CLOUDFRONTS
Dynamics 365, Power BI & Azure

DYNAMICS 365
PROJECT SERVICE AUTOMATION (PSA)

Dynamics 365 PSA Setup and User Guide

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Gold Cloud Customer Relationship Management
Gold Cloud Platform
Gold Data Analytics
Gold Application Development

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Microsoft Dynamics 365 PSA (Project Service Automation)

Microsoft Dynamics 365 PSA provides Project Managers and other stake holders, the ability to manage the entire Professional Services Project lifecycle within Dynamics 365. It also allows for a deeper collaboration between Sales and Project Management.

This document is Part 1 of a 4-part series to setup Dynamic 365 PSA and leverage its capabilities for delivery of your professional services projects.

PSA Installation

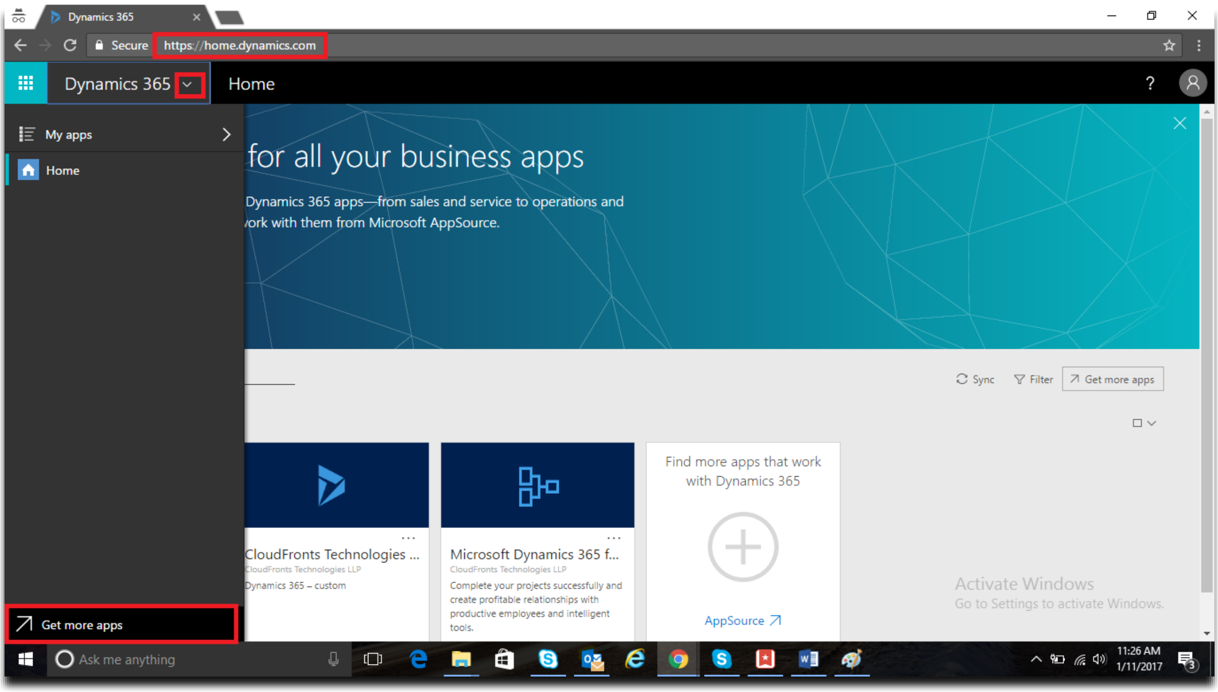
Follow the steps to install MS PSA on MS D365 Environment:

Step 1:

Login to home.dynamics.com with you credentials.

Step 2:

Click on Get more apps

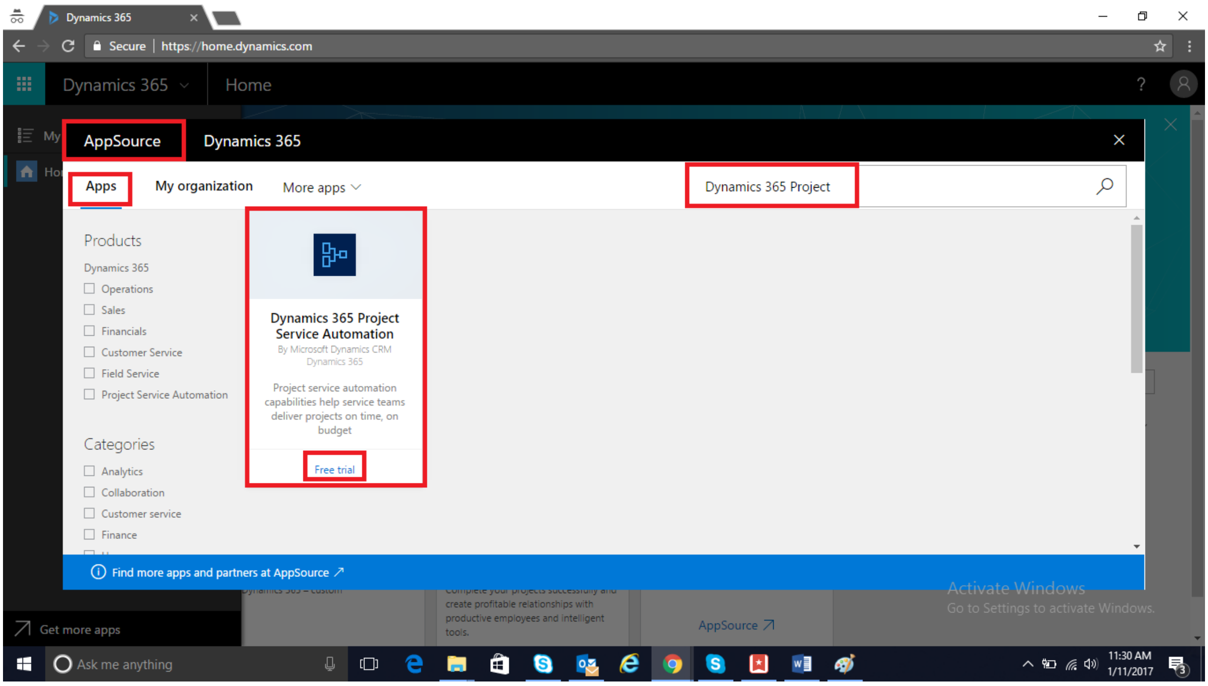


Step 3:

This will open AppSource. Select Apps and type "Dynamics 365 Project" and hit search.

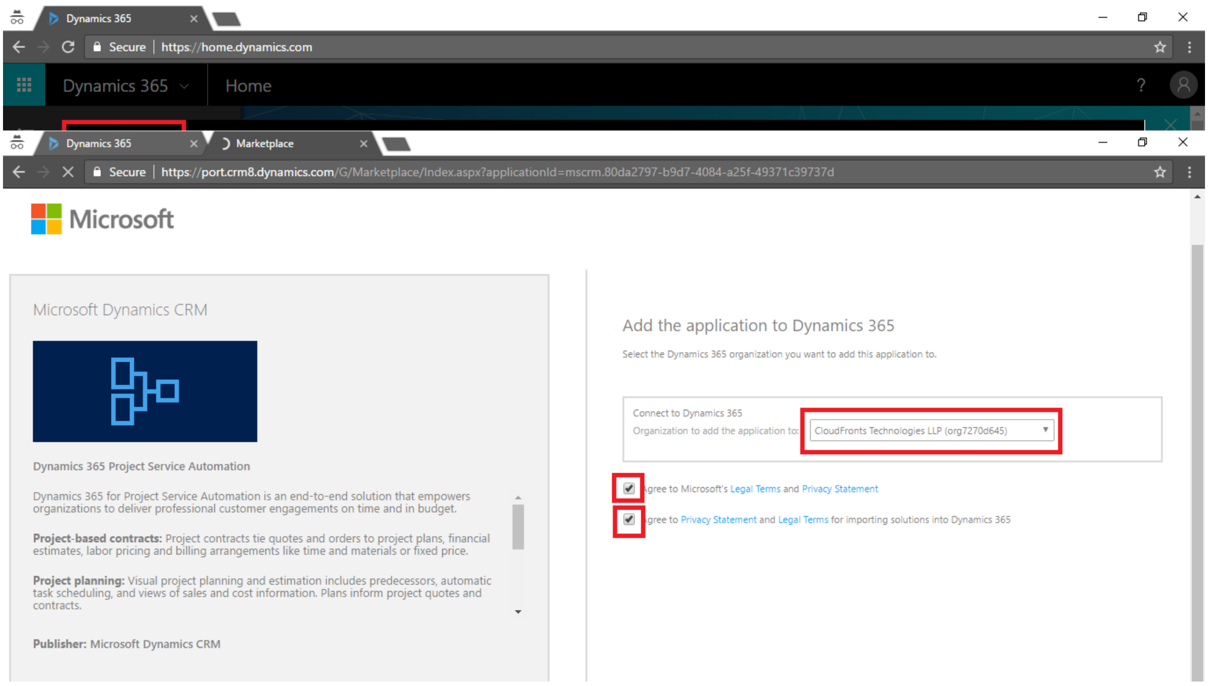
You shall see Dynamics 365 Project Service Automation in the search result.

Hit on "Free Trial" button.



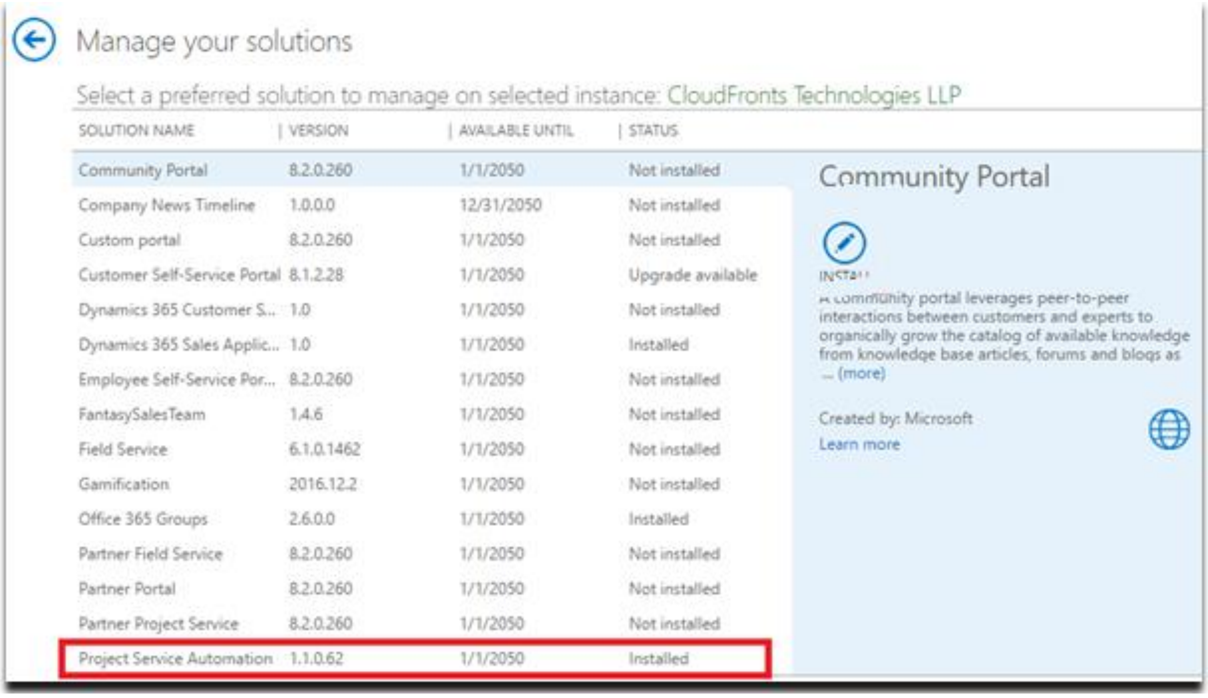
It will ask the Organization details on which it needs to be installed.

Select the Organization and agree on the terms and conditions.



Step 4:

You can see Project Services Automation installed below.



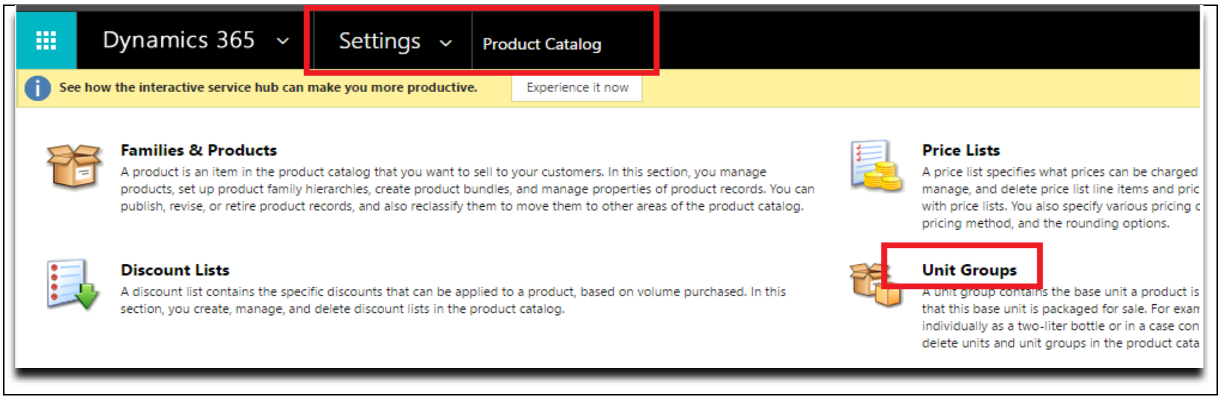
Project services basic parameter settings:

To start using the product, we need to do basic parameter settings. We need to be very careful while doing these parameter settings as they have impact on each stage of project life cycle. These are 1 time settings after the product is bought.

Following are the parameter settings that needs to be done.

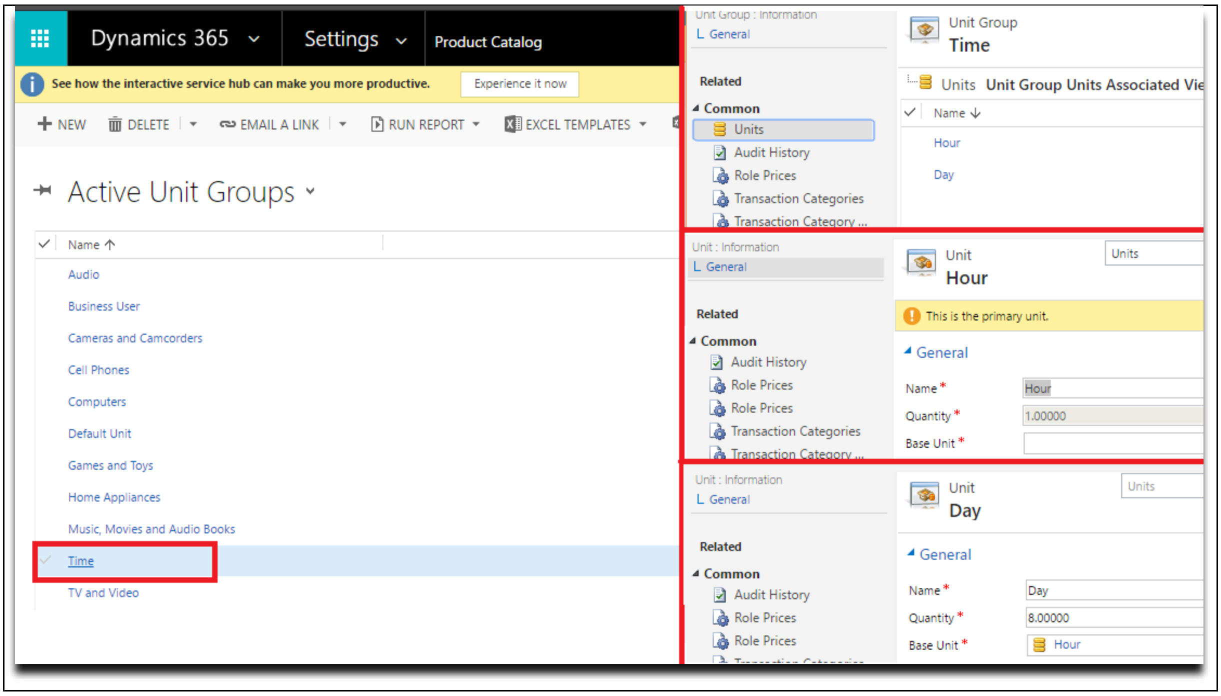
Setting up time unit

a. (Settings → Product Catalog → Unit group → Time)

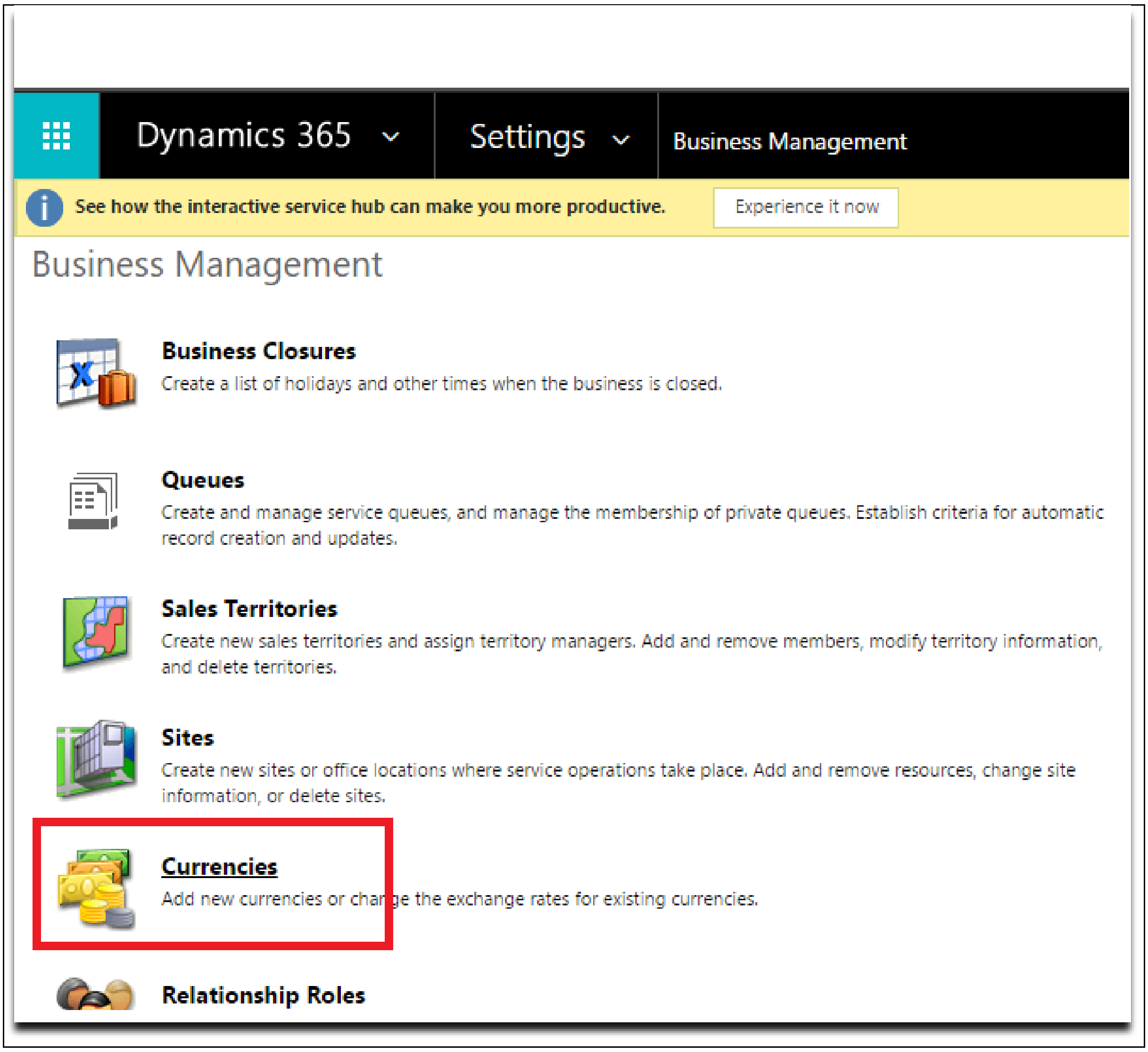


Select Unit group Time
Add units:

1. Time
2. Day

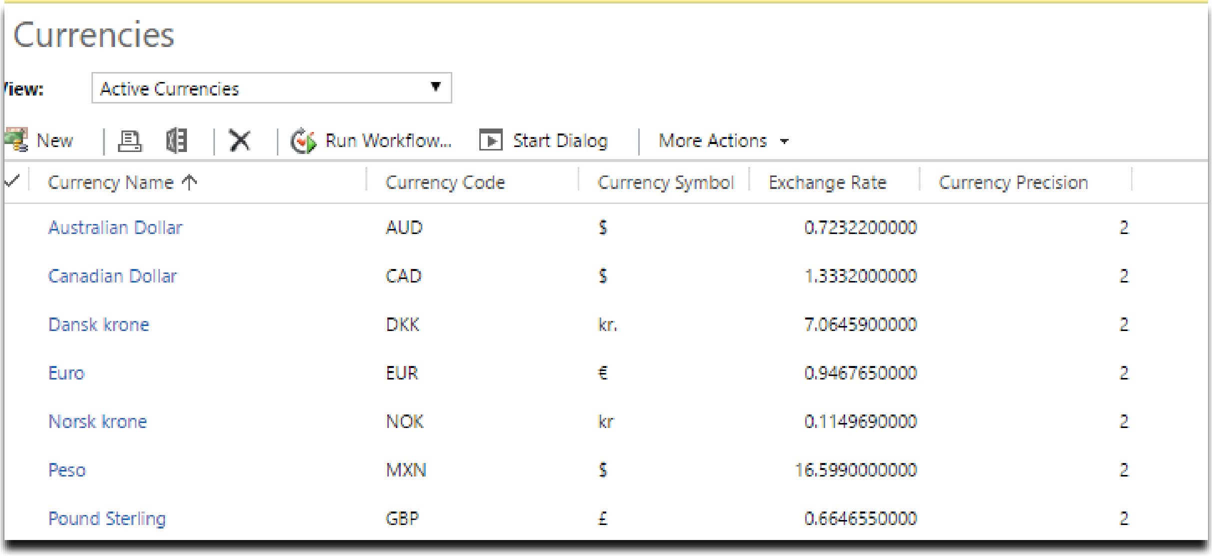


2. Currency & Exchange Rate
    a. (Settings → Business Mgmt. → Currencies)



Set below 5 values for each of the currencies that you add:

1. Currency Name
2. Currency Code
3. Currency Symbol
4. Exchange Rate
5. Currency Precision



Currencies

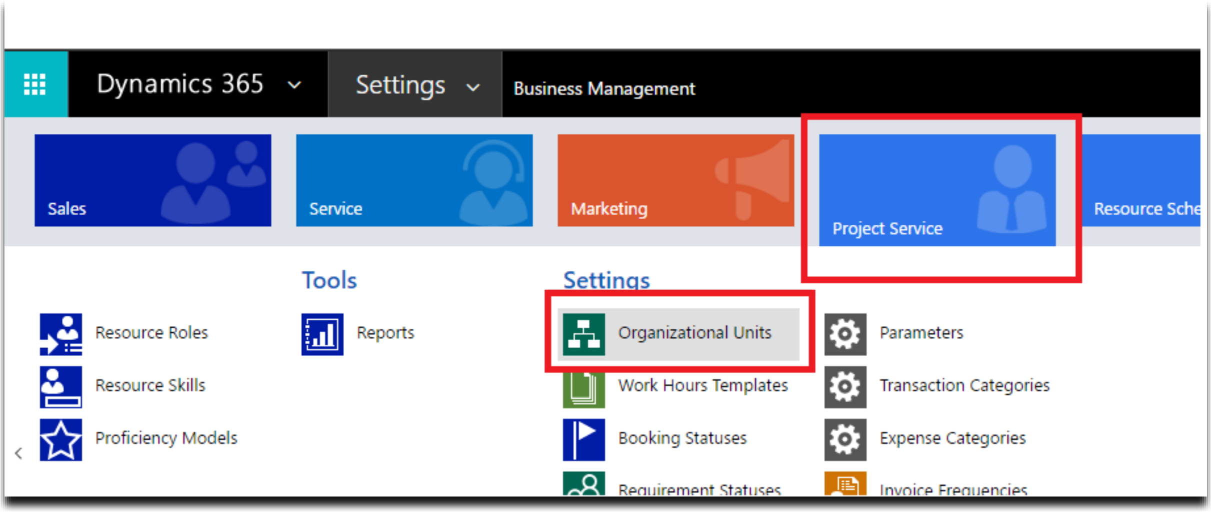
View: Active Currencies

New | Run Workflow... | Start Dialog | More Actions

Currency Name ↑	Currency Code	Currency Symbol	Exchange Rate	Currency Precision
Australian Dollar	AUD	$	0.7232200000	2
Canadian Dollar	CAD	$	1.3332000000	2
Dansk krone	DKK	kr.	7.0645900000	2
Euro	EUR	€	0.9467650000	2
Norsk krone	NOK	kr	0.1149690000	2
Peso	MXN	$	16.5990000000	2
Pound Sterling	GBP	£	0.6646550000	2

Organizational Unit

b. (Project Services → Organizational units)

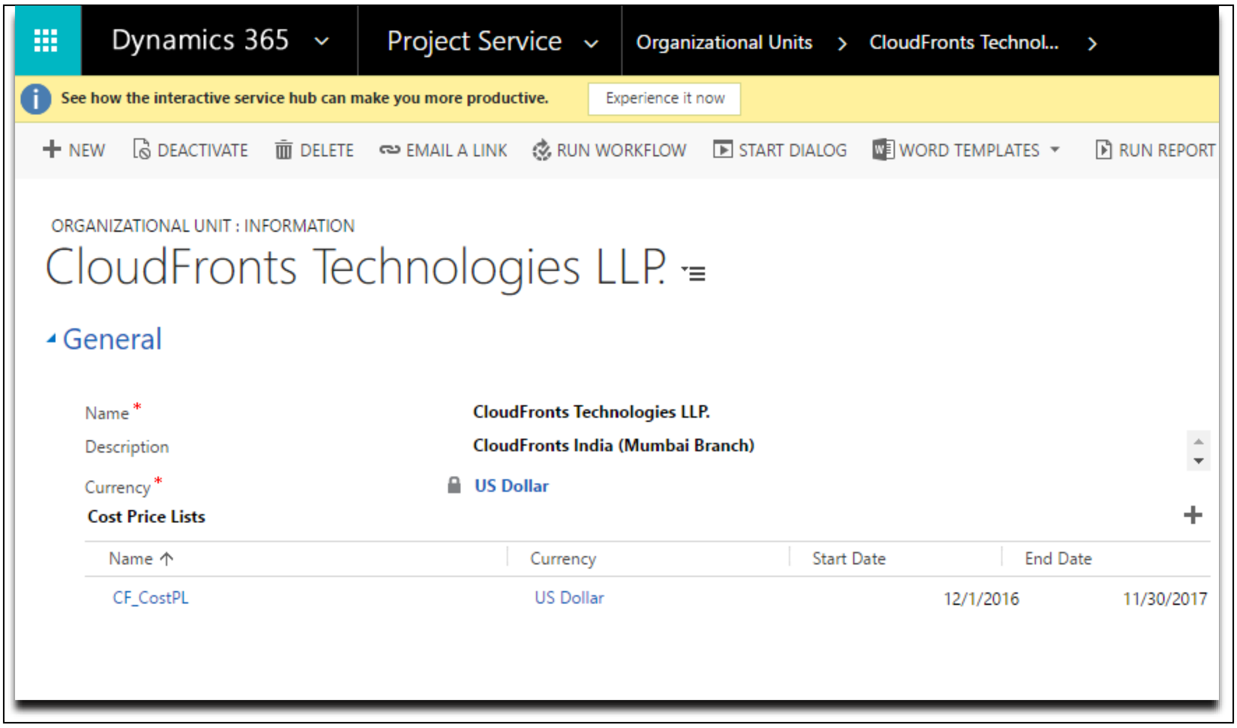


Organizational Unit in Project services is different than the Organizational Unit in D365 CRM.

Here the Organizational Unit can be a geographical location or a branch of the office.

Each Organizational Unit needs to be tagged with a Cost Price List. This is to calculate the costing for that organizational Unit, which ultimately leads us to profitability.

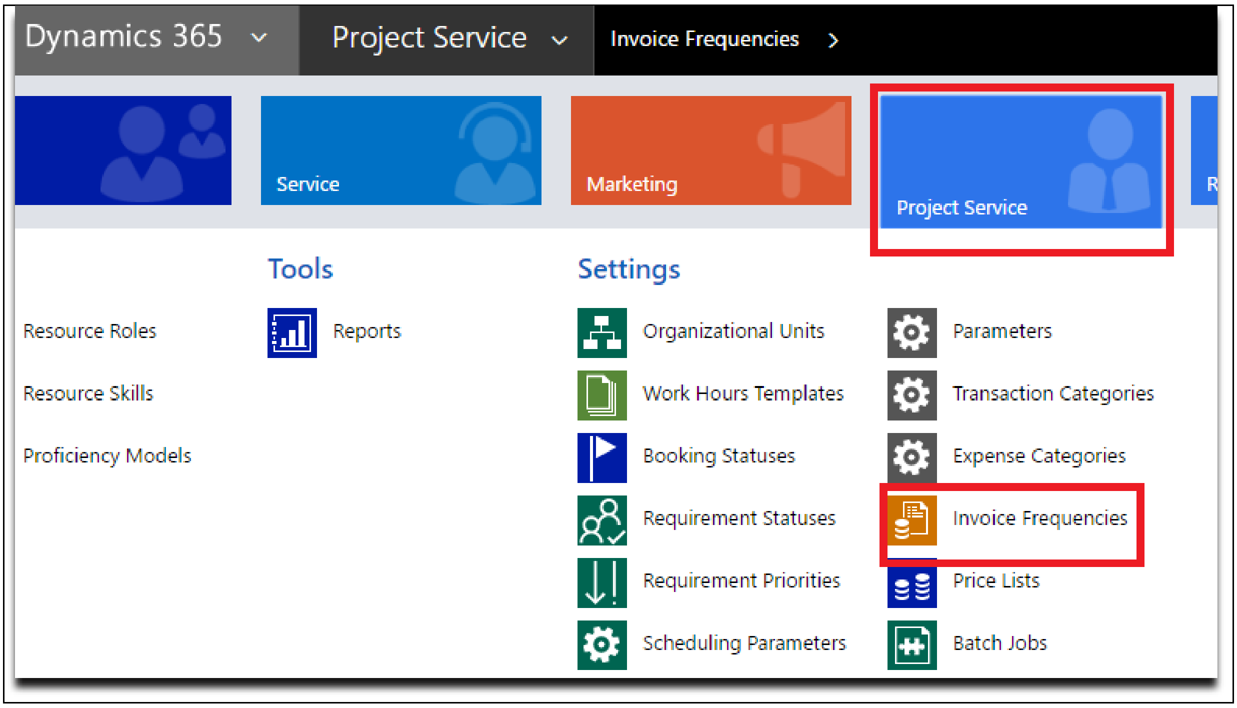
We shall see how to set up price list in Product Catalog Item.



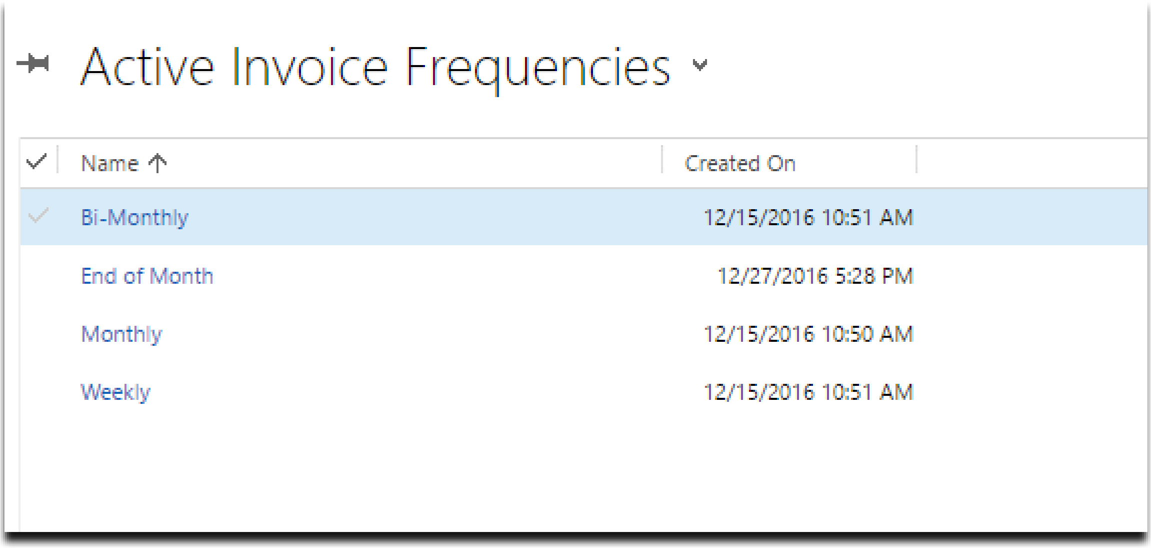
Invoice Frequencies

c. (Project Services → Invoicing Frequencies)

Invoicing frequencies determine, in what interval to bill the client.



