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1. Introduction

This user guide describes the functions offered by proRM Fast Start, a solution for Microsoft Dynamics 365.

proRM Fast Start was initiated and developed by proMX AG. To reach us, please visit our contact page.

1.1 About proRM Fast Start

proRM Fast Start is an essential add-on for project and resource management in Microsoft Dynamics 365. It includes four features offering time and expense tracking capabilities, approval and invoicing functionality, and Project Gantt for planning and structuring of project processes.

Project managers, team leaders and CEOs may also create reports using Microsoft Power BI.

proRM Fast Start is available on Microsoft AppSource and from the proMX AppStore.

1.2 proRM Fast Start Navigation

Once proRM Fast Start is installed in Microsoft Dynamics 365, an additional area called Project Service will be added to the navigation pane.

The Project Service area is divided into five groups:
The **My Work** group includes related Dynamics 365 entities, similar to all My Work Groups in default Dynamics 365.

The **Time Recording** group includes the features Tracking and Approval Manager. You will also find the entities Time Entries, Expenses and Coming/Going here.

The **Project Management** group includes the features Project Gantt. You will also find the entities Projects, Project Tasks and Project Task Assignments here.

The **Invoice Management** group includes the feature Invoicing Manager. You will also find the entities Actuals, Journals and Invoices here.

The **Resources** group is the last main group in the Project Service area. You will find the Dynamics 365 entities Bookable Resources, Working Hours, Bookable Resource Categories and Characteristics here.

The **Settings** group includes the items Configurations and Rating Models.

### 1.3 Key Features

**proRM Fast Start** for Microsoft Dynamics 365 extends the default Dynamics 365 capabilities by project management entities and additional functionality.

All utilized entities (Projects, Project Tasks, Project Task Assignments, Time Entries, Expenses, Coming/Going, Project Templates and Working Hours) are listed in the Project Service navigation area. These entities are required for use of the HTML applications Tracking, Approval Manager, Project Gantt and Invoicing Manager.

**proRM Fast Start** also uses default Microsoft Dynamics 365 entities, such as Bookable Resources, Bookable Resource Categories, Characteristics, Rating Models, Accounts, as well as the main sales entities Leads, Contacts, Opportunities, Quotes, Orders and Invoices.

### Tracking

The Tracking feature allows employees to track their efforts and costs for assigned project tasks by creating Time Entries and Expenses. A calendar view is used for simple tracking. Employees also receive direct feedback on their working time within the current time period via the Working Time overview
and charts within the application.

Employees may also use the Coming/Going function to record the beginning and end of their working day.

Project Gantt

The Project Gantt feature enables project managers to create, plan and control the structure of projects they are responsible for.

With the help of Gantt charts, they may plan and monitor ongoing and upcoming projects as well as project task dependencies.

Approval Manager

The Approval Manager feature is employed in the final phase of the project management process, readying expenses and time entries for the invoicing process. Project managers check and approve records at the end of each reporting period.

If records appear to be incorrect, approval may be denied and records edited or directed back to the employee in question.

Filtering options and charts provide project managers with additional control over project progression.

Invoicing Manager

The Invoicing Manager feature allows users to quickly create flawless invoices merely by dragging and dropping approved time entries and expenses from one side of the screen to the other. It’s the fastest and easiest way to create invoices.

Sales Process

A business process flow, which guides users through the sales process into the project phase, assists sales teams. This process flow provides a guide line on how to set up the best conditions for project managers.

It is also possible to create new projects based on sales orders and assigned products.

In the entity Accounts, Account Tiles grant an overview of a
The application shows your company’s opportunities, quotes, orders and projects including the most important details. A tile’s color symbolizes the status of each entity:

<table>
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<th>Entity</th>
<th>Tile Color</th>
<th>Status</th>
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<tr>
<td>Opportunity</td>
<td>Yellow</td>
<td>Open</td>
</tr>
<tr>
<td></td>
<td>Green</td>
<td>Won</td>
</tr>
<tr>
<td></td>
<td>Red</td>
<td>Lost</td>
</tr>
<tr>
<td>Quote</td>
<td>Grey</td>
<td>Draft</td>
</tr>
<tr>
<td></td>
<td>Yellow</td>
<td>Active</td>
</tr>
<tr>
<td></td>
<td>Green</td>
<td>Won</td>
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<tr>
<td></td>
<td>Red</td>
<td>Closed</td>
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<td>Order</td>
<td>Yellow</td>
<td>Active</td>
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<tr>
<td></td>
<td>Green</td>
<td>Fulfilled</td>
</tr>
<tr>
<td></td>
<td>Red</td>
<td>Canceled</td>
</tr>
</tbody>
</table>

Project tiles are marked blue by default. However, this may be changed to green, yellow or red during execution to reflect the status more accurately.

