

2017

Dynamics 365 - Project Service Automation Hands On Guide



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Microsoft

9/14/2017

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Introduction

Project Service Automation capabilities in Microsoft Dynamics 365 (online) provide an end-to-end solution that helps sales and delivery teams engage customers and deliver billable projects on time and within budget. Microsoft Dynamics 365 for Project Service Automation helps you:

- Estimate, quote, and contract work
- Plan and assign resources
- Enable team collaboration
- Capture time, expense, and progress data for real-time insights and accurate invoicing

Project-based contracts

Project-based contracts relate quotes and orders to project plans, financial estimates, labor pricing, and billing arrangements, like time and materials or fixed price. The contract highlights key metrics, including profitability and feasibility.

Project planning

Visual project planning and estimation includes predecessors, automatic task scheduling, and views of sales and cost information for time and expenses. You can use the resulting plan in quotes and project contracts.

Resource management

Resource information includes the skills and proficiencies of your workforce. You can view and filter resources based on skills and availability, so you can assign the right people to the right projects. You can also track resource utilization and forecasting metrics.

Time, expenses, and collaboration

Team members can use the web or mobile apps to record time and expenses for multiple projects. Managers can easily approve new entries while understanding the financial implications of the newly-approved items. All team members can collaborate with an Office 365 workspace created for their project.

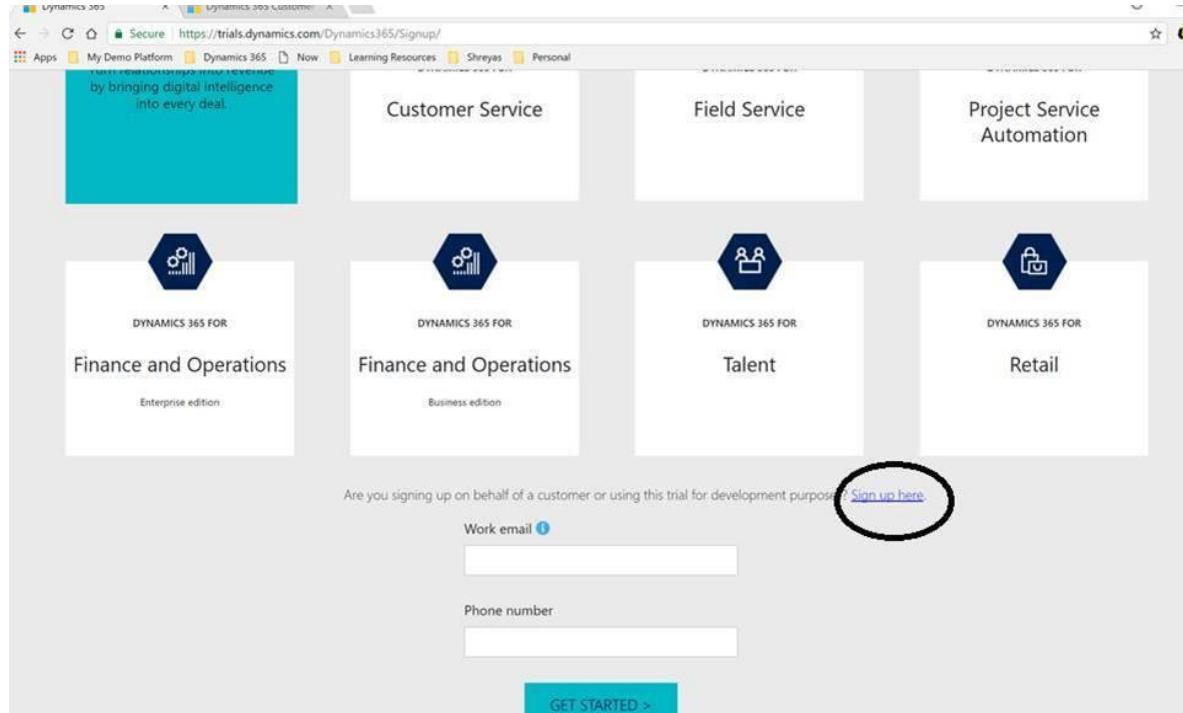
Project billing

Project invoices reflect the terms of the contract and the approved work and expenses. The financial impact of project work, including costs, unbilled revenue, and invoices, are recorded for use in analytics and integration into financial systems.

Prerequisites

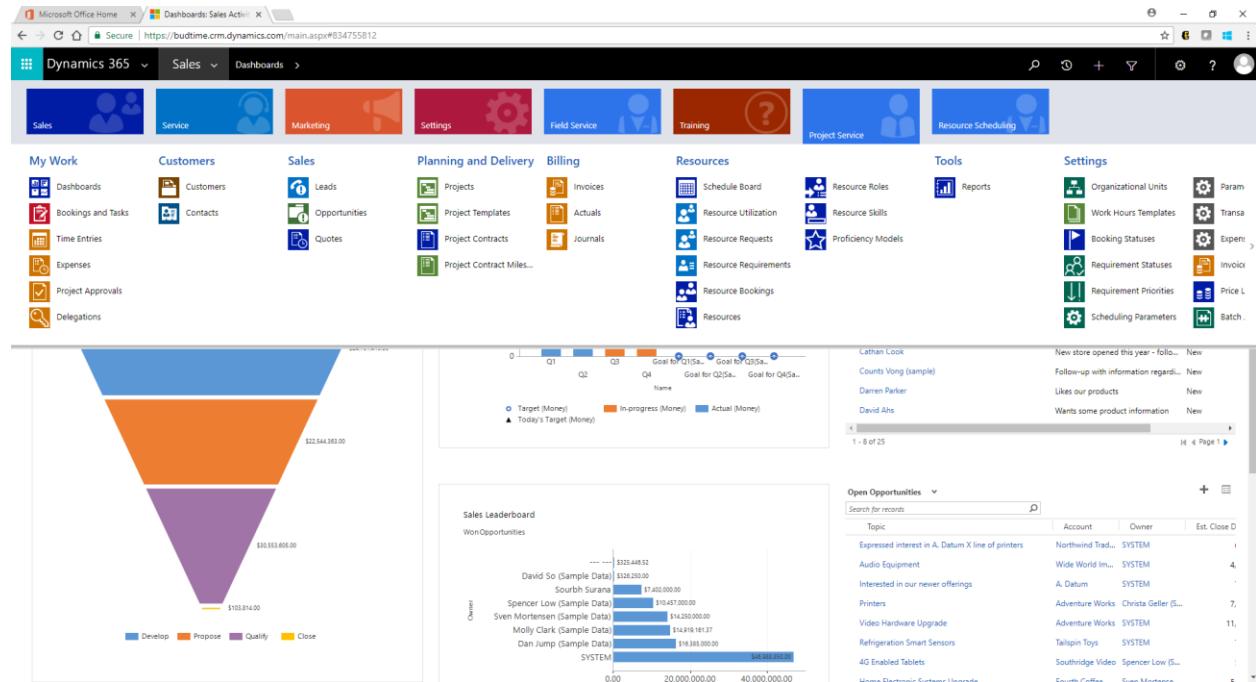
1. Create a trial for Dynamics 365 – Project Service Automation using the following link
<https://trials.dynamics.com/Dynamics365/Signup/>

Just click on “Are you signing up on behalf of a customer or using this trial for development purposes? Sign up here”. You should be able to use your non domain id to create a trial instance.



Creating Project Service Opportunity

Navigate to the Project service tab → Sales → Opportunities



This shows the list of open opportunities. Click on “New” button on the command bar.

The screenshot shows the Dynamics 365 Project Service Opportunities list. The command bar at the top includes buttons for New, Delete, Email a Link, Run Report, Excel Templates, Export to Excel, Import Data, Chart Pane, View, and a search bar. The main area displays a table of opportunities with columns: Topic, Account, Owner, Est. Close Date, Probability, Est. Revenue, Add to Forecast, and Forecast. The table lists various opportunities such as "Expressed interest in A. Datum X line of printers" and "Audio Equipment".

Topic	Account	Owner	Est. Close Date	Probability	Est. Revenue	Add to Forecast	Forecast
Expressed interest in A. Datum X line of printers	Northwind Trad...	SYSTEM	6/5/2016	70	\$10,568,950.00	No	\$259,000.00
Audio Equipment	Wide World Imp...	SYSTEM	4/20/2016	60	\$8,710,785.00	No	\$4,200,000.00
Interested in our newer offerings	A. Datum	SYSTEM	7/9/2016	60	\$7,500,000.00	No	\$2,143,500.00
Printers	Adventure Works	Christa Geller (S...	7/15/2016	80	\$4,913,000.00	No	\$4,108,000.00
Video Hardware Upgrade	Adventure Works	SYSTEM	11/3/2016	60	\$4,750,000.00	No	\$630,540.00
Refrigeration Smart Sensors	Tailspin Toys	SYSTEM	7/6/2016	40	\$3,550,000.00	No	\$1,420,000.00
4G Enabled Tablets	Southridge Video	Spencer Low (S...	5/6/2016	60	\$3,237,500.00	No	\$3,186,000.00
Home Electronic Systems Upgrade	Fourth Coffee	Sven Mortensen...	5/12/2016	20	\$3,142,000.00	No	\$628,400.00
Home PC	Adventure Works	South Surana	8/31/2016	20	\$2,470,860.00	No	
Notebooks	City Power & Lig...	SYSTEM	8/1/2016	60	\$2,441,475.00	No	\$2,217,000.00
Mobile Computing	Tailspin Toys	SYSTEM	11/2/2016	40	\$2,260,000.00	No	\$890,400.00
Mobile Computing Purchase	Blue Yonder Airli...	Sven Mortensen...	5/12/2016	40	\$2,187,500.00	No	\$1,448,550.00
Mobile Computing Expansion	Northwind Trad...	David So (Sampl...	7/17/2016	40	\$2,160,000.00	No	\$664,000.00
Product SKU #032	Adventure Works	Dan Jump (Sampl...	12/9/2016	80	\$2,134,000.00	No	\$1,707,200.00
PC Selection	Humongous Int...	Sven Mortensen...	7/13/2016	60	\$2,098,680.00	No	\$1,410,049.50
Video Hardware Update	Fourth Coffee	Dan Jump (Sampl...	8/10/2016	50	\$2,068,850.00	No	\$241,250.00
PC	Fabrikam, Inc.	SYSTEM	12/1/2016	60	\$2,078,125.00	No	\$1,242,150.00
Computers	Tailspin Toys	SYSTEM	5/31/2016	60	\$2,000,000.00	No	\$648,000.00
Portable Computing	Northwind Trad...	Molly Clark (Sa...	7/2/2016	60	\$2,000,000.00	No	\$1,500,000.00
Laptops	Proeware, Inc.	Sven Mortensen...	5/26/2016	40	\$1,361,200.00	No	\$544,480.00
Some interest in our J line of products	City Power & Lig...	Molly Clark (Sa...	5/19/2016	40	\$1,023,000.00	No	\$818,400.00
Home Electronics Consolidation	The Phone Com...	Molly Clark (Sa...	6/15/2016	60	\$900,000.00	No	\$540,000.00
Home Entertainment	Fourth Coffee	SYSTEM	6/8/2016	50	\$807,500.00	No	\$403,750.00
Video Recording Equipment	Adventure Works	SYSTEM	5/10/2016	60	\$607,000.00	No	\$364,200.00

Add the fields as in the screenshot below and save

The screenshot shows the Dynamics 365 Opportunity page for 'Dynamics AX Implementation'. At the top, there's a navigation bar with links like 'Sales', 'Opportunities', and 'Dynamics AX Imple...'. Below the navigation is a green banner with a trial expiration notice and a 'Buy Now' button. The main content area has a header 'OPPORTUNITY - PROJECT INFORMATION' with a dropdown arrow. The title 'Dynamics AX Implementation' is displayed. To the right of the title are fields for 'Est. Close Date', 'Est. Revenue', 'Status', and 'Owner' (Sourbh Surana). Below the title, a process flow diagram shows four stages: 'Qualify (Active)', 'Develop', 'Propose', and 'Close'. Each stage has associated tasks: 'Identify Contact', 'click to enter Active Transport Inc.', 'Purchase Timeframe', 'click to enter'; 'Estimated Budget', 'Purchase Process', 'Identify Decision Maker', 'click to enter'; 'Capture Summary', 'click to enter'; and 'click to enter'. A progress bar indicates the current stage is 'Develop'. Below the process flow is a section titled 'Opportunity Sales Process' with a 'Next Stage' button. The main body of the page is divided into sections: 'Summary' (left), 'Dynamics AX Implementation' (center), and 'STAKEHOLDERS' and 'SALES TEAM' (right). The 'Summary' section lists various fields like Topic, Contact, Account, etc. The 'Dynamics AX Implementation' section shows a post from Sourbh Surana on the wall. The 'STAKEHOLDERS' and 'SALES TEAM' sections are currently empty.

Now scroll down to the Opportunity lines. We will add couple of project based lines here. Click on the + sign to the right of the the project-based lines

The screenshot shows the Dynamics 365 Opportunity Line screen. The main title bar says "Dynamics 365 New Opportunity Line". The left sidebar shows "Opportunity Lines" and "Project-based Lines". The main area has a section titled "General" with fields: Opportunity (Dynamics AX Implementation), Write-In Product (Consulting and Implementation Work), Customer Budget (\$100,000.00), and Billing Method (Time and Material). Below this is a table for "Product-based Lines" which is currently empty.

We will also add one more line for expenses as fixed billing method.

The screenshot shows the Dynamics 365 Opportunity Line screen. The main title bar says "Dynamics 365 Sales Opportunities New Opportunity Line". The left sidebar shows "Opportunity Lines" and "Project-based Lines". The main area has a section titled "General" with fields: Opportunity (Dynamics AX Implementation), Write-In Product (Expenses), Customer Budget (\$10,000.00), and Billing Method (Fixed Price).

We can also add products to the same opportunity using the product based lines.

Let's navigate to the product catalog by clicking on Settings → Product Catalog → Families & Products

Screenshot of the Microsoft Dynamics 365 Product Catalog page:

The page title is "Opportunity: Dynamics". The top navigation bar includes "Dynamics 365", "Settings", "Product Catalog", and a "Buy Now" button. A green banner at the top right indicates a trial expiration in 23 days.

Families & Products
A product is an item in the product catalog that you want to sell to your customers. In this section, you manage products, set up product family hierarchies, create product bundles, and manage properties of product records. You can publish, revise, or retire product records, and also reclassify them to move them to other areas of the product catalog.

Discount Lists
A discount list contains the specific discounts that can be applied to a product, based on volume purchased. In this section, you create, manage, and delete discount lists in the product catalog.

Price Lists
A price list specifies what prices can be charged for each unit in the unit group of a product. In this section, you create, manage, and delete price list line items and price lists in the product catalog. You associate and disassociate products with price lists. You also specify various pricing options in the price list line items, such as the quantity selling option, the pricing method, and the rounding options.

Unit Groups
A unit group contains the base unit a product is available in, such as a liter, and then lists all the different increments that this base unit is packaged for sale. For example, if the base unit is a two-liter bottle, then that product could be sold individually as a two-liter bottle or in a case containing 6 two-liter bottles. In this section, you create, manage, and delete units and unit groups in the product catalog.

You should be able to see the pre-existing products, families and bundles. Navigate to or Search for "Subscription Software" and open it up.

Screenshot of the Microsoft Dynamics 365 Product Catalog page showing the "All Products, Families & Bundles" view:

The page title is "Products All Products, F...". The top navigation bar includes "Dynamics 365", "Settings", "Product Catalog", and a "Buy Now" button. A green banner at the top right indicates a trial expiration in 23 days.

The main area displays a grid of products. The columns include Name, Product ID, Hierarchy Path, Valid From, Valid To, Status, and Product Structure. A search bar is located at the top right of the grid.

The grid shows several entries, including:

Name	Product ID	Hierarchy Path	Valid From	Valid To	Status	Product Structure
SV Keyboard E10	5637146446				Active	Product
Surge Protector		Surge Protectors			Active	Product
Subscription Software		Subscription Sof...			Active	Product Family
Southridge Video Roundtable RT302	045321				Active	Product
Southridge LCD24 X300	5637146377				Active	Product
Southridge LCD22W M200	5637146383				Active	Product
Southridge LCD22 M200	5637146381				Active	Product
Southridge LCD20W M240	5637146387				Active	Product
Southridge LCD20 M210	5637146385				Active	Product
Southridge Laptop8.9 E0890	5637146268				Active	Product
Southridge Laptop19W X1980	5637146272				Active	Product
Southridge Laptop16 M1601	5637146284				Active	Product
Southridge Laptop15.4W M1548	5637146264				Active	Product
Southridge Laptop15 M1501	5637146276				Active	Product
Southridge Laptop12 M1201	5637146280				Active	Product
Southridge Desktop PC3.60 ED360	5637146336				Active	Product
Southridge Desktop PC3.0 MS300	5637146345				Active	Product
Southridge Desktop PC2.33 XD233	5637146330				Active	Product
Southridge Desktop PC2.30 MD230	5637146333				Active	Product
Southridge Desktop PC1.80 ED182	5637146342				Active	Product
Southridge Desktop PC1.80 ED180	5637146339				Active	Product

At the bottom, there is a footer with a "Page 1" indicator.

Please note that subscription software has been set up with some properties

The screenshot shows the Dynamics 365 product management interface. The top navigation bar includes 'Microsoft Office Home', 'Secure' (https://budtime.crm.dynamics.com/main.aspx#324998374), 'Dynamics 365', 'Sales', 'Products', and 'Product Family: Subs...'. A green banner at the top states 'Your Dynamics 365 trial will expire in 23 day(s)' and features a 'Buy Now' button. Below the banner are standard actions: PUBLISH, CLONE, REVISE, RETIRE, DELETE, PROCESS, VIEW HIERARCHY, EMAIL A LINK, RUN WORKFLOW, and more. The main content area displays a product card for 'Subscription Software' with a status of 'Active'. The 'PRODUCT DETAILS' section lists various properties:

Name*	Subscription Software	Unit Group	Business User
Product ID*	Subscription Software	Default Unit	Standard User
Family Hierarchy	--	Default Price List	--
Valid From	--	Decimals Supported	2
Valid To	--	Subject	--
Description	--		

The 'PRODUCT PROPERTIES' section contains a table with two rows:

Name	Base Property	Data Type	Read-Only	Required	Hidden	Default Value
No of Months		Whole Number	No	No	No	3
No of Users		Whole Number	No	No	No	10

A filter bar at the bottom shows 'Active'.

