

Profit from your Projects with Microsoft Dynamics 365 for PSA



Winner
Microsoft Partner
2017 Partner of the Year
Enterprise Resource Planning (ERP)
Award

2017/2018
INNER CIRCLE
for Microsoft Dynamics



WHAT IS PROJECT SERVICE AUTOMATION

Dynamics 365

Intelligent business applications in the cloud

Microsoft AppSource

 Office 365


Project Service
Automation


Sales


Customer Service

 Power BI

Microsoft
Dynamics 365

Cortana Intelligence
Suite


Field Service

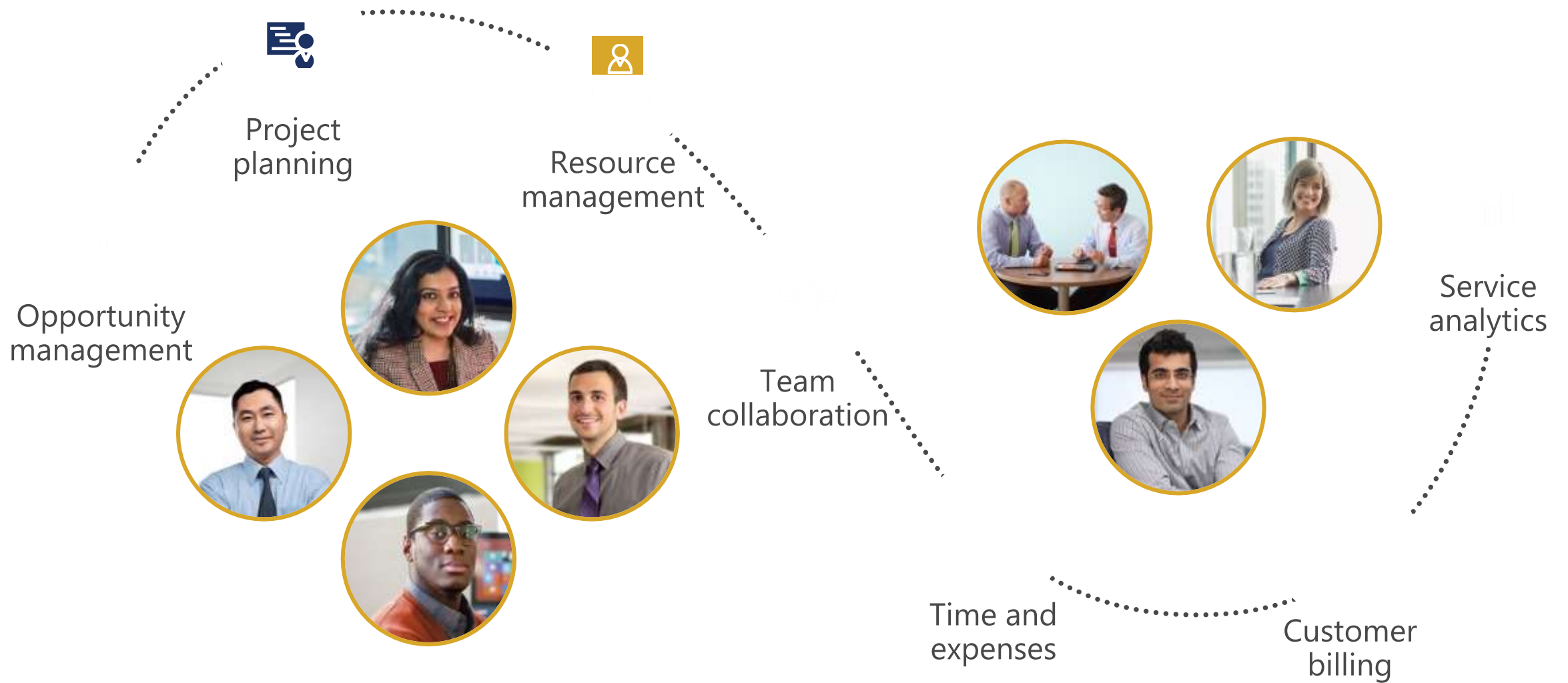

Marketing


Operations

Azure IoT
Suite

Common application platform: PowerApps, Microsoft Flow, Common Data Model

Dynamics 365 for Project Service Automation



Project Service Automation with Sales



Account Manager

The screenshot displays the Microsoft Dynamics CRM interface. The top navigation bar includes 'Microsoft Dynamics CRM', 'PSA', 'Dashboards', and 'SANDBOX'. The main area is divided into two tabs. The left tab, 'Sales Overview', features a funnel chart for the 'Sales Pipeline' with stages: 1-Qualify (\$12,000.00), 2-Develop (\$11,000.00), and 3-Propose (\$10,000.00). Below this is a table of 'Open Opportunities' with columns for 'Type', 'Potential Customer', and 'Est. Date'. The right tab, 'Chic Dept Stores', shows a detailed view of a sales opportunity. It includes a progress bar with stages: Qualify, In Progress (highlighted), and Close. Below the progress bar are 'Key Metrics' such as Total Chargeable Cost (\$327,500.00), Total Revenue (\$1,073,500.00), and Gross Margin (69.48%). A 'Distribution of cost and revenue' section contains two charts: a bar chart for 'Revenue and cost over time' (Monthly breakdown from Sep 2016 to May 2017) and a bar chart for 'Associated Revenue' by role (Analyst, Auditor, Senior Au.).