The corresponding entities may be opened via click.
2. proRM Fast Start Set-Up

For full functionality of proRM Fast Start, basic configuration is required.

2.1 Security Concept and Roles

proRM Fast Start provides a security concept to prevent unauthorized users from accessing data. Therefore, project managers and employees have different access rights. These security roles also affect the permissions in Microsoft Dynamics 365.

There are three different security roles:

proRM-Employee

The security role Employee is a prerequisite for work with proRM Fast Start. Employees may create time entries, expenses, and time stamps as well as read projects, project tasks and project task assignments.
proRM-Project Manager

A Project Manager has additional rights and may create new projects, project tasks and project task assignments.

proRM-Resource Manager

Users that are assigned the proRM-Resource Manager security roll have access to the resources area within Tracking and can thus edit other resources’ time entries and expenses as well as create bookings in their name.

proRM-Invoice Manager

The security role proRM-Invoice Manager grants users full access to the invoicing functionality of the app.

proRM-Administration

The Administration role grants full access to all proRM data. This role is similar to the System Administrator in Dynamics 365.

2.2 proRM Fast Start Entities Configuration

Before proRM Fast Start may be used, basic entities need to be set up.

2.2.1 Creating Bookable Resources

Bookable Resources describe a company’s resources and employees. Without a Bookable Resource, it is impossible to work on a project task or create time entries in the system.

Step 1: Navigate to the Project Service area and select Bookable Resources in the Resources group.
Step 2: In the task bar, click New.

Step 3: Fill in all required data (fields marked with *) and select the desired system user by clicking the User lookup button. Please note: For employees who work with proRM Fast Start, a system user and Bookable Resource of the Resource Type: User is required.

Step 4: In the task bar, click Save.
2.2.2 Creating and Configuring Working Hours

Working Hours stipulate each employee’s weekly working hours. It is possible to create different working models for bookable resources.

Step 1: Navigate to the Project Service area and select **Working Hours** in the Resource group.

Step 2: In the task bar, click **New**.

Step 3: Fill in all required data (fields marked with *).
Step 4: In the task bar, click **Save**.

Step 5: Open the desired **Working Hours** record. Then, open the navigation menu and select **Bookable Resources**.

Step 6: Click **Add existing bookable resource**.

### 2.2.3 Bookable Resource Categories

Categories describe a bookable resource’s position in the company. A bookable resource can be assigned to multiple resource categories.

**Step 1:** Navigate to the Project Service area and select **Bookable Resource Category** in the Resources group.
Step 2: In the task bar, click **New**.

![New Resource Category](image)

Step 3: Fill in all required data (fields marked with *). Then, in the task bar, click **Save**.

![New Resource Category](image)

Step 4: Open the desired **Bookable Resource**. Via the in-line grid **Resource Categories**, add existing Bookable Resource Categories from the system.

![Resource Categories](image)

2.2.4 Creating and Configuring Characteristics

The Characteristics entity is used to assign skills to employees. Based on a rating model, a value ranking the employee's experience can be defined individually for each employee.

An unlimited number of skills may be assigned to a resource.

There are two characteristic types, Skill and Certification.

Step 1: Navigate to the Project Service area and select
Characteristics in the Resources group.

Step 2: In the task bar, click **New**.

Step 3: Fill in all required data (fields marked with *) and click **Save** in the task bar.

Step 4: Open the desired **Bookable Resource**. Via the inline grid **Resource Characteristics**, add existing Characteristics from the system.