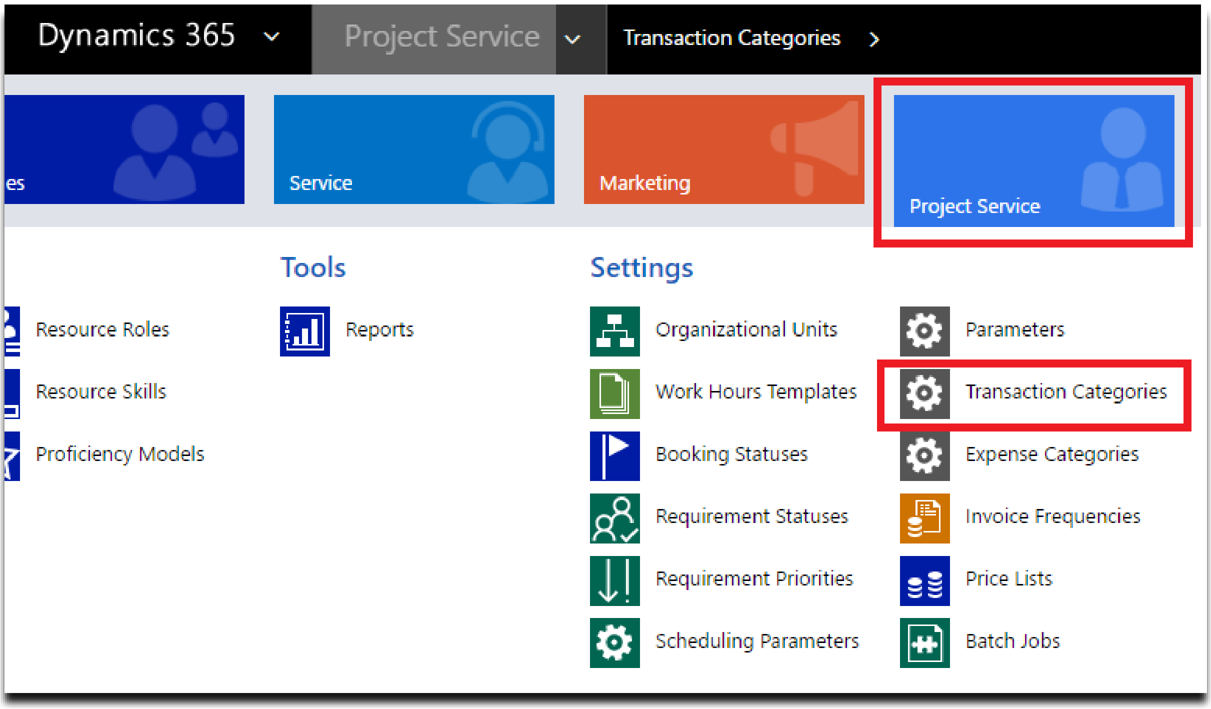
Basically, PSA offers the following 4 Invoicing frequencies that you can set-up as per your need.



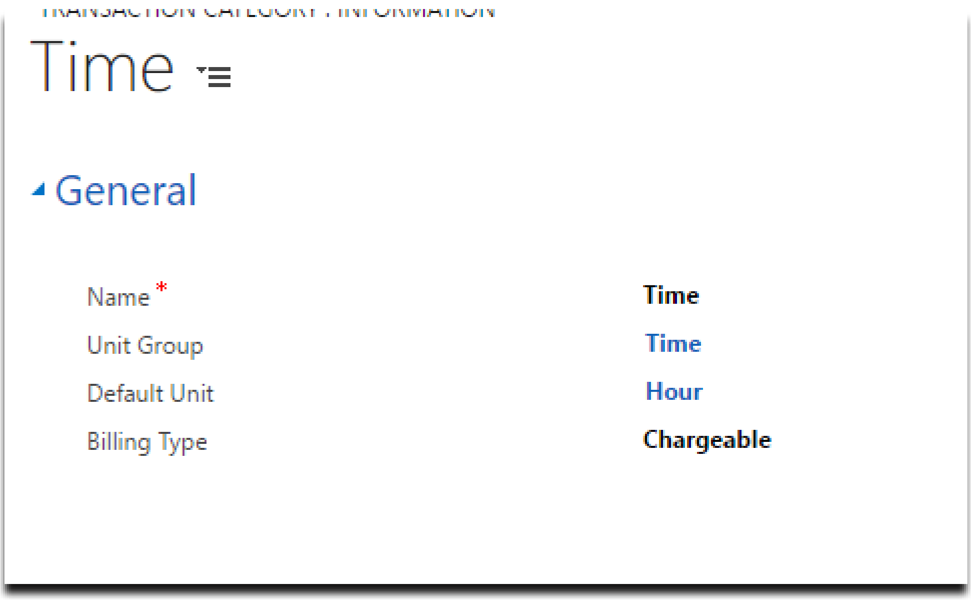
Transaction Categories

d. (Project Services → Transaction Categories)

Transaction Categories are nothing but a 'superset' of expense categories. For example, Expense categories are Domestic Airtravel, International Airtravel. The Transaction category would be Air Travel.

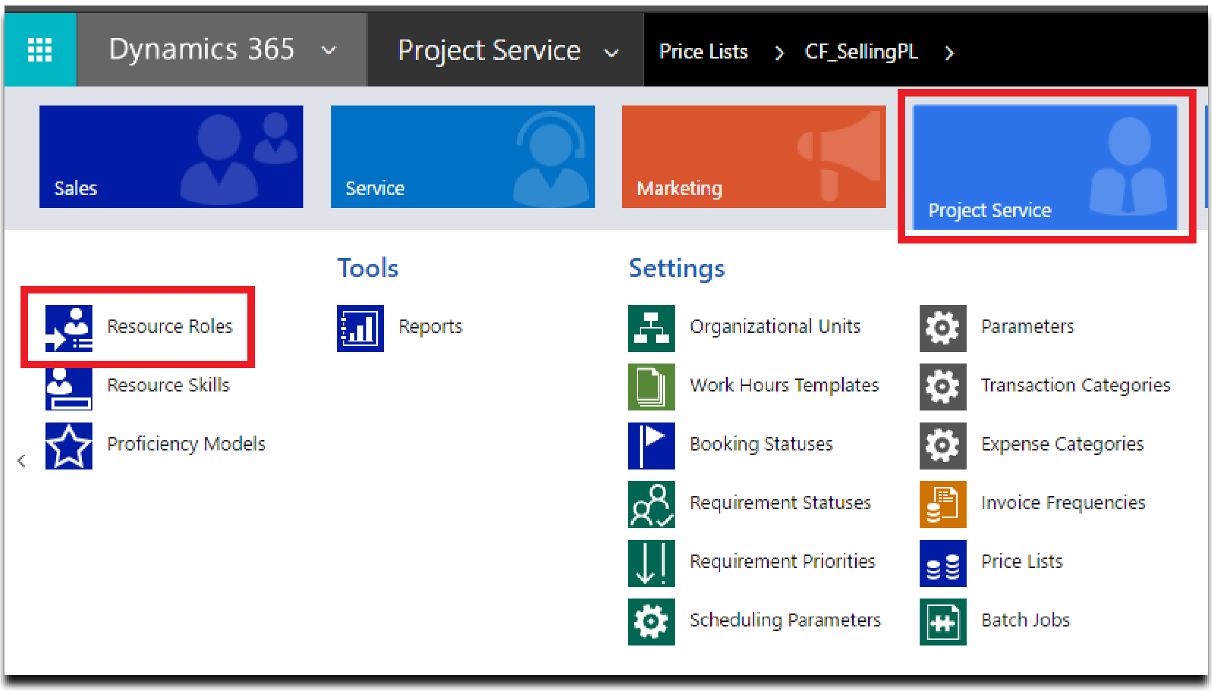


Below is the example of “Time” Transaction Category:



Add Resource Roles:

e. (Project Services → Resource Roles)

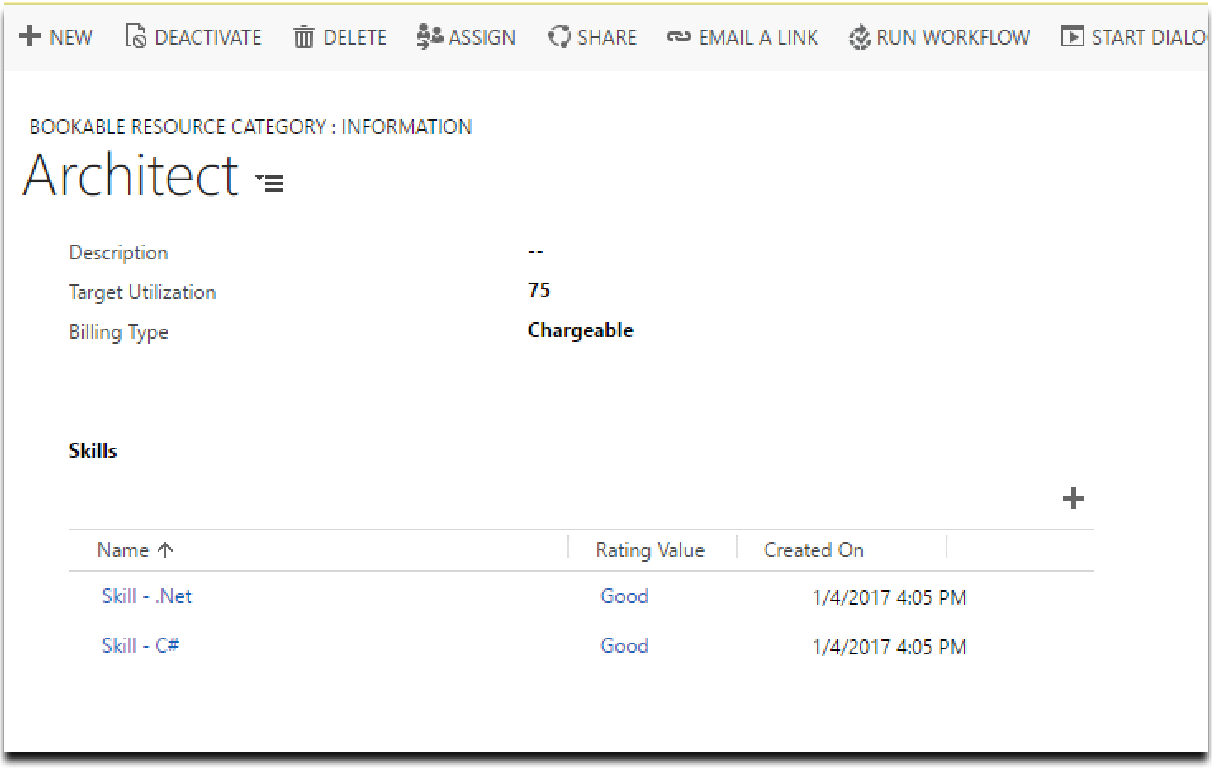


Resource Roles are nothing but, Roles defined in an organization. For e.g. a Software consultancy firm might have following Roles:

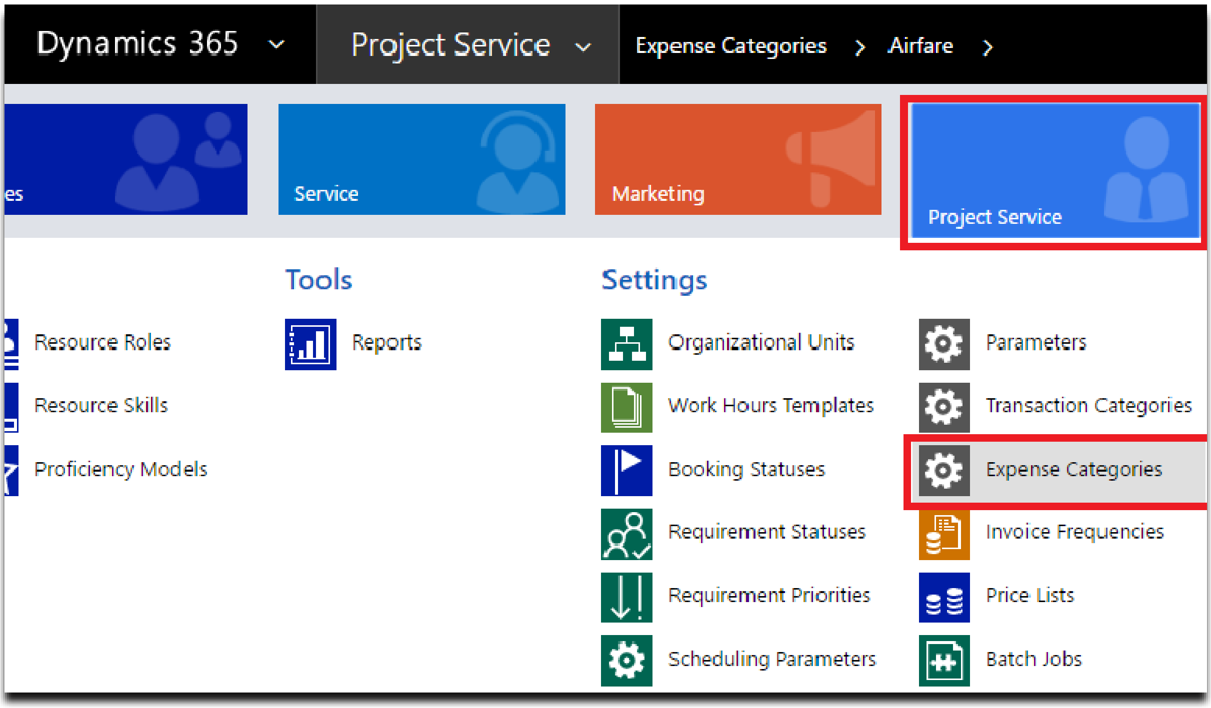
1. Architect.
2. Project Manager
3. Sr. Developer
4. Developer, Etc.

Publish the roles after creating them. Each Role can be tagged with Multiple skills while creating them. For e.g. a Sr. Developer might have following skill set:

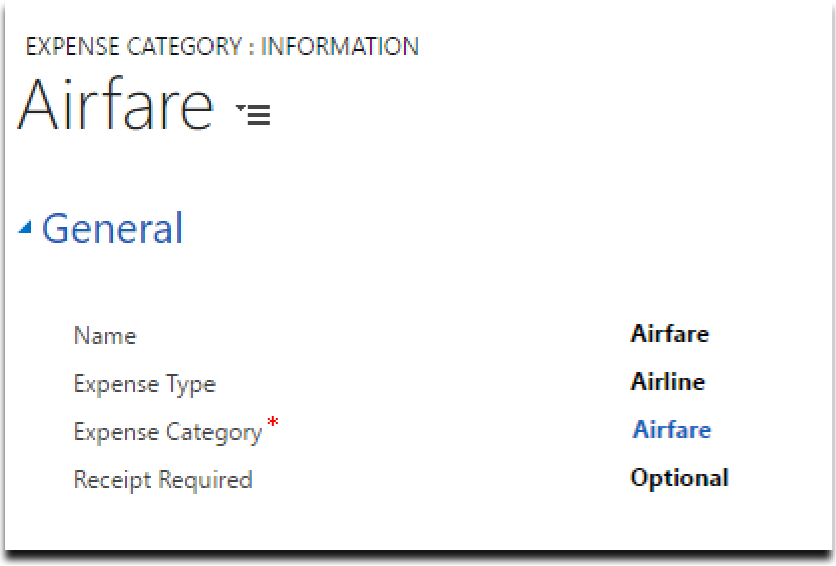
1. .Net
2. C#
3. MVC
4. CRM
5. JavaScript, etc.



3. **Expense Categories**
   a. (Project Services → Expense Categories)



Below is the example of “Airfare” Expense Category:

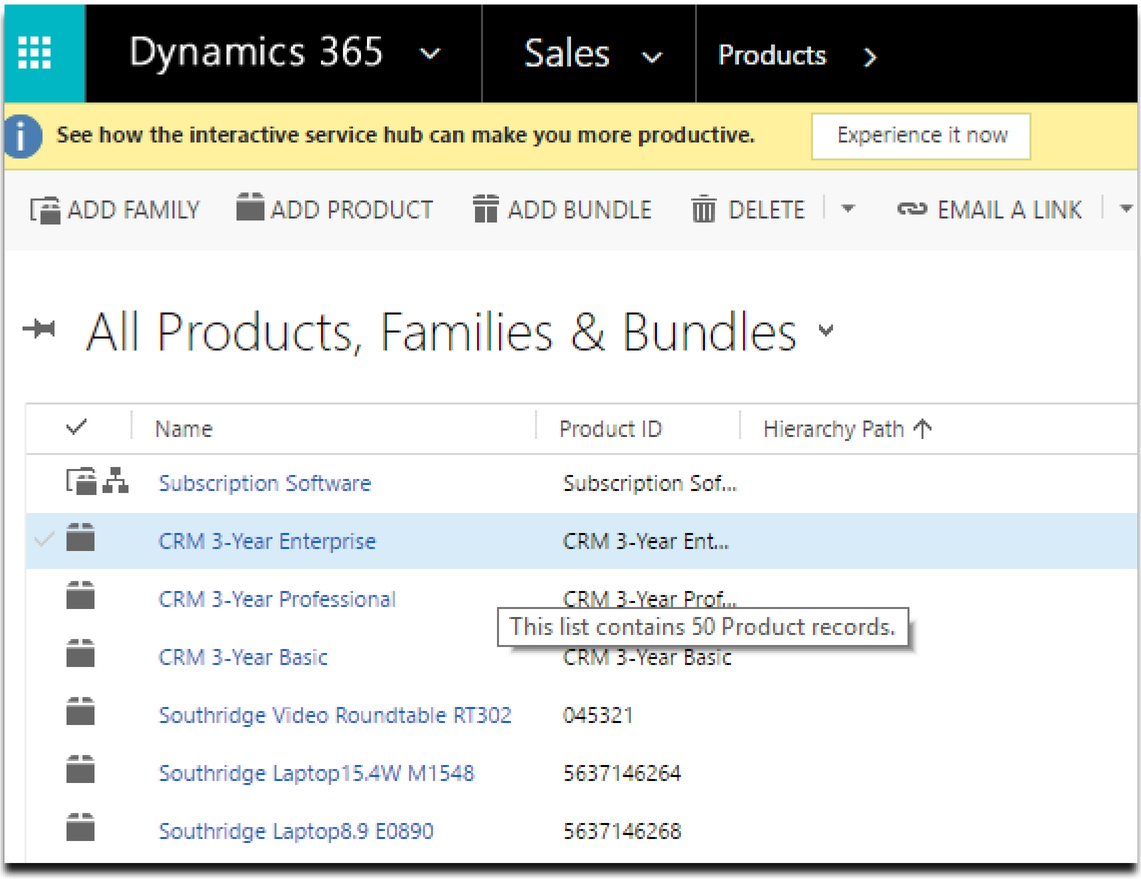


Product Catalog Item

Before setting up a product Catalog we need to do product set up which can be later added to the Price Lists (Catalog’s).

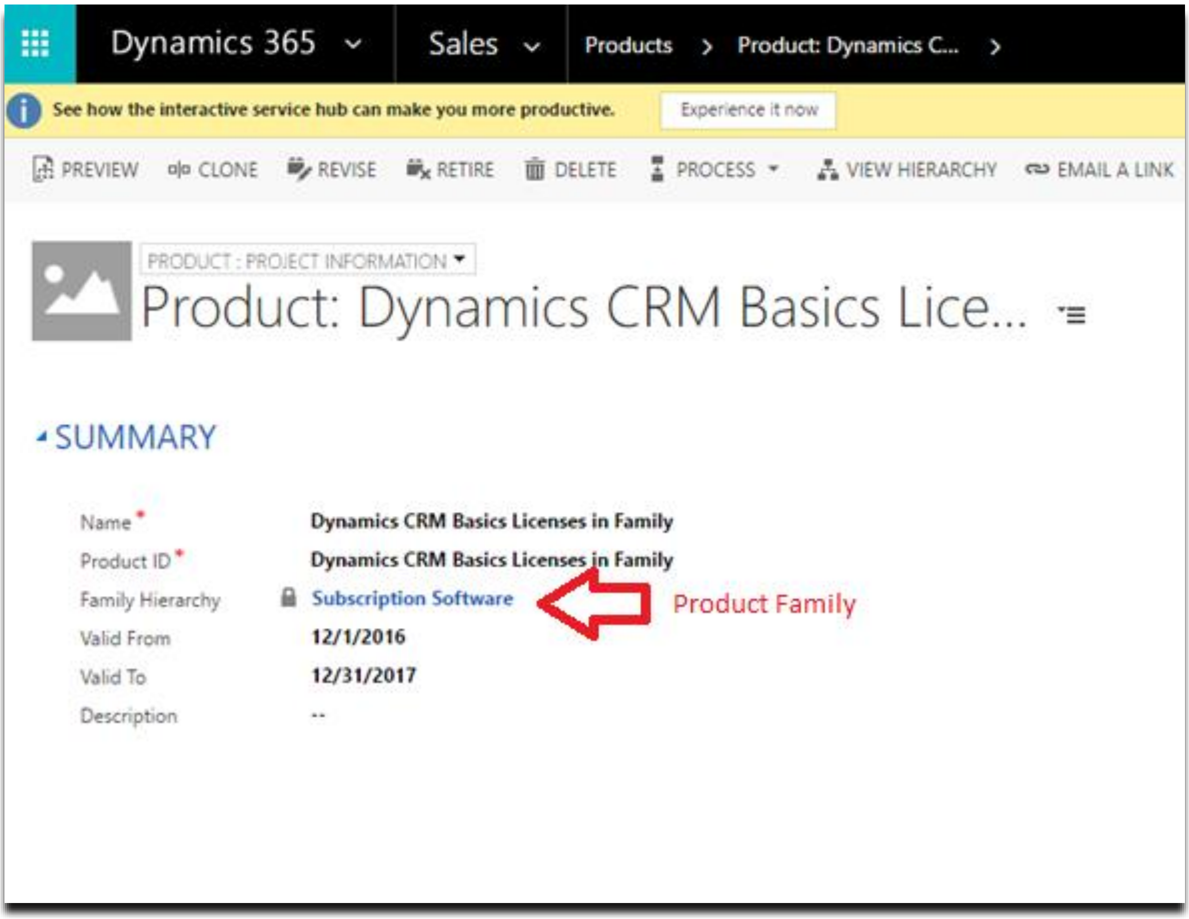
You can either create a Product or Create a Product Family and add products in that.

You can do that by Navigating to Sales→ Products



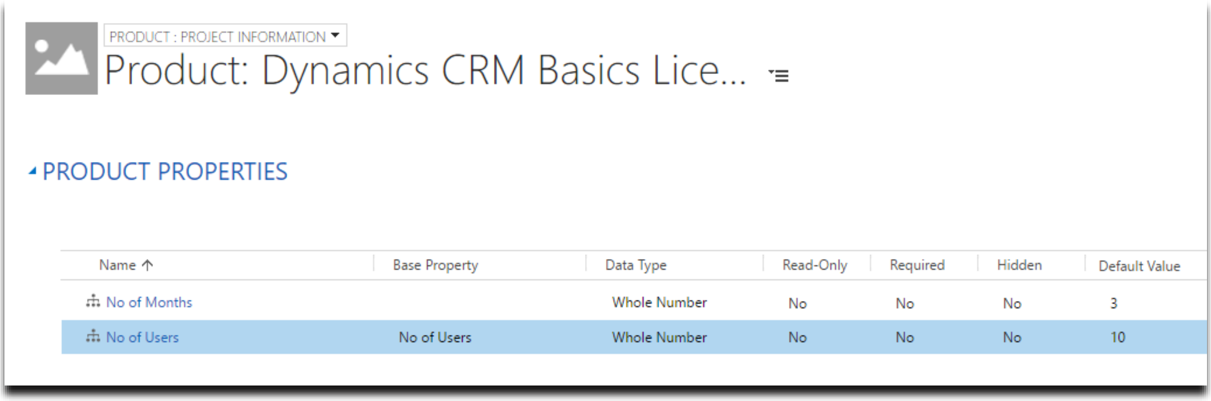
Make sure you publish the product after creating them.

If you want to add a product to a product family then, add the family hierarchy to the product family that you have created as shown below.



To leverage OOB CRM for PSA, we can now define the product properties too.

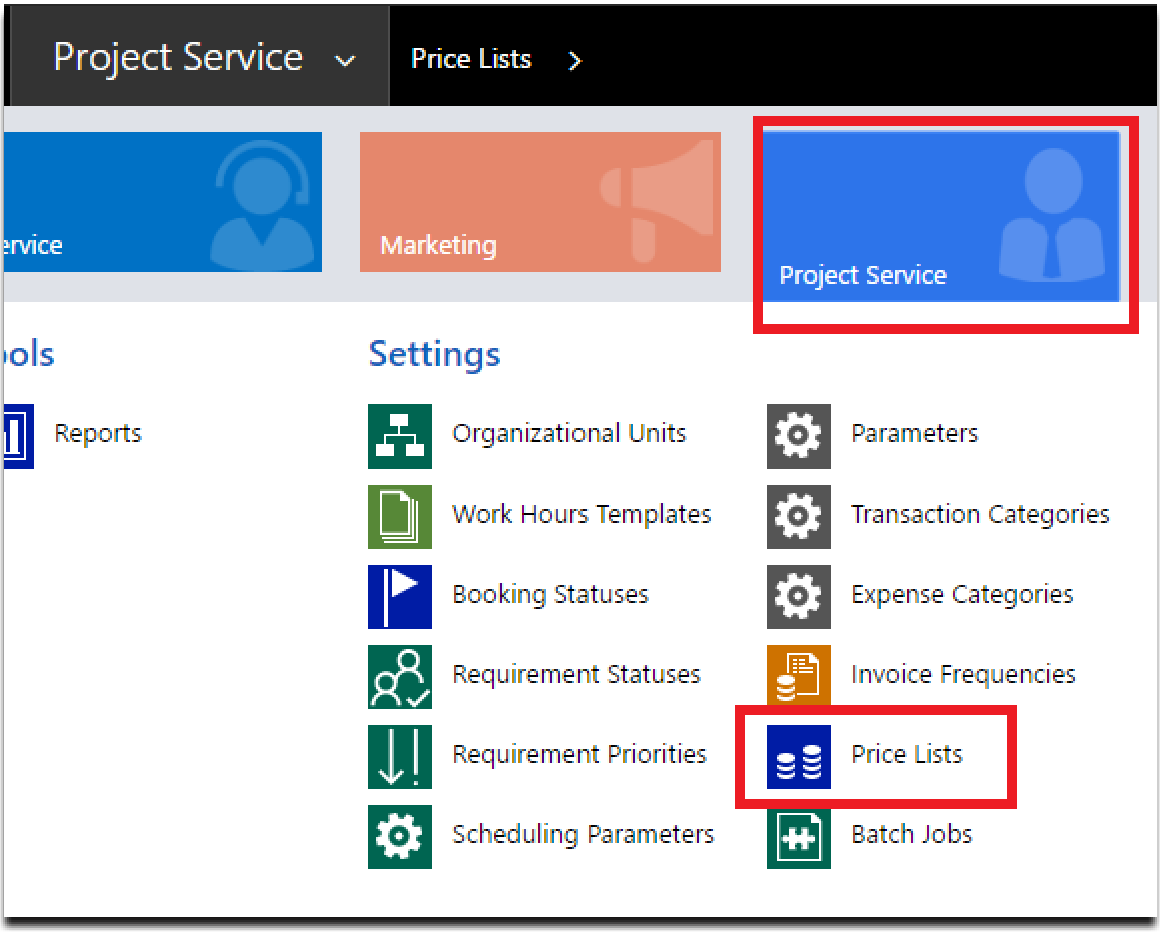
These properties can be defined as per below:



Once the product setup is completed, we can move towards creating the price lists.

PSA leverages OOB Pricelist entity by adding a field called "Context". It has 2 values, "Sales" and "Cost". Sales means the defined price list will be a Sales Price list and Cost, means the defined price list shall be a Cost Price list.

For creating a price list, navigate as shown below:



For creating a Price List, we need to set up 6 basic things:

1. Price List Name
2. Price List validity (Start Date and End Date)
3. Currency
4. Role Prices
5. Category Prices
6. Price List Items

Role Prices

PRICE LIST : PRICELEVEL

CF_SellingPL

Name *	CF_SellingPL	Description	--
Context *	Sales		
Start Date	12/1/2016		
End Date	11/30/2017		
Currency *	US Dollar		
Time Unit	--		

Role prices

Role ↑	Resourcing Unit	Unit	Price	Currency	Description
Developer	CloudFronts Technol...	Hour	$100.00	US Dollar	
Developer	CloudFronts Technol...	Hour	$100.00	US Dollar	
Project Manager	CloudFronts Technol...	Hour	$200.00	US Dollar	

Category Prices

PRICE LIST : PRICELEVEL

CF_SellingPL

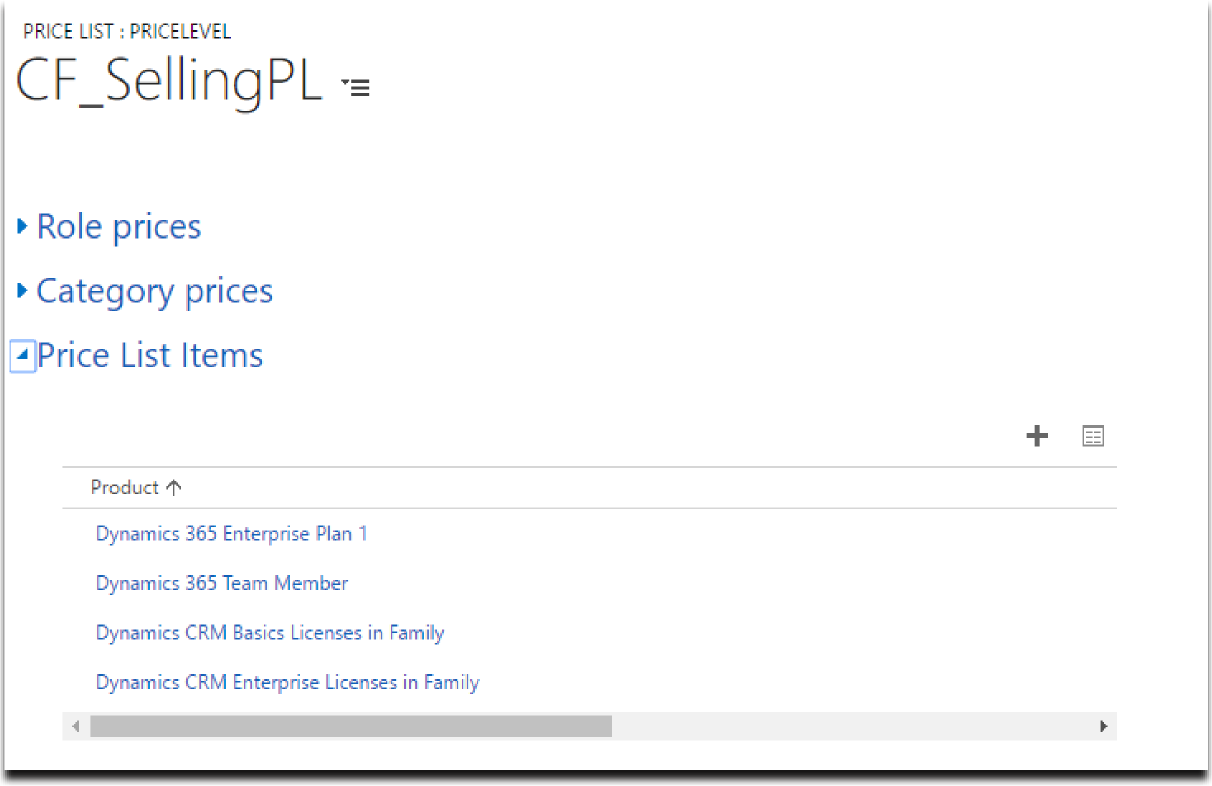
End Date	11/30/2017
Currency *	US Dollar
Time Unit	--

Role prices

Category prices

Transaction Category ↑	Unit	Price Calculation	Percent	Price	Currency	Description
Mileage	Primary Unit	At cost	0.00	$0.00	US Dollar	
Travel	Primary Unit	Price per unit	0.00	$0.50	US Dollar	

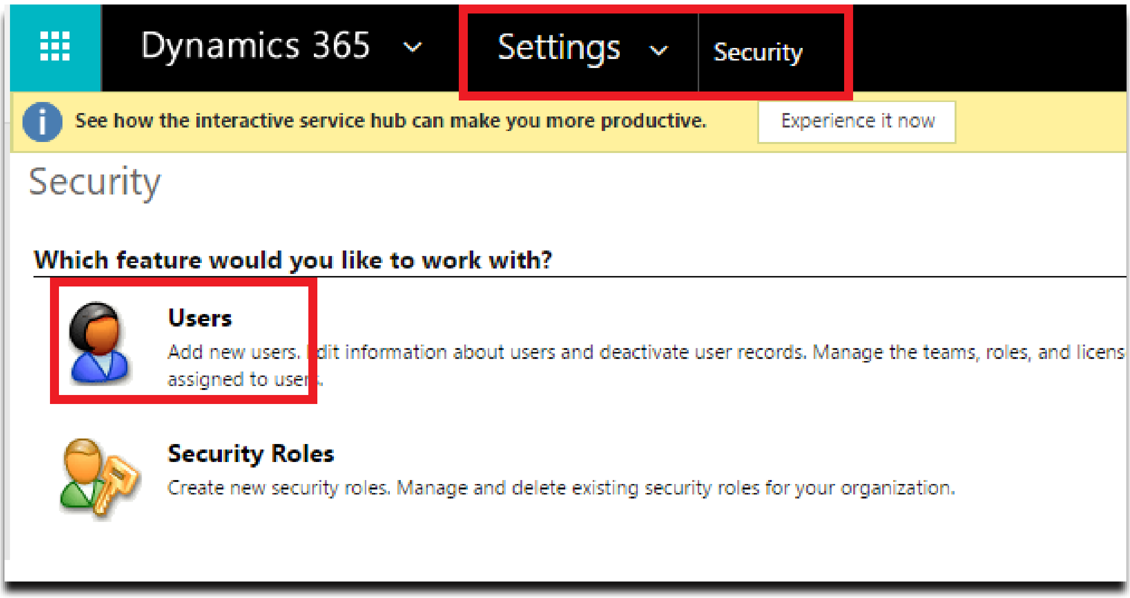
Price List Items



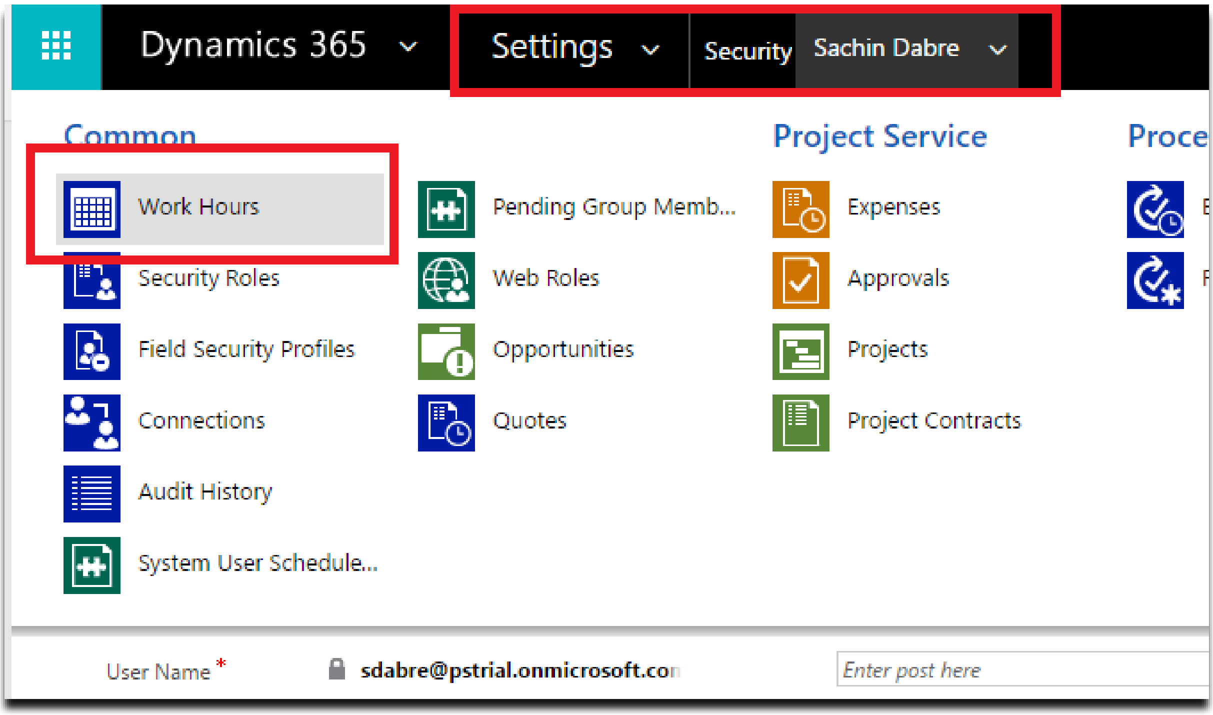
Create a work template

b. (Settings → Security → Users → Work Hours)

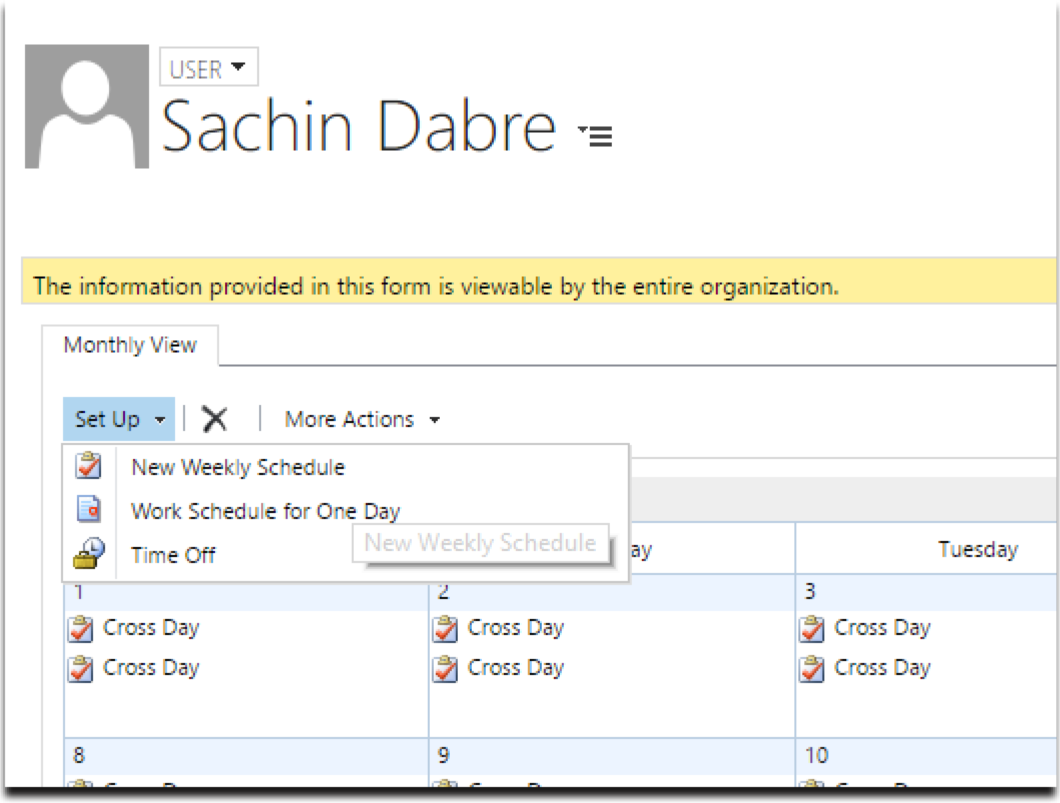
Work hours define each users' working hour. This helps, when the resources work in shifts in an organization.