Close it to get back to the view and with Subscription Software selected, click on add a new product. We will be adding Dynamics AX licenses to this product family.

The screenshot shows the Microsoft Dynamics 365 interface for managing products. The top navigation bar includes 'Dynamics 365', 'Sales', 'Products', and the current page 'Product: Dynamics A...'. A green banner at the top right indicates a trial expiration in 23 days. The main content area displays the product details for 'Dynamics AX Licenses', including its name, product ID, family hierarchy (Subscription Software), and various configuration settings like unit group, default unit, and price list. Below this, the 'PRODUCT PROPERTIES' section lists two properties: 'No of Months' and 'No of Users', both defined as Whole Number type. The status is shown as 'Draft'.

Scroll down and add a price list

And select the price list as default price list on the product.

Click on “Publish” to make product active.

◆ ADDITIONAL DETAILS

PRICE LIST ITEMS					
Price List ↓	Unit	Pricing Metho...	Amount	Percentage	
Standard	Standard User	Currency Amount	\$50.00		

The screenshot shows a Microsoft Edge browser window with the Dynamics 365 Sales module open. The URL is <https://budtime.crm.dynamics.com/main.aspx#360846215>. The page title is "Price List Item: Dynamics". The navigation bar includes "Dynamics 365", "Sales", "Products", and "Dynamics AX Licenses". A green banner at the top states "Your Dynamics 365 trial will expire in 23 day(s)" with a "Buy Now" button. The main content area is titled "PRICE LIST ITEM : PRODUCT PRICE LIST" and shows a form for "Dynamics AX Licenses". The form has sections for "General", "Pricing", and "Rounding". In the General section, fields include "Price List" (Standard), "Product" (Dynamics AX Licenses), "Unit" (Standard User), "Currency" (US Dollar), "Discount List" (empty), and "Quantity Selling Option" (No Control). In the Pricing section, "Pricing Method" is set to "Amount" with a value of "\$50.00". In the Rounding section, all fields are empty.

This product needs to be added to the pricelist used by the opportunity if it has to show up in the opportunity. Navigate to Project service → Price lists and find & open the “US Bill Rates 2016” Price list. Scroll down to the Pricelist Items and add the Dynamics AX licenses.

The screenshot shows a Microsoft Dynamics 365 Project Service interface. The top navigation bar includes 'Dynamics 365' and 'Project Service'. Below it, a green banner displays a trial expiration notice: 'Your Dynamics 365 trial will expire in 23 day(s)' and a 'Buy Now' button. The main content area is titled 'US Bill Rates 2016' under 'PRICE LIST : PRICE LEVEL'. A table lists various products with their descriptions and status. The table has columns for 'Product', 'Status', and 'Active'. The 'Active' column shows 'Active' for all items. The 'Product' column lists items such as 'CRM 3-Year Basic', 'CRM 3-Year Basic', 'CRM 3-Year Basic', 'CRM 3-Year Enterprise', 'CRM 3-Year Enterprise' (which is highlighted in blue), 'CRM 3-Year Professional', 'CRM 3-Year Professional', 'CRM Online Basic', 'CRM Online Basic', 'CRM Online Enterprise', 'CRM Online Enterprise', 'CRM Online Professional', 'CRM Online Professional', and 'Dynamics AX Licenses'. The bottom of the screen shows a footer with a 'Active' filter.

Now navigate back to the opportunity and add the product created to the opportunity, navigate to the product based lines and add the Dynamics AX Licenses with quantity of 50.

Microsoft Office Home > Opportunity: Dynamics A X

Secure | https://budtime.crm.dynamics.com/main.aspx#819910735

Dynamics 365 Project Service Opportunities > Dynamics AX Imple... >

Your Dynamics 365 trial will expire in 23 day(s) Buy Now

+ NEW CLOSE AS WON CLOSE AS LOST CLOSE ALL QUOTES RECALCULATE OPPORTUN... CONVERT TO WORK ORDER FORM PROCESS ASSIGN ...

OPPORTUNITY - PROJECT INFORMATION

Dynamics AX Implementation

Qualify (Active for 35 minutes) Develop Propose Close

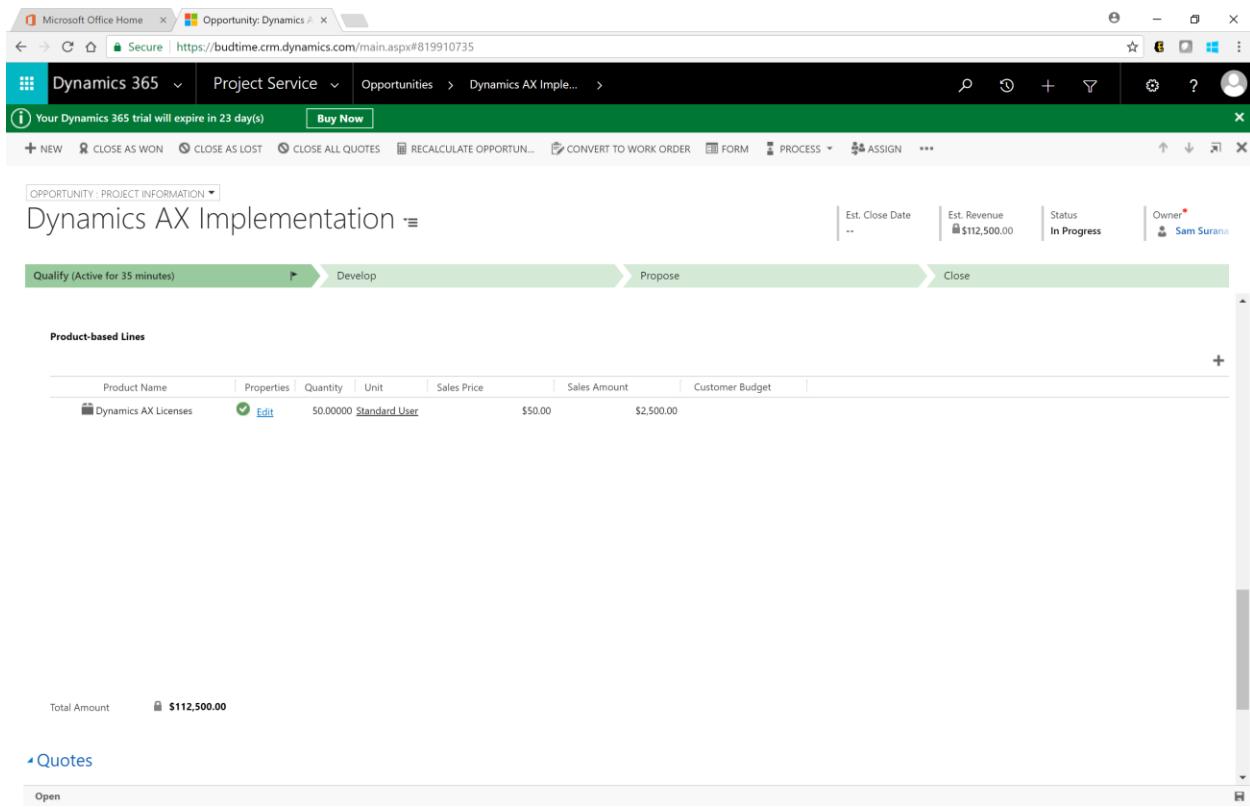
Product-based Lines

Product Name	Properties	Quantity	Unit	Sales Price	Sales Amount	Customer Budget
Dynamics AX Licenses	Edit	50.00000	Standard User	\$50.00	\$2,500.00	

Total Amount **\$112,500.00**

Quotes

Open



Quote Creation

In the opportunity, scroll down to the “Quotes” section and click on + to create new quote.

The screenshot shows the Dynamics 365 Quote creation page for the opportunity "Dynamics AX Implementation".

Quote Information:

- Quote ID: QUO-00018-Q8V0H2
- Revision ID: 0
- Name: Dynamics AX Implementation
- Potential Customer: Active Transport Inc.
- Account Manager: Sam Surana
- Contracting Unit: Contoso US
- Opportunity: Dynamics AX Implementation
- Product Price List: US Bill Rates 2016
- Requested Delivery Date: --
- Quote Expires On: --
- Status Reason: In Progress

Analysis:

- Profitable:** Gross Margin (%): 100.00, Adjusted Gross Margin: 100.00
- Outside Customer Expectations:** Estimated Schedule: Schedule Not Available, Estimated Budget: Exceeds Customer Budget

Summary:

- Bill To Address: 225200 Miles Ave., Bellevue, WA 98007 USA
- Payment Terms: Net 30
- Currency: US Dollar

Activities & Notes:

We didn't find any activity records.

Quote Lines:

Draft

Go to the quote lines

Open “consulting and implementation” and mark the include expense as No. This will make sure that expenses are not charged on this project.

Open the “Expenses” and mark the include time and include fee as No. This will make sure that only expenses are charged on this project.

Quote Lines

Project-based Lines							
Name	Billing Method	Project	Include Time	Include Expense	Include Fee	Quoted Amount	Customer Budget
Consulting and Impl...	Time and Material		Yes	No	Yes	\$100,000.00	\$100,000.00
Expenses	Fixed Price		No	Yes	No	\$10,000.00	\$10,000.00

Open the Consulting and Implementation Quote line and create quote line details as shown below.

The screenshot shows the Microsoft Dynamics 365 Sales - Quotes - New Quote Line interface. The main title is "Consulting and Implementation Work". The "General" section displays various settings: Name (Consulting and Implementation Work), Billing Method (Time and Material), Project (..), Include Time (Yes), Include Expense (No), Include Fee (Yes), Quoted Amount (\$100,000.00), Estimated Tax (\$0.00), Quoted Amount After (\$100,000.00), Budget Amount (\$100,000.00), Invoice Frequency (BiMonthly), and Billing Start Date (..). The "Quote Line Details" section shows three items in a grid:

Quote Line	Description	Billing Type	Transaction Class	Resourcing unit	Category	Role	Start Date ↑	End Date	Quantity	Unit	Sales P
29EE6FDC-3D93-E711-81... Architect	Architect	Chargeable	Time	Contoso US		Architect	9/6/2017	9/6/2017	200.00	Hour	
29EE6FDC-3D93-E711-81... Project Manager	Project Manager	Chargeable	Time	Contoso US		Project Manager	9/6/2017	9/6/2017	200.00	Hour	
29EE6FDC-3D93-E711-81... Developer	Developer	Chargeable	Time	Contoso US		Developer	9/6/2017	9/30/2017	200.00	Hour	

Open the Expenses quote line and create quote line details as shown below

The screenshot shows the Microsoft Dynamics 365 Sales interface for creating a new quote line. The top navigation bar includes 'Microsoft Office Home', 'Quote Line: New Quote', 'dynamics 365 quote line...', 'Quote Lines (Project Based)', and a secure connection indicator. The main header says 'Dynamics 365' with a dropdown, 'Sales', 'Quotes', and 'New Quote Line'. A green banner at the top right indicates a trial expiration in 22 days and has a 'Buy Now' button. Below the banner are standard toolbar buttons: OPEN COST DETAIL, DELETE, GENERATE PERIODIC MILE..., EDIT PROPERTIES, EMAIL A LINK, RUN WORKFLOW, START DIALOG, WORD TEMPLATES, and three more buttons. A dropdown menu 'QUOTE LINE - PROJECT INFORMATION' is open, showing the section 'Expenses' with a warning message: 'The sum of the amount in billing milestones, 0, must be equal to the line amount 10000.' The 'General' section contains fields for Name (2AE66FDC-3D93-E711-81...), Expenses (Fixed Price), Project (Trips), and various settings like Include Time (No), Include Expense (Yes), and Include Fee (No). To the right, financial details are listed: Quoted Amount (\$10,000.00), Estimated Tax (\$0.00), Quoted Amount After (\$10,000.00), Budget Amount (\$10,000.00), Invoice Frequency (BiMonthly), and Billing Start Date (empty). Below this is the 'Quote Line Details' section, which lists one item: '2AE66FDC-3D93-E711-81...' under 'Description', 'Chargeable' under 'Billing Type', and 'Expense' under 'Transaction Class'. It also shows 'Contoso US' under 'Resourcing unit', 'Category' (empty), 'Role' (empty), 'Start Date' (9/6/2017), 'End Date' (9/6/2017), 'Quantity' (10.00), 'Unit' (Primary Unit), and 'Sales P' (\$). A '+' button is available to add more items.

Scroll to the profitability analysis section on the quote and refresh the fields Total Chargeable cost and Total Non Chargeable cost. Also if the charts are not displaying, click on “Click here to load the charts” link.

Screenshot of the Microsoft Dynamics 365 Quotes module showing a quote for "Dynamics AX Implementation".

Key Metrics:

Total Chargeable Cost	\$75,500.00	Total Revenue	\$112,500.00	Gross Margin (%)	32.89	Profitable
Total Non-chargeable	\$0.00	Total Revenue (Base)	\$112,500.00	Adjusted Gross Margin	32.89	

Distribution of cost and revenue:

Revenue and cost over time (Monthly breakdown):

Month (End Date Time)	Revenue	Cost
Sep 2017	\$112,500.00	\$75,500.00

Associated Revenue (Amount by role):

Role	Sum (Amount) (\$)
Architect...	\$30,000.00
Devel...	\$30,000.00
Proj...	\$40,000.00
(blank)	\$2,000.00

Comparison to Customer Expectations:

javascript:

Now scroll to the “Comparison to Customer Expectations Section”

QUOTE : PROJECT INFORMATION

Dynamics AX Implementation

Total Amount: \$112,500.00 | Status: Draft | Status Reason: In Progress | Owner: Sam Surana

Key Metrics

Estimated Completion: 9/30/2017	Customer Budget: \$120,000.00	Within Customer Expectations
Requested Completion: 10/31/2017	Quoted Value: \$112,500.00	
Estimated To Finish Early		

Comparison To Customer Expectations

Comparison To Customer Budgets - By Quote Line

Project Quote Lines

Category	As Quoted	Customer Budget
Expenses	\$10,000.00	\$10,000.00
Consulting and Implementation Work	\$100,000.00	\$100,000.00

Comparison To Customer Budgets - Overall Quote

Project Quote Lines

Category	As Quoted	Customer Budget
Overall	\$112,500.00	\$120,000.00

Now lets convert the quote to a contract or an order by marking it as Won. A project contract is created and all the fields from quote are copied to the order. This action also makes the quote as read only.

A project can be attached to either quote line or the order lines based on the practice of the organization. Here I will be creating and attaching the project to the order lines shortly.

QUOTE : PROJECT INFORMATION

Dynamics AX Implementation

Total Amount: \$112,500.00 | Status: Draft | Status Reason: In Progress | Owner: Sam Surana

Key Metrics

Estimated Completion: 9/30/2017	Customer Budget: \$120,000.00	Within Customer Expectations
Requested Completion: 10/31/2017	Quoted Value: \$112,500.00	
Within Customer Budget		

Comparison To Customer Budgets - By Quote Line

Project Quote Lines

Category	As Quoted	Customer Budget
Expenses	\$10,000.00	\$10,000.00
Consulting and Implementation Work	\$100,000.00	\$100,000.00

Comparison To Customer Budgets - Overall Quote

Project Quote Lines

Category	As Quoted	Customer Budget
Overall	\$112,500.00	\$120,000.00

Now scroll down to the “Contract Lines” and click on the “Consulting & Implementation” in project based lines. See that the project field is blank. Click on it and create a new project. Enter the relevant details by selecting Project template as “Agile Template”.

The screenshot shows the Microsoft Dynamics 365 Project Service interface. At the top, there are several tabs: Microsoft Office Home, Project: AX Implementation..., dynamics 365 quote line..., and Quote Lines (Project Baseline). The main navigation bar includes Dynamics 365, Project Service, Projects, AX Implementation..., and a green banner indicating a trial expiration in 22 days with a 'Buy Now' button.

The main content area displays the 'AX Implementation Project'. It includes a summary bar with project status: Due Date 3/13/2018, Estimated Cost \$113,920.00, Cost Consumption % 0.00, and Progress % 0.00. Below this is a horizontal business process bar with stages: New, Quote, Plan (Active for 10 minutes), Deliver, Complete, and Close.

The 'Summary' section contains tabs for General, Estimates, and Actuals. Under General, fields include Name (AX Implementation Project), Description (Active Transport Inc.), Customer (Active Transport Inc.), Calendar template (Default Work Template), Currency (US Dollar), Contracting Unit (Contoso US), Project Manager (Sam Surana), and Project Template (Agile Template). Under Estimates, fields include Estimated Start Date (9/11/2017), Estimated Finish Date (3/13/2018), Estimated Hours (1,096.00), and Estimated Cost (\$113,920.00). Under Actuals, fields include Actual Start (..), Actual End (..), Actual Hours (0.00), and Actual Cost (\$0.00).

The 'Sales' section shows a 'Project Contract' table with one row for 'Consulting and Implementation W...' with a value of '\$100,000.00'. The table has columns: Name, Billing Method, Amount, Order, Contract Status (Order), and Customer (Order). The customer listed is 'Active Transport Inc.'.

Note that the Business process bar readily tells you which stage of the project you are at.

Now click on the Workbreak down structure in navigation. Give it a few seconds to load.