Time & materials and fixed fee projects



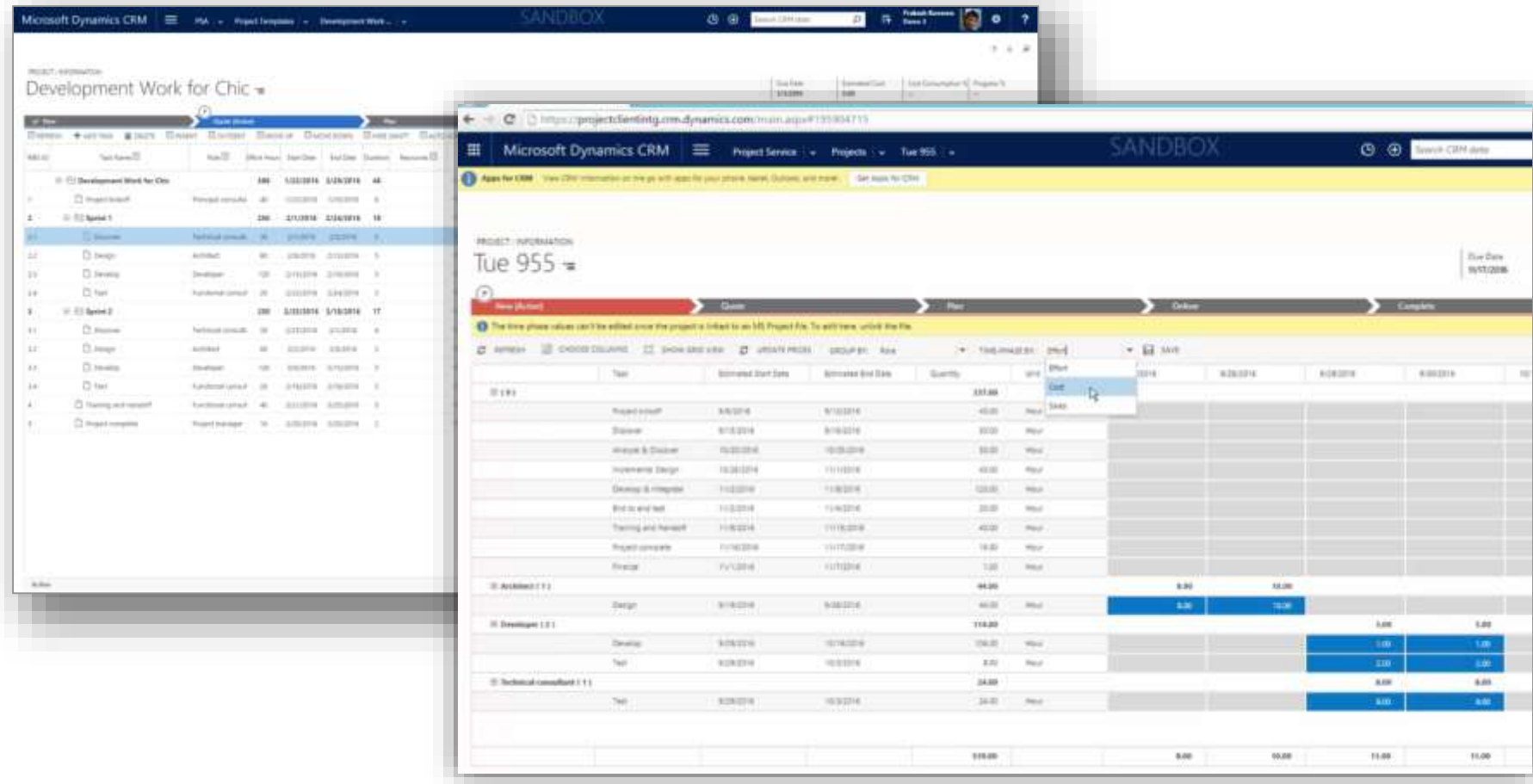
Account Manager



Project Manager



End Customer



The right screenshot displays a Gantt chart and a resource allocation table for project 'Tue 955'. The table shows resource usage across different project phases and time periods.

| Resource | Type | Resource Start Date | Resource End Date | Quantity | Unit | Effort | 2014 | 3/26/2014 | 8/28/2014 | 9/22/2014 | 10 |
|----------|--------------------------|---------------------|-------------------|----------|------|--------|------|-----------|-----------|-----------|----|
| 193 | Project setup | 3/6/2014 | 9/10/2014 | 40.00 | Hour | 40.00 | | | | | |
| | Discovery | 9/15/2014 | 9/16/2014 | 9.00 | Hour | 9.00 | | | | | |
| | Analysis & Design | 10/20/2014 | 10/20/2014 | 9.00 | Hour | 9.00 | | | | | |
| | Implementation Design | 10/28/2014 | 11/11/2014 | 40.00 | Hour | 40.00 | | | | | |
| | Develop & Integrate | 11/10/2014 | 11/18/2014 | 120.00 | Hour | 120.00 | | | | | |
| | End to end test | 11/23/2014 | 11/24/2014 | 20.00 | Hour | 20.00 | | | | | |
| | Training and handoff | 11/18/2014 | 11/18/2014 | 40.00 | Hour | 40.00 | | | | | |
| 194 | Project complete | 11/16/2014 | 11/17/2014 | 18.00 | Hour | 18.00 | | | | | |
| | Final | 11/17/2014 | 11/17/2014 | 1.00 | Hour | 1.00 | | | | | |