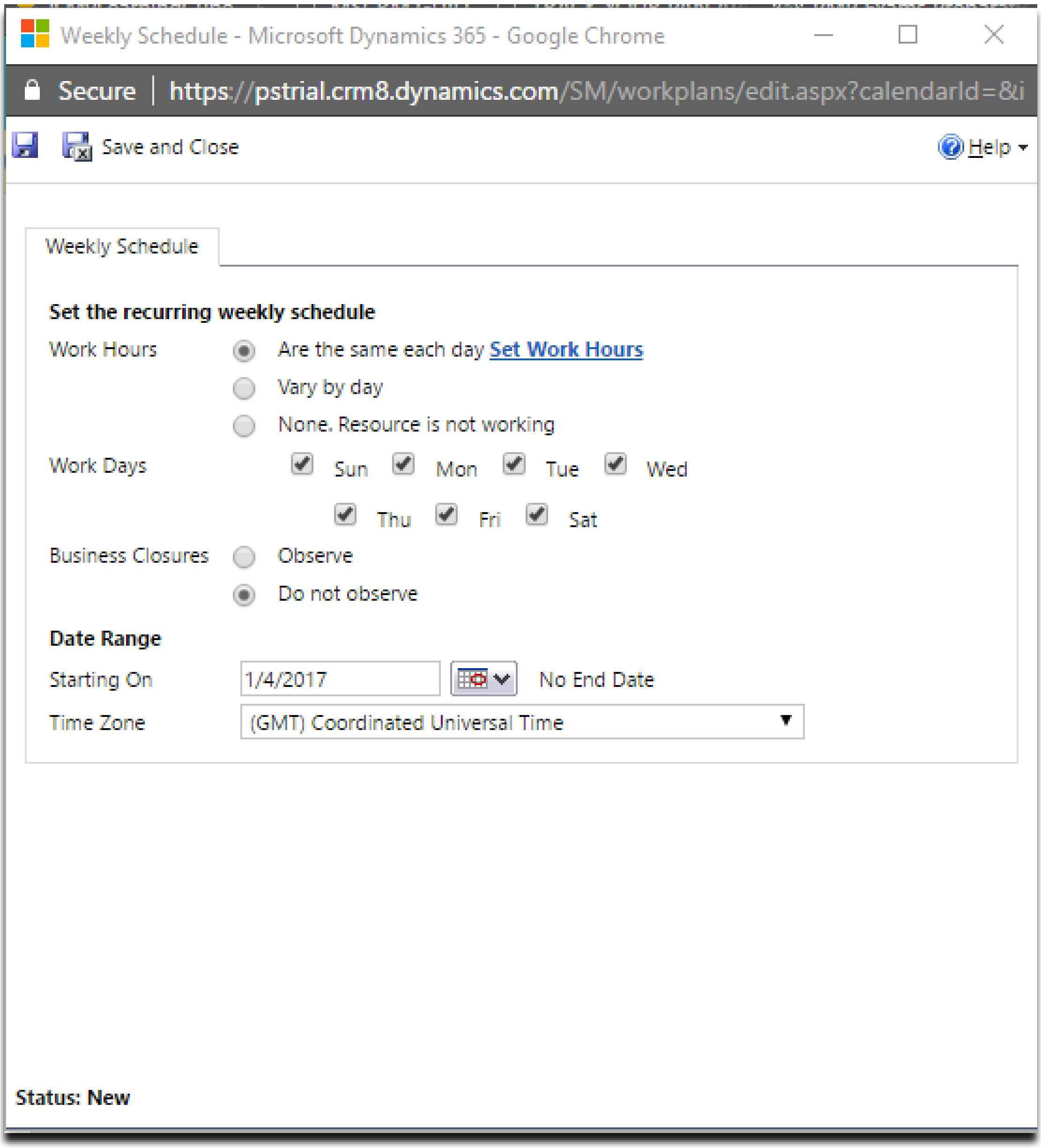
Open a user and navigate to "Work Hours".



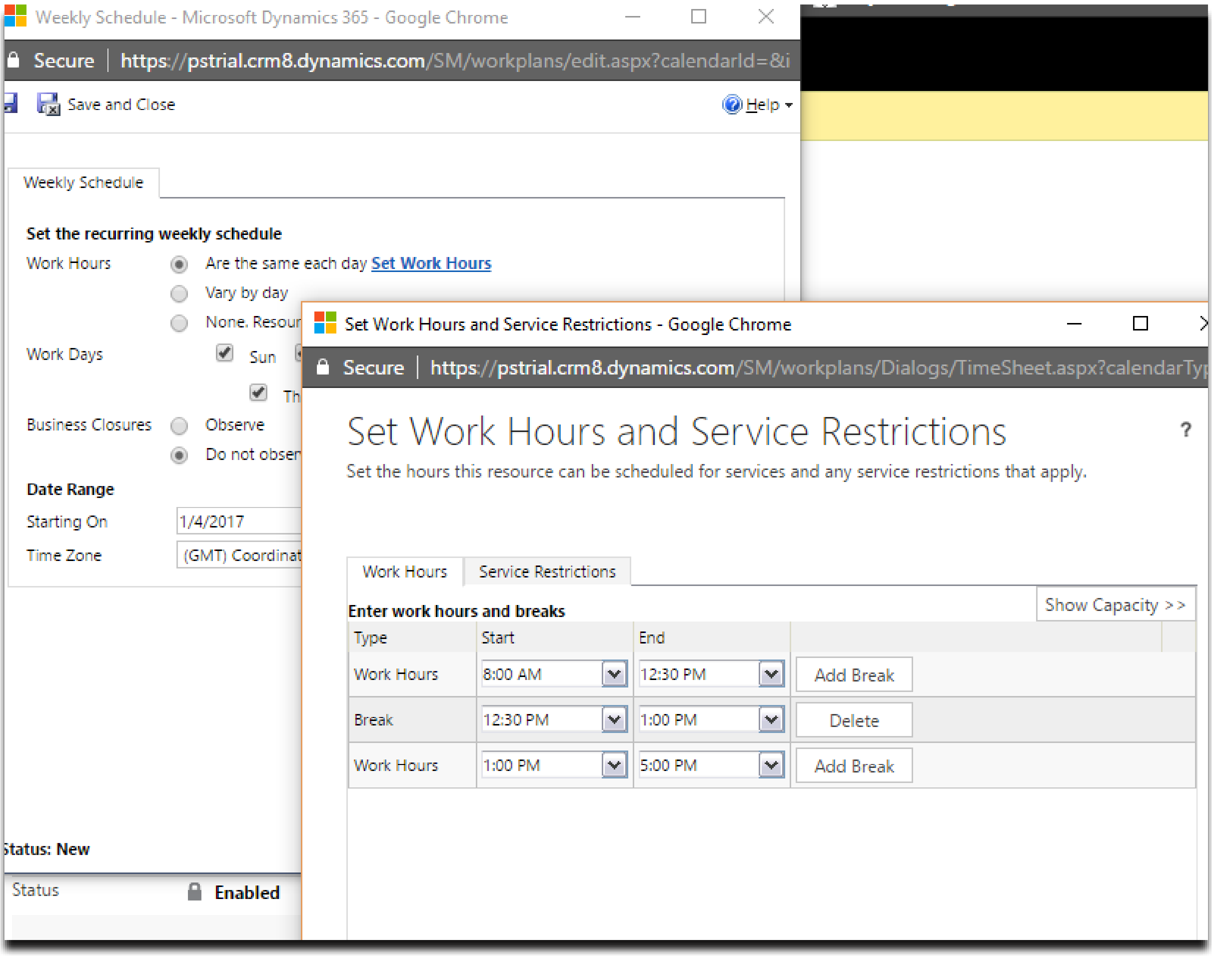
Click on Setup and "New Weekly Schedule"



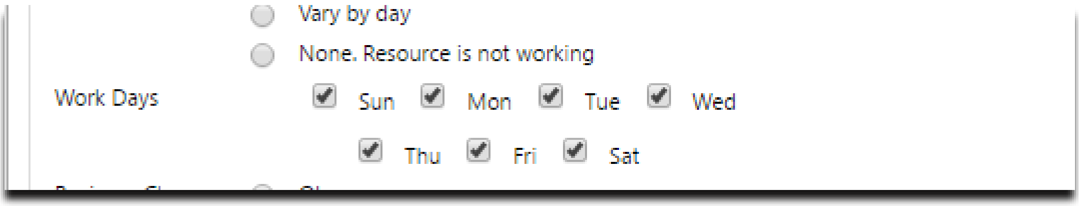
A Pop Up opens



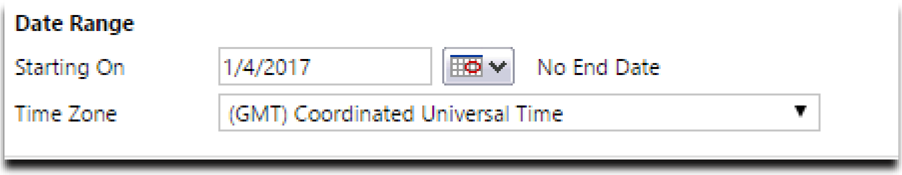
Click on Set Work Hours, define the working hours, add break if you want and click OK.



Select the “No of Days” the resource works in a Day.



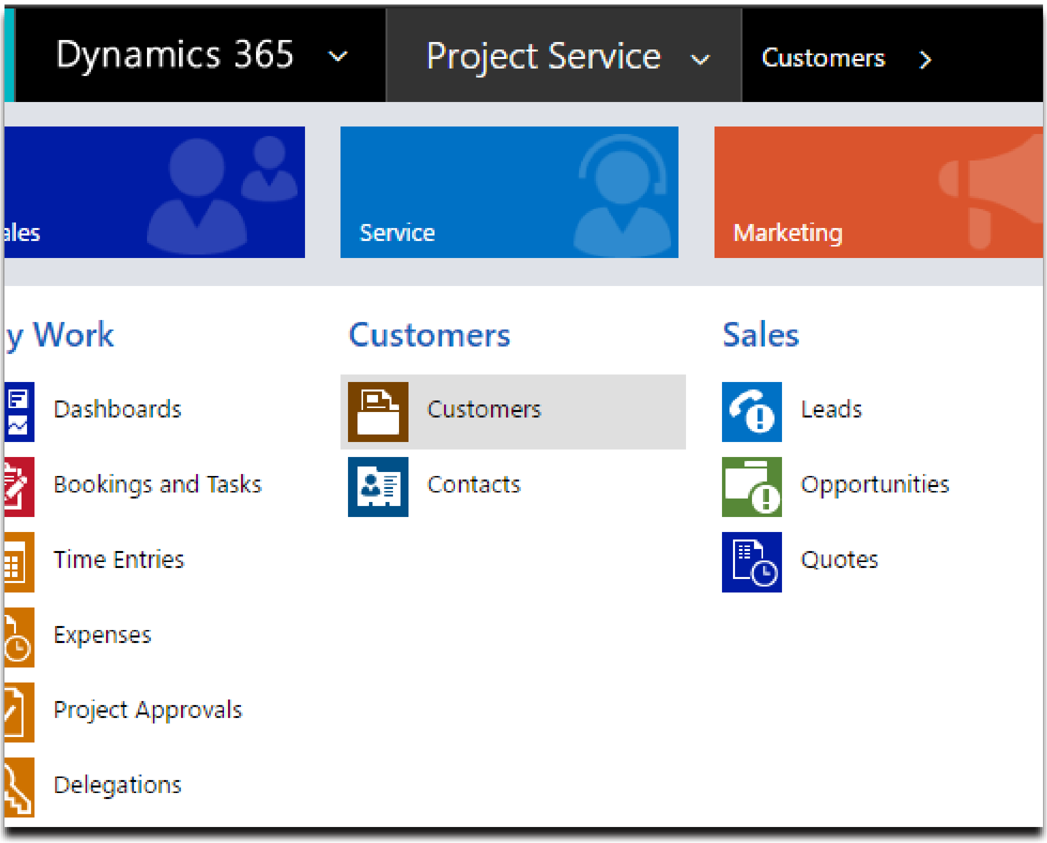
Set the “Starting On” and “Time Zone” in which the user works:



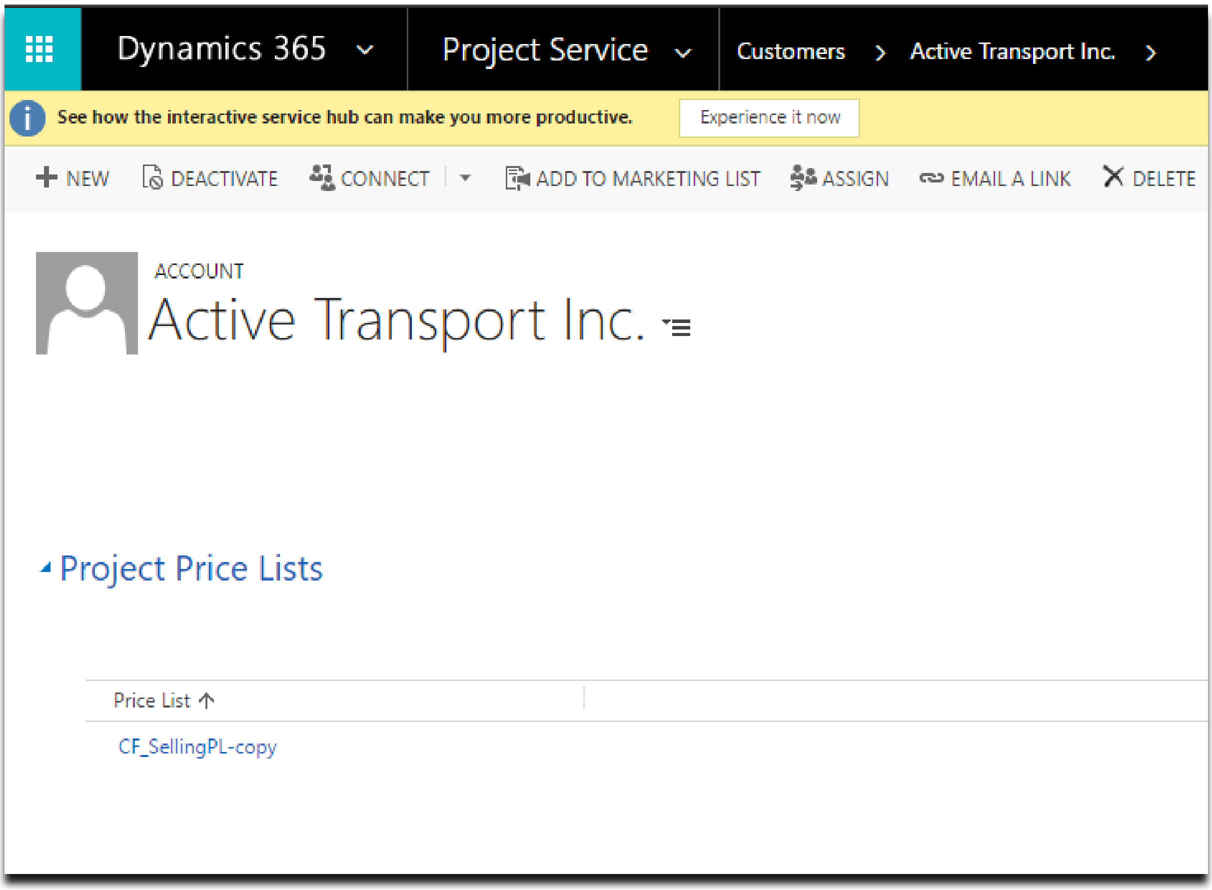
Create a customer

c. (Project Services → customer)

Before we head towards creating a project, we should have Customers (Accounts) in the system.



Once you create a new customer you can tag a default price list against a customer.



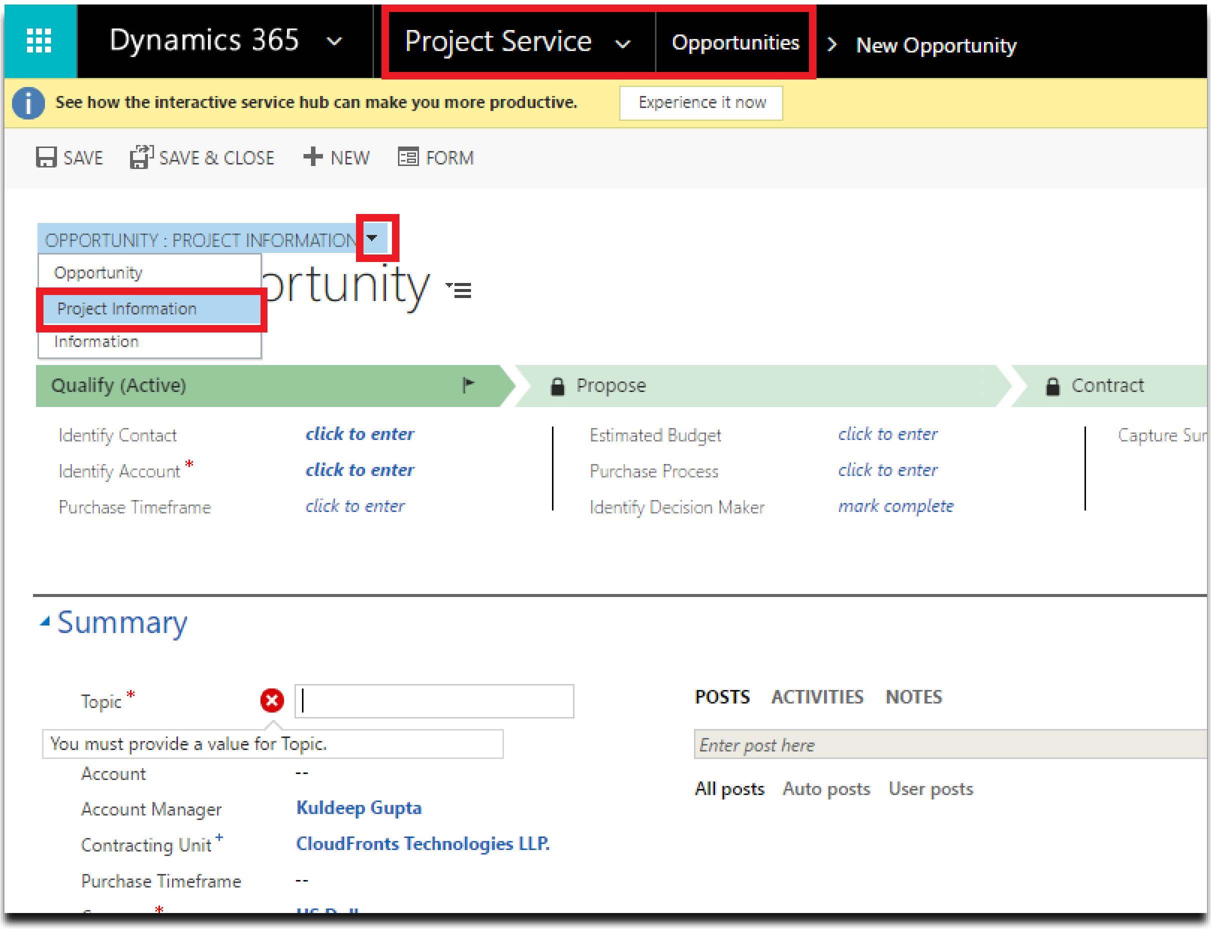
This should always be a Sales Price List. Also, do not forget to Activate the customer once created by hitting the Activate button in the Ribbon control.

Opportunity Management

After we are done with the Basic Setup of the Product. We are now ready to use it. In this part of the e-book, we are going to move towards project creation right from Opportunity Stage→Quotation Stage→Project Contract Stage→closing the Sales Cycle.

Opportunity Stage

The first stage to move towards project creation can probably be creating an opportunity. For creating and opportunity you need to traverse to (Project Services →Opportunity) and create a new opportunity.

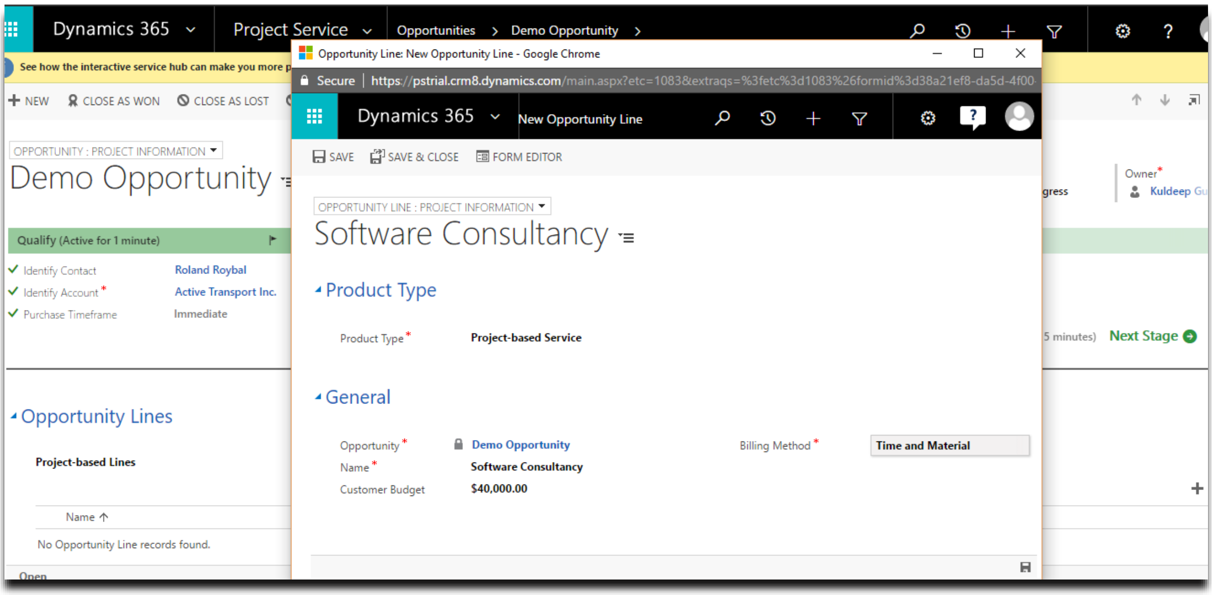


Fill out all the required information. At this point we are in the Qualify stage of the Business Process Flow.

Once you are done, Save the opportunity. Once you save the opportunity you may enter opportunity lines in case you wish to enter.

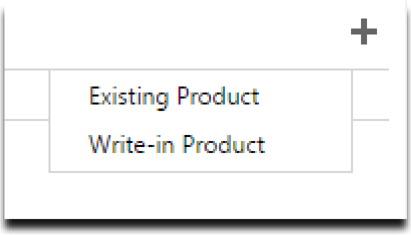
There are 2 types of Opportunity Lines to enter, **Project Based Lines** and **Product Bases Lines.**

Project Bases Lines are lines that we add for project for instance Software Consultancy or anything related to project development from IT stand point.



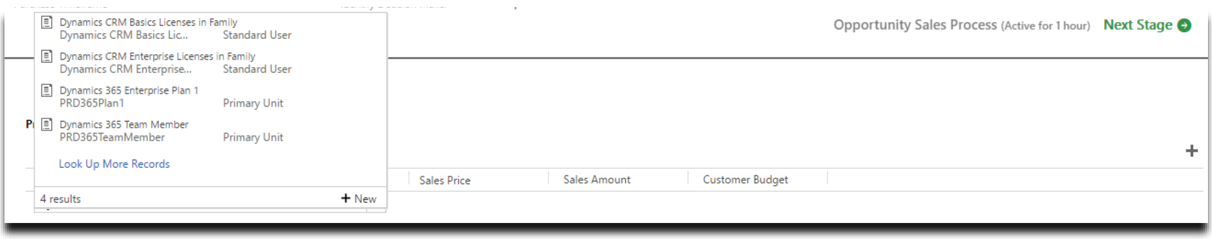
Product Based Lines are lines that we add for the products that we offer clients. For e.g. D365 Basic License, D365 Enterprise License, Office 365 E3 licenses**.**

Here we have 2 options when we add Product Based Lines



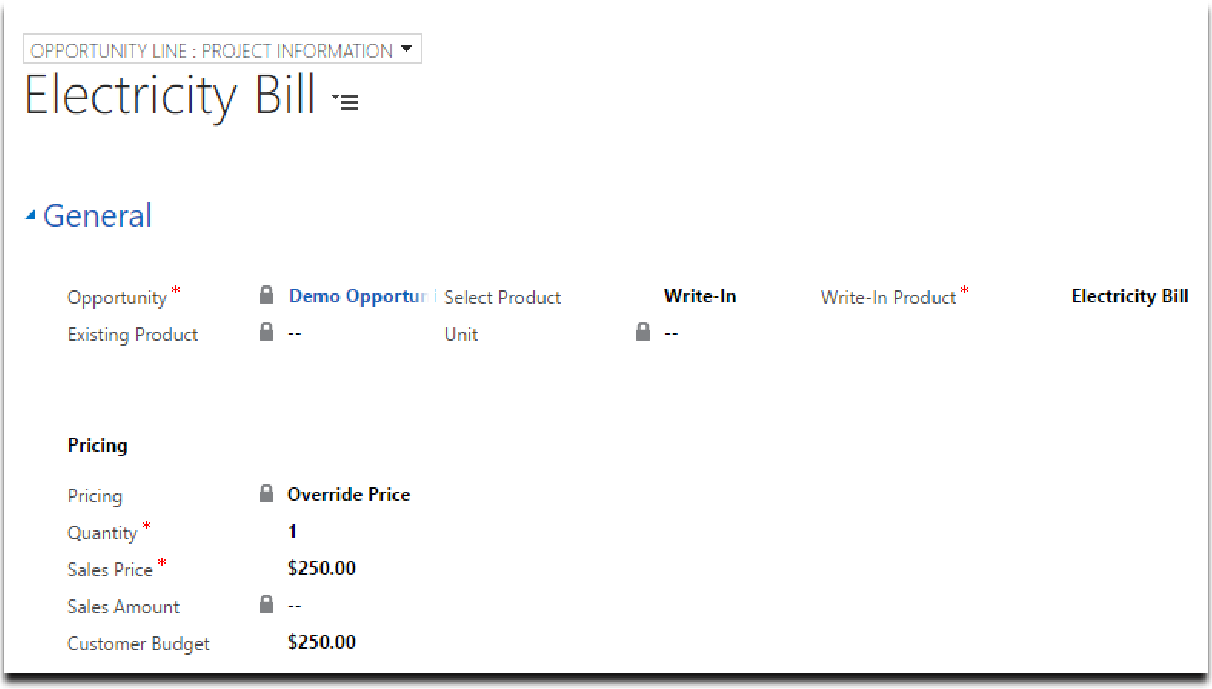
Existing Product adds the product from the price list that is tagged on the opportunity. Generally, if a customer while creating is tagged with a Price List then, the same price list flows in by default to the opportunity as soon as the customer is selected while creating the opportunity. This can be overridden by selecting a different Price List if needed. This should always be Sales Price List.

Upon selecting the **Existing Product** option, we can select the product from the price list by typing the product name.



Upon selecting the product, we can edit the properties that we defined while creating the product in [Product Catalog Item](#).

Upon selecting the **Write-In Product** option the below form opens. You can fill in the details and add the write-in product to the Product Based Lines Grid.



Once we are done with adding the Project Based and Product Based lines, we can move to the next stage by hitting the Next Stage button on the Business Process Flow.

When you hit the Next Stage Button there are two options that we have:

1. Select an existing Quote
2. Create a new Quote.

At this juncture, we assume we do not have a Quotation in the system and we need to create one.

So, we hit the Create + button.

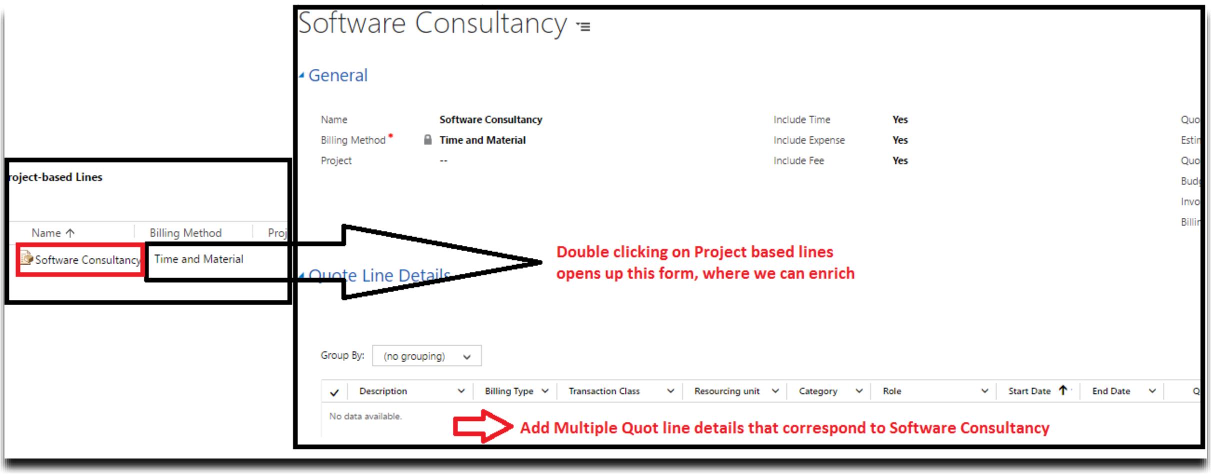
A few changes that takes place on the form are:

1. We move to the next stage of the Business Process Flow, i.e. Propose.
2. We navigated internally to Quote Entity, where in the Quote is in Draft state.

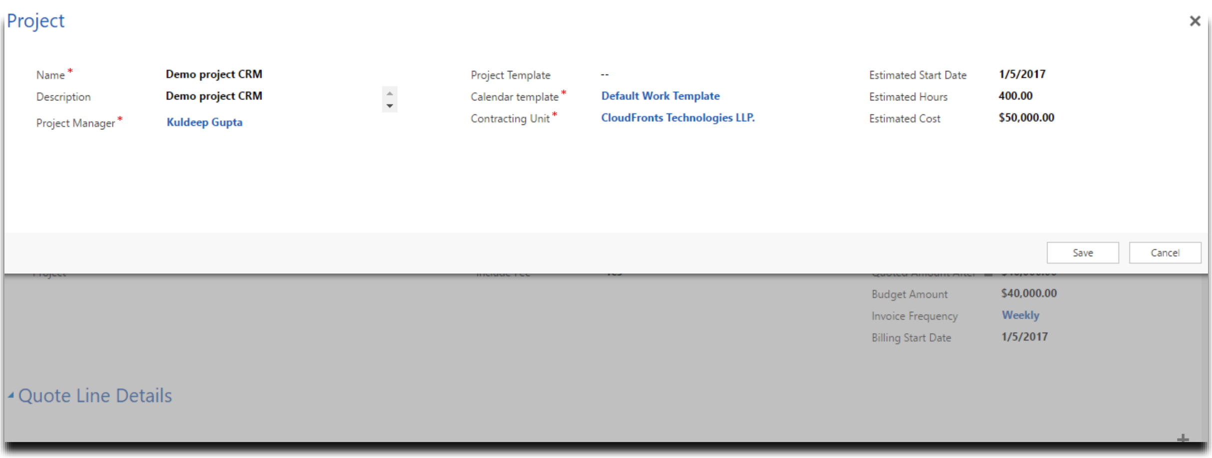
Quote Stage

If we observe here on the Quote form all the details, including the Project Based and Product Based lines are rolled over from Opportunity Phase.