Microsoft Office Home > Project: AX Implementation > dynamics 365 quote line > Quote Lines (Project Baseline)

Secure | https://budtime.crm.dynamics.com/main.aspx#585157408

Dynamics 365 > Project Service > Projects > AX Implementation ...

Common

- Documents
- Resource Requirements
- Office 365 Groups
- Actuals
- Work breakdown struc...
- Project estimates
- Project tracking
- Project Team Members

Name *	AX Implementation Project	Estimated Start Date	9/11/2017	Actual Start	--
Description	--	Estimated Finish Date	3/13/2018	Actual End	--
Customer	Active Transport Inc.	Estimated Hours	1,096.00	Actual Hours	0.00
Calendar template *	Default Work Template	Estimated Cost	\$113,920.00	Actual Cost	\$0.00
Currency *	US Dollar				
Contracting Unit *	Contoso US				
Project Manager *	Sam Surana				
Project Template	Agile Template				

Sales

Project Contract

Name	Billing Method	Amount	Order	Contract Status (Order)	Customer (Order)
Consulting and Implementation W...	Time and Mater...	\$100,000.00	Dynamics AX Implement...	Draft	Active Transport Inc.

https://budtime.crm.dynamics.com/javascript:

Microsoft Office Home > Project: AX Implementation > dynamics 365 quote line > Quote Lines (Project Baseline)

Secure | https://budtime.crm.dynamics.com/main.aspx#585157408

Dynamics 365 > Project Service > Projects > AX Implementation ... >

Your Dynamics 365 trial will expire in 22 day(s) [Buy Now](#)

PROJECT : INFORMATION

AX Implementation Project

Due Date: 3/13/2018 | Estimated Cost: \$113,920.00 | Cost Consumption %: 0.00 | Progress %: 0.00

New > Plan (Active for 10 minutes) > Deliver > Complete > Close

REFRESH + ADD TASK - DELETE ↗ INDENT ↘ OUTDENT ↑ MOVE UP ↓ MOVE DOWN HIDE GANTT GENERATE PROJECT TEAM MOVE PROJECT CHOOSE COLUMNS TIME SCALE: Year

Task Mode	WBS ID	Task Name	Predeces...	Effort H...	Start Date	End Date	Duration	Assigned Roles	Resources	2017	2018
		AX Implementation Project		1096	9/11/2017	3/13/2018	132			Jul	Oct
	1	Project kickoff		40	9/11/2017	9/15/2017	5	Functional cons...		Jan	
	2	Sprint 1		510	9/15/2017	12/11/2017	62			Apr	
	2.1	Discover	1	50	9/15/2017	9/25/2017	7	Functional cons...			
	2.2	Design	2.1	40	9/26/2017	10/2/2017	5	Architect			
	2.3	Develop	2.2	400	10/3/2017	12/11/2017	50	Developer			
	2.4	Test	2.2	20	10/3/2017	10/5/2017	3	Functional cons...			
	3	Sprint 2		490	12/12/2017	3/2/2018	59				
	3.1	Analyse & Discover	2	30	12/12/2017	12/15/2017	4	Functional cons...			
	3.2	Incremental Design	3.1	40	12/18/2017	12/22/2017	5	Architect			
	3.3	Develop & Integrate	3.2	400	12/25/2017	3/2/2018	50	Developer			
	3.4	End to end test	3.2	20	12/25/2017	12/27/2017	3	Functional cons...			
	4	Training and Handoff	3	40	3/5/2018	3/9/2018	5	Functional cons...			
	5	Project complete		4	16	3/12/2018	3/13/2018	2	Program Manag...		

Active

Here you can make changes to the project plan for example increase the design effort hrs to 40 and the develop hrs to 400.

From the navigation bar, click on the project estimates to look at the estimates in Time phase by cost, effort and sales manner or just in grid.

The screenshot shows the Dynamics 365 Project Service interface. The top navigation bar includes links for Microsoft Office Home, Project AX Implementation, dynamics 365 quote line, and Quote Lines (Project Baseline). The main title is "Dynamics 365" followed by "Project Service" and "Projects > AX Implementation ...". A banner at the top states "Your Dynamics 365 trial will expire in 22 days(s)" with a "Buy Now" button. The main content area is titled "PROJECT : INFORMATION" and "AX Implementation Project". It displays a grid of tasks grouped by role: Functional consultant (6), Architect (2), Developer (2), and Program Manager (1). The grid columns include Task, Estimated Start Date, Estimated End Date, and various time-phased cost and effort values. The grid shows tasks like "Project kickoff - Functional", "Discover", "Test", "Analyse & Discover", "End to end test", "Training and Handoff", "Design", "Incremental Design", "Develop", "Develop & Integrate", and "Project complete". The grid also includes summary rows for each group and a total row at the bottom. The top right of the grid shows summary metrics: Due Date 3/13/2018, Estimated Cost \$113,920.00, Cost Consumption % 0.00, and Progress % 0.00. The bottom of the grid has a "Active" filter and a refresh icon.

Go back to the project and click on OPEN IN MS PROJECT. If you have installed the PSA addin for MS project then this should open the MS PROJECT. If not, you can install it from the following link.

<https://www.microsoft.com/en-us/download/details.aspx?id=54299>

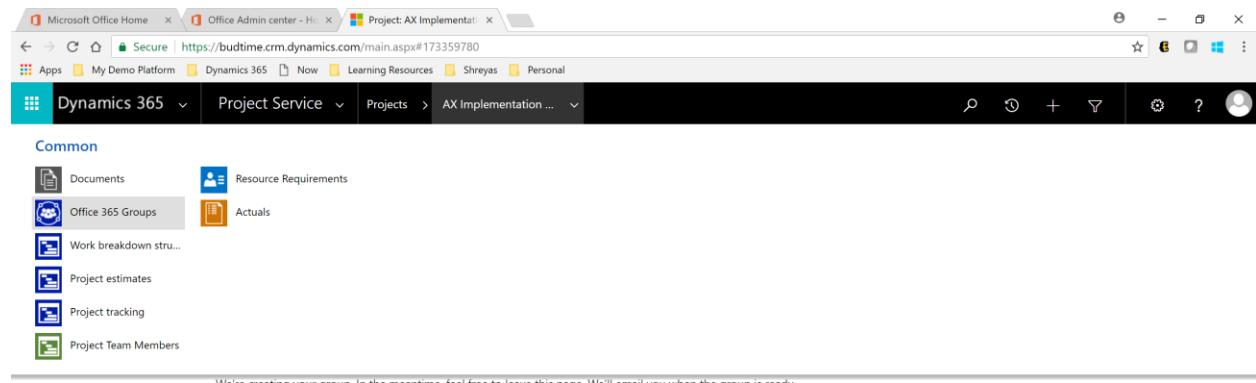
~~ TO BE ADDED LATER ~~

Office 365 Groups

Office Groups Setup

1. Install the “Office 365 Groups” solution from the O365 CRM Online Administration Center solutions management page
2. Once the solution installation is complete, in CRMOL, navigate to Settings > Office 365 Groups
 - a. In the “Office 365 Groups Integration Settings” page, click on ‘Add entity’ button to add a new row
 - b. Use the dropdown to choose Opportunity (opportunity entity)
 - c. Then Add another entry for the Project (msdyn_project) entity
 - d. Click on ‘Publish all’ to publish this customization
3. Once the customizations have been published, navigate to an opportunity record and project record to confirm that the “Office 365 Groups” option shows up in the top navigation menu items

Open the project that you want to collaborate on. Click on the navigation bar and click on Office 365 groups.



The screenshot shows the Microsoft Dynamics 365 Project Service interface. At the top, there's a navigation bar with links like 'Dynamics 365', 'Project Service', 'Projects', and 'AX Implementation ...'. A green banner at the top indicates a trial expiration notice: 'Your Dynamics 365 trial will expire in 22 day(s)' with a 'Buy Now' button. Below the banner, the project title 'AX Implementation Project' is displayed, along with its status: 'Private Group'. The main area shows a timeline with stages: 'New', 'Quote', 'Plan (Active for 4 hours)', 'Deliver', 'Complete', and 'Close'. Under each stage, there are sub-sections: 'Calendar' (no upcoming meetings), 'Conversations' (a placeholder 'Start a group conversation.'), 'Open Conversations' (empty), 'Notebook' (empty), 'Documents' (empty), and 'Members' (one member listed: Sam Surana). A sidebar on the left shows 'Active' projects.

Here Dynamics 365 users can collaborate with Non-Dynamics 365 users. Non Dynamics 365 users can add or consume content from office 365.

Microsoft Office Home | Office Admin center - Home | Project: AX Implementation | GroupMail - Sami@Budtime.onmicrosoft.com | Microsoft Corporation [US] | https://outlook.office.com/owa/?realm=187ae85d-79d2-4094-860d-dd9feb9474c1&path=/group/aximplementationproject@Budtime.onmicrosoft.com/mail

Office 365 | Outlook

Search AX Implementation...

AI Folders Groups

Inbox Sent Items Drafts More AX Implementation Project

Discover Create

Conversations Files Calendar Notebook ...

AI AX Implementation Project

+ New Reply all Forward

Seen conversations

AX Implementation Project
The new AX Implementation Project group 801p
Welcome to the AX Implementation Project group. Use...

The new AX Implementation Project

AX Implementation Project
Wed 9/6/2017 8:01 PM

Welcome to the AX Implementation Project group!

Use the group to share ideas, files, and important dates.

Meet Connectors

Get more done with your team by connecting it to your favorite apps through Office 365.

Got it Try it

In a public group, anyone in your organization can participate in the group's conversations, files, and calendar. In a private group, only members can participate.

Learn more

Start a conversation Add to the team site

Read group conversations or start your own. Start sharing and collaborating on content in SharePoint.

Share files Connect your apps

View, edit, and share all group files, including email attachments. Connect apps like Twitter and Trello to stay current with information and updates your team cares about.

Get the Groups app on your phone and stay connected.

Download on the App Store GET IT ON Google Play Get it from Microsoft

Resource Management

Resource Management Dashboard

The screenshot shows the Dynamics 365 Resource Management Dashboard. At the top, there is a navigation bar with links to Microsoft Office Home, Office Admin center, Dashboards: Resource M..., GroupMail - Sam@bu..., and Tropical Storm Katia - Bu... . Below the navigation bar, the main dashboard area is displayed.

Requests By Role: A chart titled "Requests By Role" is shown, but it displays a message: "There is no data to create the Requests By Role chart."

Utilization by Role: A bar chart titled "Utilization by Role" shows Active Role Utilization. The Y-axis represents Utilization Percent from 0 to 100, and the X-axis lists roles: Admin, Principal contr., Financial contr., Project mana..., Technical contr., and Owner. A horizontal orange line represents the Target Utilization Percent at approximately 75%. The chart shows utilization percentages slightly above the target for most roles.

Role	Utilization Percent
Admin	~70
Principal contr.	~72
Financial contr.	~75
Project mana...	~72
Technical contr.	~75
Owner	~72

Resource Demand Distribution: A bar chart titled "Resource Demand Distribution" shows Unassigned Resource Demand in hours. The Y-axis ranges from 0 to 400 hours. The chart has five bars with values approximately 120, 300, 180, 350, and 80 hours.

Category	Sum (hours)
1	~120
2	~300
3	~180
4	~350
5	~80

what's new: A news feed section with two posts:

- Dynamics AX Implementation**
Sam Surana won Opportunity for Account Active Transport Inc.: \$112,500.00. Congratulations!
On Dynamics AX Implementation's wall
Today
- Dynamics AX Implementation**
Opportunity: Created by Souribh Surana for Account Active Transport Inc..
On Dynamics AX Implementation's wall
Today

Go to Project service → Schedule board. This tool gives you ability to see resources.

The screenshot shows the Microsoft Dynamics 365 Project Service Schedule Board. The top navigation bar includes links to Microsoft Office Home, Office Admin center, Microsoft Dynamics 365, GroupMail, and Tropical Storm Katia. The main header displays "Dynamics 365" and "Project Service". The title bar indicates "Weekly view" and "Initial public view".

The board displays a grid of resource availability from September 3, 2017, to November 19, 2017. The columns represent specific dates: 9/3/2017, 9/10/2017, 9/17/2017, 9/24/2017, 10/1/2017, 10/8/2017, 10/15/2017, 10/22/2017, 10/29/2017, 11/5/2017, 11/12/2017, and 11/19/2017.

The left sidebar, titled "Filter & Map View", contains a search bar labeled "Search resources..." and a list of 13 resources, each with a profile picture, name, and availability status (e.g., 0:00, 0%). The resources listed are:

- Abraham McCormi...
- Alan Steiner (Samp...
- Allison Dickson
- Ashley Chinn
- Bernadette Foley
- Bob Kozak
- Cheri Castaneda
- Christal Robles
- Christie Dawson
- Clarence Desimone

The grid shows resource availability over time. For example, Bob Kozak has availability from 9/3/2017 to 10/22/2017, with a total of 240:00 hours available, which is 28% of his capacity. Other resources like Abraham McCormi... and Alan Steiner have no availability listed.

At the bottom of the board, there is a section titled "Booking Requirements".

Open the AX Implementation Project and go to WBS.

Microsoft Office Home > Office Admin center - Home > Project: AX Implementation > GroupMail - Sam@Budtime > Tropical Storm Katia - Bill

Secure https://budtime.crm.dynamics.com/main.aspx#319123627

Apps My Demo Platform Dynamics 365 Now Learning Resources Shreyas Personal

Dynamics 365 Project Service Projects > AX Implementation ... >

Your Dynamics 365 trial will expire in 22 day(s) Buy Now

PROJECT : INFORMATION
AX Implementation Project

Due Date 3/13/2018 Estimated Cost \$113,920.00 Cost Consumption % 0.00 Progress % 0.00

New Quote Plan (Active for 5 hours) Deliver Complete Close

REFRESH ADD TASK DELETE INDENT OUTDENT MOVE UP MOVE DOWN HIDE GANTT GENERATE PROJECT TEAM MOVE PROJECT CHOOSE COLUMNS TIME SCALE: Year

Task Mode	WBS ID	Task Name	Predeces...	Effort H...	Start Date	End Date	Duration	Assigned Roles	Resources	2017	2018		
		AX Implementation Project		1096	9/11/2017	3/13/2018	132			Jul	Oct	Jan	Apr
1		Project kickoff		40	9/11/2017	9/15/2017	5	Functional cons...					
2		Sprint 1		510	9/15/2017	12/11/2017	62						
2.1		Discover	1	50	9/15/2017	9/25/2017	7	Functional cons...					
2.2		Design	2.1	40	9/26/2017	10/2/2017	5	Architect					
2.3		Develop	2.2	400	10/3/2017	12/11/2017	50	Developer					
2.4		Test	2.2	20	10/5/2017	10/5/2017	3	Functional cons...					
3		Sprint 2		490	12/12/2017	3/2/2018	59						
3.1		Analyse & Discover	2	30	12/12/2017	12/15/2017	4	Functional cons...					
3.2		Incremental Design	3.1	40	12/18/2017	12/22/2017	5	Architect					
3.3		Develop & Integrate	3.2	400	12/25/2017	3/2/2018	50	Developer					
3.4		End to end test	3.2	20	12/25/2017	12/27/2017	3	Functional cons...					
4		Training and Handoff	3	40	3/5/2018	3/9/2018	5	Functional cons...					
5		Project complete	4	16	3/12/2018	3/13/2018	2	Program Manag...					

Active

Click on “Generate Project Team”. This will generate team with generic resources.

Microsoft Office Home > Office Admin center - Home > Project: AX Implementation > GroupMail - Sam@Budtime > Tropical Storm Katia - Bill

Secure https://budtime.crm.dynamics.com/main.aspx#319123627

Apps My Demo Platform Dynamics 365 Now Learning Resources Shreyas Personal

Dynamics 365 Project Service Projects > AX Implementation ... >

Your Dynamics 365 trial will expire in 22 day(s) Buy Now

PROJECT : INFORMATION
AX Implementation Project

Due Date 3/13/2018 Estimated Cost \$113,920.00 Cost Consumption % 0.00 Progress % 0.00

New Quote Plan (Active for 5 hours) Deliver Complete Close

Project Team Members Associated View

+ NEW MAINTAIN BOOKINGS SUBMIT REQUEST CONFIRM DISABLE RESOURCE SIGN... EXCEL TEMPLATES EXPORT PROJECT TEAM ...

Bookable Resource	Role	Position Name	From	To	Required Hou...	Booked Hours	Soft Book	Assigned Hou...	Resource Requirement	Status (Resour...	Applicants avail
Generic Resource	Architect	Architect 1	9/26/2017	12/22/2017	80.00			80.00	AX Implementation Proj...	No	
Generic Resource	Developer	Developer 1	10/3/2017	3/2/2018	800.00			800.00	AX Implementation Proj...	No	
Generic Resource	Functional cons...	Functional cons...	9/11/2017	3/9/2018	150.00			150.00	AX Implementation Proj...	No	
Generic Resource	Functional cons...	Functional cons...	9/15/2017	9/25/2017	50.00			50.00	AX Implementation Proj...	No	
Generic Resource	Program Mana...	Program Mana...	3/12/2018	3/13/2018	16.00			16.00	AX Implementation Proj...	No	
Sourbh Surana	Project Manager		9/11/2017								

1 - 6 of 6

Page 1

Active

Now click on “Hard Book”. This opens Book Resources Dashboard.

Here we can see who is free, compare resources, sort & filter and book the resource.

The screenshot shows the 'Book Resources' dashboard. On the left, there is a 'Filters' sidebar with dropdown menus for 'Organizational Units' (Contoso US), 'Business Units', 'Resource Types' (Contact, User), 'Teams', 'Roles' (Functional consultant), 'Skills', and 'Match Resources Using' (Skills in Profile). Below these are 'RESET' and 'APPLY' buttons. The main area is titled 'Book Resources' and displays a grid of resource availability. At the top, it says 'AX Implementation Pr... Required Capacity: 150 Hours'. The grid has columns for dates from September 11 to November 19. A specific resource, Dianna Woodward, is highlighted in a tooltip, showing her profile picture, name, title ('Functional consultant'), and time zone ('GMT-08:00'). To the right of the grid, there are sections for 'Skills' (Agile Methodology, Budgeting, CRM, Inventory Management, Project Management), 'Availability' (100%), 'Utilization' (Target 75%), and 'Cost' (Cost rate \$120.00, Total cost \$18,000.00, Bill rate \$170.00, Revenue generated \$25,500.00). At the bottom of the grid, there is a pagination indicator '1 - 8 of 8'.