| 195 | Design | 9/16/2014 | 9/22/2014 | 40.00 | Hour | 40.00 | 8.00 | 12.00 | | | |
| | Development 1.2.1 | | | 114.00 | | | | | 3.00 | 1.00 | |
| 196 | Discovery | 9/26/2014 | 10/14/2014 | 106.00 | Hour | 106.00 | | | 1.00 | 1.00 | |
| | Test | 9/28/2014 | 10/20/2014 | 8.00 | Hour | 8.00 | | | 2.00 | 2.00 | |
| 197 | Technical consultant 1.1 | | | 24.00 | | 24.00 | | | 8.00 | 8.00 | |
| | Test | 9/28/2014 | 10/3/2014 | 24.00 | Hour | 24.00 | | | 4.00 | 6.00 | |
| Total | | | | | | 519.00 | 8.00 | 10.00 | 11.00 | 11.00 | |

Microsoft Project client integration



Project Manager



End Customer

The screenshot displays the Microsoft Project Professional interface with several overlapping windows. The main window shows a Gantt Chart with tasks like 'Project kickoff', 'Sprint 1', 'Sprint 2', and 'Project complete'. A 'Resource Sheet' window is open, showing a table of resources:

| Resource Name | Type | Material Label | Initials |
|---------------|------|----------------|----------|
| PM | Work | | P |
| Dev | Work | | D |
| Test | Work | | T |

A 'Project Service Resourcer' window is also visible, showing a list of resources with details like 'Book Resources', 'Requirement', and 'Availability'. The interface includes standard Office-style menus (File, Task, Resource, Report, Project, View, Developer, Dynamics Project Service, Format) and a search bar at the top right.