In Quote stage, we need to dig deeper inside each **Project-based Lines** and define them.



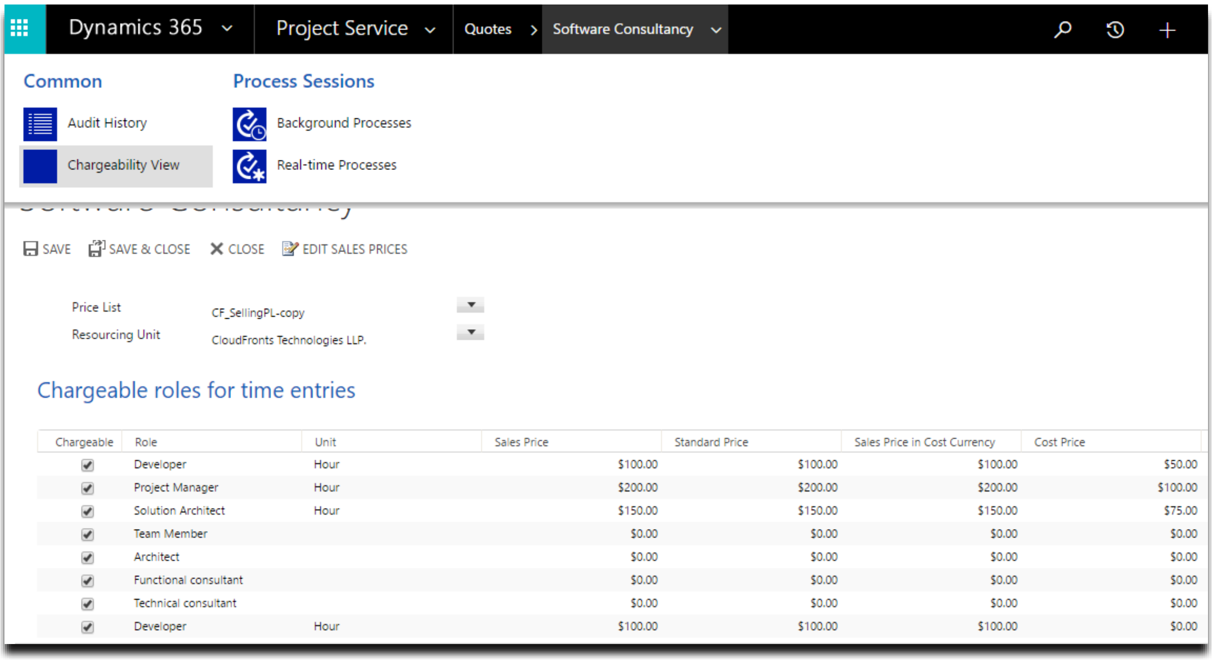
At this juncture, you can also select the project from the lookup or create a new one. For now, we assume we need to create a new project. When we hit on the New button in the look up a Quick Create form opens which asks us the basic details of the project header.



Upon clicking on Save the Project gets created and gets tagged to the Opportunity.

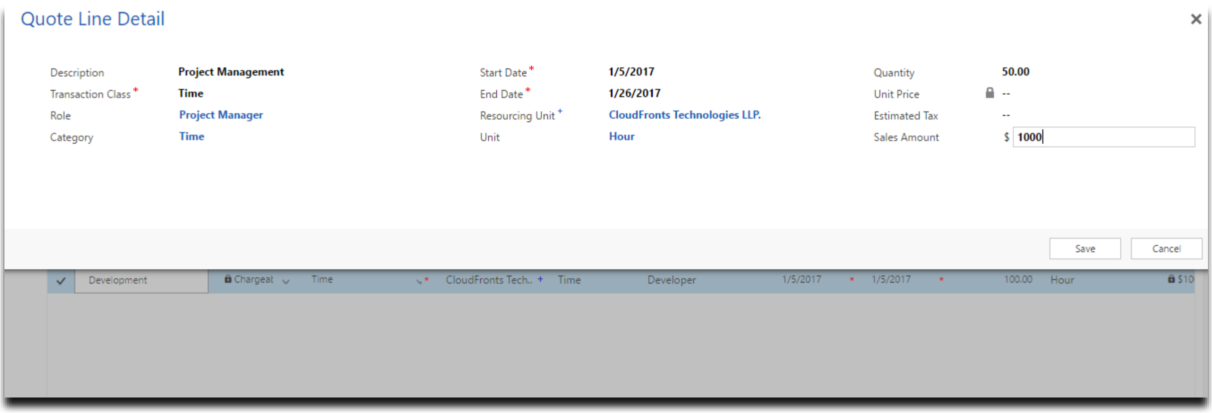
On the Quote form if you wish to check the chargeability View you can click on the **Chargeability View** button from the menu as guided below. This chargeability view tells us the role prices that we are offering to the customer also it tells us the costing per organizational unit. This all comes from the pricelist which is tagged at the opportunity level and the costing comes from the role prices at organizational level.

We also have an option to modify the sales prices here by clicking on the **Edit Sales Price** button.

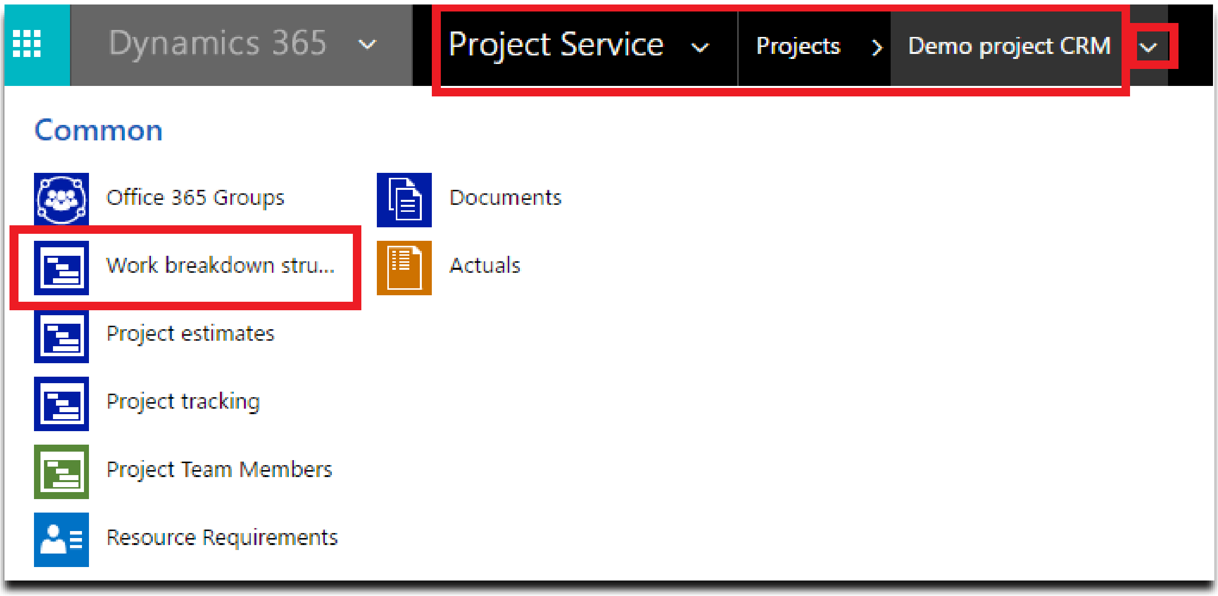


Coming back to Quote Lines there are 2 options we can add the Quote lines.

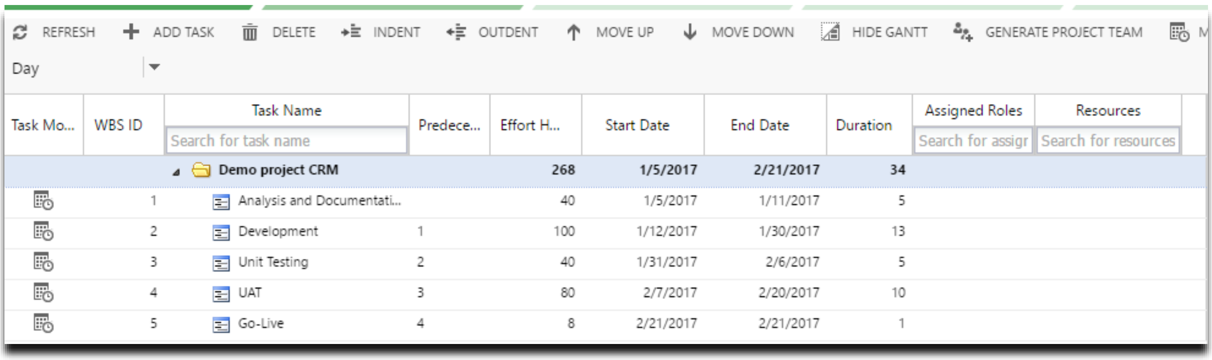
1. Add the lines manually:
   Here we click on the plus icon over the grid and Quick Create form for Quote Line Detail opens. We can fill in the required details for the Quote line and save that line. Upon saving that line appears in the Quote Line grid.



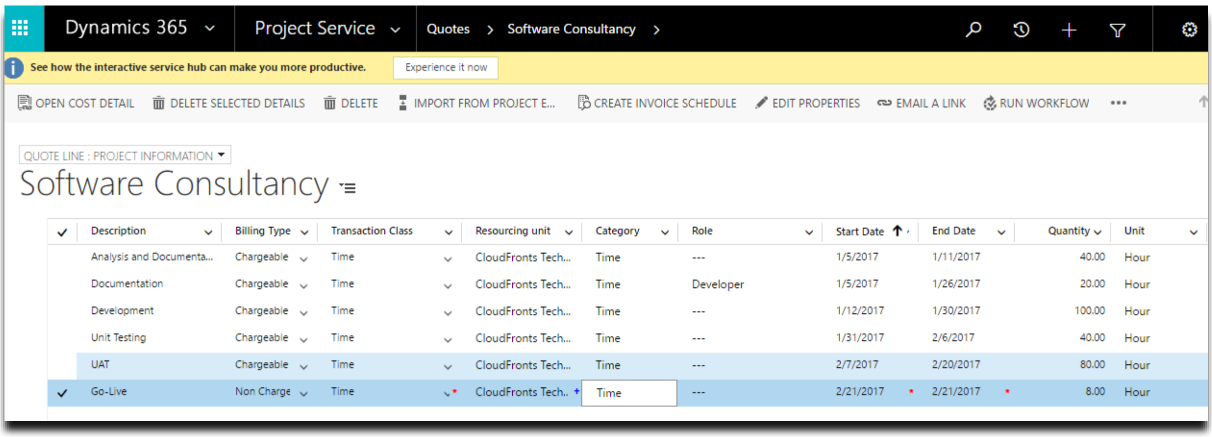
2. Import them from Project Lines:
   Here we have a facility to import all the lines from Project's WBS (Work Breakdown Structure). To create the lines in WBS, you can navigate to Project Services→Projects→ open the project→ Work Breakdown Structure.



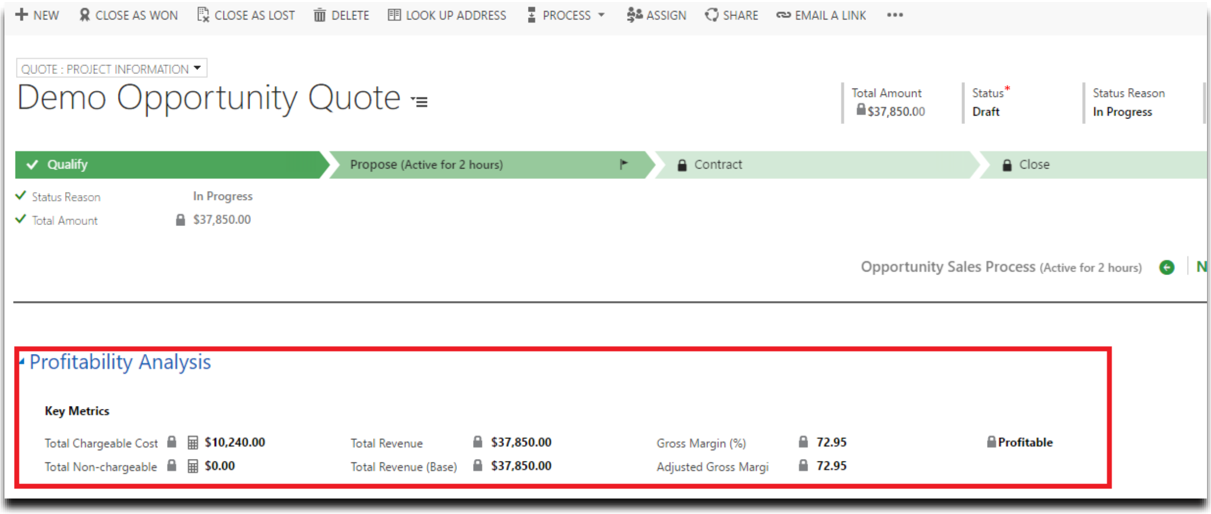
Work break down structure is where you plan your project, add tasks and do other activities with it which we shall see later in this document. Below is how WBS looks after adding a couple of tasks.



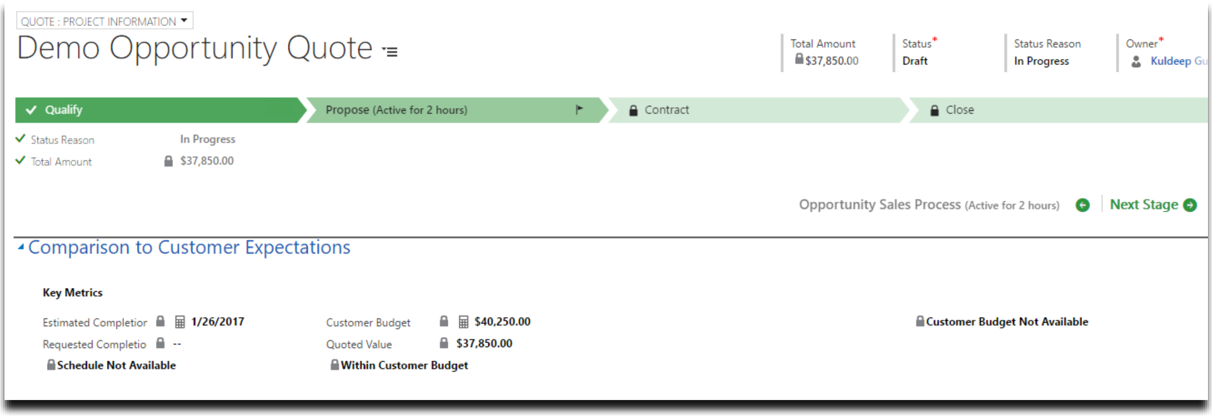
Once this is ready, we can hit on "Import from Project Estimation" button on the ribbon control. This will bring in all the line details from the project in Quote Line Details.



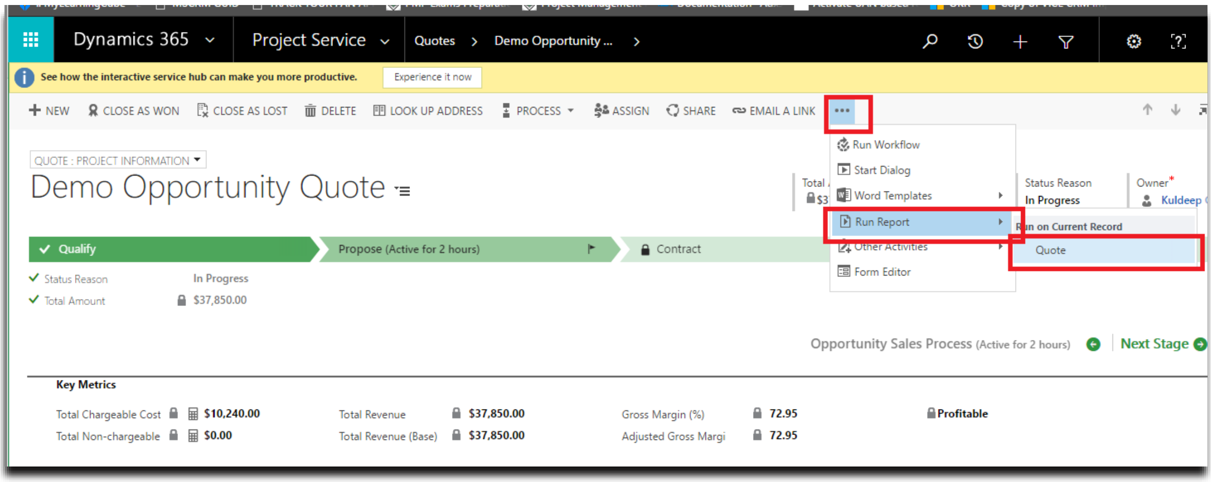
On the Quote form, we can Check the Profitability of the project by visiting the **Profitability Analysis Section** on the quote.



We also can do a Comparison to Customer Expectations

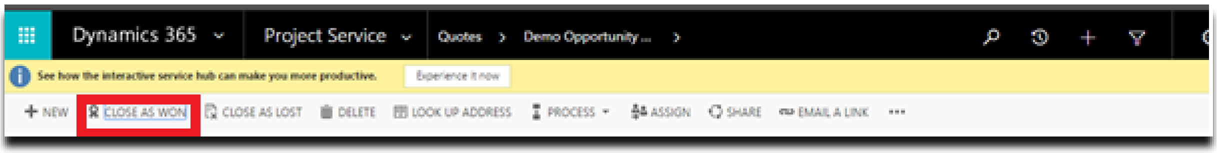


Once we are done with the Quotation we have a nice report that we can extract and send out to the customers. This can also be customized as per personal need.



Contract Stage

Once the quote is accepted by the Customer the next stage to create a contract of the deal. For this we need to mark the Quotation “CLOSE AS WON”. Upon doing this it automatically created the contract of the quote.

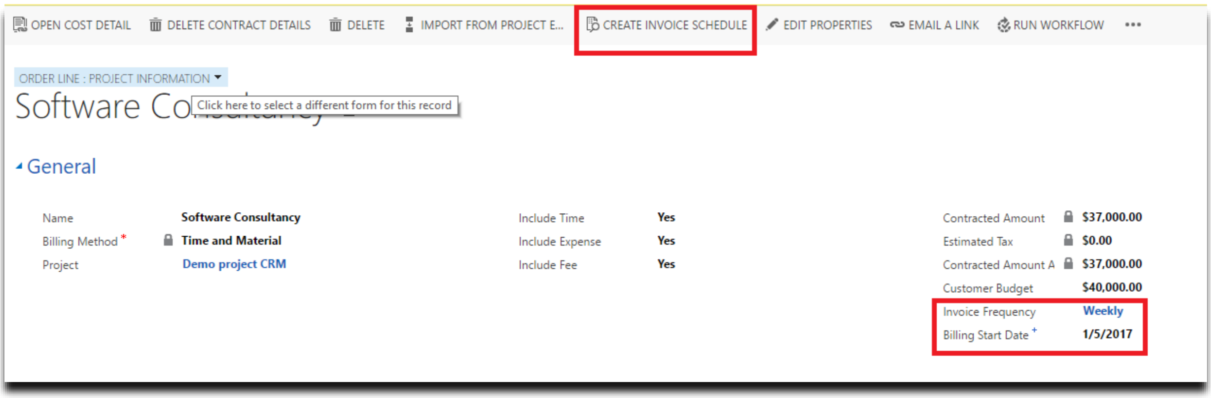


After the contract is created, for each Project Based Contract lines we can generate the Invoicing schedule.

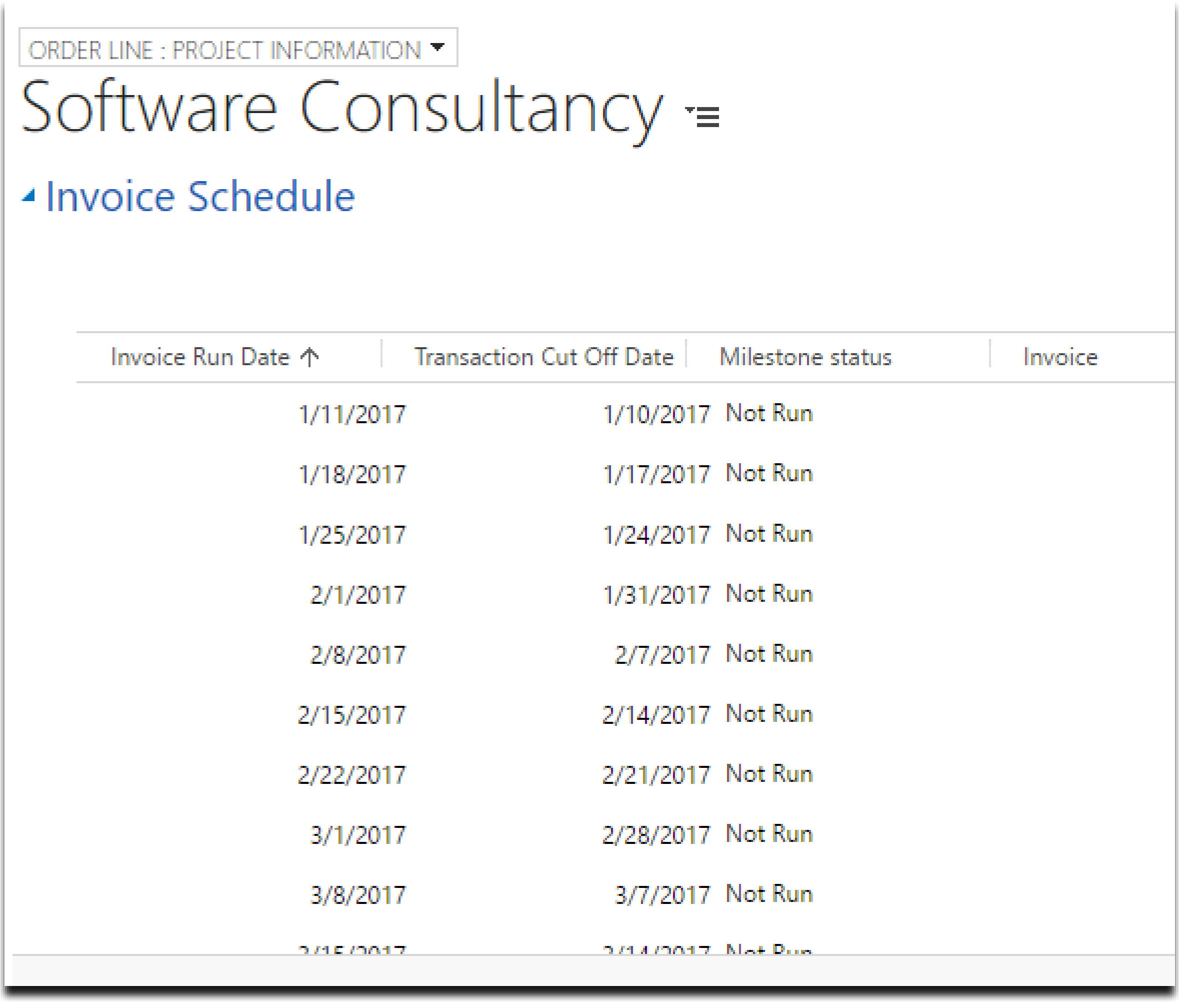
There are 2 types of Invoicing Schedule that can be generated:

1. Billing Frequency Based
   This gets generated for Project Contract Lines which possess Billing Method as “Time and Material”.

   To generate the billing frequency, click on the button “CREATE INVOICE SCHEDULE” on the ribbon control.



   Once done, you can see the Schedule defined as per below:



2. Milestone Based

This gets generated for Project Contract Lines which possess Billing Method as “Fixed Price”.

To generate the billing frequency, click on the button “GENERATE PERIODIC MILESTONE” on the ribbon control.

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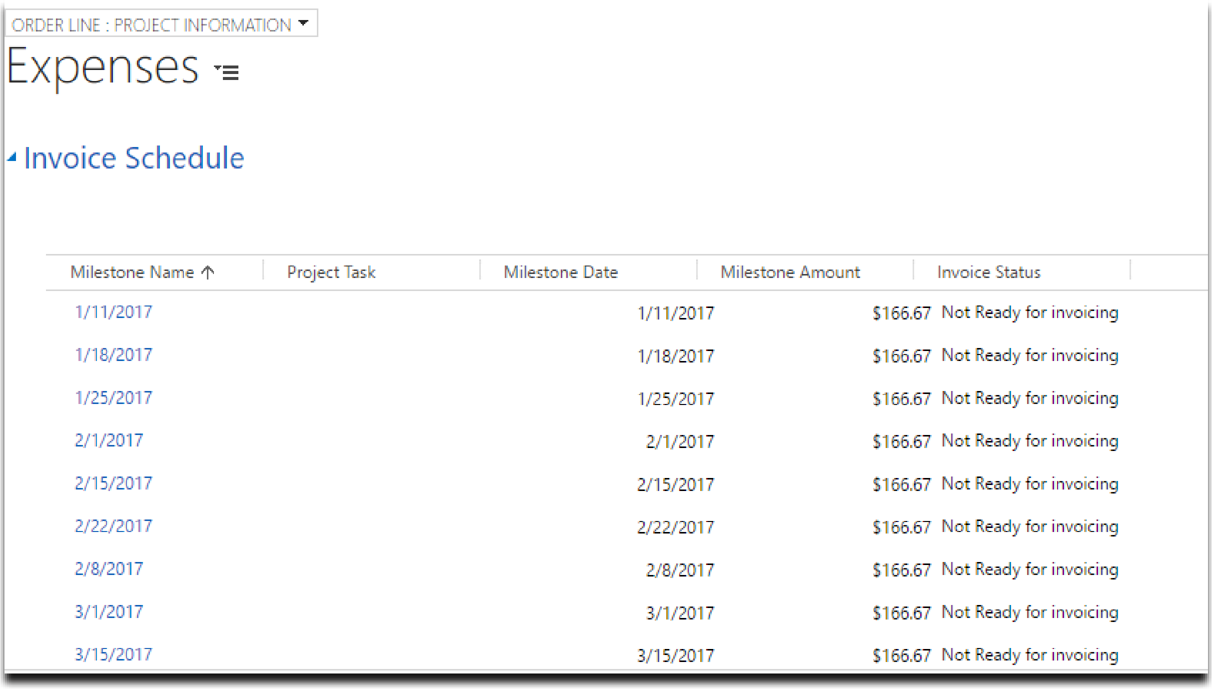


ORDER LINE : PROJECT INFORMATION

Expenses

Invoice Schedule

Milestone Name	Project Task	Milestone Date	Milestone Amount	Invoice Status
1/11/2017		1/11/2017	$166.67	Not Ready for invoicing
1/18/2017		1/18/2017	$166.67	Not Ready for invoicing
1/25/2017		1/25/2017	$166.67	Not Ready for invoicing
2/1/2017		2/1/2017	$166.67	Not Ready for invoicing
2/15/2017		2/15/2017	$166.67	Not Ready for invoicing
2/22/2017		2/22/2017	$166.67	Not Ready for invoicing
2/8/2017		2/8/2017	$166.67	Not Ready for invoicing
3/1/2017		3/1/2017	$166.67	Not Ready for invoicing
3/15/2017		3/15/2017	$166.67	Not Ready for invoicing

After the contract is confirmed the Contract can then be closed. This ends the opportunity management life cycle.

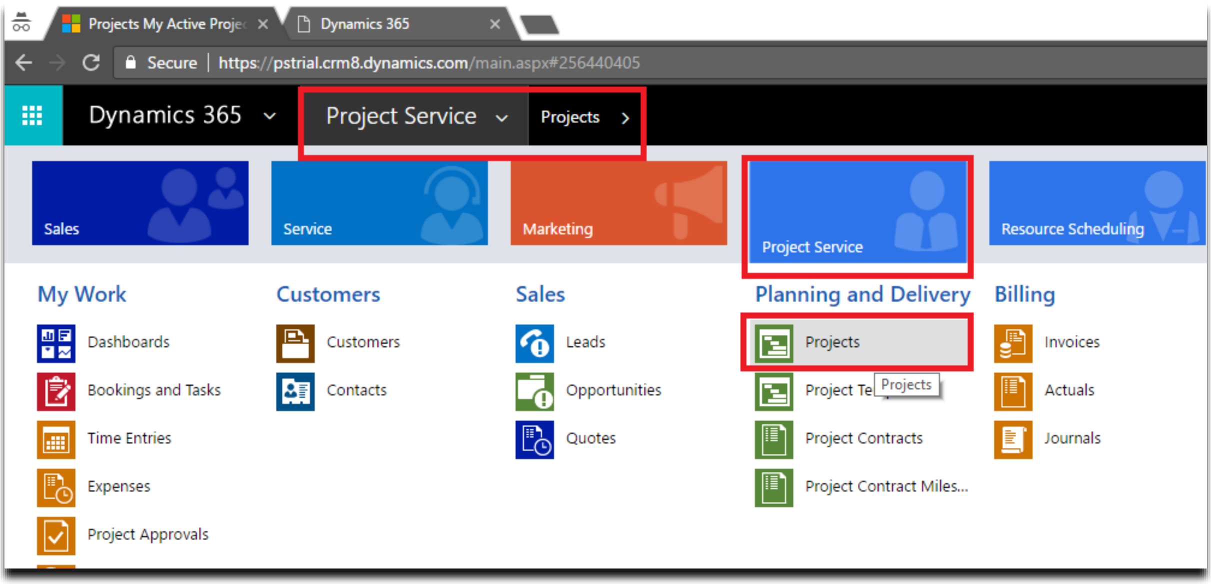
Planning with MS – PSA

We saw the entire sales cycle in Part 2 of this e-book. In this part, we are going to have a look at how to plan the project and how it integrates with MS Project.

Once the contract is confirmed and accepted by the client, the project manager now jumps in the actual mode of planning the project, creating his team.

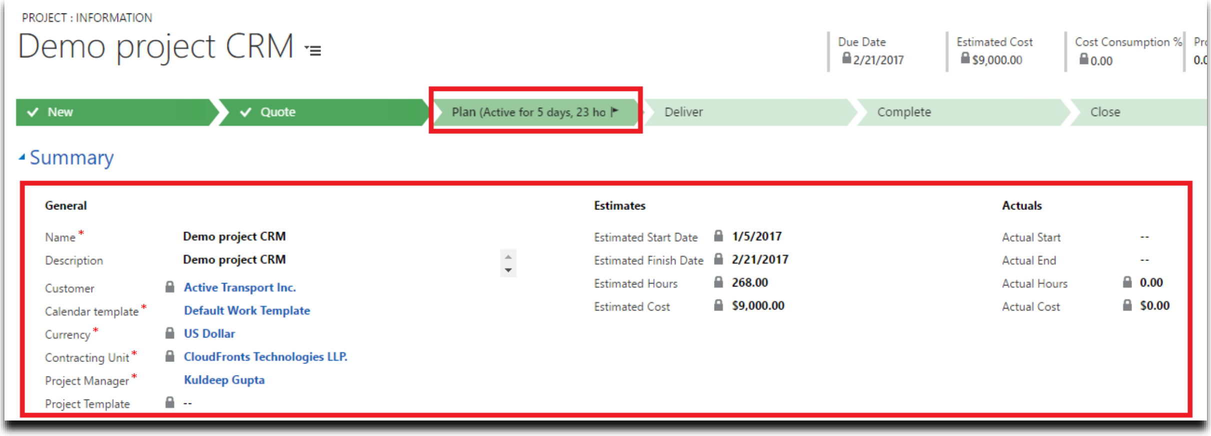
With planning, he can also estimate his work effectively and make appropriate resource arrangements well in advance.

To plan the project Manager goes in Project Services→Projects

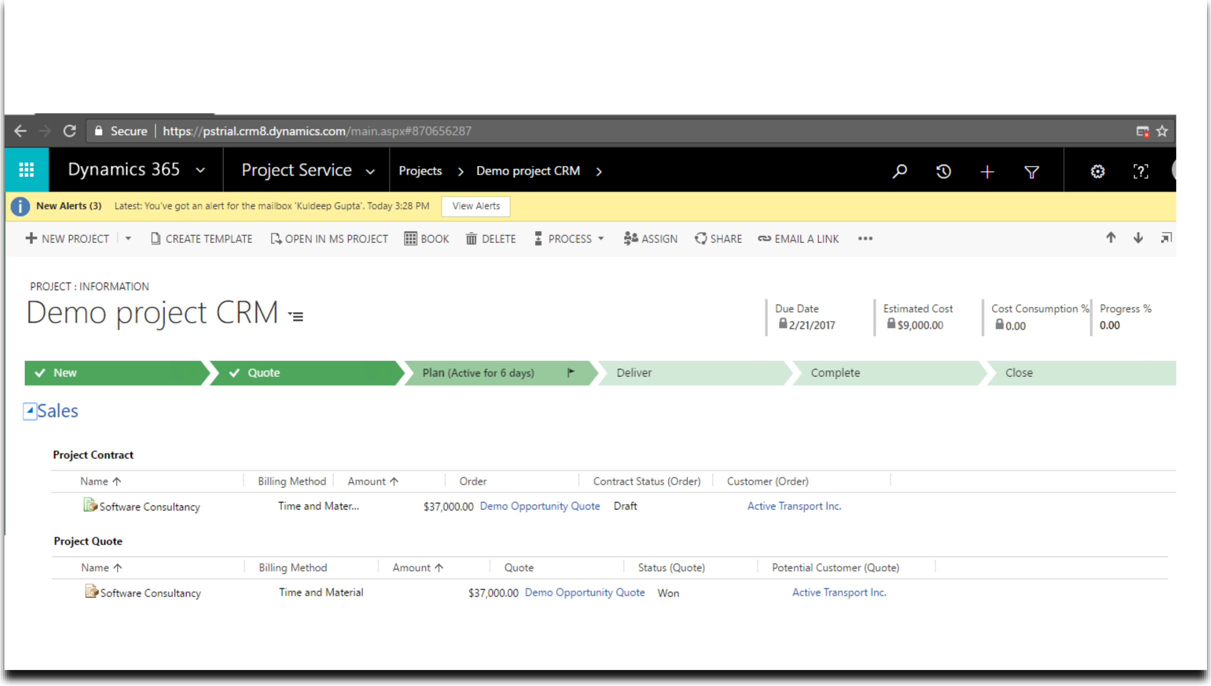


Select the project that you had created while creating the Quotation (Explained in Part 2, Opportunity Management).