Book all the resources based on the relevant filter criteria.

Availability View - Google Chrome

Secure | https://budtime.crm.dynamics.com/%7B636402264170000344%7D/WebResources/msdyn/_Resource/AvailabilityView/GenericResourceAssignment/AvailabilityView.htm?Data=%7b"name":"%3a"AX%20Implementation%20Project..."

Filters

Organizational Units
Select Organizational Units
Contoso US

Business Units
Select Business Units

Resource Types
Select Resource Types
Contact
User

Teams
Select Teams

Roles
Select Roles
Program Manager

Skills
Select Skills

Match Resources Using
Skills in Profile

RESET | APPLY

Book Resources

AX Implementation Pr... Required Capacity: 16 Hours

MARCH
12
16

Search

< 3/12/2018 - 3/13/2018 > DAY WEEK MONTH

✓ Ashley Chinn Program Manager

✓ Janna Santana Program Manager

✓ Jay Orth Program Manager

Processing, please wait...

1 - 3 of 3

The screenshot shows the BudTime availability view in Google Chrome. On the left, there is a sidebar titled 'Filters' with sections for Organizational Units, Business Units, Resource Types, Teams, Roles, Skills, and Match Resources Using. The 'Program Manager' role is selected under 'Roles'. At the bottom of the sidebar are 'RESET' and 'APPLY' buttons. The main area is titled 'Book Resources' and shows a grid for March 12 and 13, 2018. The grid lists three resources: Ashley Chinn, Janna Santana, and Jay Orth, all of whom are Program Managers. Each resource has a small profile picture and their names followed by their title. Below the grid, a message says 'Processing, please wait...'. At the bottom of the page, there is a pagination indicator '1 - 3 of 3'.

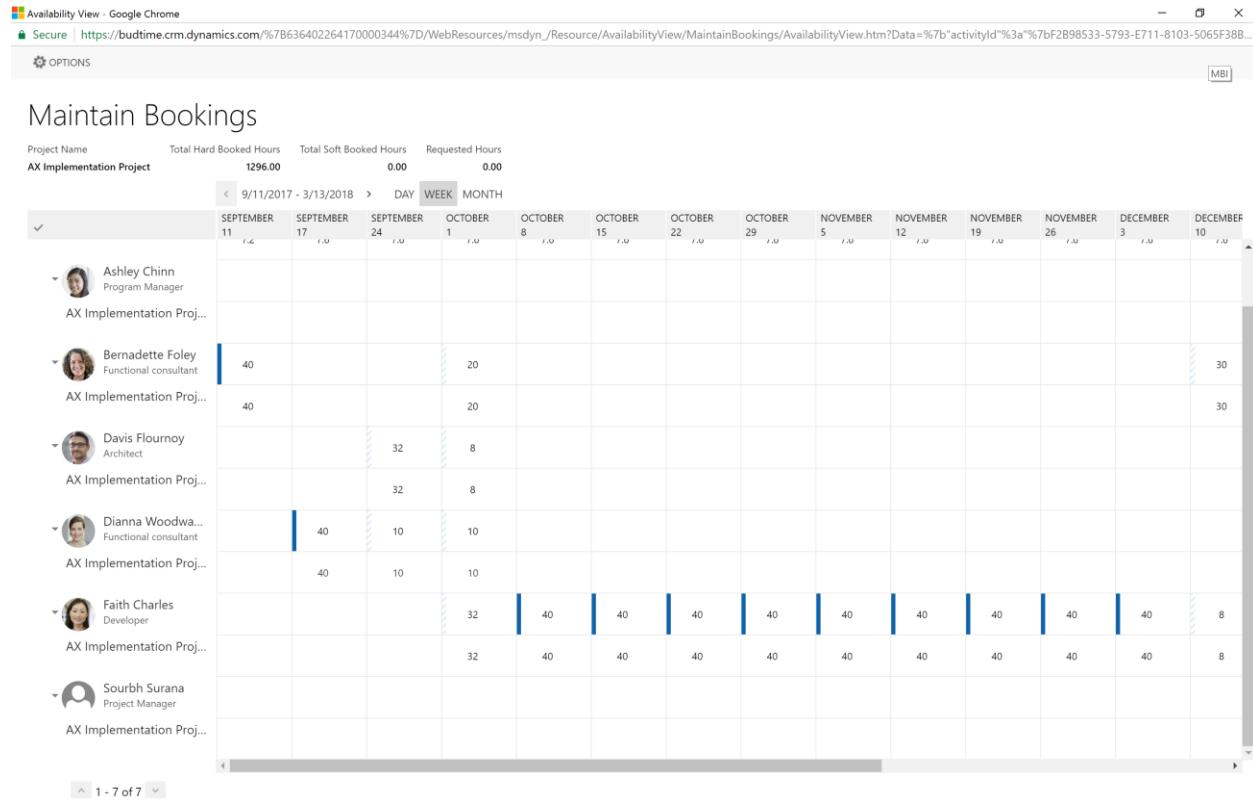
I have booked them as follows.

The screenshot shows the Microsoft Dynamics 365 Project Service interface. At the top, there are several open tabs including "Project Team Member", "Weekly Schedule - Micro", "Office Admin center - H...", "TD Ameritrade Login", and "Bank of America — Ban...". The main header bar has "Dynamics 365" and "Project Service" dropdowns, followed by "Projects > AX Implementation ...". Below the header is a green banner with a warning about a trial expiration and a "Buy Now" button. The main content area is titled "PROJECT : INFORMATION" and "AX Implementation Project". A horizontal timeline bar shows stages: "New", "Quote", "Plan (Active for 16 hours)", "Deliver", "Complete", and "Close". To the right of the timeline are status boxes for Due Date (3/13/2018), Estimated Cost (\$113,920.00), Cost Consumption (% 0.00), and Progress (% 0.00). Below the timeline is a section titled "Project Team Members Associated View" with a search bar. It lists team members with their roles and booking details:

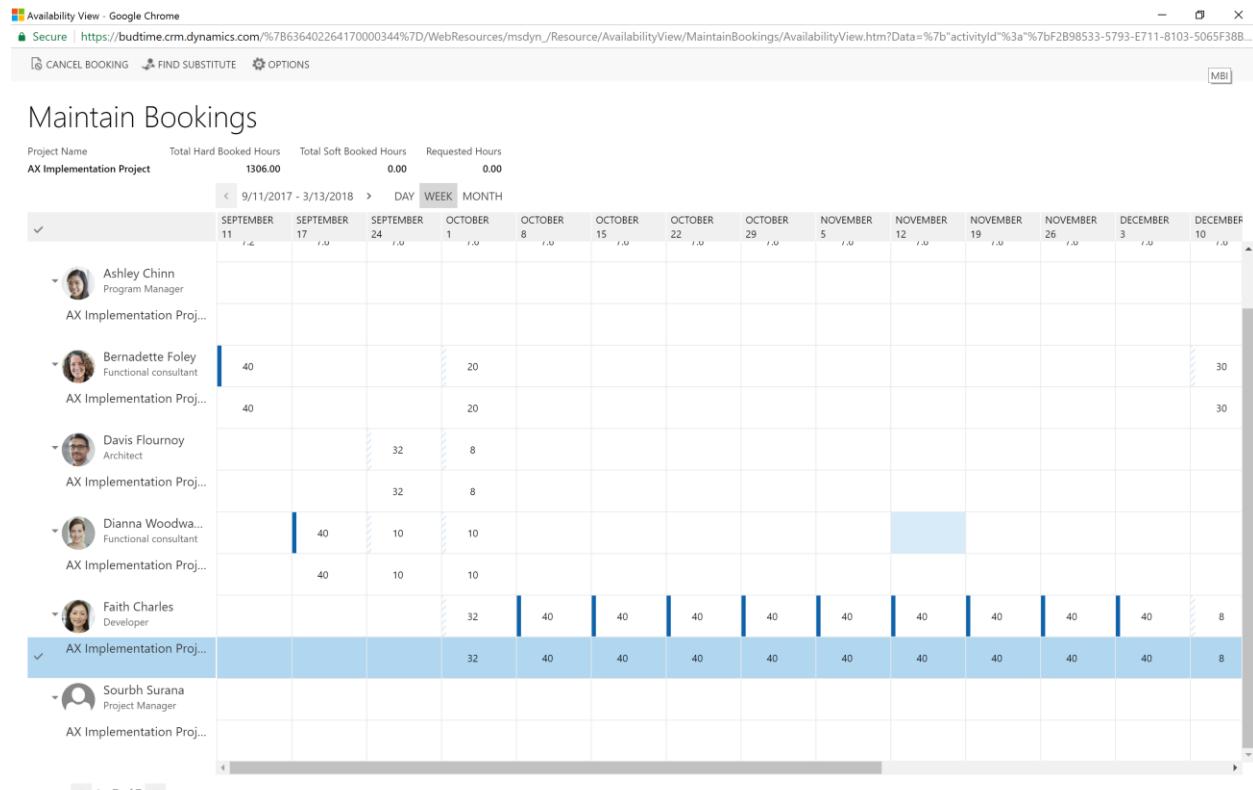
Bookable Resource	Role	Position Name	From	To	Required Hours	Booked Hours	Soft Book	Assigned Hours	Resource Requirement	Status (Resour...)	Applicants availab
Alan Steiner (Sample Data)	Project Manager		9/11/2017	3/13/2018		200.00				No	
Ashley Chinn	Program Mana...		3/12/2018	3/13/2018		16.00		16.00		No	
Bernadette Foley	Functional cons...		9/11/2017	3/9/2018		150.00		150.00		No	
Davis Flournoy	Architect		9/26/2017	12/22/2017		80.00		80.00		No	
Dianna Woodward	Functional cons...		9/15/2017	9/25/2017		50.00		50.00		No	
Faith Charles	Developer		10/3/2017	3/2/2018		800.00		800.00		No	
Sourbh Surana	Project Manager		9/11/2017							No	

At the bottom left, it says "1 - 7 of 7". On the far right, there are navigation icons for "Page 1" and "Page 2". A filter bar at the bottom is set to "Active".

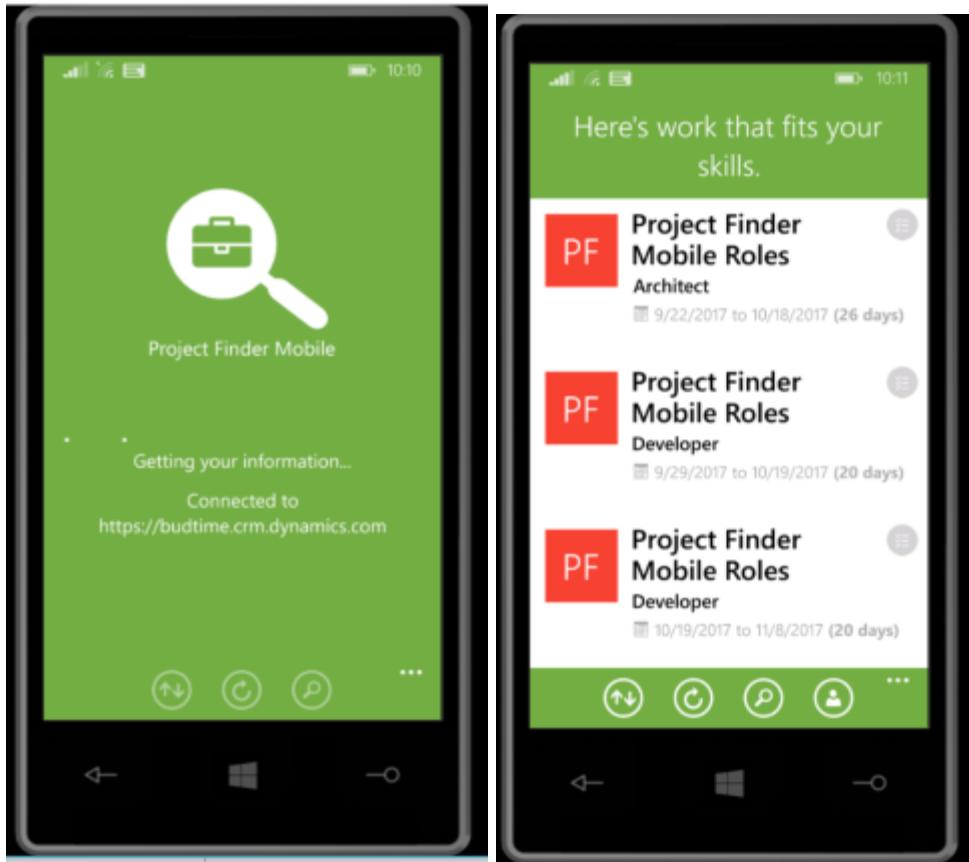
Now I want to see if Functional consultant Dianna's booking is correct or not. I can then click on the "Maintain Booking" and make some adjustments.

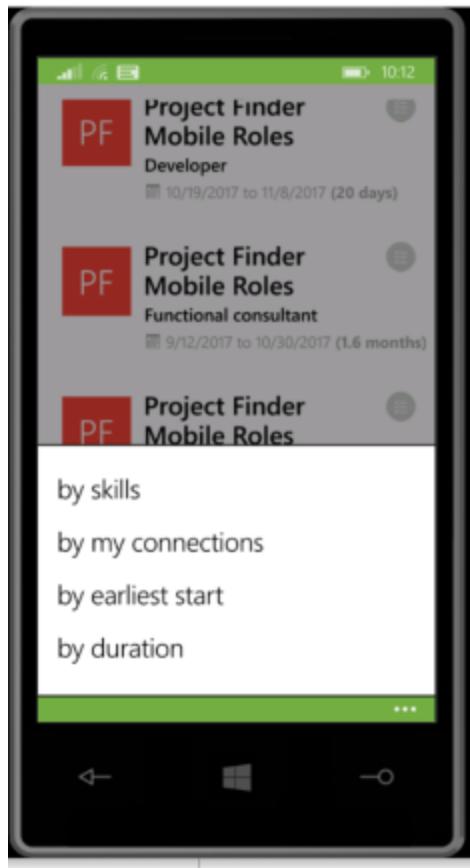


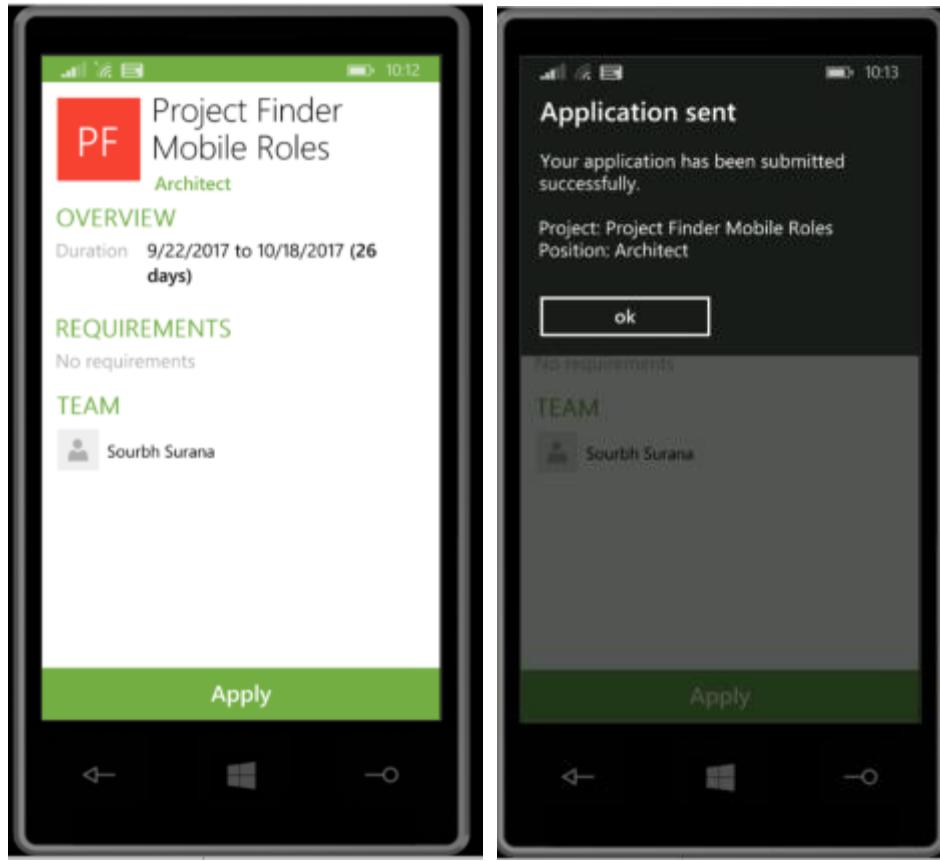
You can also substitute a resource. Click on “Faith”, you will see a button for substituting a resource. We don’t execute it right now but good to know about the functionality.



An applicant can use “Project Finder mobile app” to apply for the Job based on skill, connections, earliest start etc. The application is then routed to the project manager for approval. Once the project manager approves it the applicant becomes the part of the team. The project finder mobile app is available for android, iOS and windows.







Resource Utilization

Click on Project service → Resource Utilization to see the utilization of the resources

Time and Expense Approval

Here you can record and modify Time Entry.

Time Entry

Click on Project Service → My Work → Time Entries then click on the + sign below the day you want to enter the time for.