Step 5: In the new tab, set the characteristic and experience
3. proRM Fast Start Functionality

This chapter describes various functions of proRM Fast Start. It includes instructions to:

- Creating a project
- Creating a project task
- Assigning a resource to a project task
- Creating a time entry
- Creating an expense
- Coming/Going
- Submitting time entries
- Submitting expenses
- Approving time entries
- Approving expenses
- Using reporting tools

3.1 Projects

Projects are the focal point of proRM Fast Start. The solution is organized according to a strict hierarchy, at the top of which should ideally sit a customer, i.e. an Account or a Contact in Dynamics 365.

Each project has to be assigned to a customer. It is possible to assign several projects to the same customer. Each project may include several project tasks.

Resources may not be assigned directly to a project but to project tasks only; this is called Project Task Assignment.
New projects may be created using the Dynamics 365 form, Quick Create feature or Project Gantt application.

3.1.1 Creating a Project in Project Gantt

**Step 1:** Navigate to the Project Service area and select **Project Gantt** in the Project Management group.

**Step 2:** Select the desired customer in the **Filter** lookup. Keeping the filter empty will load all data in the system.

Please note: Loading all available data will decrease performance.
Step 3: Click **Refresh** to load data.
On the left-hand side, a project tree illustrates the project hierarchy. You will find the corresponding Gantt charts on the right-hand side of the application.

Step 4: Select a customer and right-click to open the context menu. Select **Add new project**.
Step 5: A new dialog pops out. Fill in data for the new project. Then, confirm with **OK** to create the project.

3.1.2 Creating a Project via Quick Create

**Step 1:** Open the Quick Create form by navigating to the + icon in the menu bar and select **Project** in the Records group.

**Step 2:** Fill in all required data (fields marked with *) to create the new record. Then, click **Save**.

3.1.3 Creating a Project via Dynamics 365 Form

**Step 1:** Navigate to the Project Service area and select **Projects**
in the Project Management group.

Step 2: Click **New** in the task bar.

Step 3: Enter the required data (fields marked with *).
You can fill the data directly into the form or use the proRM Business Process Flow at the top of the page, which will guide you through the different stages of the project.

For more information about the business process flow feature, please visit the [Microsoft TechNet website](https://technet.microsoft.com).
Step 4: Click the **Save** button in the task bar or at the bottom right corner of the screen.

3.1.4 Project Templates

Frequently used project structures may be saved as Project Templates.

In order to save time while creating Project Tasks, giving estimations for assignments, or planning project structures, these templates may be imported for different customers or projects via the Project Gantt application.

3.2 Project Tasks

Projects are made up of one or more project tasks. Project tasks can be subordinate to each other.

Project managers may add resources to the project task which is lowest in the hierarchy.

New tasks may be created using the Dynamics 365 form, Quick Create feature or Project Gantt application.

3.2.1 Creating a Project Task in Project Gantt

**Step 1:** Navigate to the Project Service area and select
Project Gantt in the Project Management group.

Step 2: Select a customer via the lookup **Filter**. Leaving the filter empty will load all data in the system.  

Please note: Loading all available data will decrease performance.

Step 3: After choosing the desired filter, click **Refresh** to load data into the application.
On the left-hand side, a project tree illustrates the project hierarchy. You will find the corresponding Gantt charts on the right-hand side of the application.

**Step 4:** Select the project or project task for which you wish to create a new project task. Right-click to open the context menu and select **Add child task**.

When creating a subordinate project task, the **Add child task** functionality will be hidden in the submenu **Project Task**.
Step 5: A dialog window pops out. Fill in required data for the project task. When all fields are filled in, confirm with OK to create the project task.

3.2.2 Creating a Project Task via Quick Create

Step 1: Open the Quick Create form by clicking the + icon in the menu bar and select Project Task in the Records group.
Step 2: A form appears. Fill in all required data (fields marked with *). Click Save to create the project task.

3.2.3 Creating a Project Task via Dynamics 365 Form

Step 1: Navigate to the Project Service area and select Project Tasks in the Project Management group.

Step 2: Click New in the task bar.

Please note: Loading all available data in the system will decrease performance.
Step 3: Fill in all required data (fields marked with *).

Step 4: Click the **Save** button in the task bar or in the bottom right corner of the screen.