When we open the project, we see that we are already in the Planning stage of the business process flow. Along with which we can also see the header details of the project that we created.



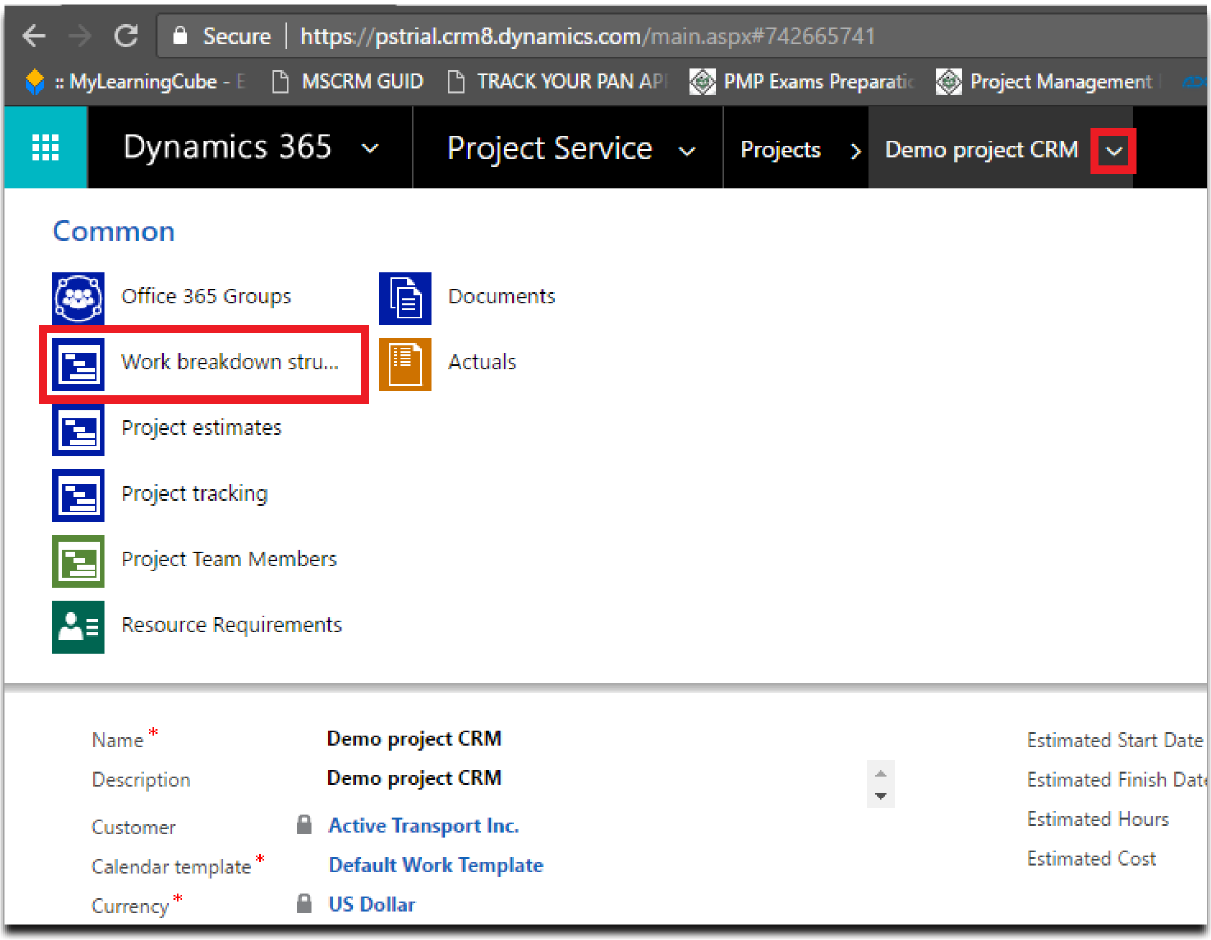
We also see below is the Sales Section where can see the Project contract, Project Quote and Project Opportunity getting tagged on the Project.



Work Break Down structure

Work Break Down Structure or WBS is a place where a project manager can prepare the schedule of the project, prepare a proper plot of the project, allocate resource. WBS describes the work to be done on a project. If the WBS is planned properly, the chances of project gaining success improves drastically. This is the only place where we also describe which tasks is to be performed after which task.

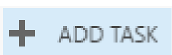
To create a WBS you can go to Project Services→Project→Work Breakdown structure.



Below are the tasks that we can perform on the WBS.

1. Add Task.
2. Indent the task (Make the task a child task to another task)
3. Outdent the task (Make a child task the main task of its parent task)
4. Move Tasks Up and Down
5. Delete a Task
6. Hide Gantt Chart
7. Move Project
8. Choose Columns
9. Generate Project Team

Add Task

When you start creating the Gantt Chart, it is empty with no task. You can start adding the tasks on the Gantt Chart by hitting on the 

Button.

The Added task has lot of attributes that plays high importance to Project Manager while planning, like:

Task Name

This is basically the name of the task.

Precedence

This defines which task shall be performed after which task.

Effort Hours
They define the no of hours that task is for.

Start Date
This tells you when the task is supposed to start.

End Date
This tells you when the task is supposed to end.

Duration
This provided the duration of tasks in Days.

Assigned Roles
This defines the type of role needed for that task.

Resources
This will tell you which resource is working on that task.

Indent the task
This will make the Task a child task to the task before it.

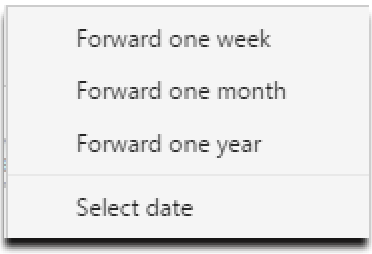
Outdent the Task
This will make the child task the main task of its parent task.

Move Up and Move Down
With this we can move the order of the task up and down.

Delete
Delete will delete the task from WBS.

Hide Gantt Chart
This will Hide the Gantt Chart on the Right-Hand Side of the WBS.

Move Project
This provides you with an option to move the project by the following 4 options:



Forward one week
Move the entire plan ahead by a week.

Forward one month
Move the entire plan ahead by a month.

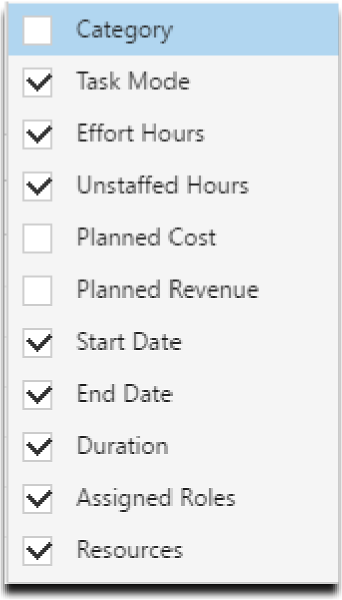
Forward one year
Move the entire plan ahead by a year.

Select a date

Move the entire plan ahead or before, by a specific date.

Choose Columns

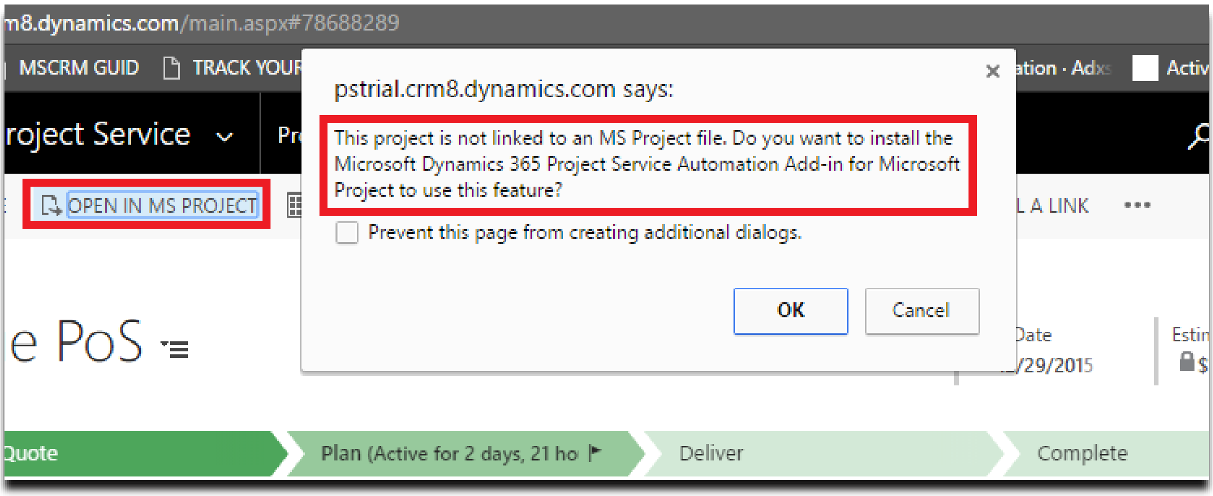
Choose columns provide us with the columns that we wish to, or do not wish to see on the WBS.



Planning with MS Project

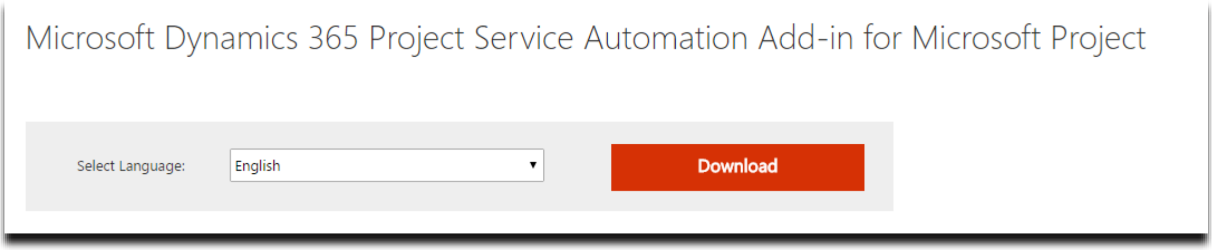
Dynamics 365 MS Project allows Project Manager to plan more efficiently by allowing them to plan in MS Project. Following is the way how you can use MS Project to plan your project.

Open the project from Project Services→Projects→"*Project Name*", click on "OPEN IN MS PROJECT" button in Ribbon Control. I will give you a message that the project is not linked to

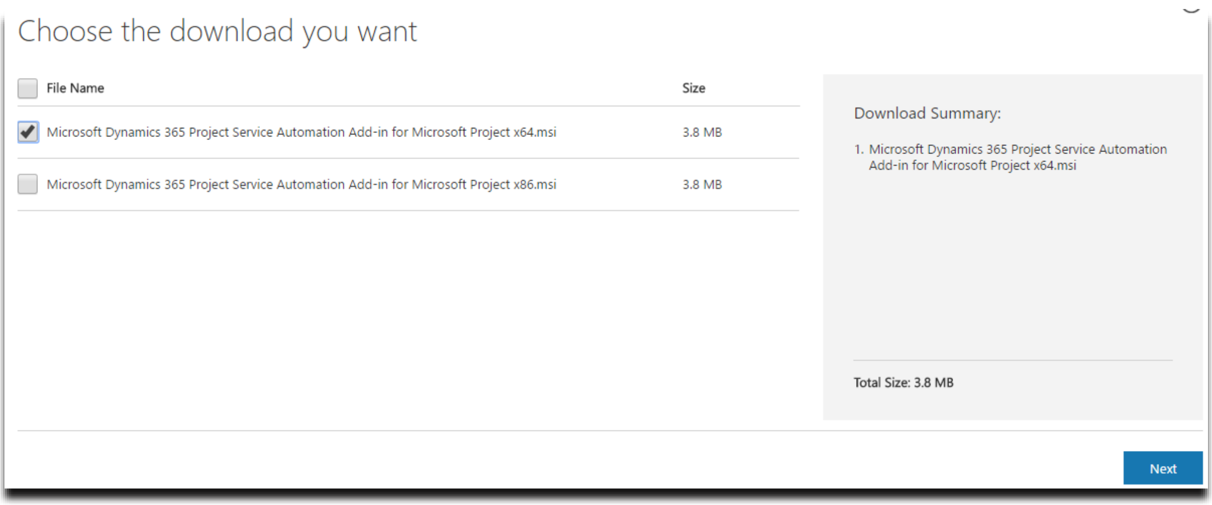


As soon as we hit "OK" on the message box, it redirects us to the page where we need to download the Microsoft Dynamics 365 Project Service Automation Add-in for Microsoft Project.

Select your language and hit on “Download” button.

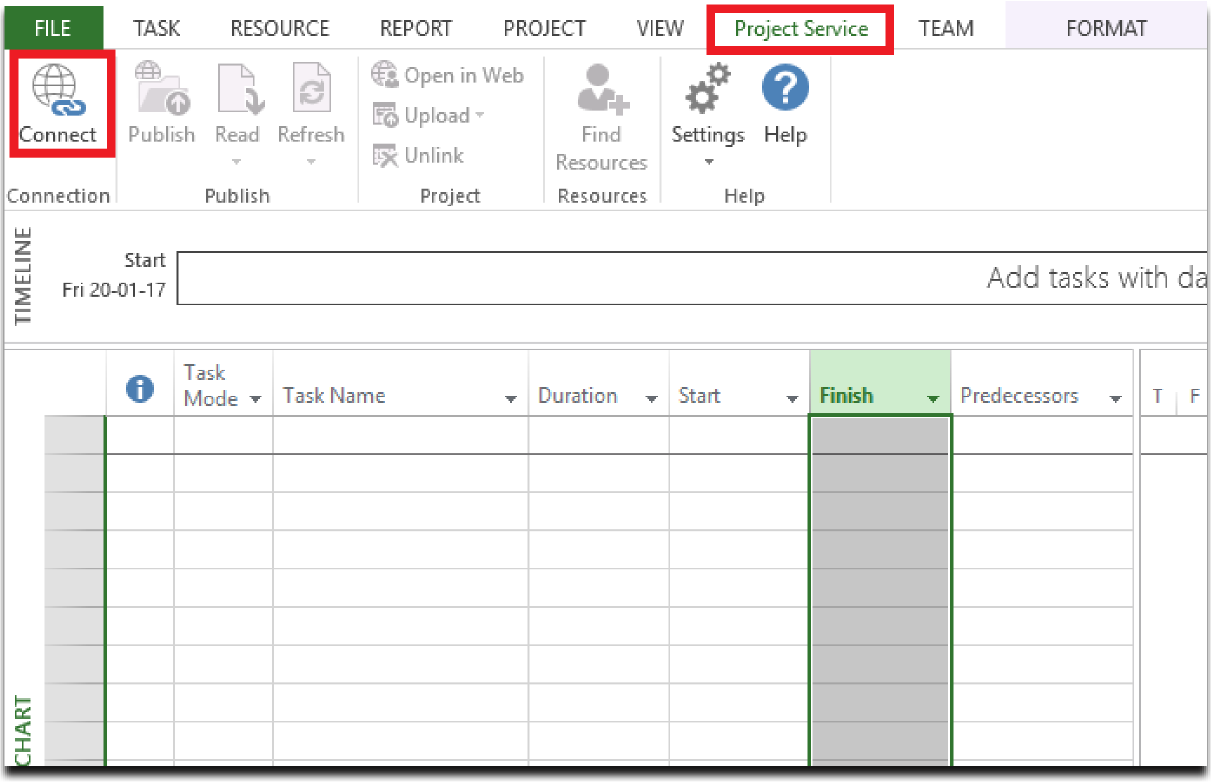


Select whether you need the 64 bit or 32 bit version and click “Next”.

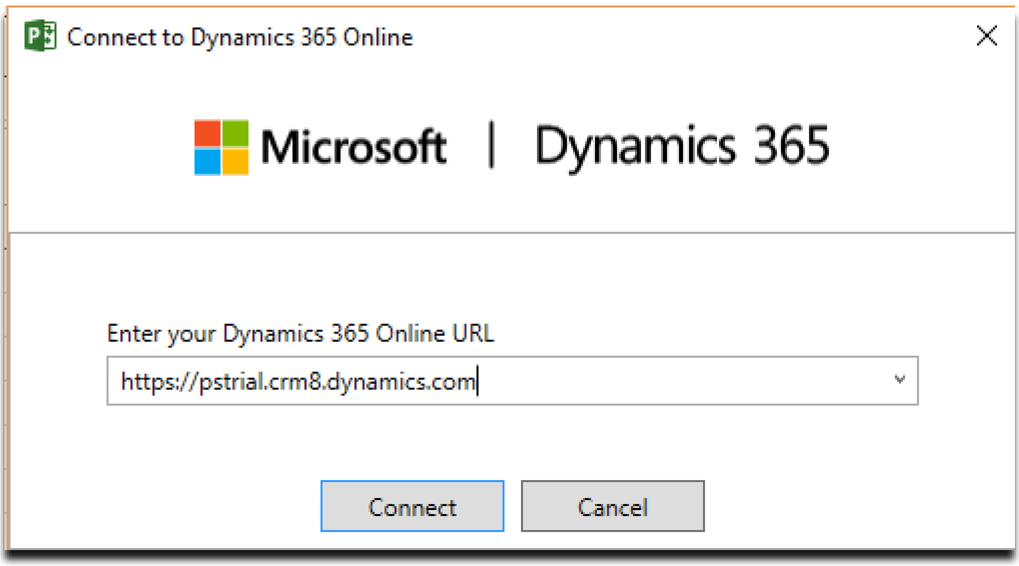


This will download “Microsoft Dynamics 365 Project Service Automation Add-in for Microsoft Project x64.msi” file on your system. Save the file and install it.

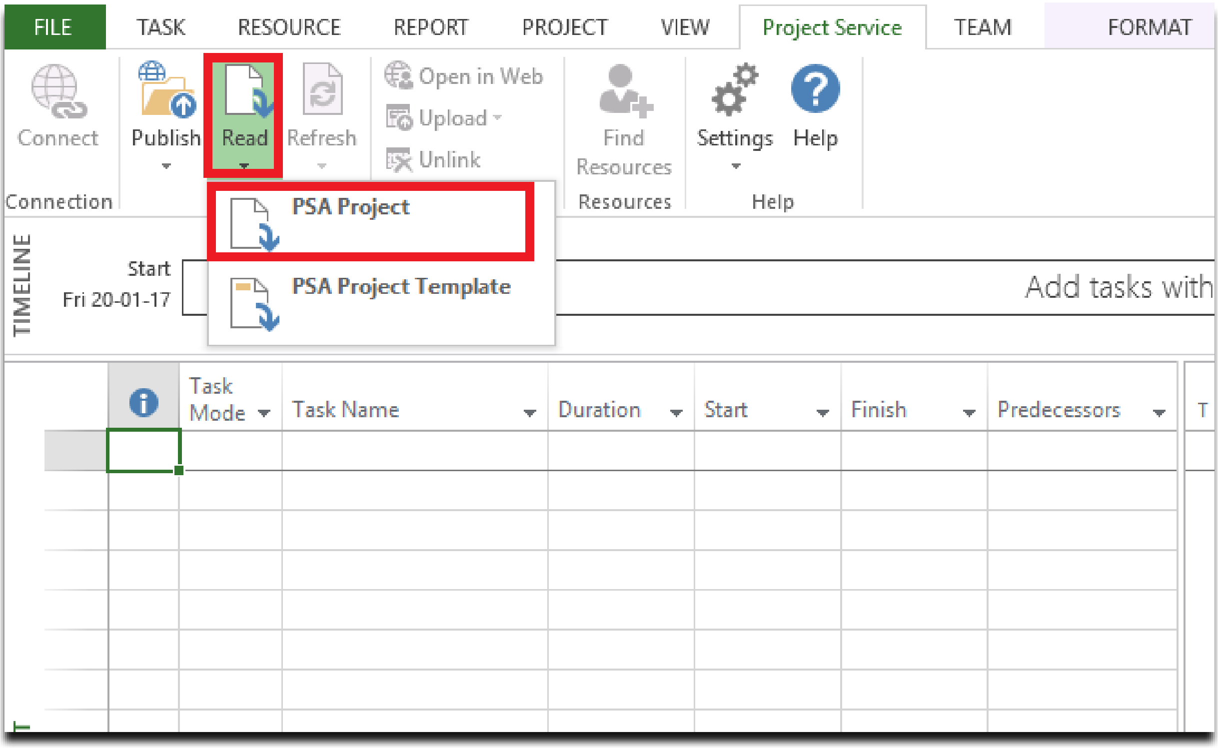
After the installation of Add-in is complete then open MS Project application and click on “Project Service” tab and click on “Connect” Button



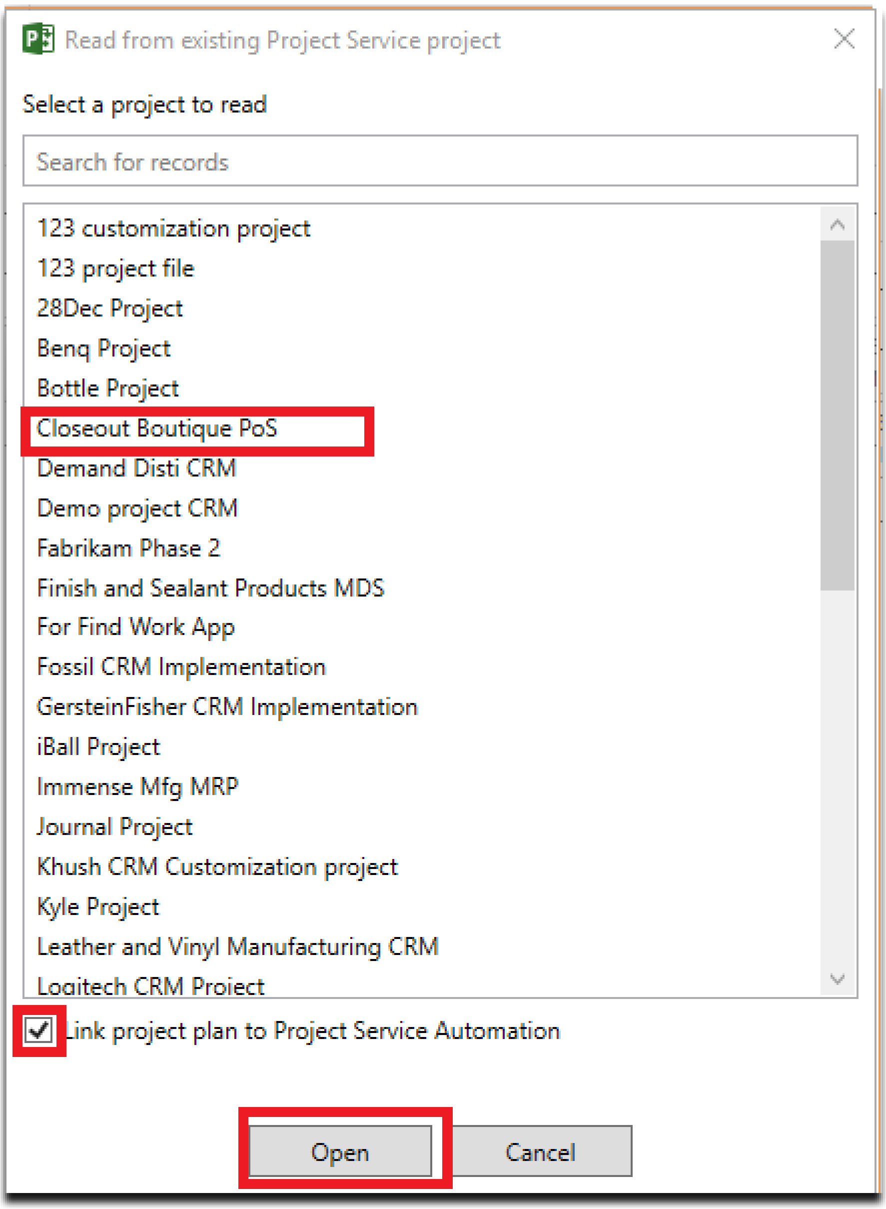
This will open a pop-up, where you will need to enter the D365 environment URL and click "Connect"



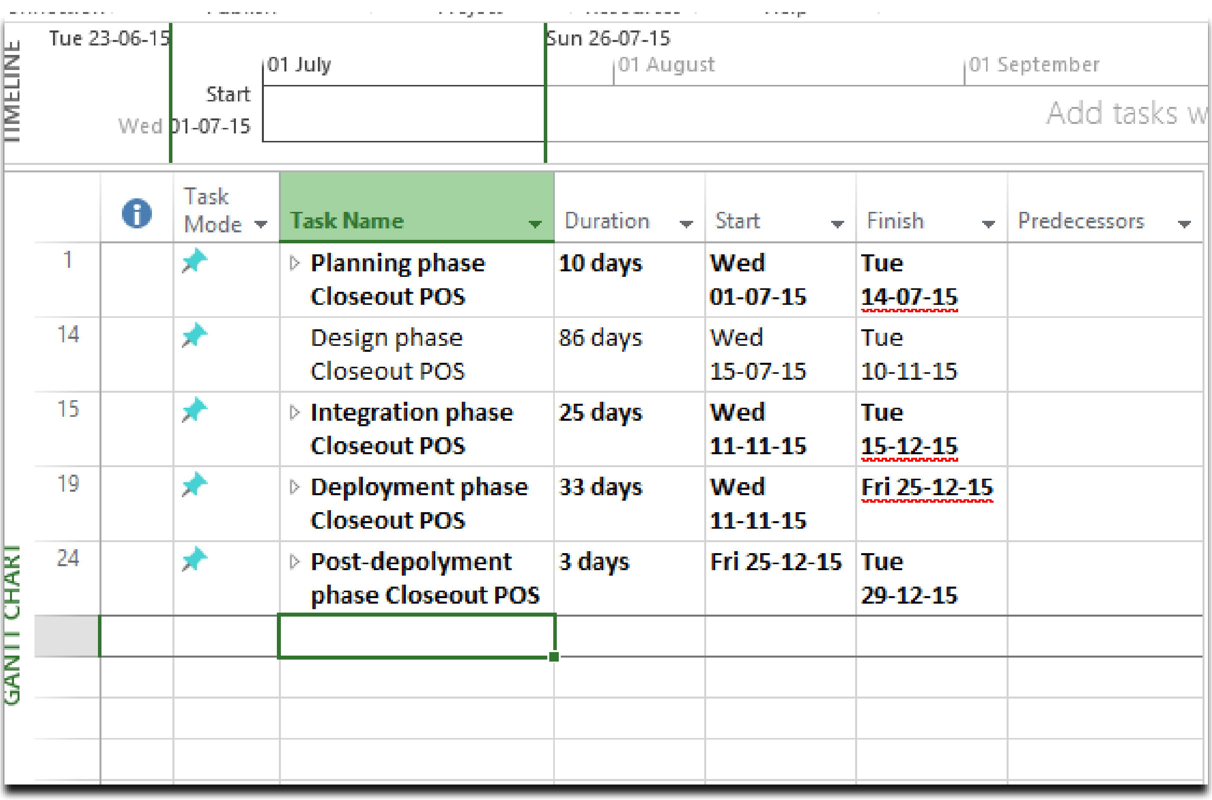
This will ask you for the credentials for the D365 Environment, enter the sign in details and login. After successful login, click on "Read" button.



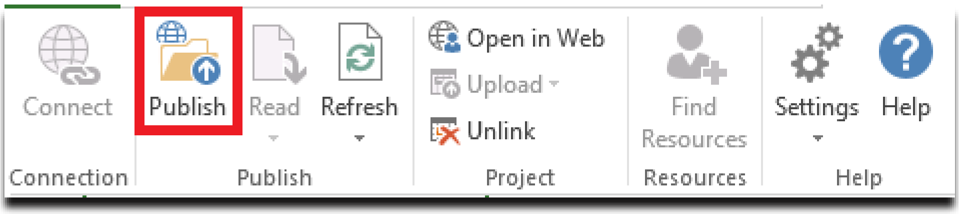
This will ask you to select the project to be edited.



All the tasks from PSA WBS flows in the MS Project.



After you are done with your editing, you can click on "Publish" button to publish the details on the MS PSA.

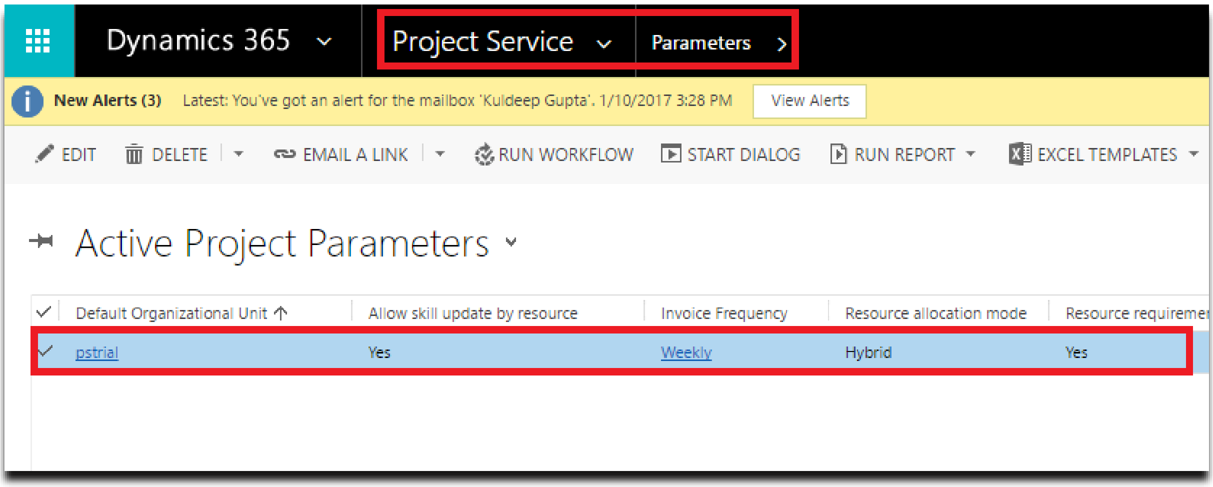


Here on, if you now click on "OPEN IN MS PROJECT" button from your project, it will open MS Project.

Who all can allocate resources?

PSA allows us to decide who all can do the resource allocation to the projects. To configure the same, we need do an additional parameter setting in Project Services→ Parameters.

Select the Parameter setting or create a new one.



In the General Section, we need to mainly configure the below:

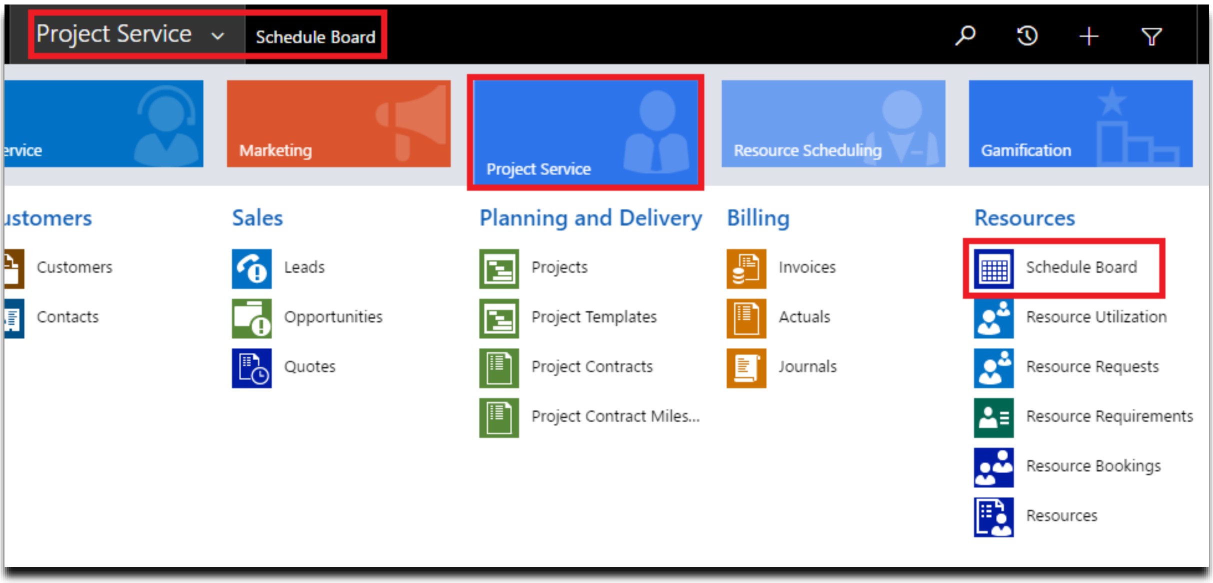
1. Invoice Frequency
2. Project Manager Role
3. Team Member Role
4. Resource Allocation
    a. Central
        i. Only Resource Managers can allocate the resources to the project
    b. Hybrid
        i. Here Project Managers, Account Managers and Resource Managers can allocate resources to the project.

Resource Scheduling

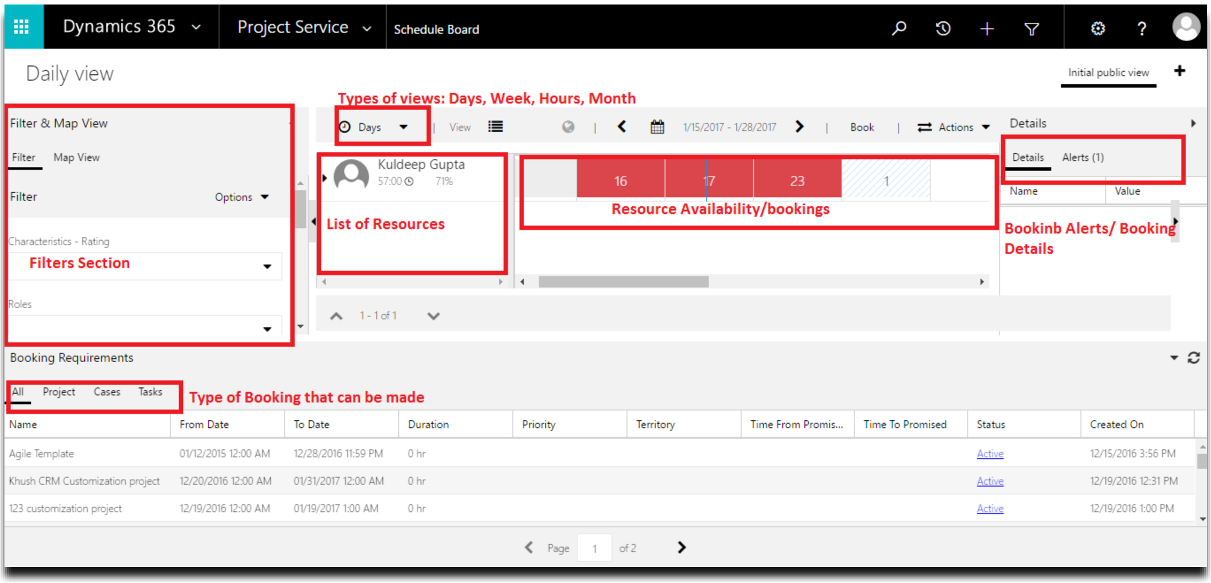
What is a Schedule board?