The screenshot shows the Microsoft Dynamics 365 interface for recording time entries. At the top, there are three browser tabs: 'Microsoft Office Home', 'Dynamics 365', and 'Bing'. Below the tabs, the address bar shows the URL: <https://budtime.crm.dynamics.com/main.aspx#462022826>. The navigation bar includes links for 'Apps', 'My Demo Platform', 'Dynamics 365', 'Now', 'Learning Resources', 'Shreyas', and 'Personal'. The main menu shows 'Dynamics 365' and 'Project Service' selected. A sub-menu for 'Time Entries' is open. The toolbar below the menu includes buttons for 'GRID', '+ NEW', 'DELETE', 'SUBMIT', 'RECALL', 'COPY FROM', 'IMPORT DATA', 'TODAY', 'FILTER', 'PREVIOUS', and 'NEXT'. The current date range is September 10 - September 16, 2017. The calendar grid shows days from Sunday, 9/10, to Saturday, 9/16. A 'Time Entry' dialog box is overlaid on the calendar. The dialog has fields for 'Date' (9/11/2017), 'Duration' (02:00), 'Type' (Work), 'Project' (AX Implementation Project), 'Project Task' (Project kickoff), 'Role' (Project Manager), 'Internal Comments' (Project manager was not available), and 'External Comments'. There are 'Save' and 'Cancel' buttons at the bottom right of the dialog. In the calendar grid, the 11th and 12th are yellow, while the 13th is blue, indicating specific days for entry.

Once you click on save here is how it look. The colors are chosen by system so your colors may look different. You can also change the calendar view.

The screenshot shows a Microsoft Dynamics 365 Project Service Time Entries calendar for the week of September 10 to September 16, 2017. The calendar grid has columns for Sunday (9/10) through Saturday (9/16). A specific entry is highlighted for Monday, September 11, starting at row 2 and ending at row 3. This entry is colored green and contains the following information:

- AX Implementation Project**
- Project manager was not available
- 200
- Draft

Each day in the calendar has a small circular button with a plus sign (+) in the bottom right corner, indicating the option to add new entries.

Now you can hit submit to submit the Time entry for approval.

The screenshot shows the Microsoft Dynamics 365 Project Service Time Entries screen. A modal dialog box is open, titled "September 10 - September 16, 2017". The dialog contains a table with columns: Date, Duration, Type, Project ↑, Project Task ↑, and Status. The data in the table is:

	Date	Duration	Type	Project ↑	Status
9/11/2017	02:00	Work	AX Implementation Project	Project kickoff	Draft

Below the table is a note field containing "Project manager was not available 2:00 Draft". To the right of the table is a chart section with a summary table and a pie chart.

Type	Entries	Hours
Work	1	2:00
Grand Total	1	2:00

The pie chart represents the distribution of the 2:00 hours. At the bottom right of the dialog are "Submit" and "Cancel" buttons.

Project manager can now look at the entries and approve the entry.

Click on Project Service → Project Approvals. Here you should be able to see previously submitted entry. Open it up and now click on approve.

Microsoft Office Home > Dynamics 365 > Project Approval Time Entry > Bing

Secure | https://buftime.crm.dynamics.com/main.aspx#349166833

Apps My Demo Platform Dynamics 365 Now Learning Resources Shreyas Personal

Dynamics 365 > Project Service > Project Approvals >

Your Dynamics 365 trial will expire in 18 day(s) Buy Now

SKILL APPROVAL EXPORT TO EXCEL CHART PANE

Time Entries for Approval

Project	Project Task	Date	Time Entry	Submitted By	Resource	Resource Role	Billing Type	Submitted (hrs)	Billable (hrs)	External Comments
AX Implementation P...	Project kickoff	9/11/2017	Project manager...	Sourbh Surana	Sourbh Surana	Project Manager	Chargeable	2.00	2.00	

1 - 1 of 1 (0 selected)

All # A B C D E F G H I J K L M N O P Q R S T U V

The screenshot shows a Microsoft Dynamics 365 Project Service interface. At the top, there's a navigation bar with links like 'Dynamics 365', 'Project Service', 'Project Approvals', and 'Sourbh Surana - Tim...'. A green banner at the top indicates a trial expiration in 18 days. Below the banner, there are buttons for 'APPROVE' (with a checkmark icon), 'REJECT' (with a cross icon), and 'FORM EDITOR'. The main content area is titled 'PROJECT APPROVAL : INFORMATION' and shows a 'Time Entry' record for 'Sourbh Surana'. The record details are as follows:

Billing Type	Chargeable
Submitted (hrs)	2.00
Billable (hrs)	2.00
Time Entry	Project manager was not available
External Comments	..
Submitted By*	Sourbh Surana

Below this, there's a section titled 'Details' which includes a 'Time Entry' sub-section with the following fields:

Date *	9/11/2017
Duration *	2 hours
Project	AX Implementation Project
Project Task	Project kickoff
Description	Project manager was not available
Role	Project Manager
Type *	Work

At the bottom left, there's a small 'Active' button.

Expense Entry

Click on Project Service → My Work → Project Approvals then click on the + sign below the day you want to enter the time for.

On the screen fill in all the details. You can also add the receipt here by clicking "Add Receipt".

The screenshot shows a Microsoft Dynamics 365 interface for managing expenses. A modal dialog box is open in the center, titled "New expense: 9/11/2017". The dialog contains the following fields:

- Expense Purpose: International Call
- Amount: 30.00
- Sales Tax: 0.00
- Currency: US Dollar (USD)
- Project: AX Implementation Project
- Category: Phone
- External Comments: Had to call offshore team
- Receipts: No receipt is available for this expense.
- Status: Draft

At the bottom right of the dialog are three buttons: "Add receipt", "Save", and "Cancel".

The background shows a weekly calendar view from September 10 to September 16, 2017. The first column (Sunday) has a red box highlighting the amount \$0.00 and category Phone. The status for all days is Draft.

Here is how the expense entry will look like when you save. The colors are chosen by system so your colors may look different.

Screenshot of Microsoft Dynamics 365 Expenses module showing a weekly calendar view from September 10 to September 16, 2017. The interface includes a top navigation bar with Microsoft Office Home, Dynamics 365, Microsoft Dynamics 365, and Bing tabs. Below the navigation is a ribbon with Apps, My Demo Platform, Dynamics 365, Now, Learning Resources, Shreyas, and Personal sections. The main area shows a grid of days (Sun, 9/10 to Sat, 9/16) with a modal dialog open over the Monday cell. The modal displays a summary of an expense entry: \$30.00 for International Call under AX Implementation Project, Phone category, and Draft status. The modal has a close button (+) at the top right.

Now click on submit

The screenshot shows the Microsoft Dynamics 365 Project Service Expenses page. The top navigation bar includes links for Microsoft Office Home, Dynamics 365, Microsoft Dynamics 365, and Bing. The main header shows 'Dynamics 365' and 'Project Service' with a dropdown for 'Expenses'. Below the header is a toolbar with buttons for GRID, NEW, DELETE, SUBMIT, TODAY, PREVIOUS, and NEXT.

The main content area displays a grid for September 10 - September 16, 2017. A new expense entry is being added, shown in a modal dialog. The dialog contains a table with columns: Date, Project, Category, Expense Purpose, and Amount. The entry is: 9/11/2017, AX Implementation Project, Phone, International Call, \$30.00. To the right of the table is a chart section titled 'Summary' with a table showing one expense item and a total amount of \$30.00. Below the table is a pie chart with the value '\$30.00'. At the bottom of the dialog are 'Submit' and 'Cancel' buttons.

A tooltip on the left side of the grid shows the details of the selected expense: \$30.00, International Call, AX Implementation Project, Phone, Draft.

All these time and expense entries can be submitted via tablet or mobile also.

Now a project manager can approve the expenses. Click on Project Service → Project Approvals. Now change the view to Expense Entries for Approvals.

Microsoft Office Home > Dynamics 365 > Project Approval Expenses > Bing

Secure | https://buftime.crm.dynamics.com/main.aspx#362262139

Apps My Demo Platform Dynamics 365 Now Learning Resources Shreyas Personal

Dynamics 365 > Project Service > Project Approvals >

Your Dynamics 365 trial will expire in 18 day(s) Buy Now

SKILL APPROVAL EXPORT TO EXCEL CHART PANE

Expense Entries for Approval

System Views

- Absences/Vacations for Approval
- Expense Entries for Approval
- My Past Approvals
- Non-Project Expenses for Approval
- Non-Project Time Entries for Approval
- Processing Approvals
- Time Entries for Approval
- Create Personal View
- Save Filters as New View
- Save Filters to Current View

Submitted By	Resource	Expense Entry	Billing Type	Sales Price	Has Receipt	External Comments
Sourbh Surana	Sourbh Surana	International Call	Not Available	\$0.00	Yes	Had to call offshore t...

Search for records

1 - 1 of 1 (0 selected)

All # A B C D E F G H I J K L M N O P Q R S T U

Screenshot of the Microsoft Dynamics 365 Project Service - Project Approvals page showing a expense approval request.

The browser tabs are: Microsoft Office Home, Dynamics 365, Project Approval: Sourbh, and Bing.

The address bar shows: https://buftime.crm.dynamics.com/main.aspx#285886149

The ribbon navigation shows: Apps, My Demo Platform, Dynamics 365, Now, Learning Resources, Shreyas, Personal, Dynamics 365, Project Service, Project Approvals, Sourbh Surana - Exp...>.

A green banner at the top says: Your Dynamics 365 trial will expire in 18 day(s) and has a Buy Now button.

Below the banner are buttons for APPROVE, REJECT, GO TO RECEIPTS, and FORM EDITOR.

The main title is PROJECT APPROVAL : INFORMATION Sourbh Surana - Expense.

The General tab is selected, showing the following details:

Billing Type	Not Available
Sales Price	\$0.00
Has Receipt	Yes
Expense Entry	International Call
External Comments	Had to call offshore team
Submitted By *	Sourbh Surana

The Details tab is also visible, showing the following expense entry details:

Expense Entry	
Transaction Date *	9/11/2017
External Description	Had to call offshore team
Amount *	\$30.00
Sales tax amount.*	\$0.00
Total Amount	\$30.00
Currency	US Dollar
Project	AX Implementation Project
Expense Category	Phone

A status bar at the bottom left says Active.

Project manager can now click on the Approve to approve the expense.

Project Tracking

Open the desired project and from the navigation bar click on the “Project Tracking” view.

The screenshot shows the Dynamics 365 Project Service interface. The top navigation bar includes links for Microsoft Office Home, Project: AX Implementation, and Bing. Below the navigation bar, the main menu shows 'Dynamics 365' and 'Project Service' selected. Under 'Project Service', 'Projects' is chosen, followed by 'AX Implementation ...'. The left sidebar under 'Common' contains links for Documents, Resource Requirements, Office 365 Groups, Actuals, Work breakdown struc..., Project estimates, Project tracking (which is highlighted), and Project Team Members. The main content area displays a Gantt chart titled 'Effort Tracking' for the 'AX Implementation Project'. The Gantt chart shows tasks from July 2017 to April 2018. The tasks include 'Project kickoff', 'Sprint 1' (with sub-tasks 'Discover', 'Design', 'Develop', 'Test'), 'Sprint 2' (with sub-tasks 'Analyse & Discover', 'Incremental Design', 'Develop & Integrate', 'End to end test'), and 'Project complete'. The chart indicates effort hours (e.g., 1096, 510, 490) and progress percentages. A legend at the bottom right of the chart area shows 'Project Stages (Active for 5 days, 19 hours)' with a green circle icon and 'Next Stage' with an orange circle icon. The URL in the browser address bar is https://budtime.crm.dynamics.com/main.aspx#86025632.

Here you can toggle between effort tracking and the cost tracking to see the progress of the project by effort and cost.

Screenshot of the Microsoft Dynamics 365 Project Service interface showing the cost tracking for the AX Implementation Project.

Project Record Status:

- Due Date: 3/13/2018
- Estimated Cost: \$113,920.00
- Cost Consumption %: 0.21
- Progress %: 0.18

Cost Tracking Grid:

Task Name	Planned Cost	Remaining Cost (ETC)	Cost Estimate at Complete (...)	Actual Cost	Cost Consumption %	Cost Variance
AX Implementation Project	\$113,920.00	\$113,680.00	\$113,920.00	\$240.00	0.21	\$0.00
1 Project kickoff	\$4,800.00	\$4,560.00	\$4,800.00	\$240.00	5.00	\$0.00
2 Sprint 1	\$52,400.00	\$52,400.00	\$52,400.00	\$0.00	0.00	\$0.00
2.1 Discover	\$6,000.00	\$6,000.00	\$6,000.00	\$0.00	0.00	\$0.00
2.2 Design	\$4,000.00	\$4,000.00	\$4,000.00	\$0.00	0.00	\$0.00
2.3 Develop	\$40,000.00	\$40,000.00	\$40,000.00	\$0.00	0.00	\$0.00
2.4 Test	\$2,400.00	\$2,400.00	\$2,400.00	\$0.00	0.00	\$0.00
3 Sprint 2	\$50,000.00	\$50,000.00	\$50,000.00	\$0.00	0.00	\$0.00
3.1 Analyse & Discover	\$3,600.00	\$3,600.00	\$3,600.00	\$0.00	0.00	\$0.00
3.2 Incremental Design	\$4,000.00	\$4,000.00	\$4,000.00	\$0.00	0.00	\$0.00
3.3 Develop & Integrate	\$40,000.00	\$40,000.00	\$40,000.00	\$0.00	0.00	\$0.00
3.4 End to end test	\$2,400.00	\$2,400.00	\$2,400.00	\$0.00	0.00	\$0.00
4 Training and Handoff	\$4,800.00	\$4,800.00	\$4,800.00	\$0.00	0.00	\$0.00
5 Project complete	\$1,920.00	\$1,920.00	\$1,920.00	\$0.00	0.00	\$0.00

The overall project status can be got from the Project record → Status Tab.

Microsoft Office Home > Project: AX Implementation > Bing

Secure https://buftime.crm.dynamics.com/main.aspx#86025632

Apps My Demo Platform Dynamics 365 Now Learning Resources Shreyas Personal

Dynamics 365 Project Service Projects > AX Implementation ... >

Your Dynamics 365 trial will expire in 17 day(s) Buy Now

+ NEW PROJECT CREATE TEMPLATE OPEN IN MS PROJECT BOOK DELETE PROCESS ASSIGN SHARE EMAIL A LINK ***

PROJECT : INFORMATION
AX Implementation Project

Due Date 3/13/2018 Estimated Cost \$113,920.00 Cost Consumption % 0.21 Progress % 0.18

New > Quote > Plan > Deliver (Active for 1 minute) > Complete > Close

Status

Overall Project Status Yellow
Comments There are some risks that need to be resolved.

Schedule Performance On Time
Cost Performance On Budget

Status Updated On 9/12/2017 6:38 PM

Progress

Cost Consumption %

Project Task Role view Schedule Performance By Role

Project Task Role view Cost Performance By Role

Active

Project Billing

Navigate to Project Service → Project Contracts and open the Dynamics AX implementation contract.

The screenshot shows the Dynamics 365 Project Contracts page. At the top, there's a navigation bar with links for 'Dynamics 365', 'Project Service', 'Project Contracts', and a 'Buy Now' button. Below the navigation is a toolbar with icons for 'NEW', 'EDIT', 'DELETE', 'CREATE DIRECT EMAIL', 'ASSIGN', 'SHARE', 'EMAIL A LINK', 'RUN WORKFLOW', and 'START DIALOG'. A message at the top left says 'Your Dynamics 365 trial will expire in 17 days!'. The main area is titled 'All Project Contracts' and contains a table with columns: Name, Contract Status, Total Amount, Customer, and Email (Customer). The table lists 18 entries, with one entry for 'Dynamics AX Implementation' highlighted. The bottom of the page shows a navigation bar with letters H through Z and a 'Page 1 of 1' indicator.

Here you can review the contract lines on which project based lines are used for kind of transactions and also have billing methods for the contract line. You can also review the contract performance here.

The screenshot shows the Dynamics 365 Project Contracts page for the 'Dynamics AX Implementation' contract. The top navigation and toolbar are identical to the previous screenshot. The main area is titled 'Dynamics AX Implementation' and contains sections for 'Contract Performance' and 'Contract Lines'. Under 'Contract Lines', there's a table titled 'Project-based Lines' with columns: Name, Billing Method, Project, Include Time, Include Expense, Include Fee, Amount, and Customer Budget. Two rows are listed: one for 'Consulting and L...' with 'Time and Material' as the Billing Method, and another for 'Expenses' with 'Fixed Price' as the Billing Method. The bottom of the page shows a navigation bar with letters H through Z and a 'Page 1 of 1' indicator.

Lets open the first contract line “Consulting and Implementation”. Here you can see the details of the project contract lines.

The screenshot shows the Dynamics 365 Order Line New Order Line interface. The main title bar says "Order Line: New Order Line - Google Chrome". Below it, the URL is "Secure | https://bdtime.crm.dynamics.com/main.aspx?etcs=1089&extraq=%3f_CreateFromId%3d%257b3D866AD-5693-E711-8103-5065F38851F1%257d%26_CreateFromType%3d1088%26gridType%3d1089%26etc%3d%257b851E5FB3-5693-E711-8103-5065F38851F1%257d%26rkey...". The top navigation bar includes "Dynamics 365", "New Order Line", and various action buttons like "OPEN COST DETAIL", "DELETE CONTRACT DETAILS", "CREATE INVOICE SCHEDULE", "EDIT PROPERTIES", "EMAIL A LINK", "RUN WORKFLOW", and "START DIALOG".

The main content area is titled "ORDER LINE - PROJECT INFORMATION" and displays the "Consulting and Implementation Work" record. It shows the following details:

- Name:** Consulting and Implementation Work
- Billing Method:** Time and Material
- Project:** AX Implementation Project
- Include Time:** Yes
- Include Expense:** No
- Include Fee:** Yes
- Contracted Amount:** \$100,000.00
- Estimated Tax:** \$0.00
- Contracted Amount A:** \$100,000.00
- Customer Budget:** \$100,000.00
- Invoice Frequency:** BiMonthly
- Billing Start Date:** ..