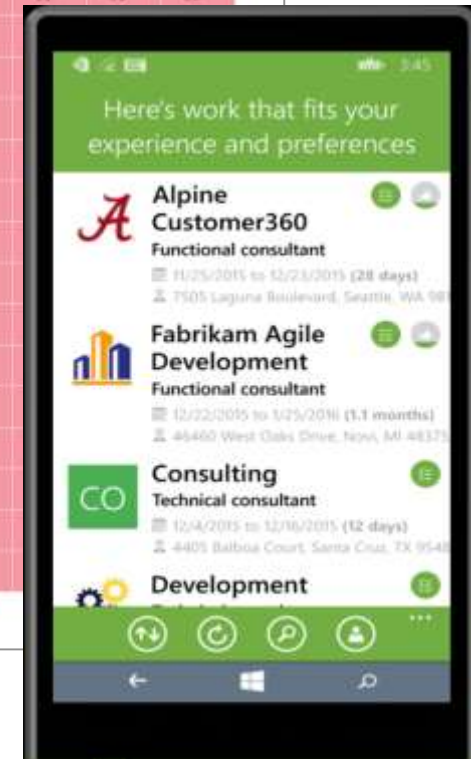
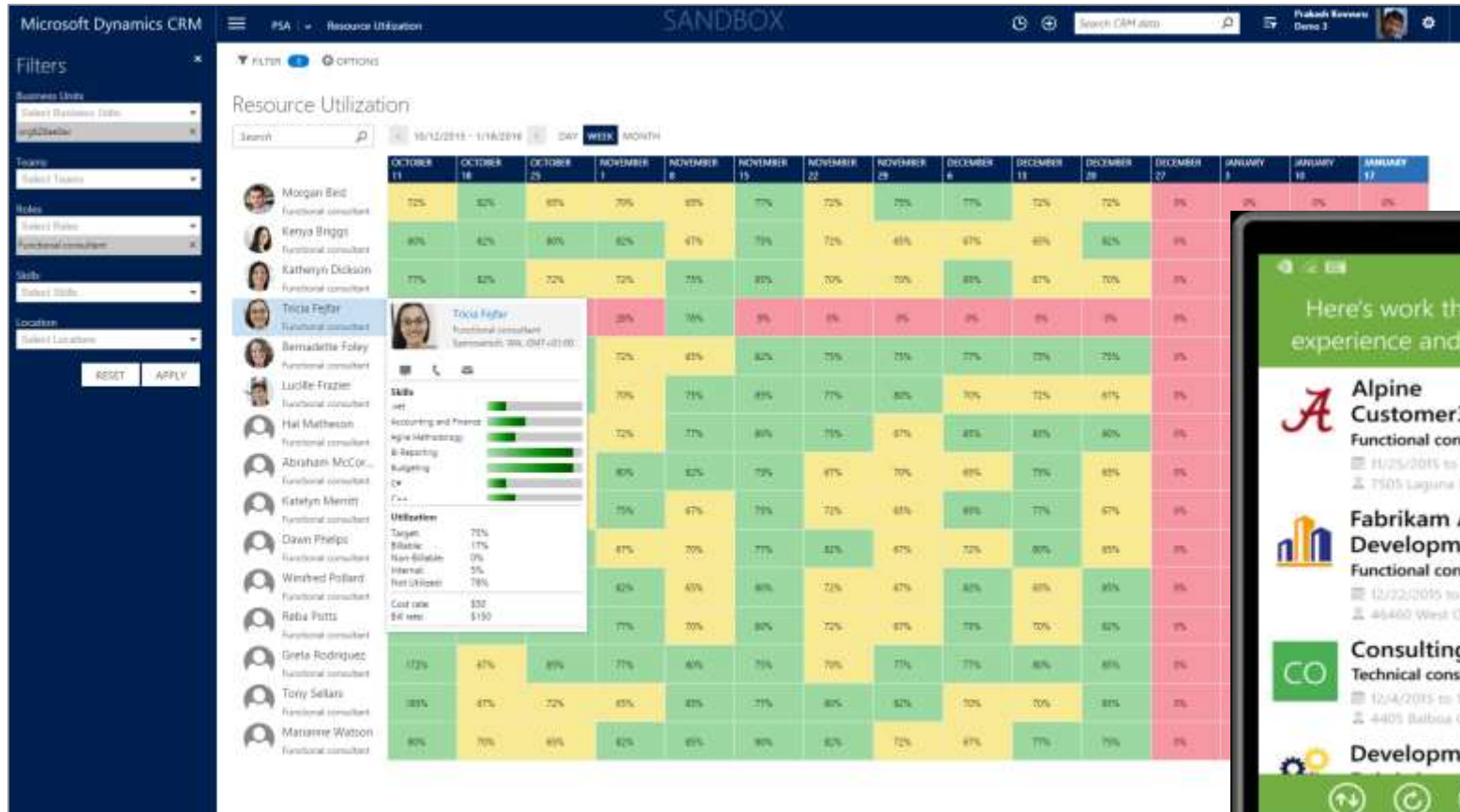
Automated and self-selection resourcing