Schedule board gives you an overall view of your resources and their bookings. It tells us how much is the resource booked. You can view the availability by Month, Week, Day or Hours.

To navigate to Schedule board, you can go to Project Services→Schedule Board

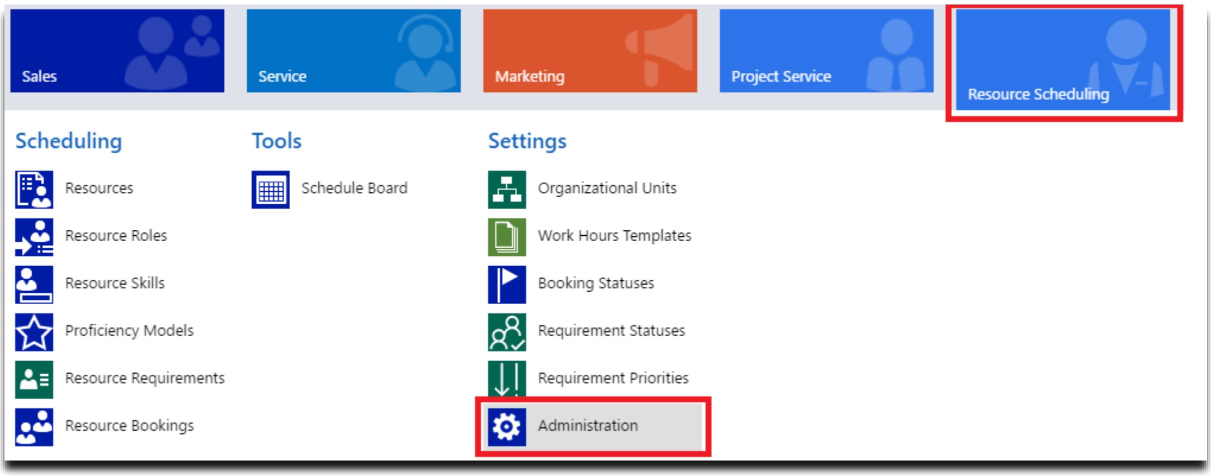


Upon opening the schedule board looks like below:



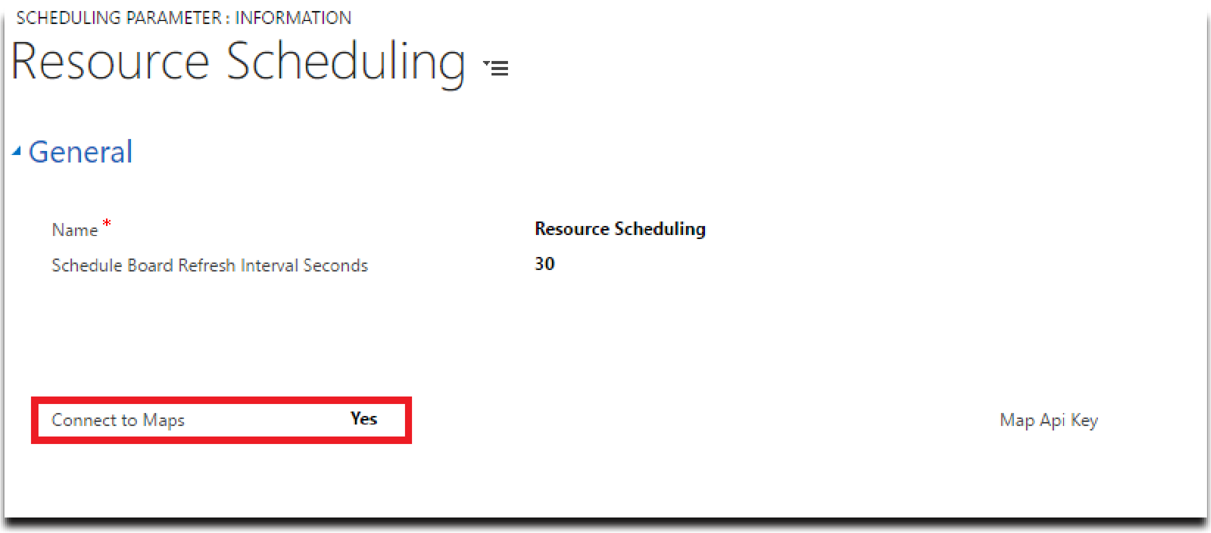
Configuring a schedule board

Before we go to the schedule board we need to configure the same. For configuring the Schedule board navigate to Resource Scheduling→Administration.



Click on Schedule Parameters

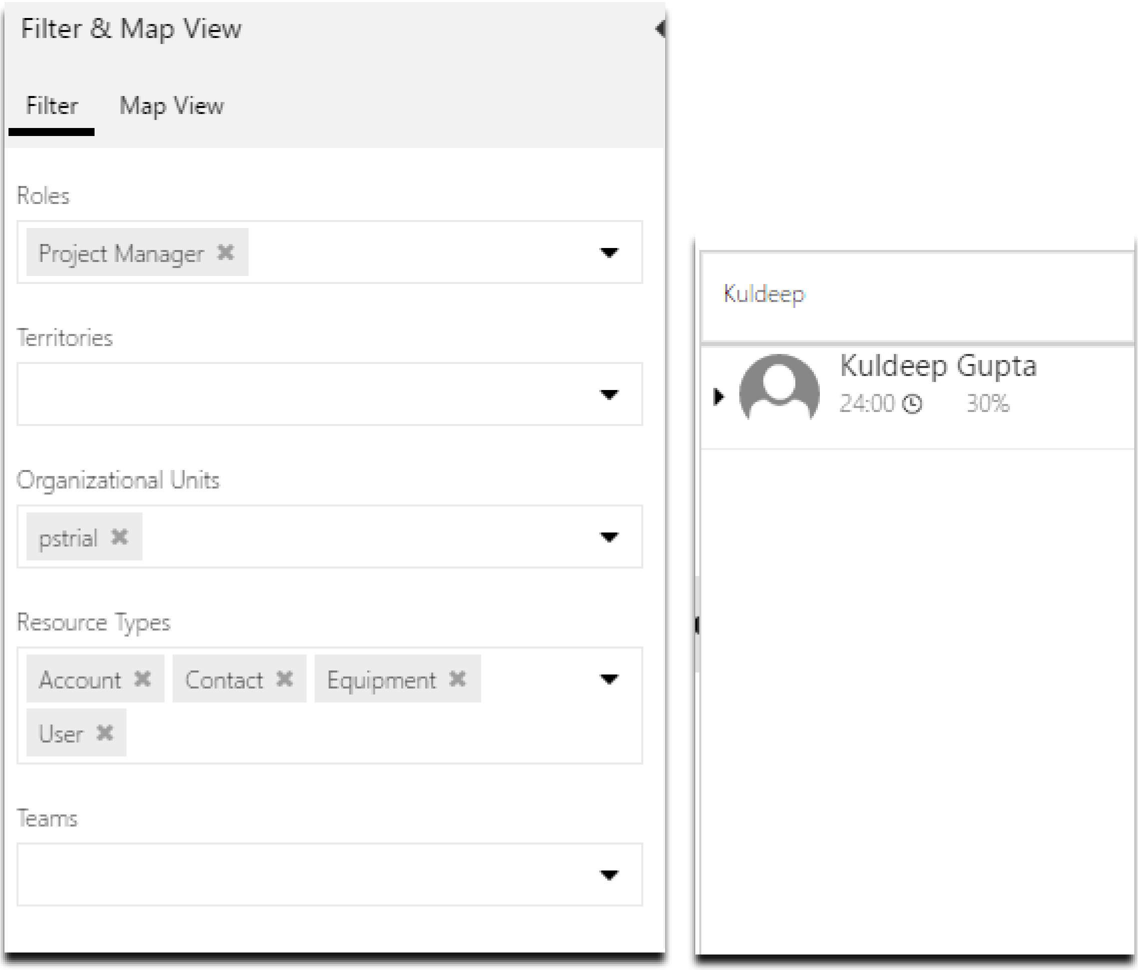
Mark "Connect to Maps" as Yes.



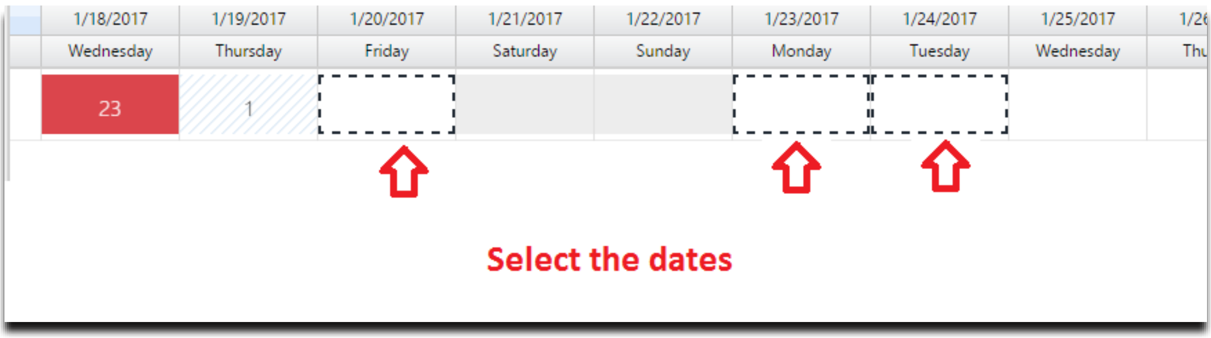
Schedule a resource

After we have configured the resource now we can Book the resource from Schedule board. For the same, navigate to Schedule board as shown above.

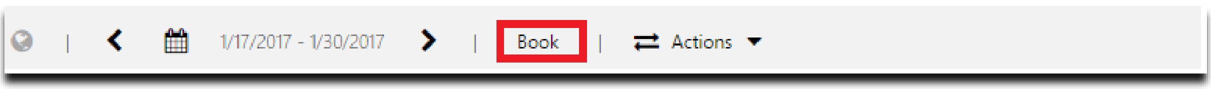
Filter & Select the resource you want to schedule.



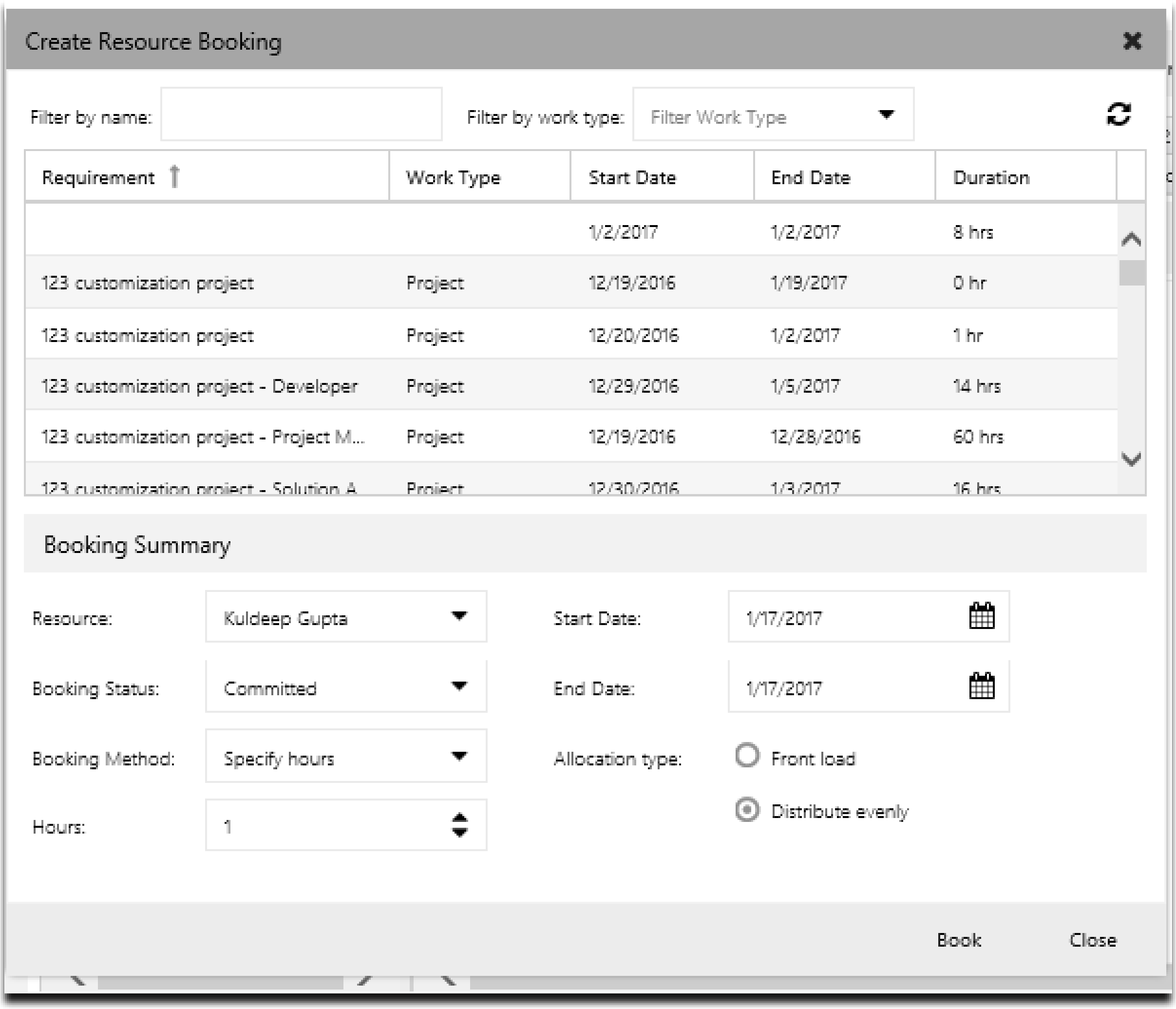
Select the dates you want to allocate him (select appropriate view before allocating).



Click on Book button



Upon clicking on the book button, the following screen comes up



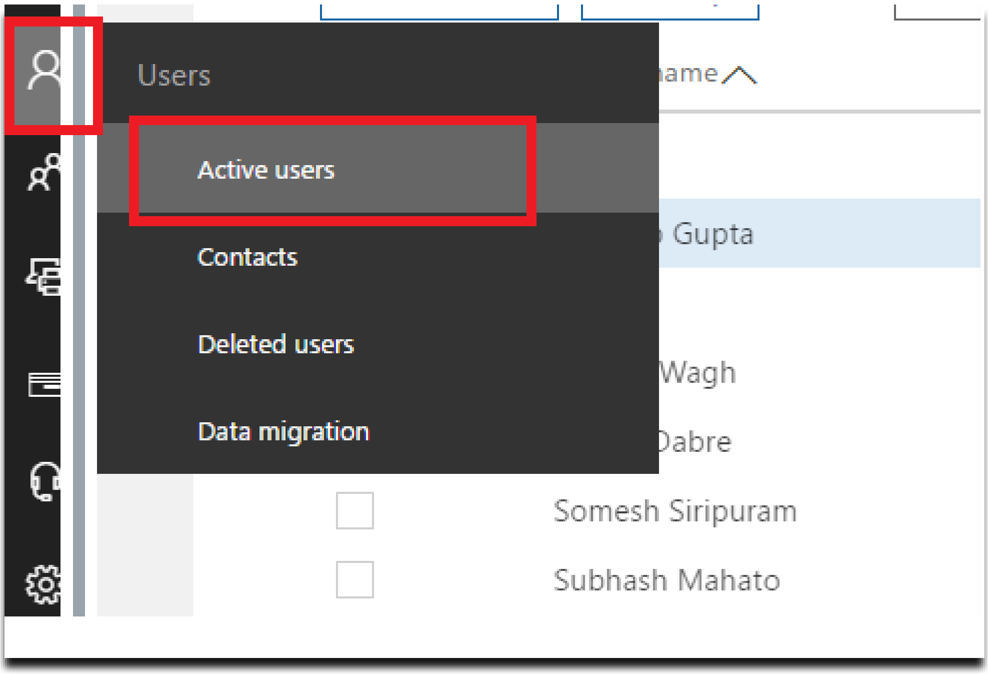
After making the right selection for Filter Type, booking Status, Booking Method, Start Date, End Date and Allocation Type you can hit on Book button and the booking gets created for the resource.

The same is also visible in the calendar of the Resource.

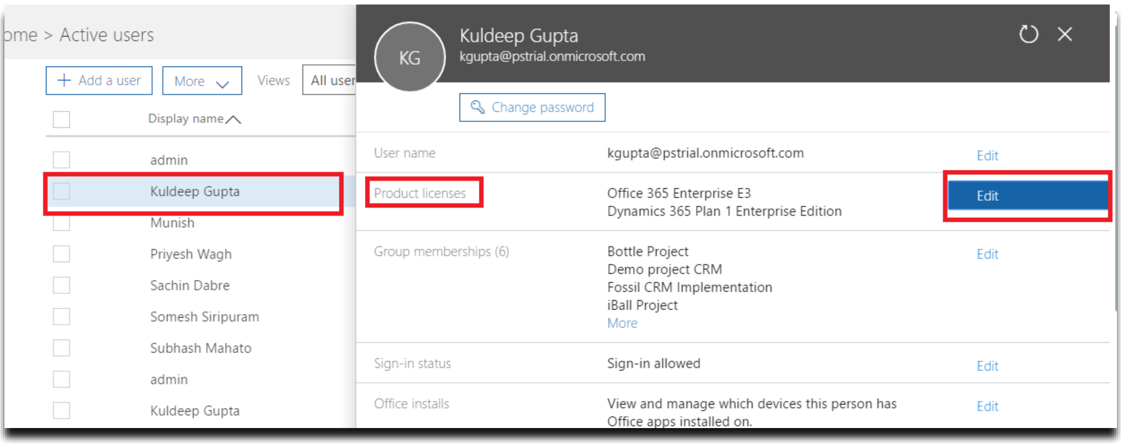
To make sure the booking gets reflected in the calendar the following configurations needs to be taken care of.

Configurations to reflect allocation in Calendar

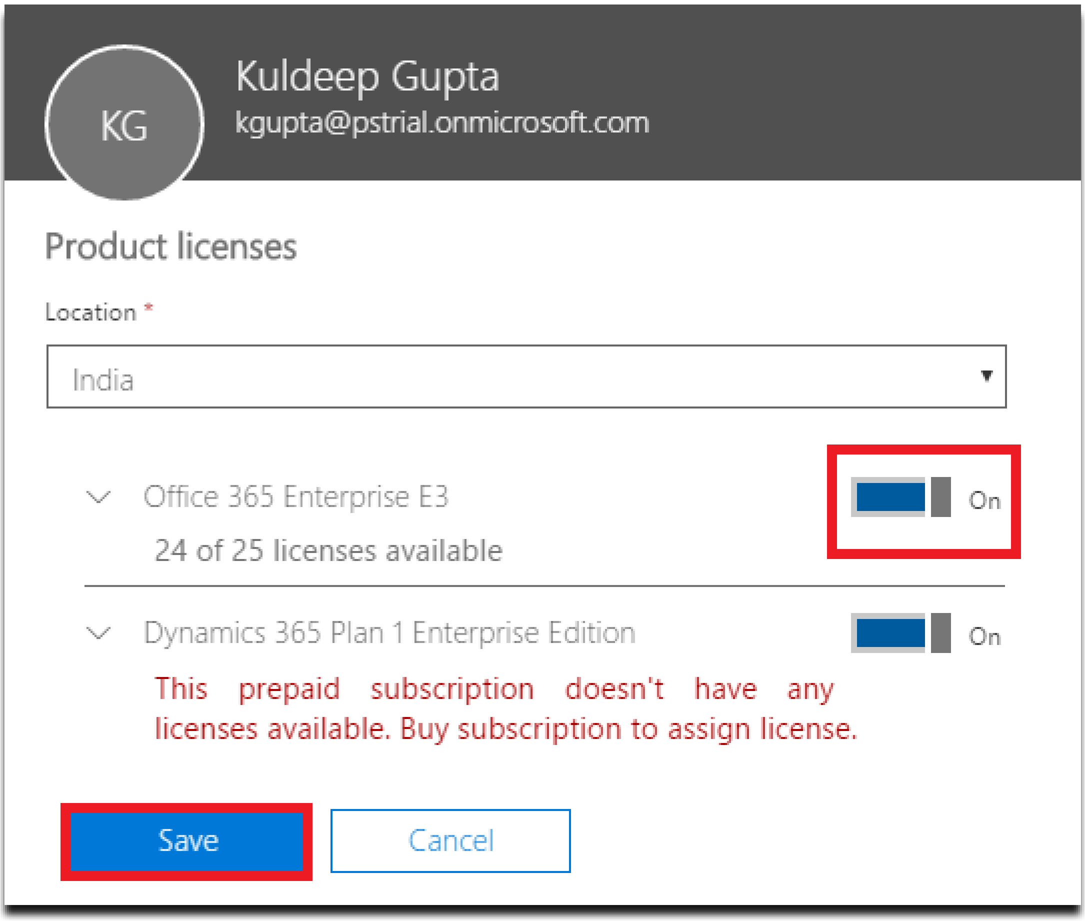
1. Make sure the user is assigned with Office 365 E3 licenses. To verify/assign the same, follow the steps below:
    a. Login to admin portal (https://portal.office.com)
    b. Login with the admin user credentials.
    c. Click on the Users→Active Users



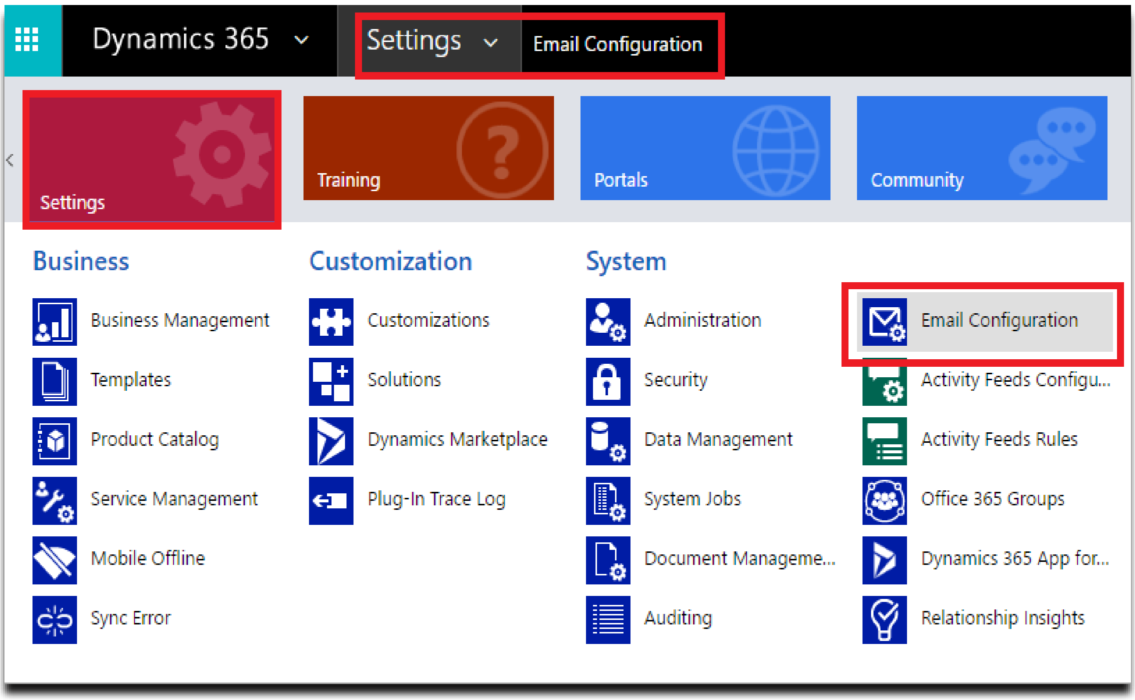
d. Select the user and navigate to Product licenses and hit on Edit Button as shown below.



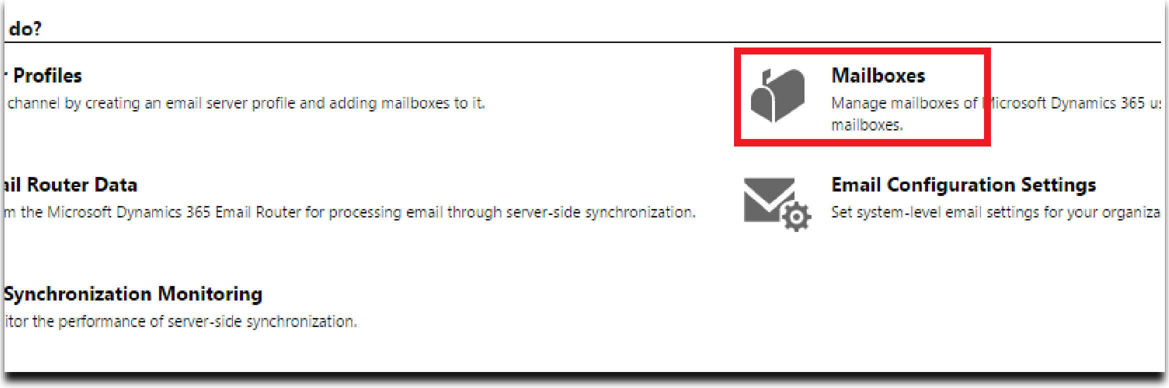
e. Turn on the Office 365 Enterprise E3 license button and you are set.



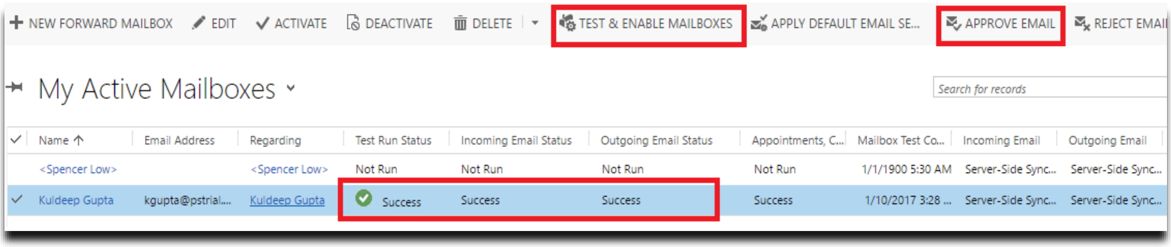
2. Enable Server Side sync
   a. Navigate to Settings→Email Configuration



b. Click on Mailboxes



c. Select the user and Hit on “APPROVE EMAIL” button from the Ribbon Control.
d. Once the email is approved, we need hit the “TEST & ENABLE MAILBOXES” button from the Ribbon Control.
e. You should see “success” for “Test Run Status”, “Incoming Email Status” & “Outgoing Email Status”

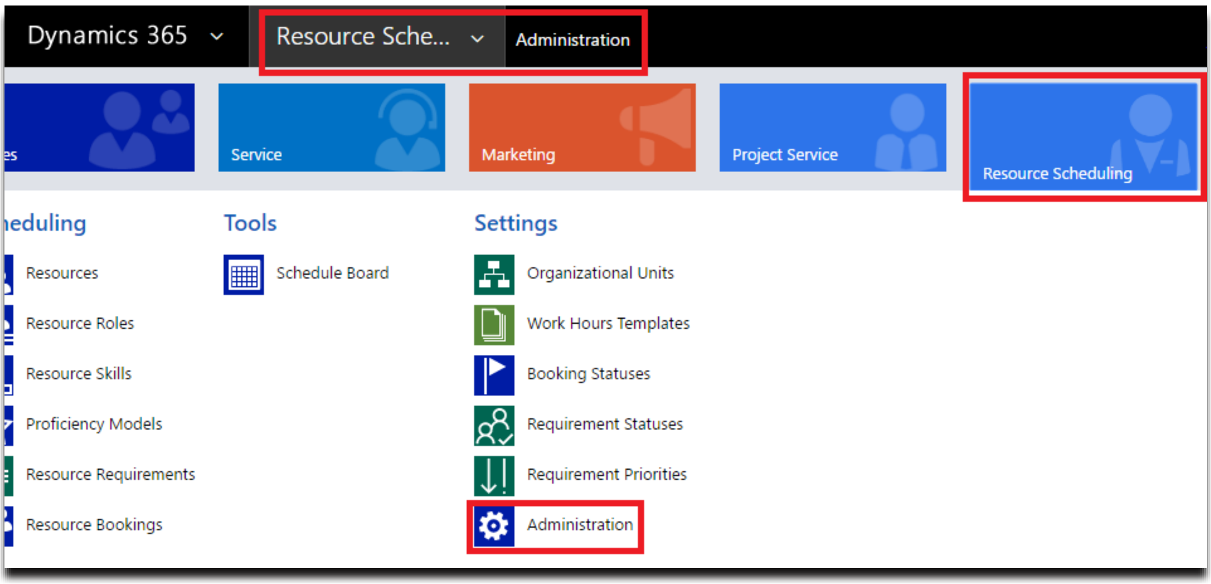


3. Once the above settings are done and the resource is scheduled from the schedule board, the allocations are reflected in the O365 Calendar for that user.

Enable Case and other entities for scheduling

To facilitate allocating resource on Cases apart from the project Tasks, following configurations needs to be done.

Navigate to Resource Scheduling→Administration



Click on “Enable Resource Scheduling for Entities”

In the Enable New Entity Section Add the following details:

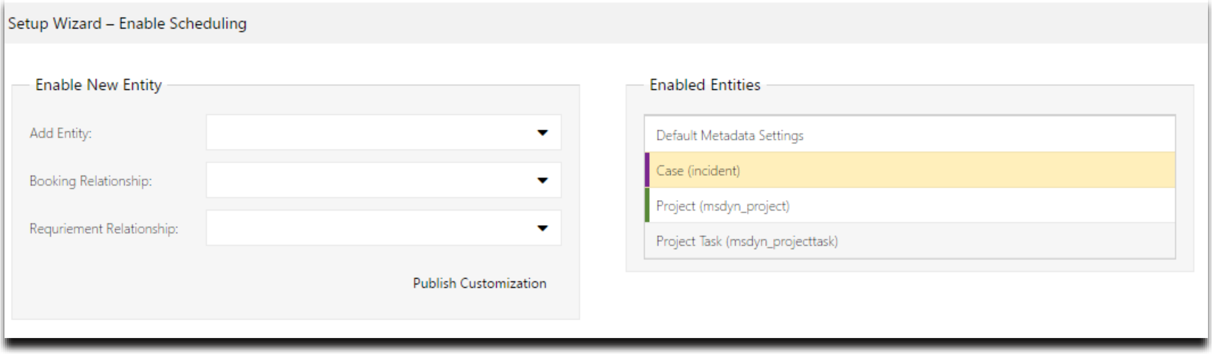
Add Entity: Case (incident)

Booking Relationship: provide a logical name to this.

Requirement Relationship: make sure this is set to “msdyn_committype”

And then hit “Publish Customization” button.

As soon as you hit Publish Customization button it appears in the “Enabled Entities section”.

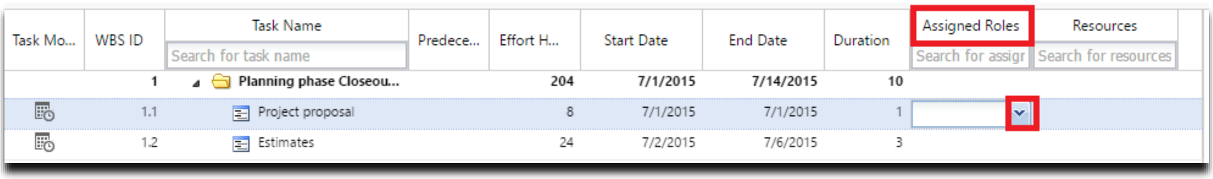


Building a Team from WBS

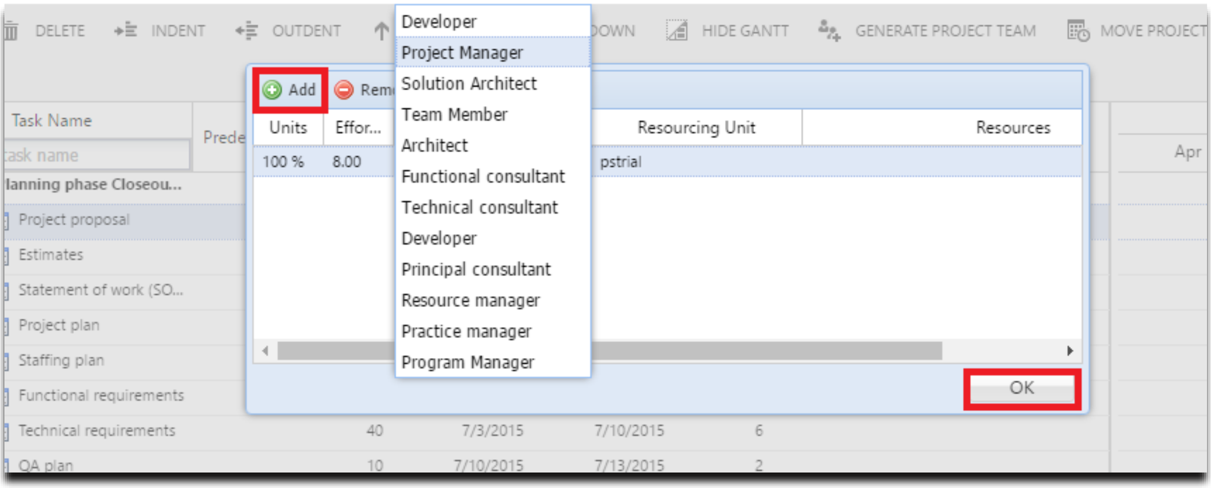
This is another way from where we can build a team for our project and allocate resources for the same. The process to do so is as follows:

Post the project plan is prepared in the Gantt Chart. Allocate the Roles to each task.