Below this, there is a section titled "Project Contract Line Details" which contains a table of contract line items. The table has the following columns:

Description	Billing Type	Transaction Class	Resourcing Unit	Transaction...	Role	Start Date...	End Date/...	Quantity	Unit	Price	Tax	Amount	Price (Orig...	Amount L...	Origin	Prc
Architect	Chargeable	Time	Contoso US	---	Architect	9/6/2017	9/6/2017	200.00	Hour	\$150.00	---	\$30,000.00	\$100,000.00	Architect	b5	
CRM Online Enterprise	Chargeable	Material	Contoso US	---		9/5/2017	9/5/2017	1.00	Administrativ...	\$60.00	---	\$60.00	\$50.00	CRM Online Enter...	271	
Developer	Chargeable	Time	Contoso US	---	Developer	9/6/2017	9/30/2017	200.00	Hour	\$150.00	---	\$30,000.00	\$100,000.00	Developer	b5	
Dynamics AX Licenses	Chargeable	Material	Contoso US	---		9/6/2017	9/6/2017	50.00	Standard User	\$50.00	---	\$2,500.00	\$30.00	Dynamics AX Lic...	ff1	
Project Manager	Chargeable	Time	Contoso US	---	Project Mana...	9/6/2017	9/6/2017	200.00	Hour	\$200.00	---	\$40,000.00	\$120.00	Project Manager	b5	
Trips	Chargeable	Expense	Contoso US	---		9/6/2017	9/6/2017	10.00	Primary Unit	\$1,000.00	---	\$10,000.00	\$1,000.00	Trips	de	

Lets open the next contract line “Expenses” and create a few milestones. After the record opens, you can click “Generate periodic milestones” for system to generate the milestones or the milestones can be manually created.

Order Line: New Order Line - Google Chrome
Secure https://buftime.crm.dynamics.com/main.aspx?etc=1089&extraqs=%3F_CreateFromId%3d%257bB3D866AD-5693-E711-8103-5065F38B51F1%257d%26_CreateFromType%3d1089%26_gridType%3d1089%26etc%3d1089%26id%3d1089%26

Dynamics 365 > New Order Line >

OPEN COST DETAIL DELETE CONTRACT DETAILS DELETE IMPORT FROM PROJECT E... GENERATE PERIODIC MILE... EDIT PROPERTIES EMAIL A LINK RUN WORKFLOW START DIALOG ...

ORDER LINE - PROJECT INFORMATION ▾ Expenses ▾

The sum of the amount in billing milestones, 30000, must be equal to the line amount 10000.

General

Name	Expenses
Billing Method *	<input checked="" type="checkbox"/> Fixed Price
Project	AX Implementation Project
Include Time	No
Include Expense	Yes
Include Fee	No
Contracted Amount	\$10,000.00
Estimated Tax	\$0.00
Contracted Amount A	\$10,000.00
Customer Budget	\$10,000.00
Invoice Frequency	BiMonthly
Billing Start Date *	..

Project Contract Line Details

Invoice Schedule

Milestone Name	Project Task	Milestone Date	Milestone Amount	Invoice Status
Initial 30% milestone	Analyse & Discover	9/30/2017	\$30,000.00	Not Ready for invoicing

To see the Actuals, click on navigation bar and click “Actuals”. Here you should be able to see everything that was approved for the project.

The screenshot shows the Microsoft Dynamics 365 Project Service interface. At the top, there's a navigation bar with links like 'Dynamics 365', 'Project Service', 'Project Contracts', and 'Dynamics AX Imple...'. A green banner at the top indicates a trial expiration notice: 'Your Dynamics 365 trial will expire in 17 day(s)' with a 'Buy Now' button.

The main content area is titled 'ORDER : PROJECT INFORMATION' and displays the title 'Dynamics AX Implementation'. Key details shown include 'Total Amount \$112,500.00', 'Status Active', 'Status Reason Confirmed', and 'Owner Sam Surana'.

Below this, a table titled 'Actual Associated View' lists transaction details:

Transaction Type	Transaction Class	Adjustment Status	Document Date	Start Date/Time	End Date/Time	Project ID	Task ID	Transaction category	Contracting Unit	Resourcing Unit	Quantity	Unit of measurement	Price
Cost	Time		9/11/2017 5:00 ...	9/11/2017 5:00 ...	AX Implementa...	Project kickoff		Contoso US	I201708230421...		2.00	Hour	\$120.00
Unbilled Sales	Time		9/11/2017 5:00 ...	9/11/2017 5:00 ...	AX Implementa...	Project kickoff		Contoso US	I201708230421...		2.00	Hour	\$200.00
Resourcing Unit	Time		9/11/2017 5:00 ...	9/11/2017 5:00 ...	AX Implementa...	Project kickoff		I201708230421...	I201708230421...		2.00	Hour	\$120.00
Inter-Organizati...	Time		9/11/2017 5:00 ...	9/11/2017 5:00 ...	AX Implementa...	Project kickoff		I201708230421...	I201708230421...		2.00	Hour	\$120.00

At the bottom, a footer bar shows 'Active' and page navigation controls.

Now for the billing.

In order to bill a milestone we need to manually make the milestone ready for billing prior to generating an invoice. We can view all the project milestones by going to Project Service → Project contract milestones. Open the contract milestones and change the status to ready of invoicing.

The screenshot shows a Microsoft Edge browser window with the Dynamics 365 Project Service application open. The URL is https://budtime.crm.dynamics.com/main.aspx#474188694. The page title is "Project Contract Line Mill...". The top navigation bar includes "Dynamics 365", "Project Service", and "Project Contract Mill...". A green banner at the top right says "Your Dynamics 365 trial will expire in 16 day(s)" with a "Buy Now" button. Below the banner are three status indicators: "READY TO INVOICE", "NOT READY TO INVOICE", and "EXCEL TEMPLATES". The main content area is titled "Project Contract Milestones" and contains a table with one row of data. The table columns are: Milestone Name, Milestone Date, Milestone Amount, Invoice Status, Project Contract Line Description, and Project Contract. The single row shows "Initial 30% miles...", "9/30/2017", "\$30,000.00", "Not Ready for in...", "Expenses", and "Dynamics AX Implem...". A search bar "Search for records" is at the top right of the table. To the right of the table is a vertical ribbon with icons for "Charts", "Grid", and "List". At the bottom of the table are navigation links from "All" to "Z" and a "Page 1" link.

Milestone Name	Milestone Date	Milestone Amount	Invoice Status	Project Contract Line Description	Project Contract
Initial 30% miles...	9/30/2017	\$30,000.00	Not Ready for in...	Expenses	Dynamics AX Implem...

Now we can go to the contract and click on button, create invoice.

The screenshot shows the Dynamics 365 Project Service interface. At the top, there's a navigation bar with 'Dynamics 365', 'Project Service', 'Project Contracts', and 'Dynamics AX Imple...'. Below the navigation is a green banner stating 'Your Dynamics 365 trial will expire in 16 day(s)' with a 'Buy Now' button. The main area is titled 'Dynamics AX Implementation' under 'ORDER : PROJECT INFORMATION'. It displays various details: ID (ORD-00019-V2Z6J2), Name (Dynamics AX Implementation), Customer (Active Transport Inc.), Account Manager (Sam Surana), Contracting Unit (Contoso US), Product Price List (US Bill Rates 2016), Requested Delivery Date (10/31/2017), Opportunity (Dynamics AX Implementation), Quote (Dynamics AX Implementation), and Contract Status Reason (Confirmed). The 'BASIC INFORMATION' section shows a Total Amount of \$112,500.00, a Status of Active, and a Status Reason of Confirmed. The 'OWNER' field is set to Sam Surana. On the right, there are sections for 'ACTIVITIES' (which shows no records) and 'NOTES'. A 'BILLING AND PRINT SETUP' section includes fields for Bill To Address (225200 Miles Ave., Bellevue, WA 98007, USA), Bill To Contact Name (..), Payment Terms (Net 30), and Currency (US Dollar). At the bottom, there's a 'Project-based Lines' section with a table showing one row for 'Active'.

This creates an invoice which can then be reviewed and sent. You can look at each of the invoice lines and change the quantity or add a new time, expense or fee based on the rules specified in the contract line.

Microsoft Office Home > Invoice: Dynamics AX Im... > Bing

Secure https://buftime.crm.dynamics.com/main.aspx#143326631

Apps My Demo Platform Dynamics 365 Now Learning Resources Shreyas Personal

Dynamics 365 Project Service Invoices > Dynamics AX Imple... >

Your Dynamics 365 trial will expire in 16 day(s) Buy Now

Draft (Active for 1 minute) In Review Sent

Contract Dynamics AX Implementation

Invoice Process (Active for 1 minute) Next Stage

Summary

Invoice ID *	INV-00000-YOD5L3
Name *	Dynamics AX Implementation
Currency *	US Dollar
Price List *	US Bill Rates 2016
Payment Terms	Net 30

Project-based Lines					
Name	Project ↑	Billing Method	Contract Line Amount	Amount Previously...	Amount
Consulting and Implement...	AX Implementation Project	Time and Mater...	\$100,000.00	\$0.00	\$400.00
Expenses	AX Implementation Project	Fixed Price	\$10,000.00	\$0.00	\$30,000.00

Bill To Address	225200 Miles Ave. Bellevue, WA 98007 USA
-----------------	--

PRODUCTS					
Product Name	Delivered On	Quantity	Unit	Price Per Unit	Extended Amount
Dynamics AX Licenses	9/6/2017	50.00000	Standard User	\$50.00	\$2,500.00

Reporting and Analysis

Traditional Structured Reports

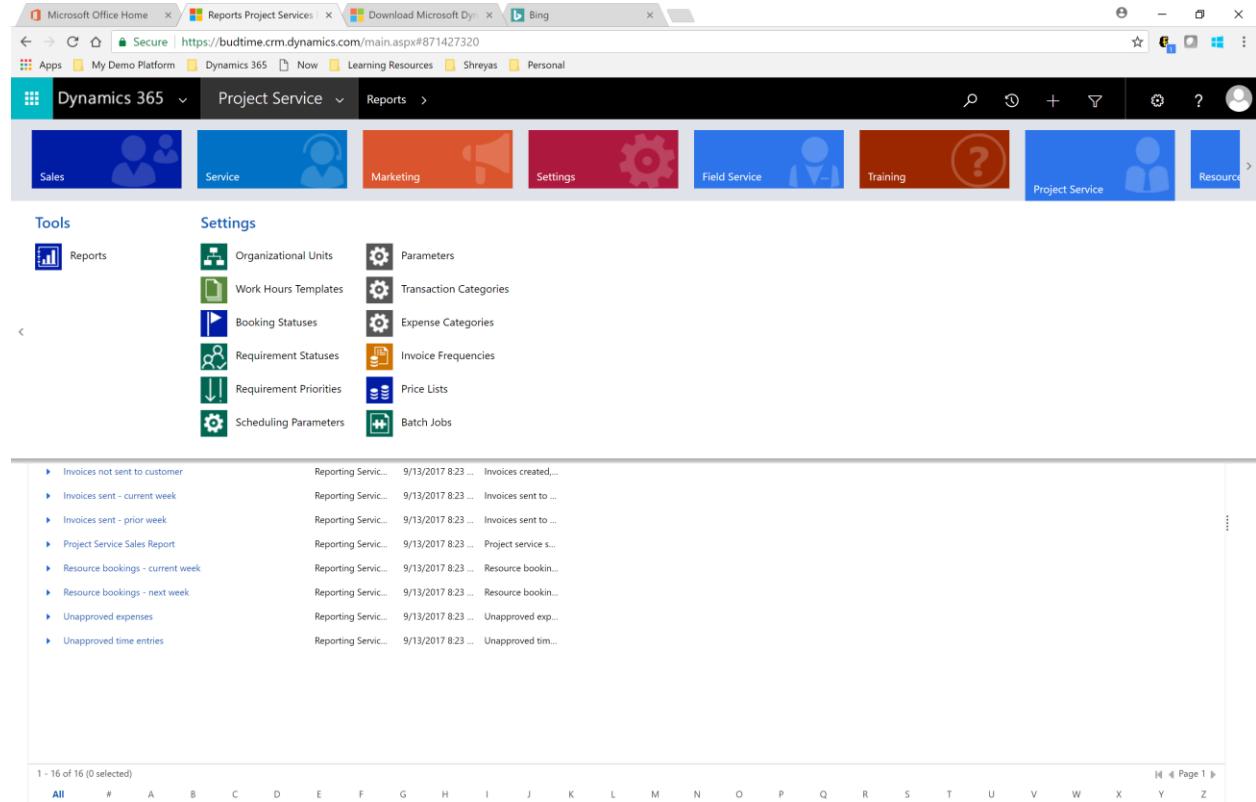
SQL Server Reporting Services Reports

Since PSA is a solution built on top of dynamics CRM it uses SSRS reports to do structured reporting. There are some sample reports and excel templates available which can be downloaded and installed on top of the solution.

Here is the link to the sample reports

<https://www.microsoft.com/en-us/download/details.aspx?id=52951>

Once installed you can navigate to reports by going to Project service → Tools → Reports.



The screenshot shows the Dynamics 365 Project Service interface. At the top, there's a navigation bar with links for Sales, Service, Marketing, Settings, Field Service, Training, Project Service, and Resource. Below this is a secondary navigation bar with categories like Tools and Settings. Under Tools, there's a 'Reports' icon. Under Settings, there are several configuration options: Organizational Units, Work Hours Templates, Booking Statuses, Requirement Statuses, Requirement Priorities, Scheduling Parameters, Parameters, Transaction Categories, Expense Categories, Invoice Frequencies, Price Lists, and Batch Jobs. The main content area displays a list of 16 reports, each with a title, a timestamp, and a brief description. The reports include: Invoices not sent to customer, Invoices sent - current week, Invoices sent - prior week, Project Service Sales Report, Resource bookings - current week, Resource bookings - next week, Unapproved expenses, Unapproved time entries, Reporting Service..., 9/13/2017 8:23 ..., Invoices created..., Reporting Service..., 9/13/2017 8:23 ..., Invoices sent to ..., Reporting Service..., 9/13/2017 8:23 ..., Invoices sent to ..., Reporting Service..., 9/13/2017 8:23 ... Project service s..., Reporting Service..., 9/13/2017 8:23 ... Resource bookin..., Reporting Service..., 9/13/2017 8:23 ... Resource bookin..., Reporting Service..., 9/13/2017 8:23 ... Unapproved exp..., Reporting Service..., 9/13/2017 8:23 ... Unapproved tim... . At the bottom, there's a footer with page navigation links from A to Z.

1 - 16 of 16 (0 selected)	
All	#
A	B
C	D
E	F
G	H
I	J
K	L
M	N
O	P
Q	R
S	T
U	V
W	X
Y	Z

There are 16 reports here. Lets run Approved time entries for this week. You see that we have the time entry that we approved earlier.

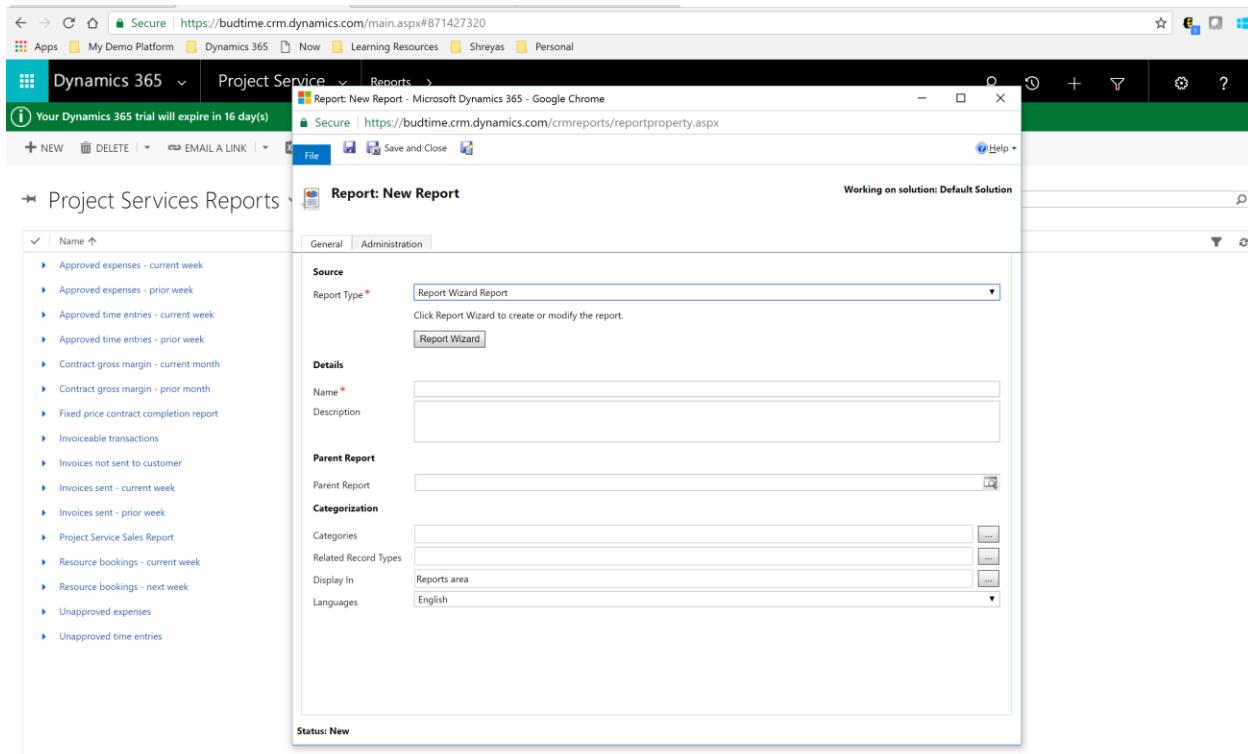
The screenshot shows a Dynamics 365 interface with a sidebar on the left containing navigation links like 'My Demo Platform', 'Dynamics 365', 'Now', 'Learning Resources', 'Shreyas', and 'Personal'. A message at the top says 'Your Dynamics 365 trial will expire in 16 days'. The main area is titled 'Project Services Reports' and shows a list of report items under 'Approved expenses - current week'. One item, 'Approved time entries - current week', is expanded to show a table titled 'Approved Time for the Current Week'. The table has columns: resource, Type, Date, Project, Project manager, and Project task. One row is visible for 'Sam Surana'.

resource	Type	Date	Project	Project manager	Project task
Sam Surana	Work	9/11/2017	AX Implementation Project	Sam Surana	Project kickoff

CRM Report Wizard

CRM report wizard is part of core CRM. You can use the report to create simple SSRS reports.