Resource Manager



Project Manager



Unified resource scheduling




Resource Manager



Project Manager



Partner

| Resource | Aug 01 | Aug 02 | Aug 03 | Aug 04 | Aug 05 | Aug 06 | Aug 07 |
|---|--------|--------|--------|--------|--------|--------|--------|
|  Marvs Developer 100% | 8 | 9 | 9 | 12 | 9 | 5 | 5 |

| Projects | Aug 01 | Aug 02 | Aug 03 | Aug 04 | Aug 05 | Aug 06 | Aug 07 |
|-------------|--------|--------|-------------|--------|--------|--------|--------|
| 2 Project A | | | 1 Project A | | | | |
| 1 Project B | | | | | | | |
| 2 Project B | | | | | | | |
| 2 Project C | | | | | | | |

| Work orders | Aug 01 | Aug 02 | Aug 03 | Aug 04 | Aug 05 | Aug 06 | Aug 07 |
|-------------|--------|--------|--------|--------|--------|--------|--------|
| 1 WO-A | | | | | | | |
| 2 WO-C | | | | | | | |
| 1 WO-G | | | | | | | |

| Opportunities | Aug 01 | Aug 02 | Aug 03 | Aug 04 | Aug 05 | Aug 06 | Aug 07 |
|---------------|--------|--------|--------|--------|--------|--------|--------|
| | | | | | | | |

Contoso, Ltd. | Partner Program | Opportunities | Customers | Support | Project Service Automation | PSA Partner Reviewer

Home > Project Service Automation > Partner Resources

Partner Resources

| Bookable Resource ↑ | project | Project Status (project) | Role | From ↑ | To | Booked Hours | Assigned Hours | Partner Account (Bookable Resource) |
|---------------------|----------------------------|--------------------------|-----------------|----------|-----------|--------------|----------------|-------------------------------------|
| Cheri Castaneda | Demand Distri CRM | Active | Program Manager | 9/9/2016 | 9/9/2016 | 8.00 | | Partner Sample |
| John McCormick | PSA Project | Active | Project Manager | 9/2/2016 | 9/2/2016 | 8.00 | | Partner Sample |
| John McCormick | Chic Dept Stores Project 5 | Active | Project Manager | 6/1/2016 | 8/31/2016 | 528.00 | 504.00 | Partner Sample |

