

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

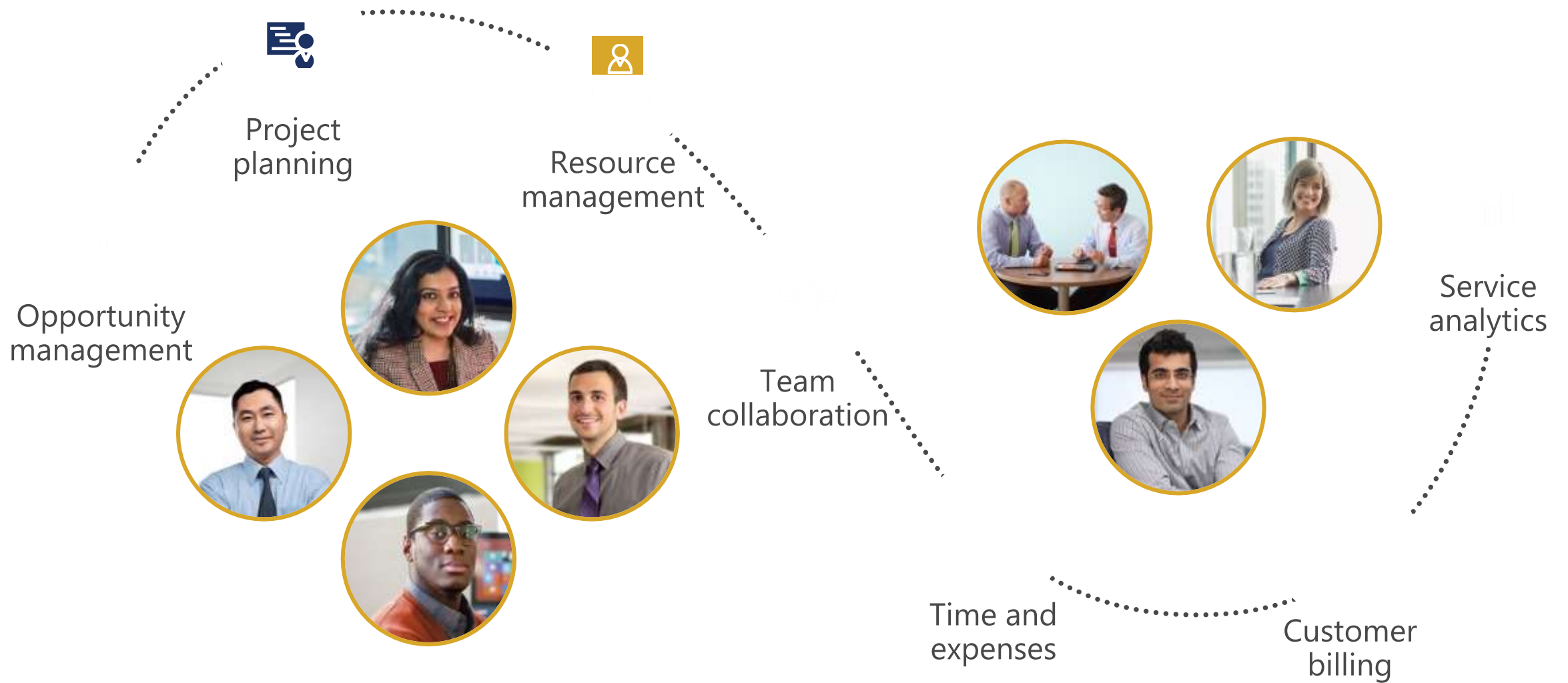

Marketing


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 (\$11,000.00), 2-Develop (\$11,000.00), and 3-Propose (\$11,000.00). Below it 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) and a bar chart for 'Associated Revenue' by role (Analyst, Auditor, Senior Au.).