In the above screen click "New". You can create a new report from here.



Custom SSRS Report Development

If the above reports are not sufficient and there is a report which is unique to the customers business then a custom SSRS report can be developed. We will not go into details of this but here are few things you need for the custom report development

- Visual Studio 2012
- Business Intelligence Development Studio (BIDS) extension
- CRM Report Authoring Extension.

More information on developing the reports can be found here

<https://msdn.microsoft.com/en-us/library/gg328097.aspx>

Project Service Data Model

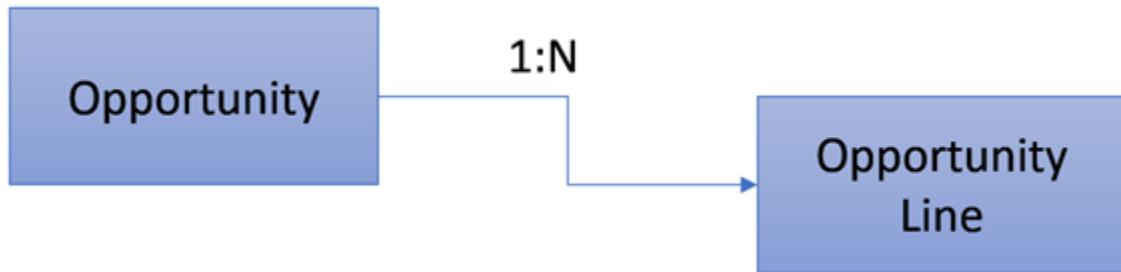
Following information is collated from the neil parkhurst's blog at <https://neilparkhurst.com/2017/02/16/psa-data-model/>

Note: It is worth being aware that Project Service and Field Service share many entities, therefore some of the msdyn_attributes may relate to Field Service. As this post has a focus on Project Service I will try to focus on the key entities / attributes you may need to be aware of for PSA.

I won't be documenting every field / entity in this post! But I hope to give enough of a flavor for the PSA data model to be able to navigate the detail yourself.

Opportunities

As is standard with opportunities each opportunity has multiple opportunity lines. Project Service adds some additional attributes to these entities.



The additional attributes on opportunity and opportunity lines include

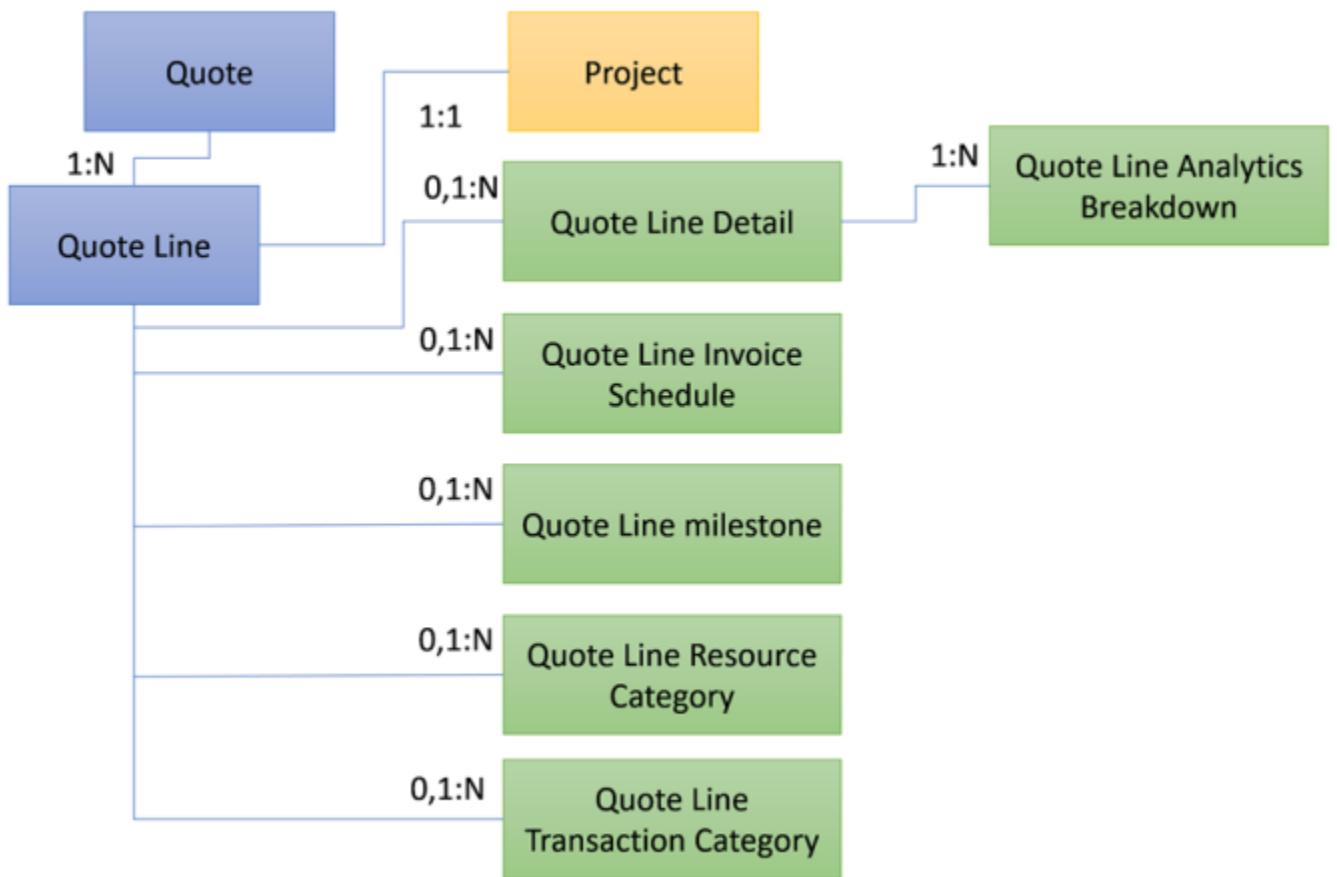
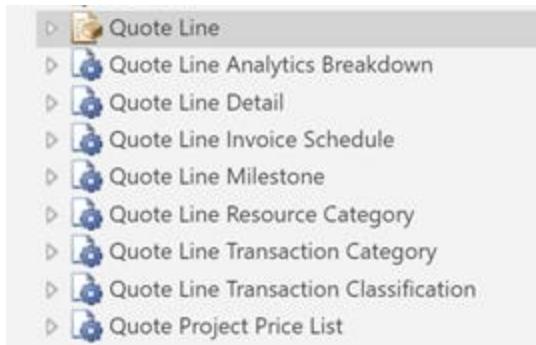
Entity	Schema Name	Display Name	Type	Comments
Opportunity	msdyn_ContractOrganization	Contracting Unit	Lookup (Organizational Unit)	The organizational unit in charge of the opportunity
Opportunity	msdyn_OrderType	Order Type	Option Set	Options include "Work based", "Item Based" and "Service-Maintenance Based". Opportunities that have an

				order type of “Work Based” will be Project based opportunities.
Entity	Schema Name	Display Name	Type	Comments
Opportunity Line	msdyn_BillingMethod	Billing Method	Option Set (Global)	Billing method for the project opportunity line. Options include Time and Material and Fixed Price
Opportunity Line	msdyn_BudgetAmount	Budget Amount	Currency	The customers budget for the opportunity line.
Opportunity Line	msdyn_linetype	Line Type	Option Set (Global)	The field to distinguish the order lines to be of project service or field service. Options include “Project Service Line” or “Field Service Line”

Quotes

As we associated quotes with opportunities not only do we get quote and quote line detail enhancements but also a number of new entities specific to Project Service come into play.

The quote line contains a link to the project entity and a number of additional entities are also associated that support the detailed estimation capabilities of project service.



Quote line detail – the “supporting” detail for the quote line. Including fields like transaction class, resourcing unit, role, start date, end date and so on. The total sales price will be rolled up into the quote line to give the quoted amount.

Quote line analytics breakdown – holds additional line detail for reporting purposes. Calculated information such as gross margin is held in the analytics table.)

Quote line invoice schedule – holds the intended invoice schedule for customer billing and will get carried forward to the project contract when the quote is won. This is generated off the billing frequency from the quote line.

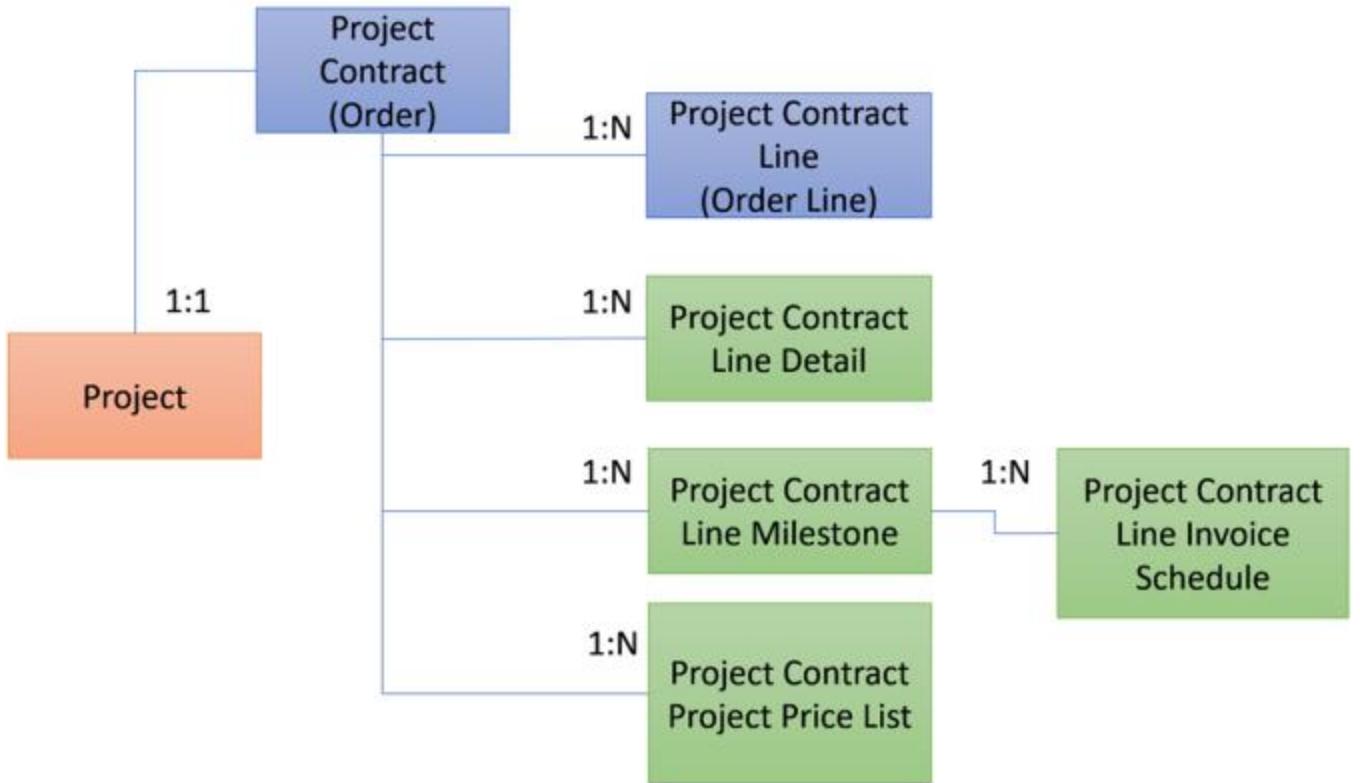
Quote line milestone – milestones show the timing of fixed price billing items.

Quote line resource – holds the values for quote line to say if this resource / transaction category is included or excluded in the quote.

Project Contract

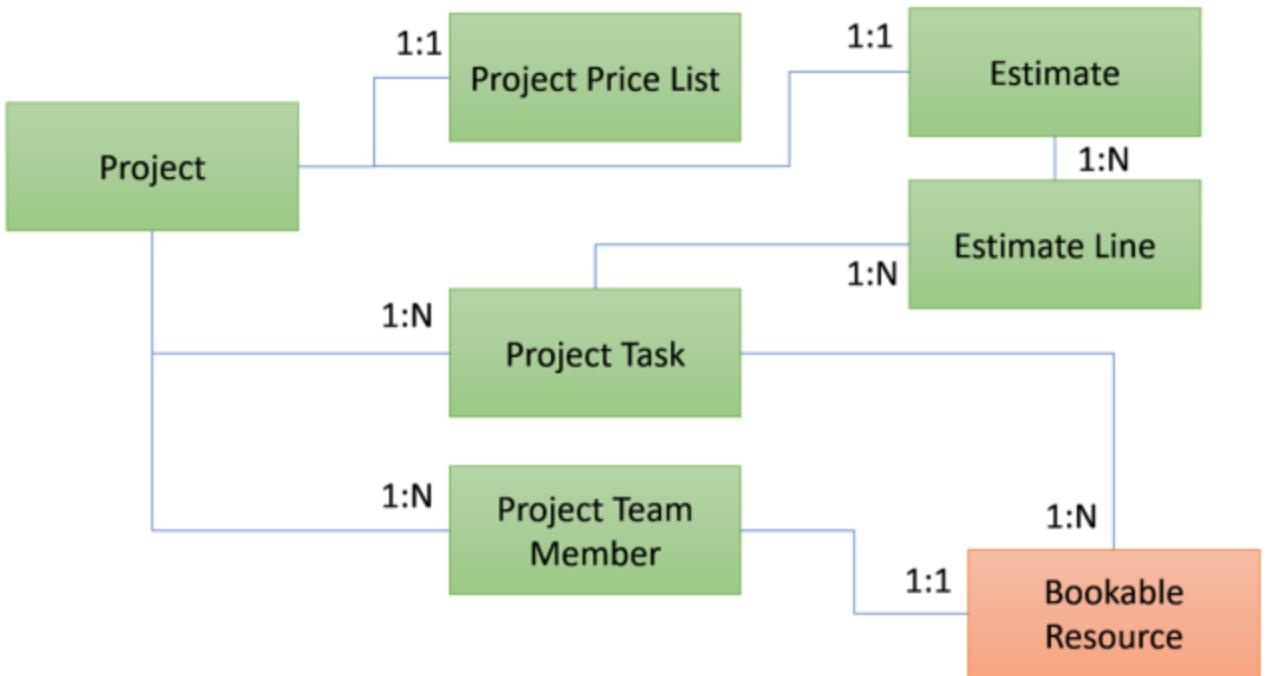
The concept behind the project contract in Project service is actually quite similar to quotation. The contract is actually the order entity and the contract line is the order line entity. But both of these will have additional fields specific to Project Service. The additional project contract entities are all named “project contract line ...”.

- ▷  Project Contract Line Detail
- ▷  Project Contract Line Invoice Schedule
- ▷  Project Contract Line Milestone
- ▷  Project Contract Line Resource Category
- ▷  Project Contract Line Transaction Category
- ▷  Project Contract Line Transaction Classification
- ▷  Project Contract Project Price List



Project

Project is a new entity specific to PSA and is the container for all of your project tasks and resourcing detail. Each project has a project team and also a number of tasks. (Both of these entities will be related to the concept of a bookable resource.) The estimate and estimates line entities contain the cost and sales estimates.



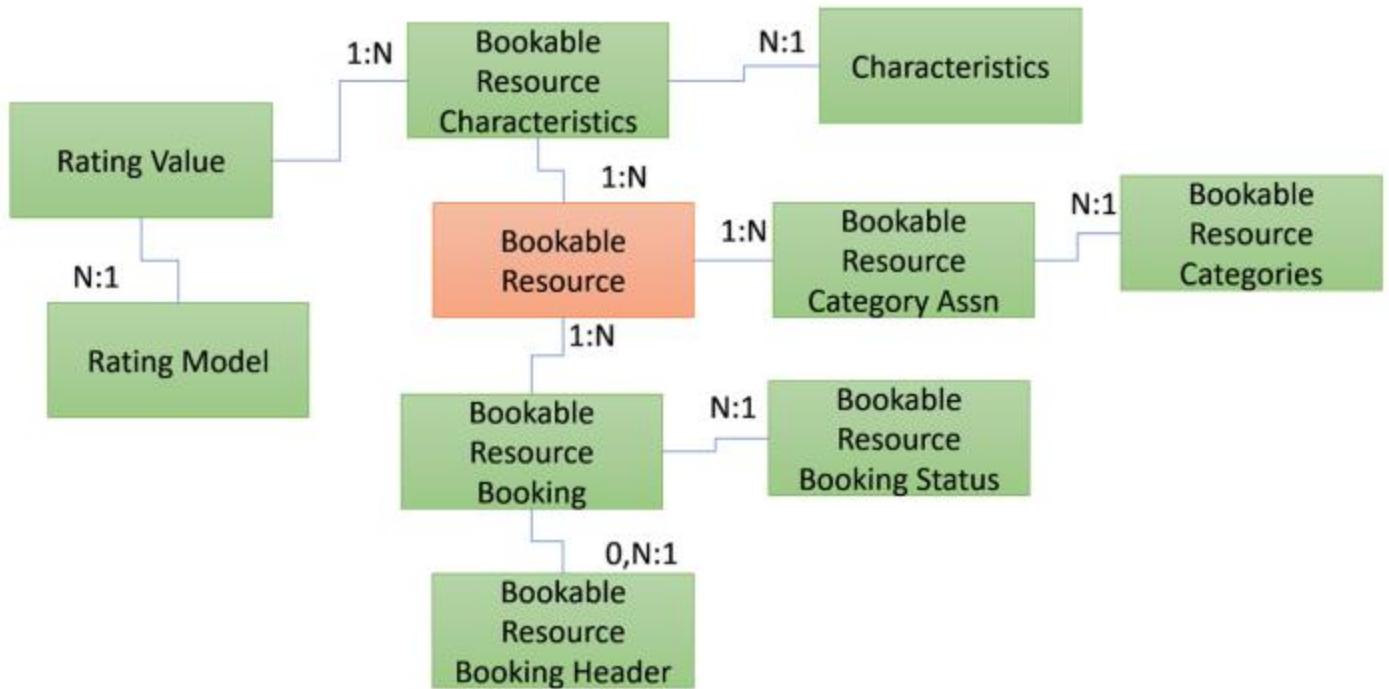
Bookable Resource

Each bookable resource then has multiple bookings. In Field Service the “Bookable Resource Booking” would relate to a work order and in PSA it will relate to a project task. (As we saw the in previous diagram.)