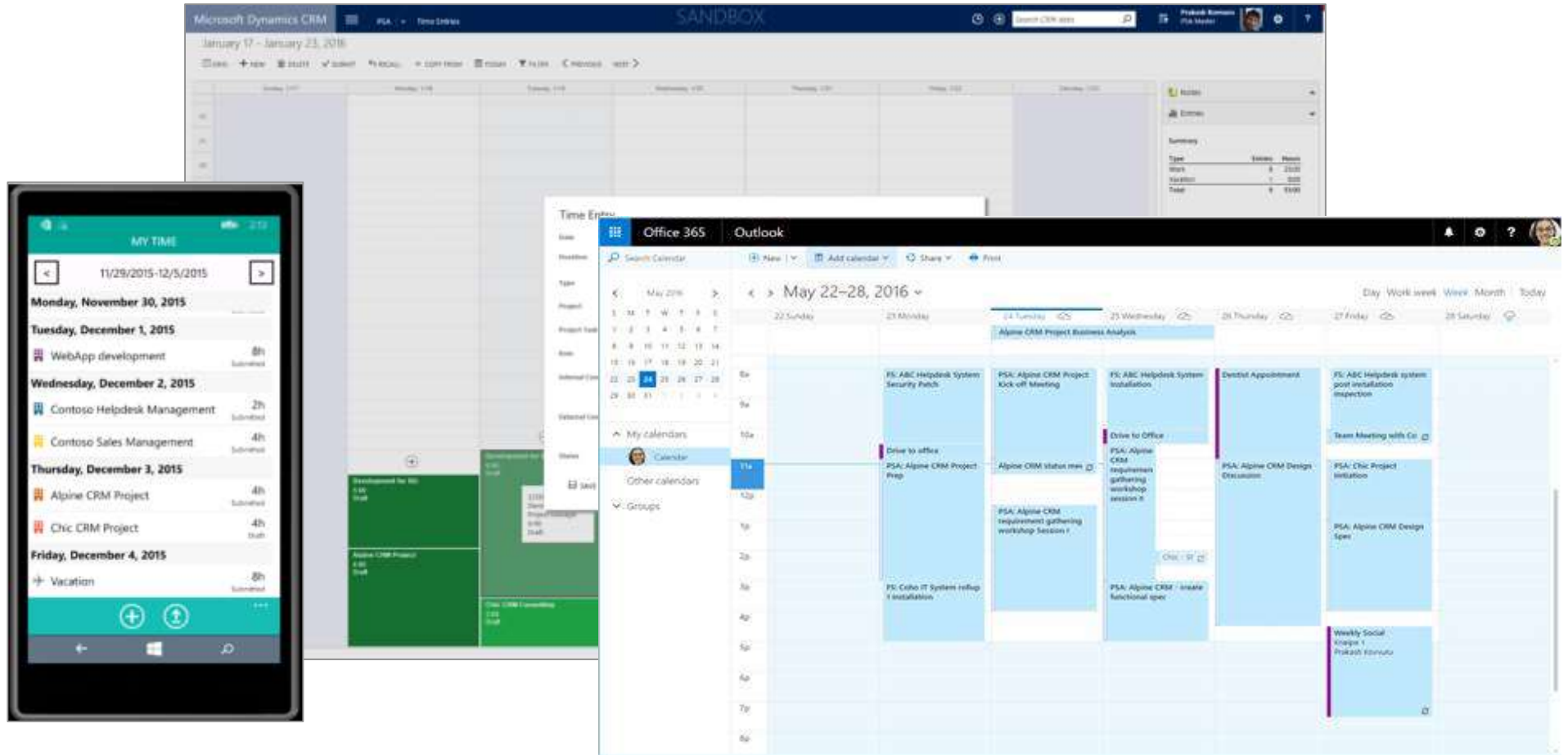
Calendar-based T&E management



Team Member



Project Manager



The image displays three different calendar management interfaces. At the top is the Microsoft Dynamics CRM interface, showing a weekly view for January 17-23, 2016, with a 'Time Entry' section on the right. Below it is a mobile application interface titled 'MY TIME' showing a daily view for November 30, 2015, with tasks like 'WebApp development' (8h) and 'Contoso Helpdesk Management' (2h). At the bottom is the Outlook interface, showing a weekly view for May 22-28, 2016, with various project-related tasks such as 'PSA: Alpine CRM Project Kick-off Meeting' and 'PSA: Alpine CRM Design Discussion'.

Dynamics 365 for Project Service Automation

Empowerment along the customer journey and across the enterprise



Opportunity Management



Project Planning



Resource Management



Team Collaboration



Time And Expenses



Customer Billing



Service Analytics



Mobile



Cloud



Global



COO / Practice Director



Account Manager



Project Manager



Partner Manager



Resource Manager



Team Member



End Customers