Time & materials and fixed fee projects



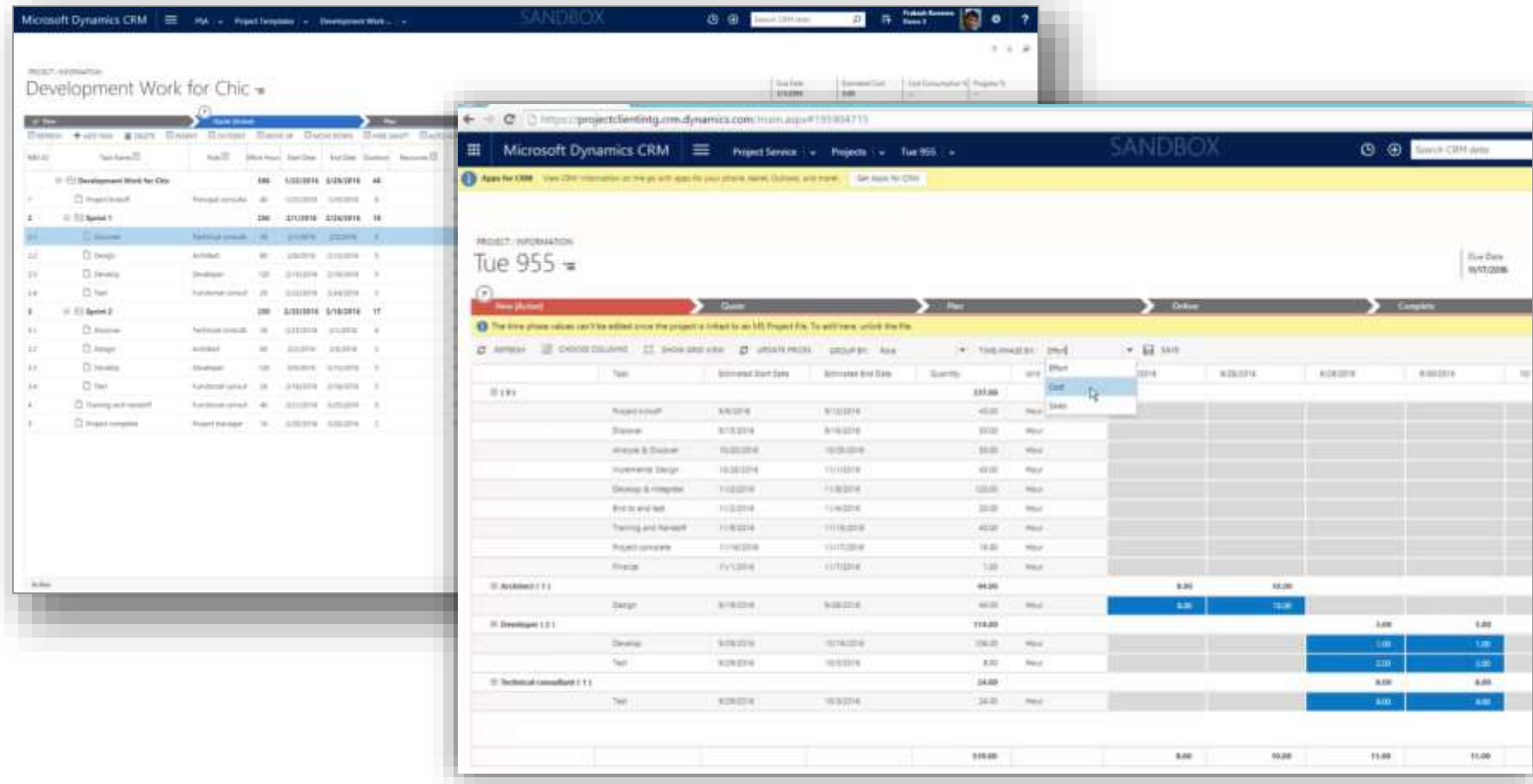
Account
Manager



Project
Manager



End
Customer



The screenshot displays the Microsoft Dynamics CRM interface for a project named "Development Work for Chic". The interface is split into two main views: a task list on the left and a Gantt chart on the right. The task list shows various project tasks such as "Project kickoff", "Design", "Development", "Test", "Training and handoff", and "Project complete", each with associated dates and durations. The Gantt chart visualizes these tasks as horizontal bars, showing their start and end dates and how they overlap. A "Cost" column is visible in the Gantt chart, indicating the financial impact of each task. The interface includes standard CRM navigation elements like the "Project Services" menu and a search bar.

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 for 'Project1 - Project Professional'. 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' window is also visible, showing a 'Book Resources' dialog for an 'Architect' role. It includes a 'Required Capacity: 66 Hours' and a list of resources with their 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.

