expectations through tailored product selection.

Expand customer choice

Offer access to your full product catalog in store or online, regardless of stock levels or location.

Better engage shoppers

Deliver personalized, appealing web experiences with content-driven commerce strategies.