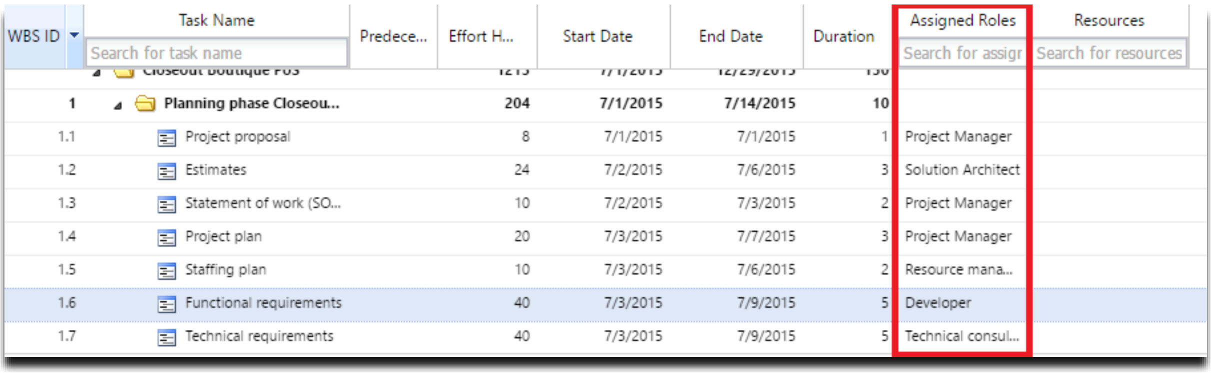
For allocation Roles to the task, click on the “Assigned Roles” Column of the Task. Hit the drop-down icon and a pop up appears where we can assign the Roles.



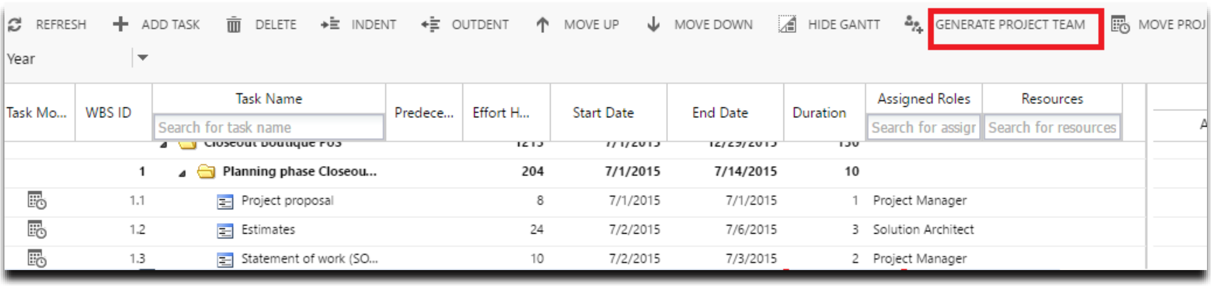
Click on Add Button in the popup and select the Role from the drop down.



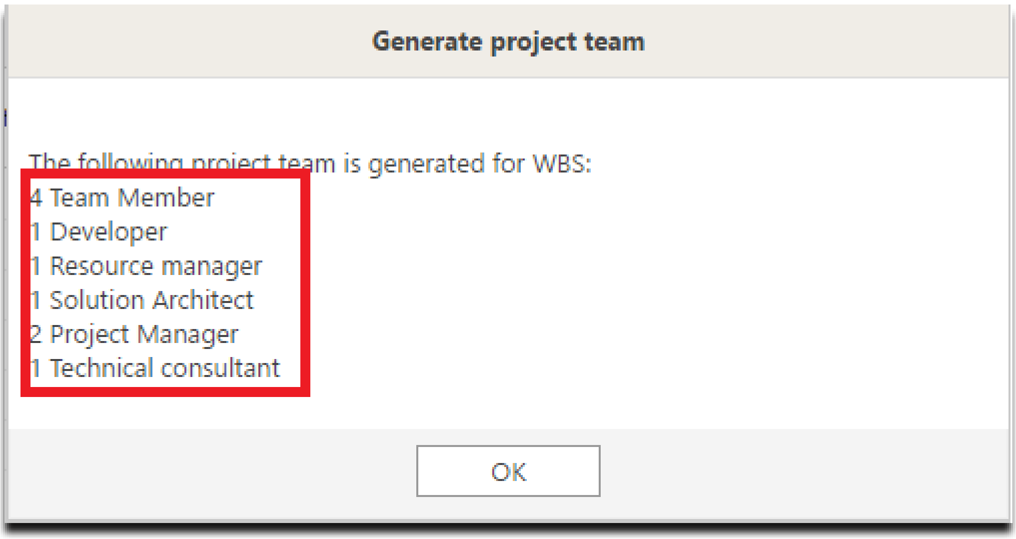
Do this for all the tasks in the Gantt Chart.



Post we are done with assigning roles to all the tasks, Hit, “GENERATE PROJECT TEAM” button on the WBS Ribbon.



Post the team is created we get the following message.

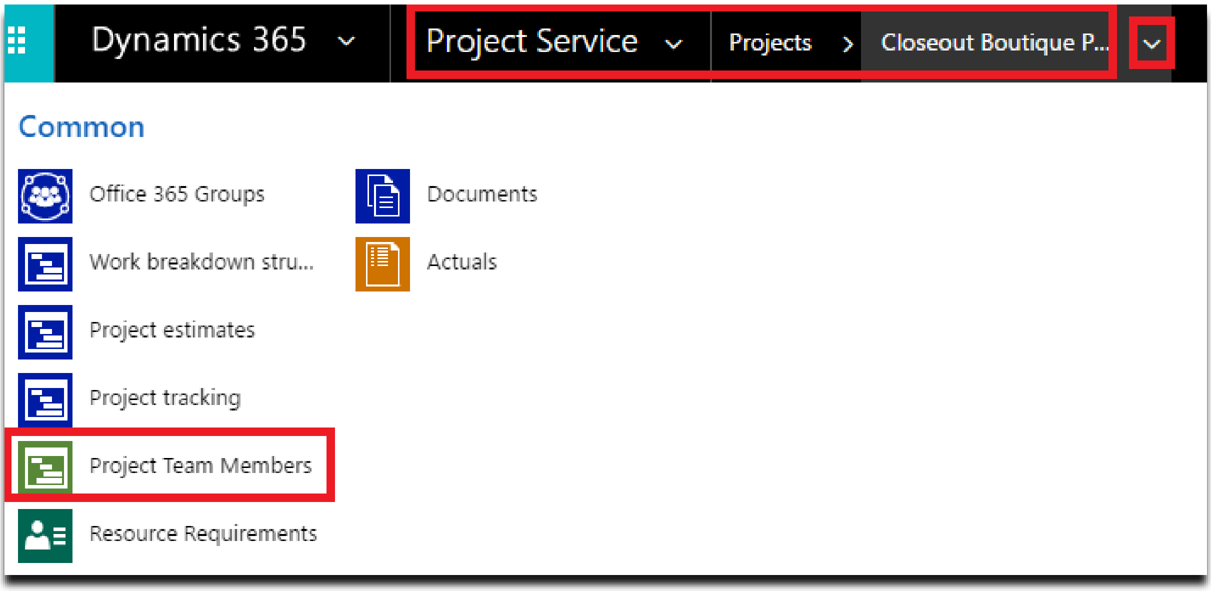


If you observe carefully we see 4 Team Member in the team. In case there are any task to which we did not assign any role, they get allocated as Team Member. These resources with Team Member role can be selected for any Role while Resource booking.

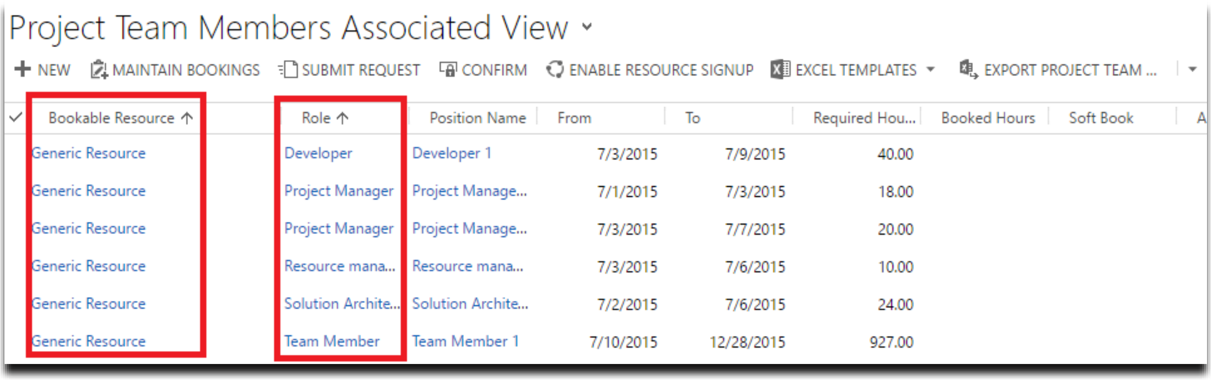
All the above resources are generic resources, which needs to be patched with proper resources.

How do you Book the resources for the Team generated via WBS?

For booking the Physical Resource versus the Generic Resource, you need to navigate to Project Services→Projects→Project Name→Project Team Members

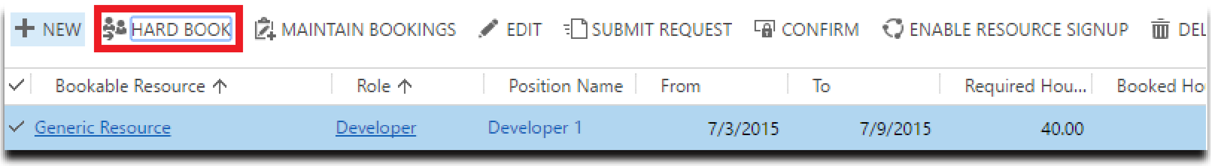


We see a "Project Team Members Associated View", where you see the Bookable Resource as "Generic Resource" along with their appropriate Roles and other details like From and To Date, Required Hours, etc.

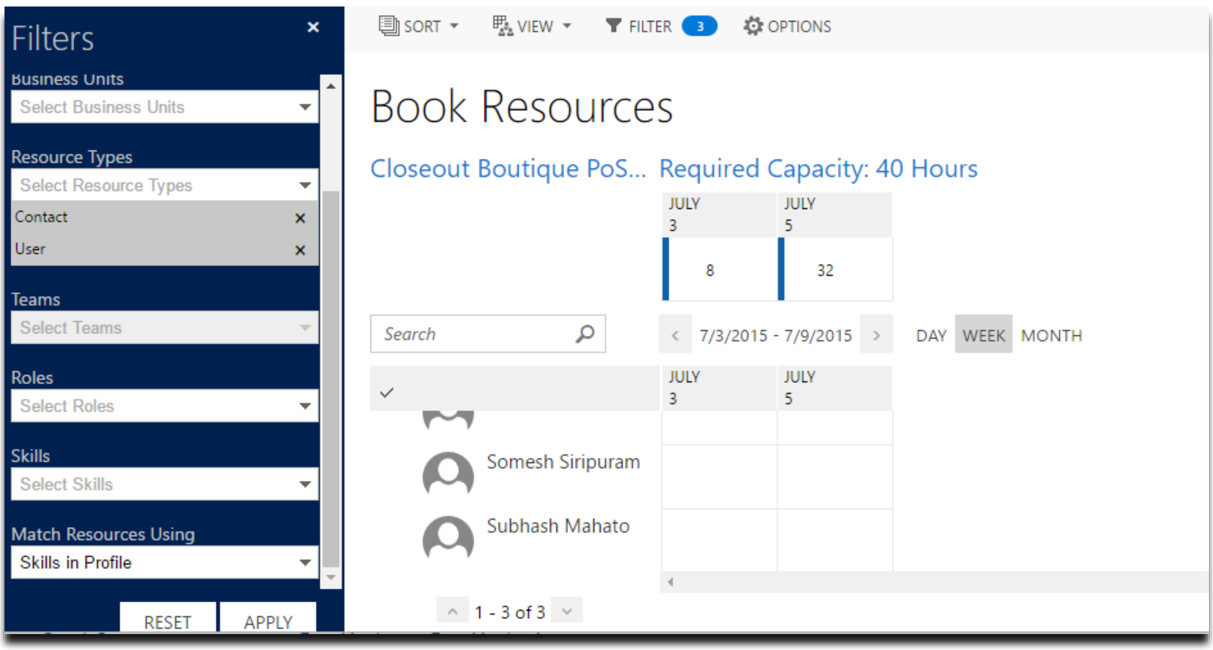


There are 2 options now to allocate resource:

1. Hard book
    a. This will book the resource by directly consulting with the intended resource.



Bases on the Requirement the Filters are applied and the Resources are shown

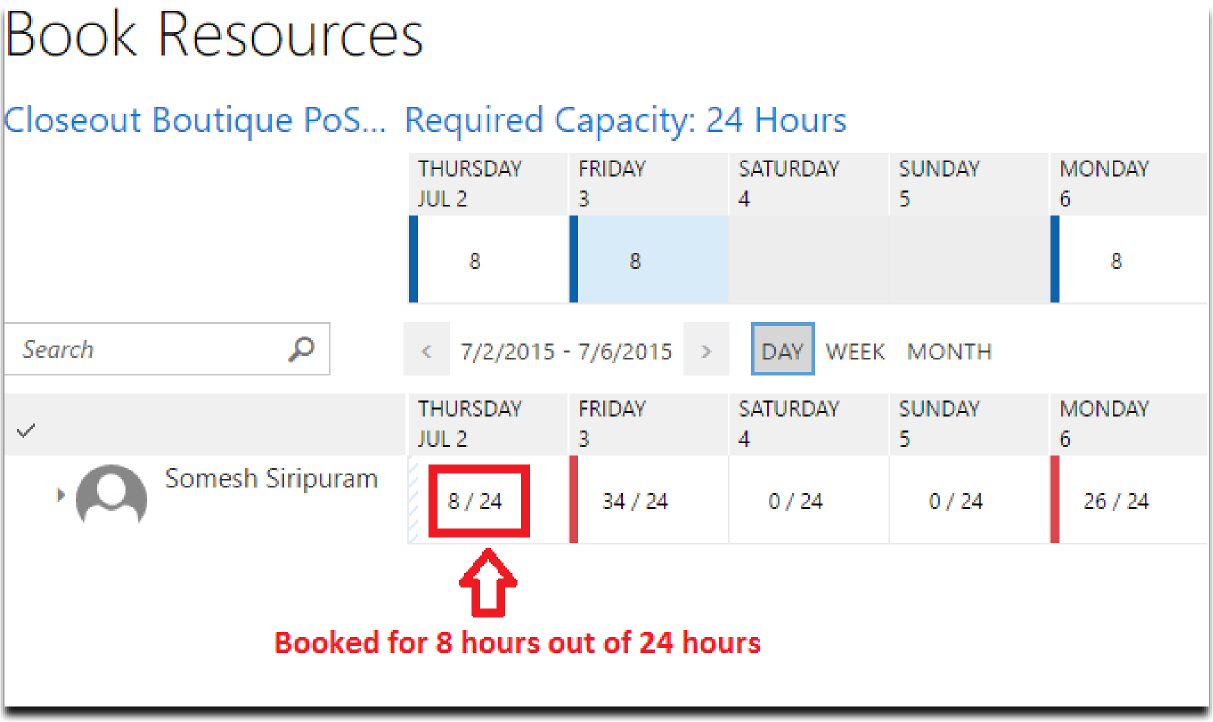


To book a resource, select the resource, you see the menu changes and “BOOK” button is visible. Before we hit on “BOOK” button to book the resource we have multiple options that we can select to make the booking and change the way the details can look on the screen. For checking the various options available, click “OPTIONS” button.

Let’s visit at what each option mean to us:

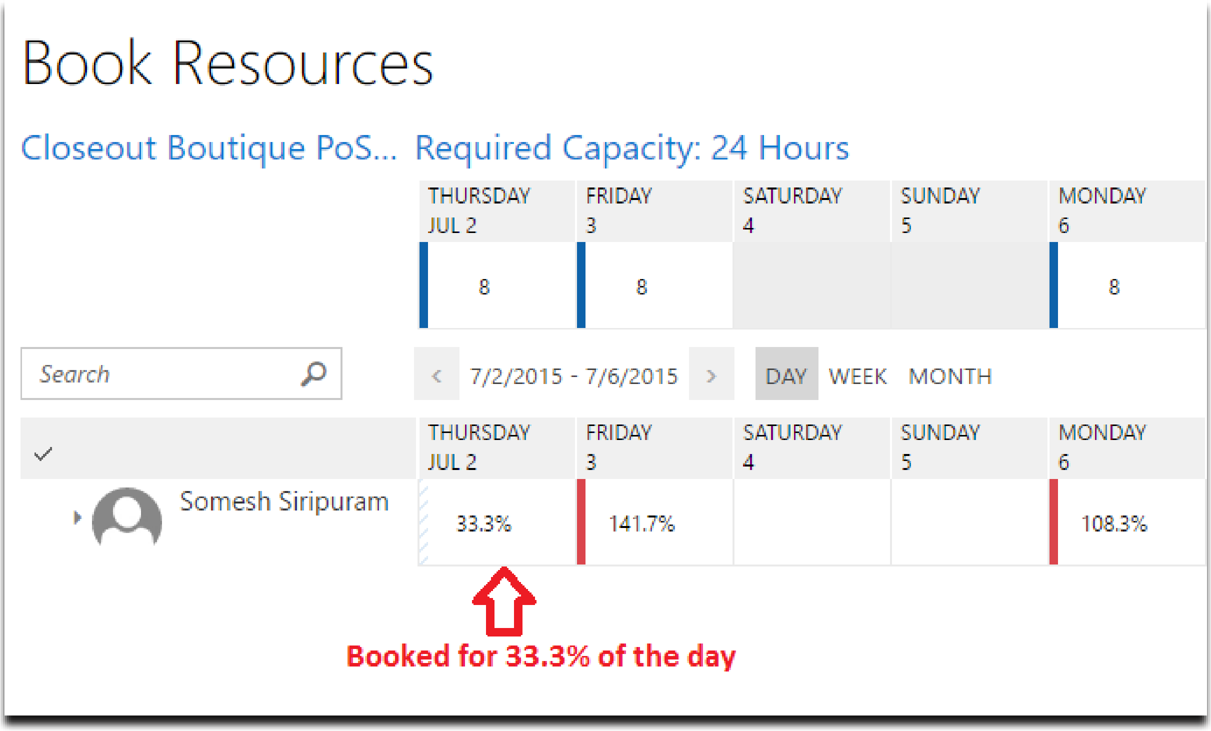
Show Capacity In Hours:

This shows the hours booked versus the hours in a day for resource.



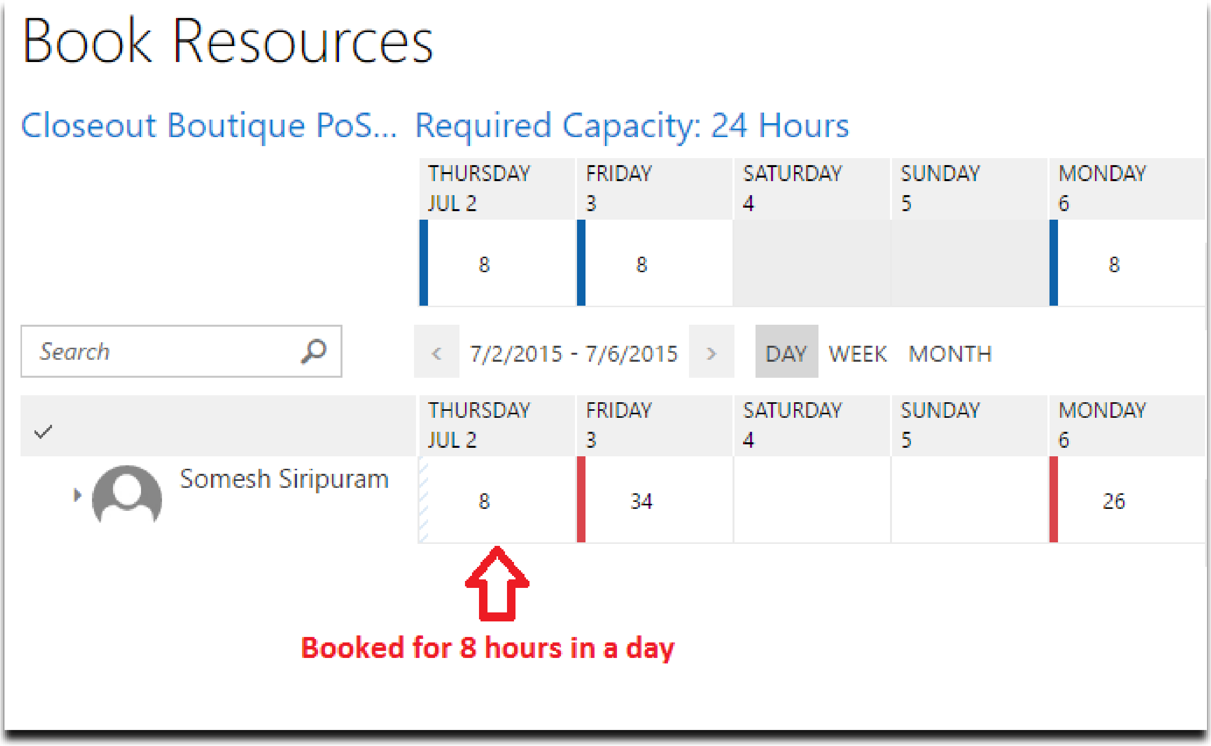
Show Booked Percentage

It shows the booking of the resource in percentage.



Show Legend

This shows only the no of hours booked in a day.



Booking Display Type

There are 3 types of bookings that can be done in the system.

1. Hard Booking
2. Soft Booking
3. Proposed Booking

Each of the type when selected shows the no of hours the resource is Hard booked, Soft Booked or Proposed for booking.

Distribution Method

There are in all 4 distribution Method that can be selected out of the 4 available options:

1. *Proportional:*
   This will book the resource for the remaining proportion of the day. For e.g. if a resource is booking for 22 hours in a day then he will be allocated only for remaining 2 hours of the day and the rest will push ahead for the next day.

2. *Front Load*
   This will start allocating the resource for 8 hours each day until the number of hours to be allocated are exhausted.

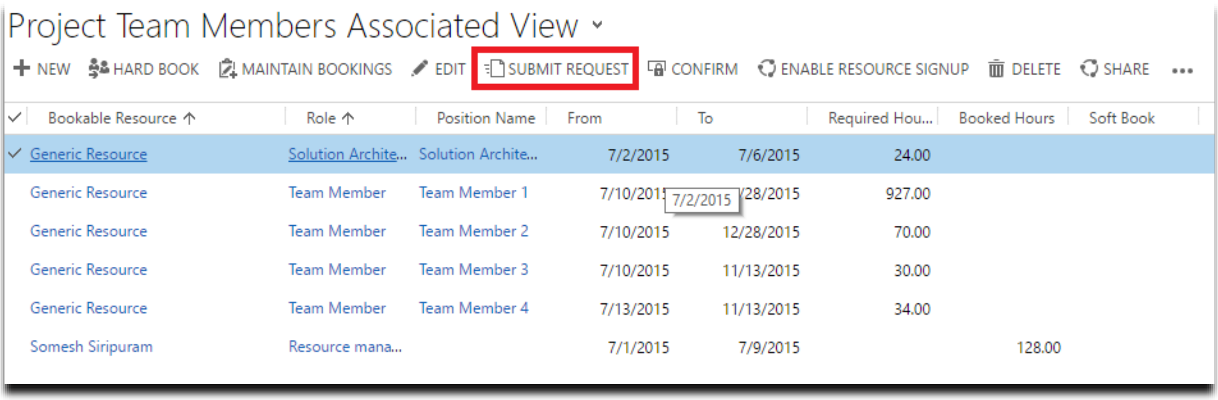
3. *Equal*
   This will allocate the resource for equal duration between the Start and End Date. for e.g. if the resource needs to be booked for 8 hours for 4 days then he shall be booked for 2 hours each day.

4. *Total*
   This will allocate the resource in total on the Start Date of the task.

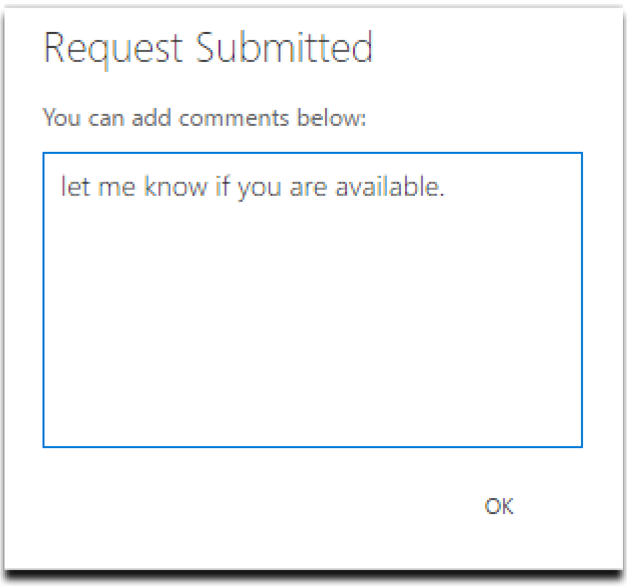
Force Refresh

This refreshes all the allocation on the main form.

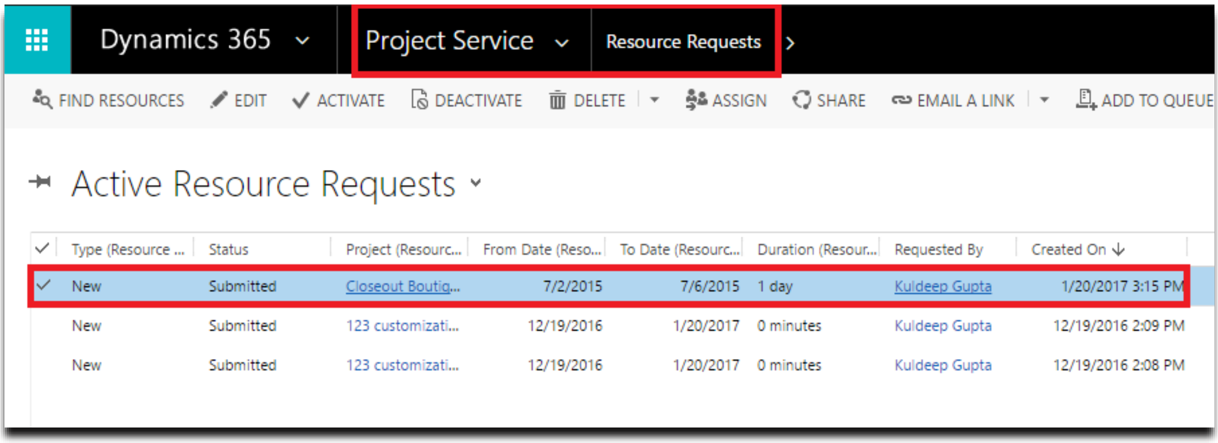
2. Submit Request
    a. Here, we Submit the request for a role and interested candidates may apply for that role. Project Managers or Resource Manager who is responsible for staffing can approve the applications received.
    For Submitting the request for the resource, navigate to Project Services → Projects→ “*Project Name*” and click on “SUBMIT REQUEST” button.



After you hit the “SUBMIT REQUEST” button there is a pop-up that comes up where in you can put in the additional comments while submitting the request.



After the request is Submitted, the Resource Manager can check the resource requests from Project Services→Resource Requests



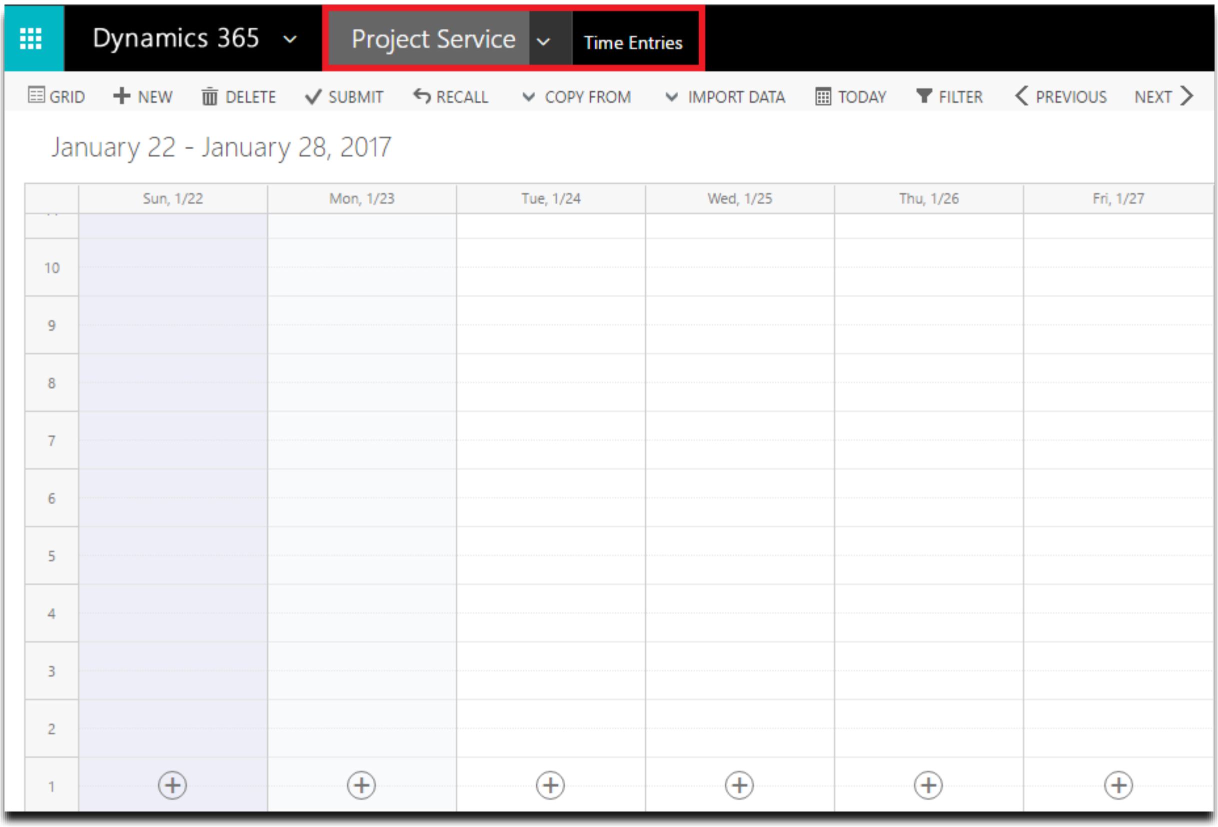
The Resource can then be appropriately be booked by clicking on “FIND RESOURCE” which will open the same booking window as we have already seen before while Hard booking the resource.

Time & Expense Entry

Time Entry

We saw how the Project Manager plans the project, creates the WBS and how he allocates and schedules the resources in Part 3 of this e-book. In this book, we shall see how the resources will do the time entry and how the billing administrator will invoice the same.

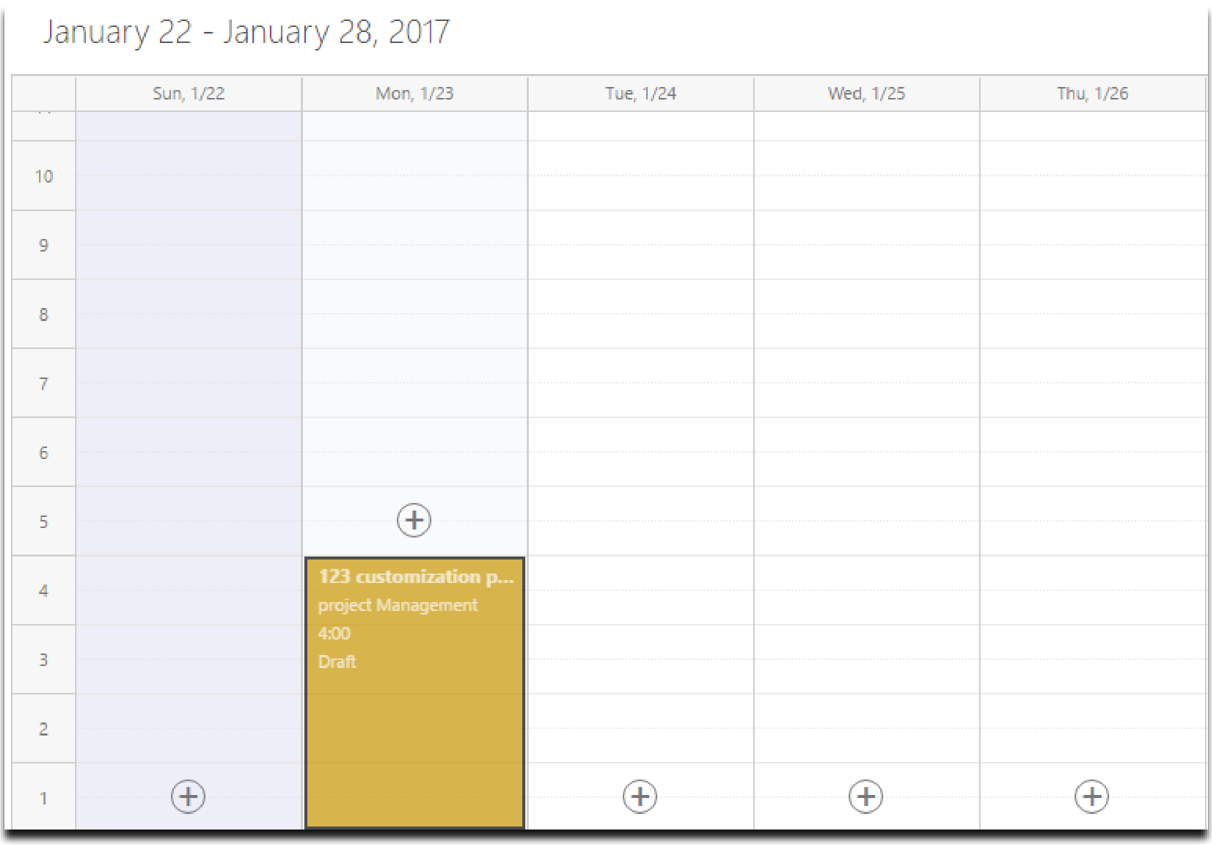
For doing the time entry you can navigate to Project Service → Time Entries



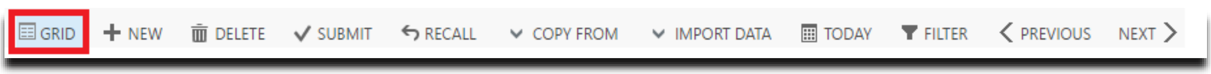
For doing the Time Entry we can hit the + button on the day when we need to do the time entry.