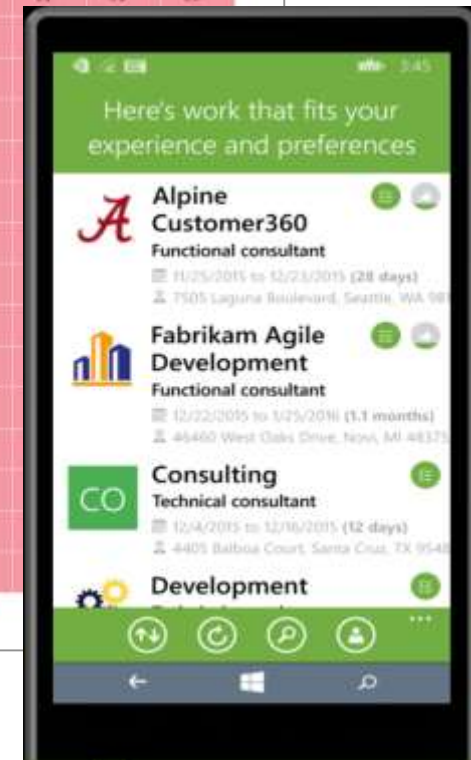
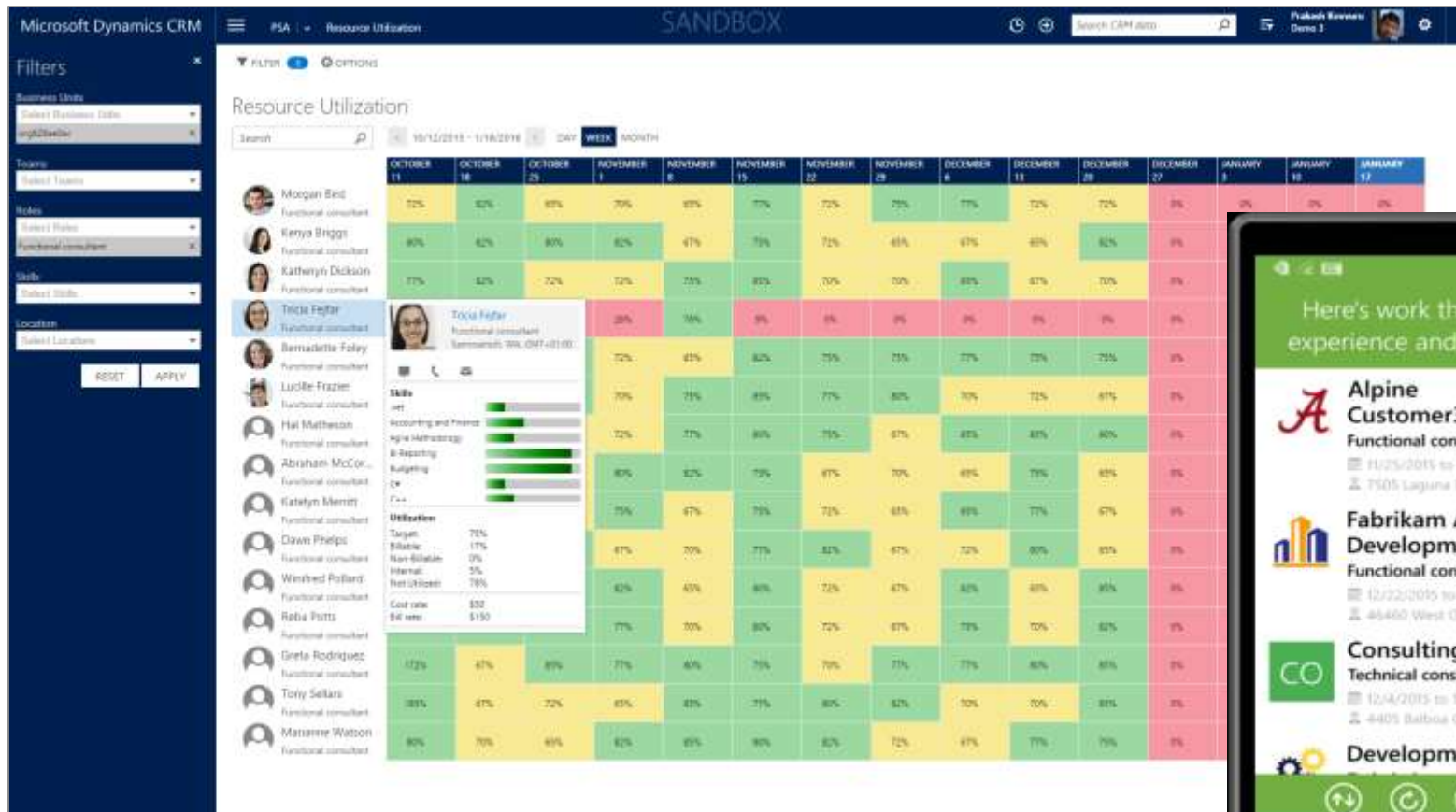
Automated and self-selection resourcing