Bookable resources are shared between Field Service and Project Service. Each bookable resource can have a number of characteristics (skills) and each of the skills has a proficiency rating.

A bookable resource can be a user, contact, account (etc). Although in Project Service only resources that are users can currently record details on timesheets and submit expenses. So generally speaking, when I talk about a bookable resource we are ultimately considering a system user.

Categories are roles. So, each bookable resource can have many roles via the “Bookable Resource Category Assn” entity. (Although one is marked as their default role.) For example, my “main” role is Functional Consultant. But when required I can also play the role of Business Analyst, Project Manager or reluctantly Tester. It will therefore be common for one resource to have multiple roles but you can only one role per project. (I have many hats that I often swap but I never wear two at once!)



Actuals

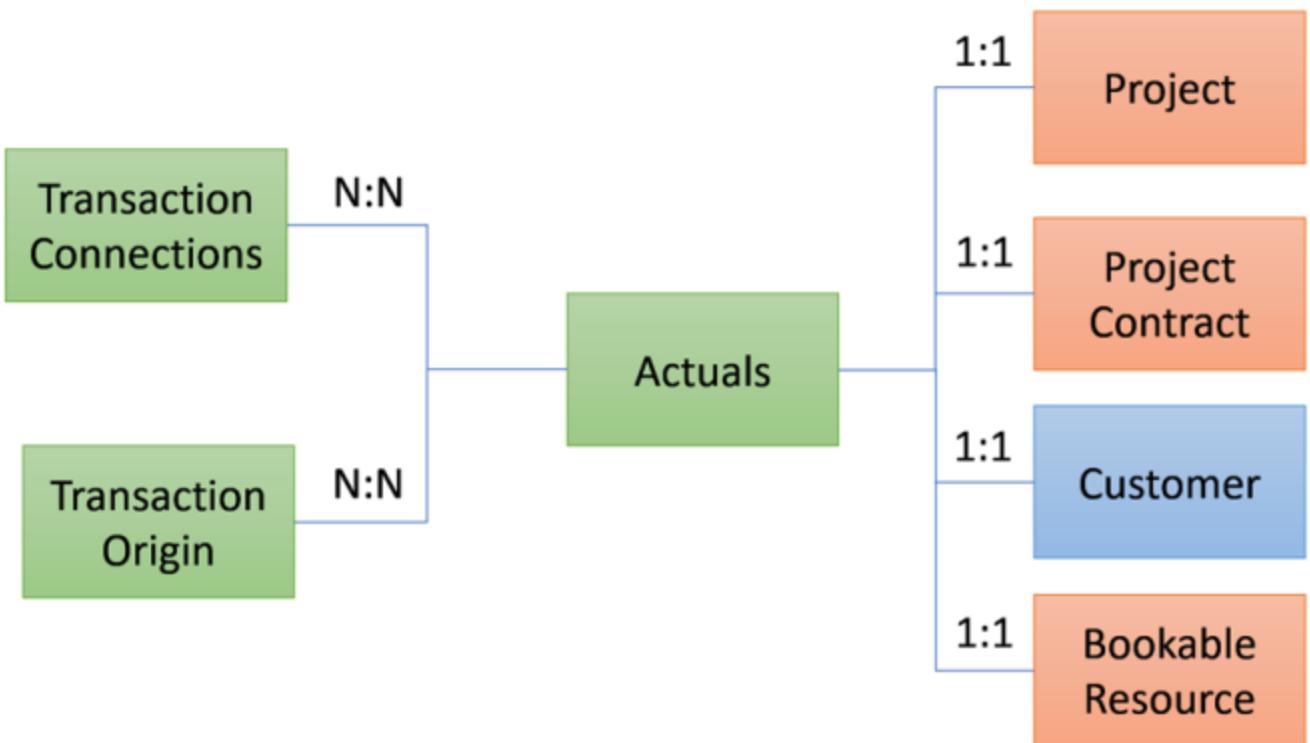
The actuals entity will store details of actual business transactions on your project. Including information on sales values, costs and quantities. When you create financial reports or maybe source data for integration with other systems, the actual entity and its associated entities will be a common source for this data.

Transaction Origin, this holds the origin of the actual transaction entity and its associated entity. Including the transaction type.

Transaction Connections shows how the connections relate. For example, an unbilled say to a estimate line.

The actual entity also has relationships with the other entities in CRM such as the project, project contact, customer and bookable resource.

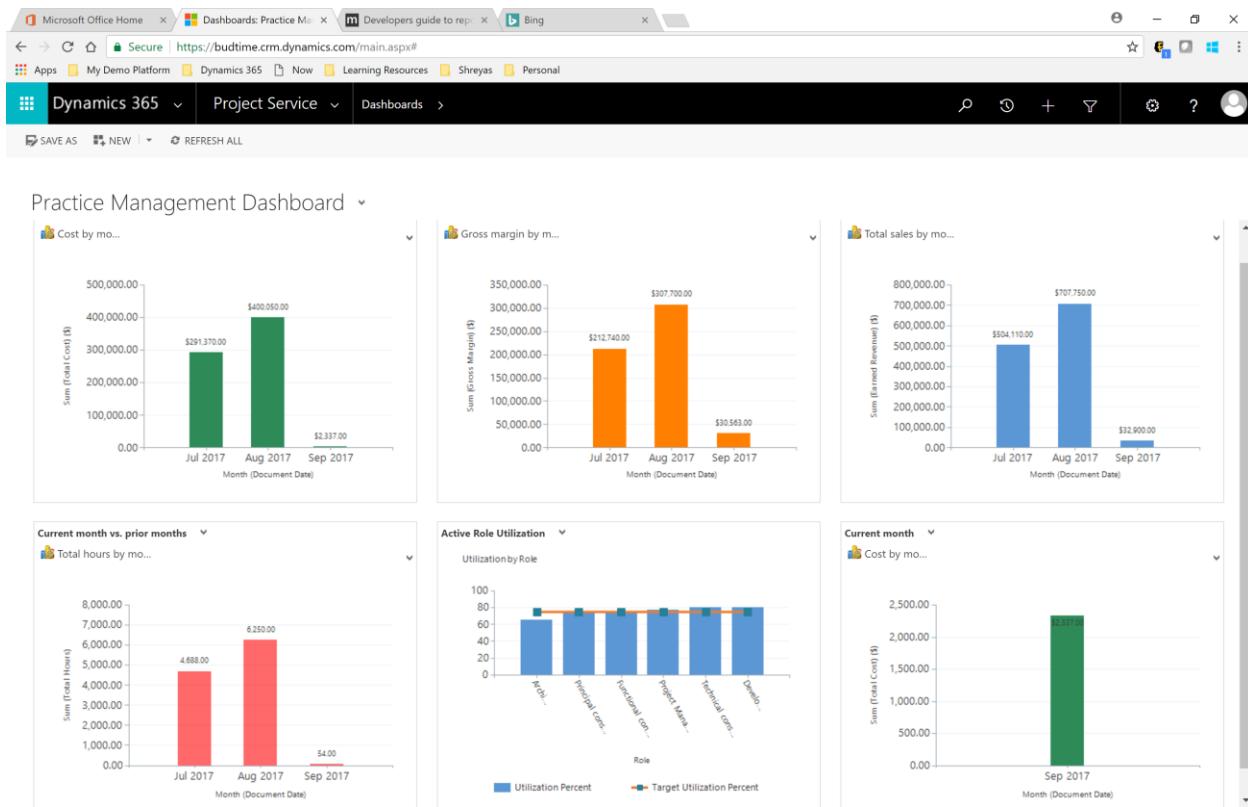
Actuals get created when there is a financial impact on your project. Meaning draft or submitted expenses would not show. Actuals would be created once the expense (or time) entries are approved.



Dashboard

Practice Management Dashboard

Practice manager can look at higher level metrics to manage the business. They can be drilled down to get more precise information. Navigate to Project Service → Dashboards and select “Practice Management Dashboard”.



Excel Templates

Another method of reporting other than SSRS reports. The sample report pack introduced earlier comes with 5 sample excel templates. After this solution is installed, Go to Settings → Templates → Document templates. From the view chevron, you can click on Excel Templates. Uploading the excel templates is discussed in the Readme file of the Sample Reports download. Here is how it looks like.

The screenshot shows a Microsoft Dynamics 365 interface for managing templates. The top navigation bar includes links for Microsoft Office Home, Document Templates Excel, Developers guide to rep..., and Bing. The main header shows 'Dynamics 365' and 'Settings' with a 'Templates' sub-menu. Below the header is a toolbar with buttons for '+ NEW', 'UPLOAD TEMPLATE', and 'DELETE'. A search bar labeled 'Search for records' is also present. The main content area displays a table titled 'Excel Templates' with the following data:

Type	Name	Status	Modified On	Modified By	Description
Microsoft Excel	Actuals Analysis	Activated	9/13/2017 10:06 AM	Sam Surana	
Microsoft Excel	Campaign Overview	Activated	8/22/2017 9:29 PM	SYSTEM	
Microsoft Excel	Case SLA Status	Activated	8/22/2017 9:29 PM	SYSTEM	
Microsoft Excel	Case Summary	Activated	8/22/2017 9:29 PM	SYSTEM	
Microsoft Excel	Pipeline Management	Activated	8/22/2017 9:29 PM	SYSTEM	
Microsoft Excel	Project Contracts	Activated	9/13/2017 10:05 AM	Sam Surana	
Microsoft Excel	Project Opportunities	Activated	9/13/2017 10:05 AM	Sam Surana	
Microsoft Excel	Project Quotes	Activated	9/13/2017 10:05 AM	Sam Surana	
Microsoft Excel	Project Summary	Activated	9/13/2017 10:04 AM	Sam Surana	

At the bottom of the table, there is a pagination section showing '1 - 9 of 9 (0 selected)' and a set of letters from 'All' to 'Z' for filtering.

To run the Templates we go the associated entity type and run the excel template. For example, if we want to run the Project Quotes excel template, we would go to Project Service → Quotes and run it from there.

Screenshot of Dynamics 365 Project Service Quotes module showing a list of quotes.

Header: Microsoft Office Home | Quotes All Quotes - Microsoft Dynamics 365 | Developers guide to rep... | Bing

Toolbar: + NEW | DELETE | EMAIL A LINK | RUN REPORT | EXCEL TEMPLATES | EXPORT TO EXCEL | IMPORT DATA | CHART PANE | VIEW | ...

Sub-Toolbar: Create Excel Template | Create Excel Template | Excel Templates

Search Bar: Search for records

Section: All Quotes

Table Headers: Name, Status, Project Quotes, Open in Excel Online, Created On, Profitability, Adjusted Gross..., Competitive, Estimated Budget

Table Data:

Name	Status	Project Quotes	Action	Created On	Profitability	Adjusted Gross...	Competitive	Estimated Budget
CRM Implementation for Alpine	Draft	\$0.00	Alpine Ski Shop	8/22/2017 11:32 PM	Not Profitable	0.00	Customer Budg...	Within Custome...
CRM Implementation for Chic - APAC	Draft	\$176,400.00	Chic Department Stores	8/22/2017 11:32 PM	Profitable	72.79	Outside Custom...	Within Custome...
CRM Implementation for Chic - APAC(old)	Draft	\$176,400.00	Chic Department Stores	8/22/2017 11:32 PM	Profitable	100.00	Outside Custom...	Within Custome...
CRM Implementation for Chic - NA	Active	\$176,400.00	Chic Department Stores	8/22/2017 11:32 PM	Profitable	72.79	Outside Custom...	Within Custome...
CRM Implementation for Chic - NA(old)	Draft	\$176,400.00	Chic Department Stores	8/22/2017 11:33 PM	Profitable	100.00	Outside Custom...	Within Custome...
CRM Offshore Quote 2	Draft	\$244,400.00	Chic Department Stores	8/22/2017 11:32 PM	Profitable	57.02	Within Custom...	Within Custome...
CRM Offshore Quote 3	Draft	\$254,400.00	Chic Department Stores	8/22/2017 11:32 PM	Profitable	100.00	Outside Custom...	Within Custome...
CRM Offshore Quote 4	Draft	\$254,400.00	Chic Department Stores	8/22/2017 11:32 PM	Profitable	100.00	Outside Custom...	Within Custome...
CRM Offshore Quote 5	Draft	\$254,400.00	Chic Department Stores	8/22/2017 11:32 PM	Profitable	100.00	Outside Custom...	Within Custome...
CRM Quote 2	Draft	\$254,400.00	Chic Department Stores	8/22/2017 11:33 PM	Profitable	100.00	Outside Custom...	Within Custome...
CRM Quote 3	Draft	\$254,400.00	Chic Department Stores	8/22/2017 11:33 PM	Profitable	100.00	Outside Custom...	Within Custome...
CRM Quote 4	Draft	\$254,400.00	Chic Department Stores	8/22/2017 11:33 PM	Profitable	100.00	Outside Custom...	Within Custome...
CRM Quote 5	Draft	\$254,400.00	Chic Department Stores	8/22/2017 11:33 PM	Profitable	100.00	Outside Custom...	Within Custome...
CRM Ticketing Opportunity	Draft	\$0.00	Alpine Ski Shop	8/22/2017 11:32 PM	Not Profitable	0.00	Customer Budg...	Within Custome...
Dynamics AX Implementation	Won	\$112,500.00	Active Transport Inc.	9/6/2017 12:59 PM	Profitable	32.89	Within Custome...	Within Custome...
PSA Opportunity - First Class	Closed	\$100,060.00	First Class Mail	9/5/2017 12:15 PM	Profitable	99.95	Outside Custom...	Exceeds Custom...
PSA Opportunity - First Class	Won	\$100,060.00	First Class Mail	9/5/2017 12:15 PM	Profitable	99.95	Outside Custom...	Exceeds Custom...
PSA Opportunity - First Class	Draft	\$77,260.00	First Class Mail	9/5/2017 12:21 PM	Profitable	75.08	Customer Budg...	Within Custome...
RM Tool	Draft	\$0.00	Active Transport Inc.	8/22/2017 11:32 PM	Not Profitable	0.00	Customer Budg...	Within Custome...

Page Navigation: 1 - 19 of 19 (0 selected) | Page 1

Screenshot of Excel Online showing a dashboard for Project Quotes.

Header: Microsoft Office Home | Quotes All Quotes - Microsoft Dynamics 365 | Developers guide to rep... | Bing

Toolbar: FILE | HOME | INSERT | DATA | REVIEW | VIEW | Tell me what you want to do

Sub-Toolbar: Cut, Copy, Paste, Format Painter, Undo, Clipboard, Font, Alignment, Number, Tables, Cells, Editing

Text: Generated 9/13/2017, 10:10:06 AM

Section: Project Quotes

Figure 1: Quote profitability

Bar chart showing Profitability (Y-axis, 0 to 18) versus Status (X-axis). The chart has two bars: Not Profitable (green) and Profitable (green).

Figure 2: Quote schedule estimation

Bar chart showing Estimated Schedule (X-axis) versus Total (Y-axis, 0 to 3,000,000). The chart has three bars: Estimated To Finish Early (green), Schedule Not Available (green), and Estimated To Finish Late (green).

Figure 3: Quote totals

Bar chart showing Type (X-axis) versus Total (Y-axis, 0 to 300,000). The chart shows four categories: CRM Implementation 2 (green), CRM Offshore quote 2 (blue), CRM Offshore quote 3 (green), and CRM Offshore quote 4 (green).

Figure 4: Quote vs. Customer Budget

Bar chart showing Type (X-axis) versus Total (Y-axis, 0 to 300,000). The chart shows four categories: CRM Implementation 2 (green), CRM Offshore quote 2 (blue), CRM Offshore quote 3 (green), and CRM Offshore quote 4 (green).

Bottom Navigation: Project Quotes, profitability, bystatuspotentialcustomer, schedulefeasibility, quotevcustomerbudget, salesandcost, bystatus, data, HELP IMPROVE OFFICE

Power BI

Power BI templates for PSA will be introduced later this year.

Templates will ship with its own dashboard and scripts.

Will need to bring own

- SQL Server or SQL Azure DB
- Power BI pro license
- Scribe license to extract the Dynamics CRM Data to Azure SQL db.

Appendix A. Reference Materials

1. If you have a DLP account, you can go thru the demo of the PSA using following link.
<https://mbspartner.microsoft.com/CRM/Topic/56>
2. Project service Automation user guide → <https://www.microsoft.com/en-us/dynamics/crm-customer-center/dynamics-365-for-project-service-automation-user-s-guide.aspx>