The following pop-up comes up where we need to enter, the Duration, Type, whether it was a Work, Absence or Vacation, Select the Project, Project Task, Select the Role and Add internal as well as external comments and save the time entry.

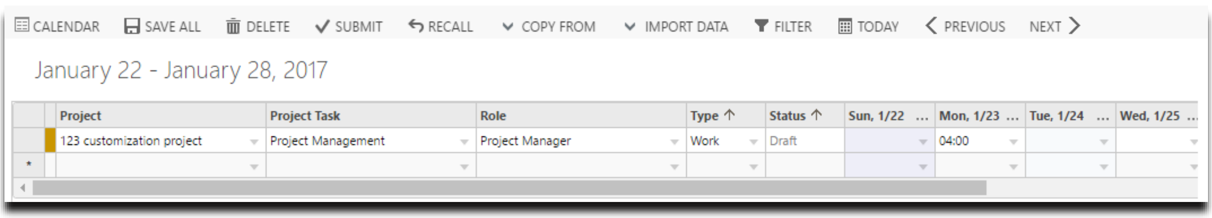
As soon as the time entry is done it appears on the calendar as shown below.



We see the Calendar View in the above screenshot. We also can toggle to Grid View by Hitting the "GRID" button in the Ribbon Control.

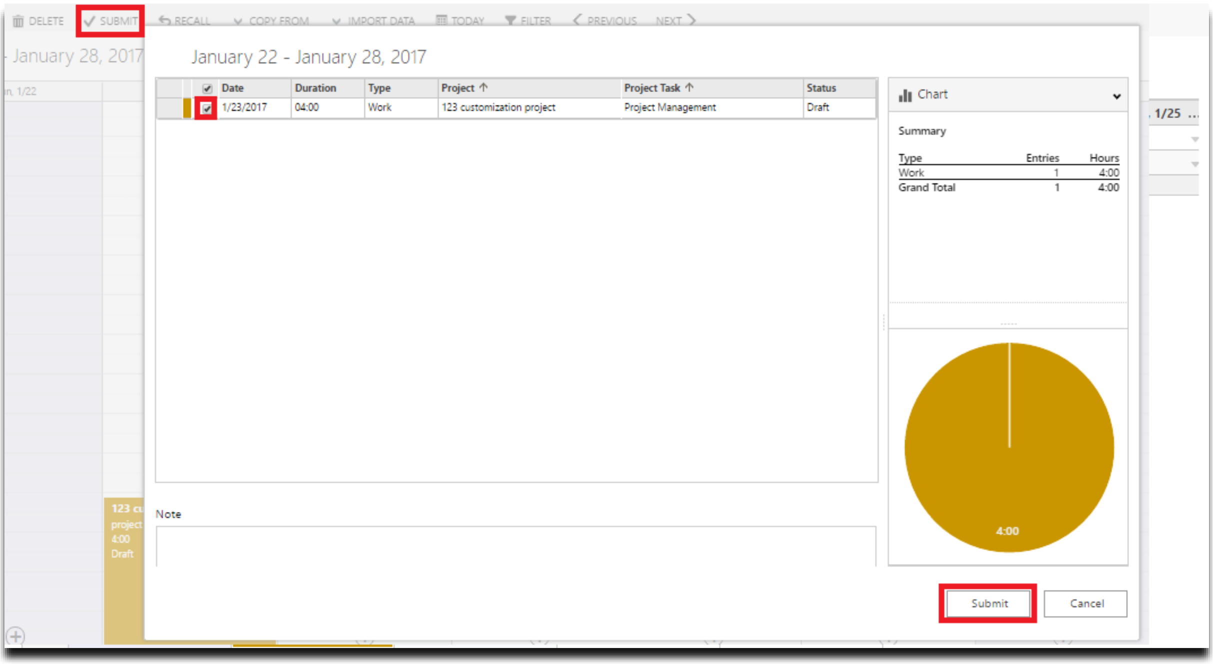


The Grid View Looks something like below:



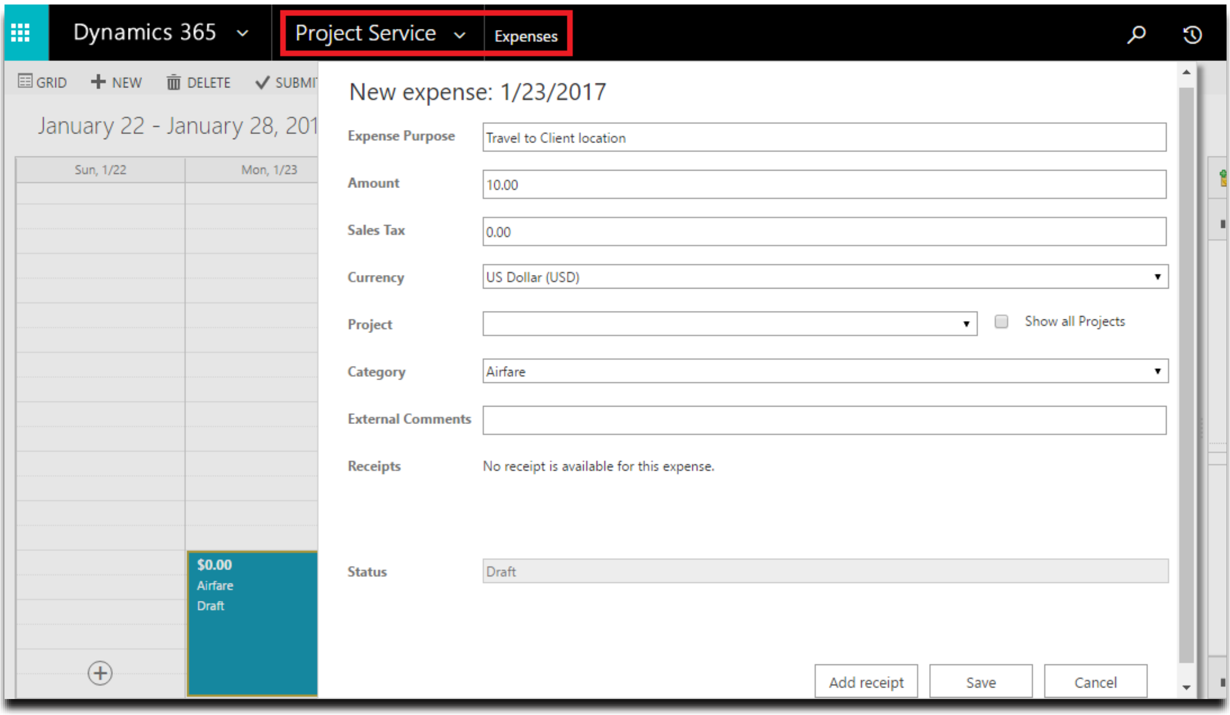
When all the time entries have been done, you can submit them by hitting the Submit button.

A popup comes where you can select the entries that you wish to Submit.



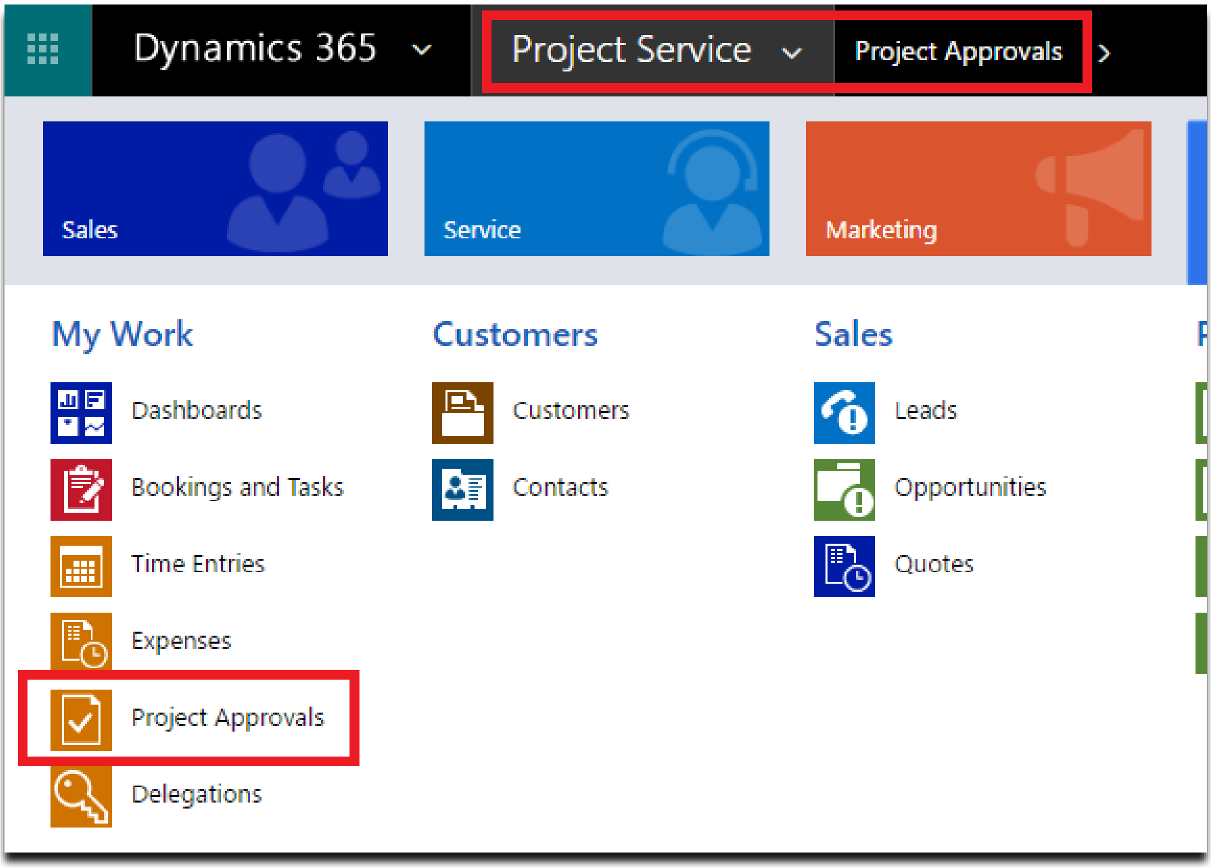
Expense Entry

Like Time Entries we can also bill for the expenses incurred during the project. For raising the expense, you can navigate to Project Service→Expenses

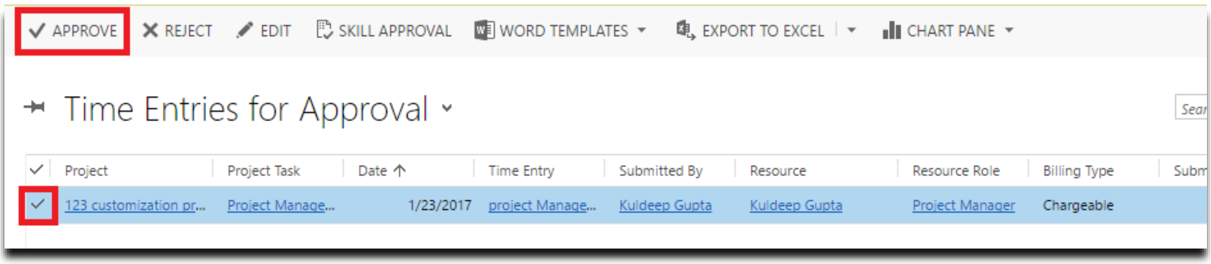


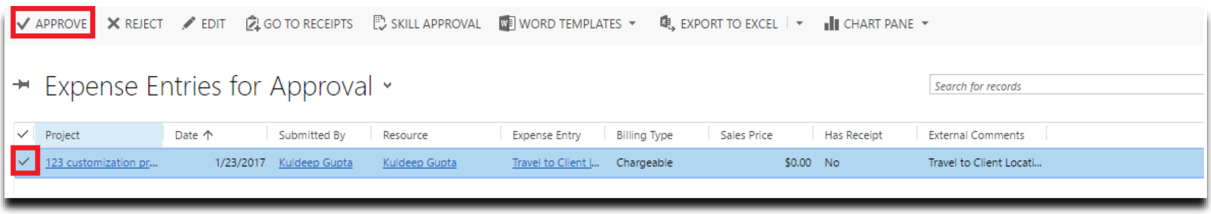
Time and Expense Entry Approval

Submitted Time Entries and Expenses waits for the project manager to Approve them. The project manager can navigate to Project Service→Project Approvals.



A list of entries from all the resources for all the projects that the project manager is responsible is shown up in “Time Entries for Approval” and “Expense Entries for Approval” view respectively and approve them by hitting the “APPROVE” button from the Ribbon control.

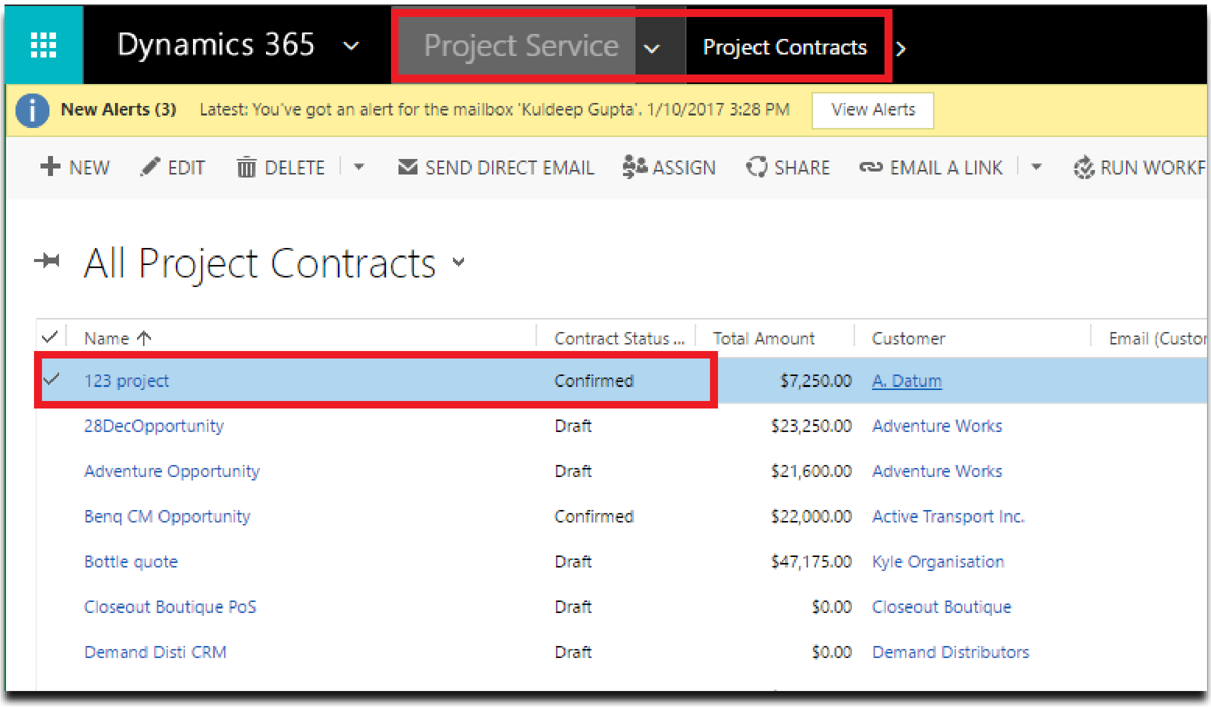




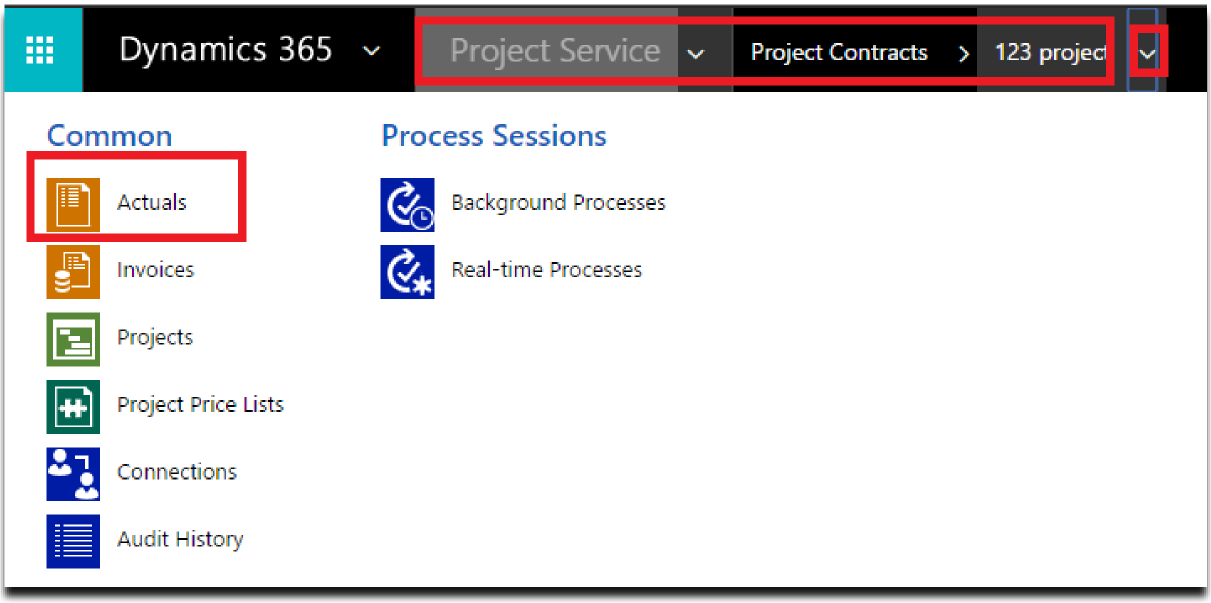
Invoicing

After the project time entries are submitted it's the job of Billing Administrator to generate Invoice and Submit it to the client.

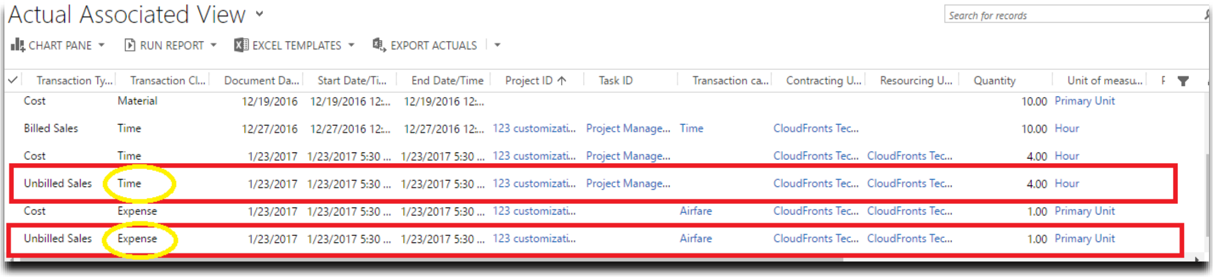
Invoicing in PSA is always generated from Project Contract. Hence, to generate the billing we need to navigate to Project Service → Project Contracts → "XYZ Project Contract"



Upon opening the project contract navigate to "Actuals" as shown below:



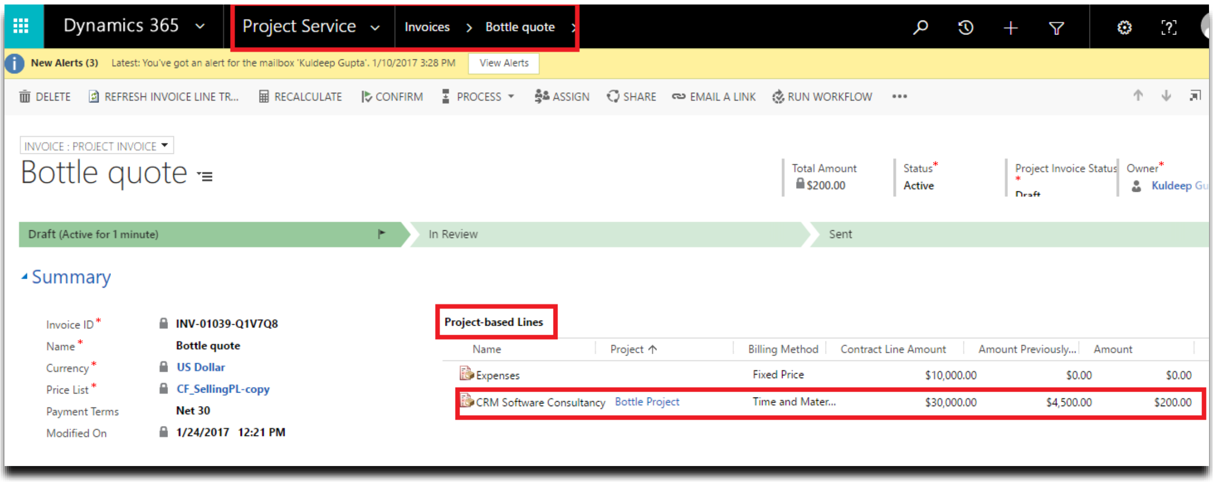
You see an "Actual Associated View" where we can see all the approved Time and Expense entries by the Project Manager as shown below.



If you observe one entry is of the type Time and one is of the type Expense.

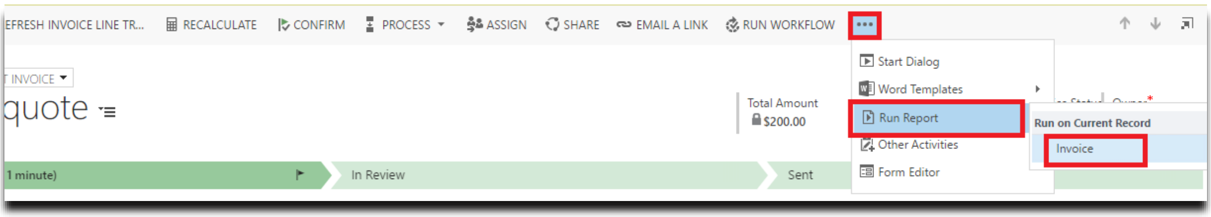
To generate the Invoice, navigate to the Project Service→Project Contracts→"XYZ Project Contract" and Hit the "CREATE INVOICE" Button.

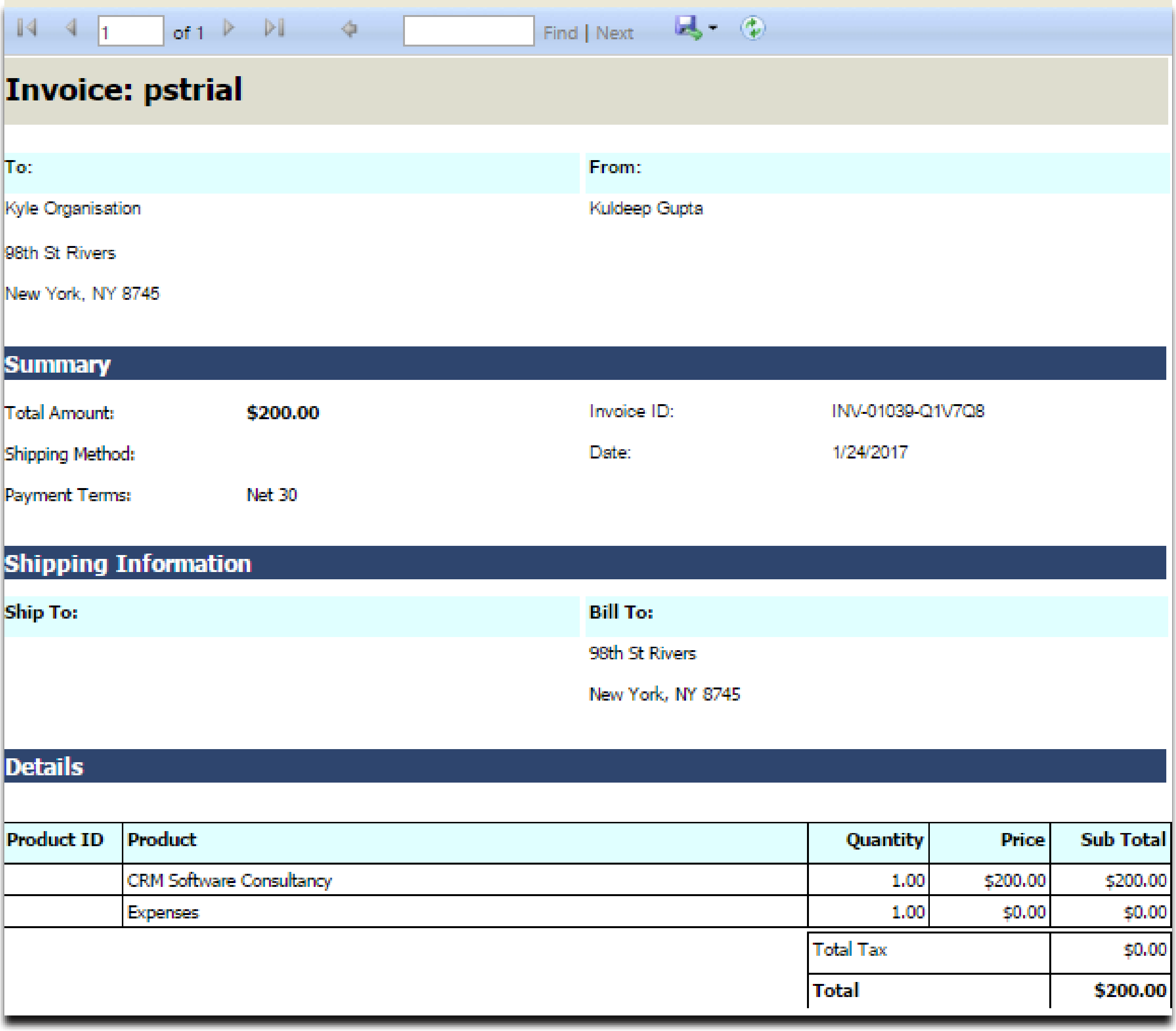
This will create the invoice and automatically navigate us to Invoices Entity.



Project Base Lines shall show all the Time and Expense Entries done on the project and Product Based Grid shall show all the Product purchased for this project, for e.g. Licenses. For which we do Milestone based billing. If the milestone has achieved the bill will automatically get generated and an invoice shall be created for the same.

There is an Invoice Report which gives you an Invoice which can be saved in multiple formats and can be send out to the customers.




1 of 1 Find | Next

Invoice: pstrial

To:	From:
Kyle Organisation	Kuldeep Gupta
98th St Rivers	
New York, NY 8745	

Summary

Total Amount:	**$200.00**	Invoice ID:	INV-01039-Q1V7Q8
Shipping Method:		Date:	1/24/2017
Payment Terms:	Net 30		

Shipping Information

Ship To:	Bill To:
	98th St Rivers
	New York, NY 8745

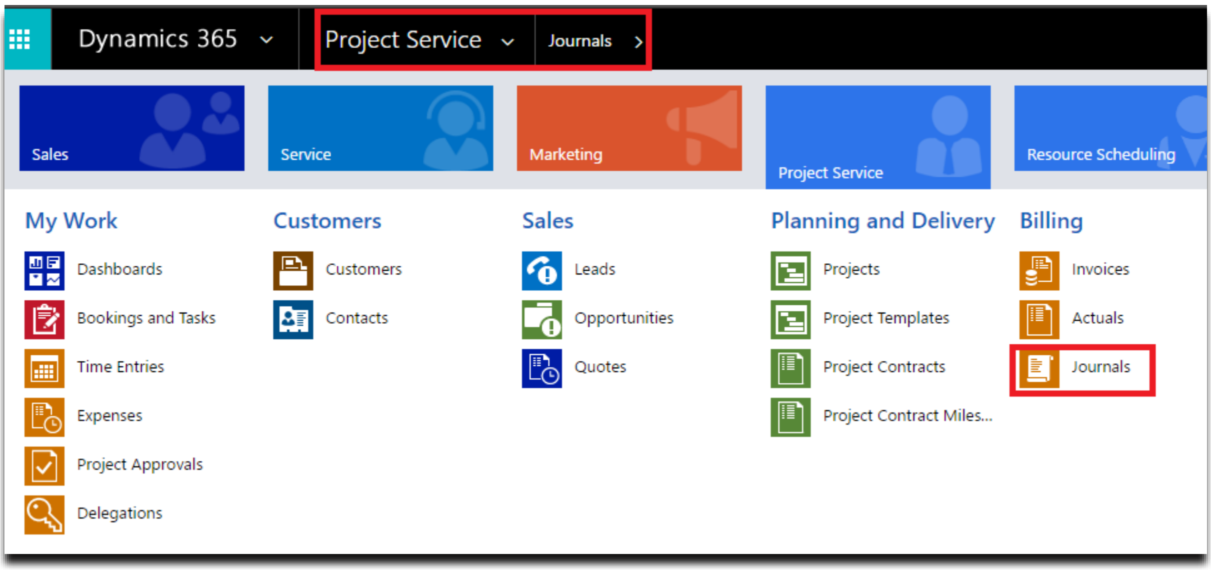
Details

Product ID	Product	Quantity	Price	Sub Total
	CRM Software Consultancy	1.00	$200.00	$200.00
	Expenses	1.00	$0.00	$0.00
		Total Tax		$0.00
		Total		**$200.00**

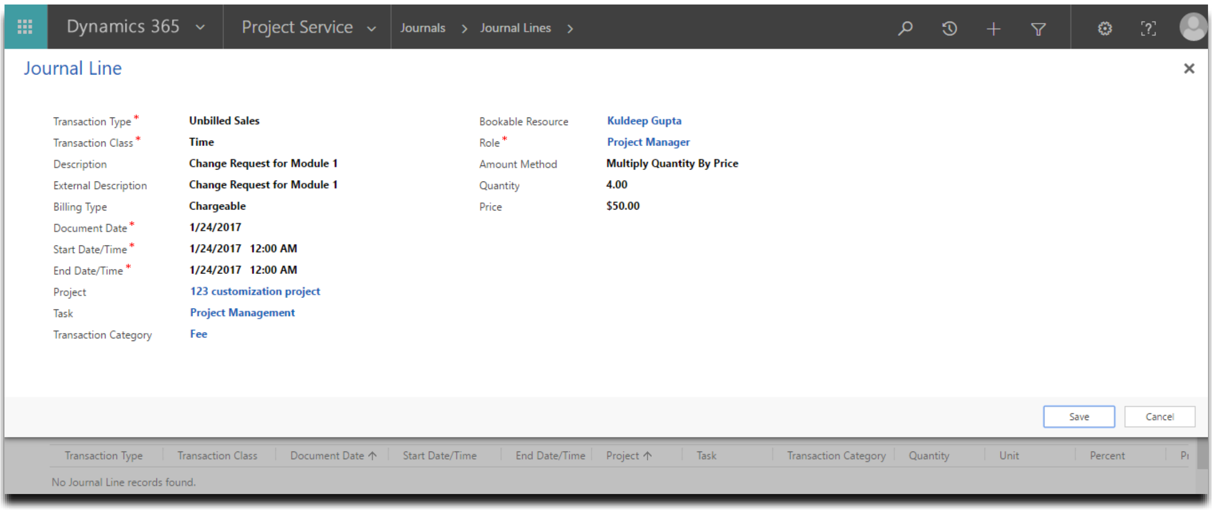
Journals

Journal entries in PSA are over and above Contract lines that we need to bill to the client.

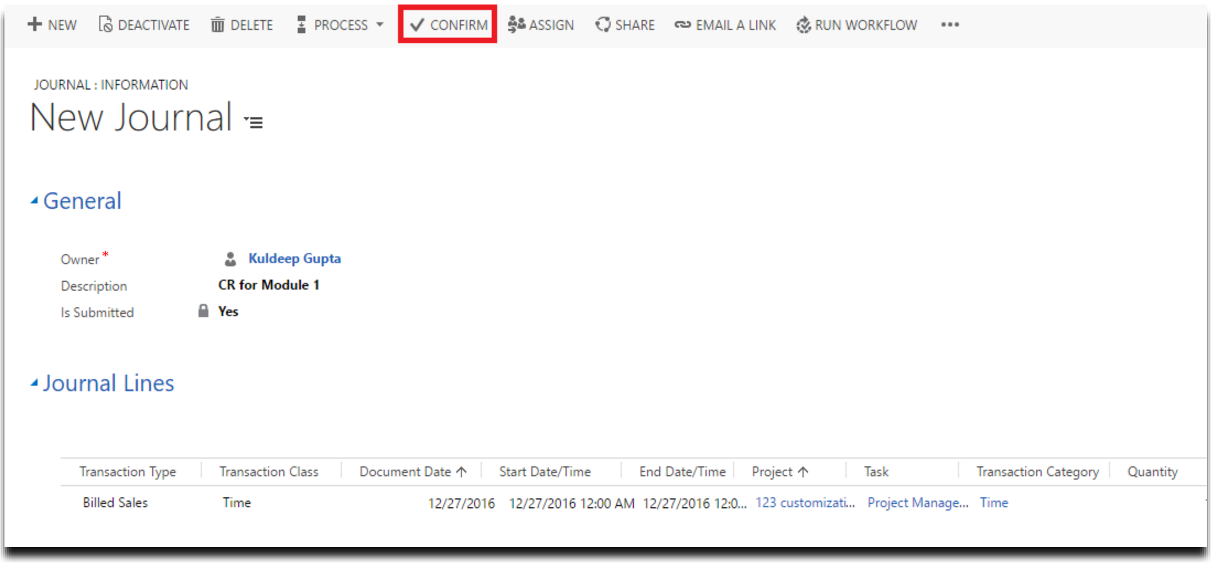
For doing the Journal Entry we need to navigate to Project Service → Journals



Click on “New” Button from the Ribbon control to create a new Journal Entry. Fill in all the details on the quick create form.



After the details are saved, you need to Confirm the same by pressing the “CONFIRM” button from Ribbon control.



The confirmed Journal entry now appears in the Actual Associated View in Project Contracts. You can then choose to invoice the same to the client.

About the Author-
Kuldeep Gupta is a Sr. Project Manager at CloudFronts. Kuldeep's deep Project Management skills and focus on Project Methodology and processes have been the cornerstone of many successful project deliveries.

Kuldeep is also a Product Manager for our flagship Project Management Application for Dynamics 365 (PM App). The PM App, which is now listed on the AppSource, started as an internal project to manage the entire Project Life Cycle within Dynamics. Yes, we do eat our own dog food.

This 4-part series on the Dynamics 365 PSA App is an initiative by Kuldeep and is meant for any Project Manager who wants to get up and running on Dynamics 365 PSA. It improves on the existing Dynamics documentation from Microsoft, through screen captures and additional content that Kuldeep found missing when setting up D365 PSA.

We are excited to have Kuldeep on board and lead our Project Management activities. Kuldeep is available for any discussion on Project Management and can be reached at kgupta@cloudfronts.com or you can tweet him at #askcloudfrontsPM.

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