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	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

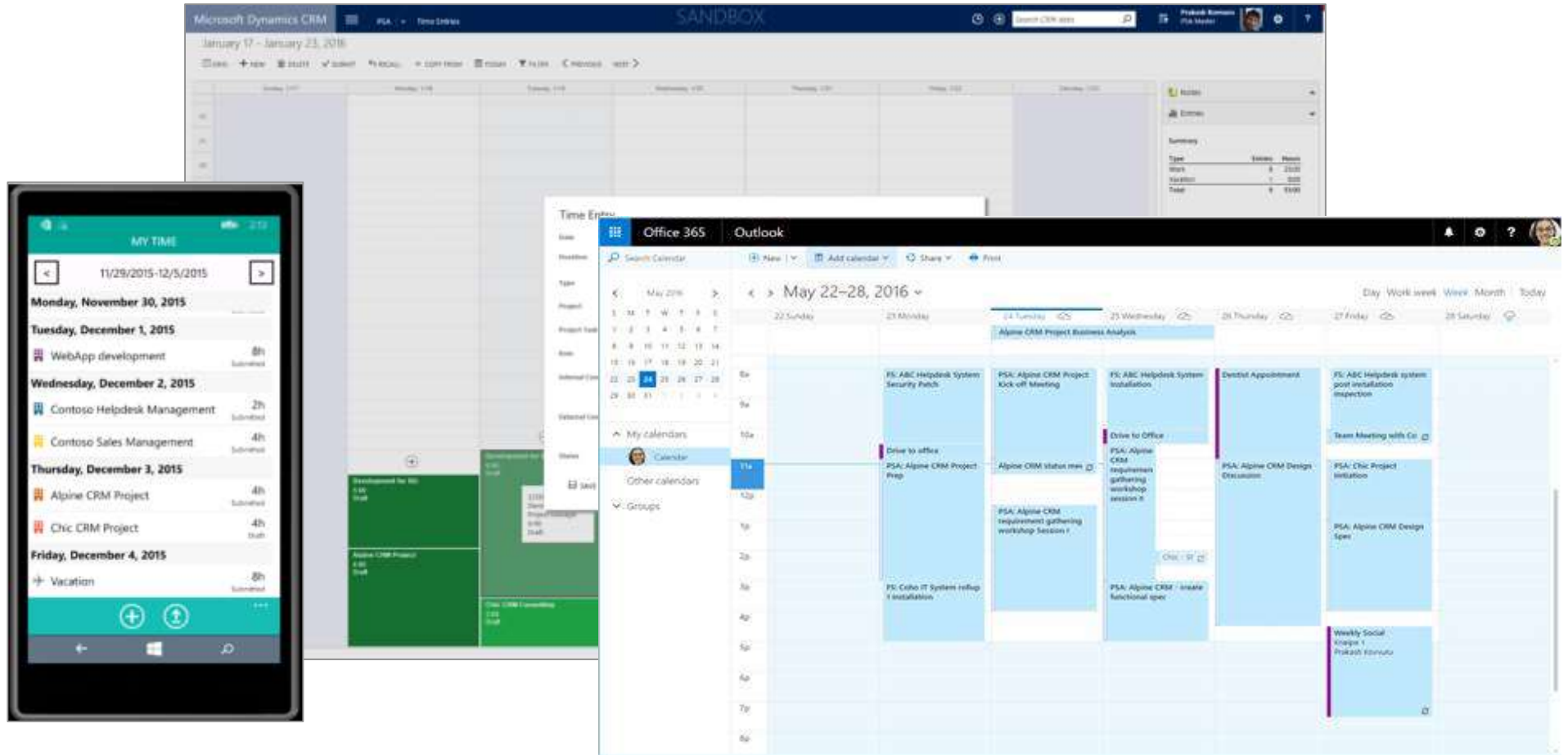
Calendar-based T&E management



Team Member



Project Manager



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