### 3.3 Project Task Assignments

The Project Task Assignment entity connects Project Task and Bookable Resource and stores project related customer
and employee data. Only after an assignment was made is it possible for the employee to create Time Entries and Expenses.

Project Task Assignments may be created using the Dynamics 365 form, Quick Create feature or Project Gantt application.

3.3.1 Creating an Assignment in Project Gantt

Step 1: Navigate to the Project Service area and select **Project Gantt** in the Project Management group.

Step 2: Select a customer through the lookup **Filter**. Leaving the filter empty will load all data into the system.

Step 3: Click **Refresh** to load data into the application.

On the left-hand side, a project tree illustrates the project hierarchy. You will find the corresponding Gantt charts on the right-hand side of the application.
**Step 4:** Select the desired project task, right-click to open the context menu and select **Resources**.

**Step 5:** The dialog window **Manage resources** opens. Click **New** in the bottom left corner. Then, fill in all fields and confirm with **OK** to create the Project Task Assignment.

Please note: Loading all available data in the system decreases the performance of the application.
3.3.2 Creating an Assignment via Quick Create

**Step 1:** Click the + icon in the menu bar and select **Project Task Assignment** in the Records group.

**Step 2:** Fill in all required data (fields marked with *) and click **Save**.

For an overview of the functionality and content of the Quick Create Feature, please visit Microsoft Dynamics 365 Help & Training.

3.3.3 Creating an Assignment via Dynamics 365 Form

**Step 1:** Navigate to the Project Service area and select **Project Task Assignments** in the Project Management group.
Step 2: Click **New** in the task bar.

Step 3: Fill in all required data (fields marked with *).

Step 4: Save the record by clicking **Save** in the task bar or in the bottom right corner of the screen.
3.4 Time Tracking

Once an employee has been assigned to a project task, they may create Time Entries for this project task. These allow employees to track their working time on the task and enable project managers to supervise the progress of their projects.

There are three different types of time entries:

**Work**: default type for work on project tasks

**Absence**: for absences, e.g. due to illness

**Holiday**: for vacation or public holidays

Time entries may be created using the Dynamics 365 form, Quick Create feature, Tracking application or Microsoft Dynamics 365 mobile application.

3.4.1 Creating a Time Entry in Tracking

**Step 1**: Navigate to the Project Service area and select **Tracking** in the Time Recording group.
Step 2: Create a Time Entry

There are two kinds of time entries. **Full-day time entries** do not feature a start and end time, only duration. However, **start-and-end-time** entries are supported as well. Here, the duration will be automatically calculated based on the start and end time.

The preferred entry type may be an individual choice, management decision or depend on the project.

Step 2.1: Create a Full-Day Time Entry

Select the day for which a time entry should be created. Right-click at the top of that day’s column to open the context menu and select **Create new Time Entry**.

This opens the Time Entry creation form which is made up of two areas. In the project tree structure on the left hand side, select the desired project task assignment. Fill the necessary data into the fields on the right. Confirm with **Save**.
Step 2.2: Create a Start-and-End-Time Entry

Click and drag the mouse to mark the desired time frame in the calendar. Then, right-click to open the context menu and select Create new Time Entry.
3.4.2 Creating a Time Entry via Quick Create

**Step 1:** Click the + icon in the menu bar and select *Time Entry* in the Records group.

For an overview of the functionality and content of the Quick Create Feature, please visit Microsoft Dynamics 365 Help & Training.
Step 2: Fill in all required data (fields marked with *). Click Save to create the new data record.

3.4.3 Creating Tracking Entries via CRM Form

Step 1: Navigate to the Project Service area and select Time Entries in the Time Recording group.

Step 2: Click New in the task bar to open a new blank form.

Step 3: Fill in all required data (fields marked with *), either by filling the data into the form or using the proRM Business Process Flow at the top of the page, which will guide you.

For more information about the business process flow feature, please visit the Microsoft TechNet website.
through the different stages of time entry creation.

**Step 4:** Click the **Save** button in the task bar or in the bottom right corner of the screen.

### 3.4.4 Creating a Time Entry in the Microsoft Dynamics 365 Mobile Application

The Microsoft Dynamics 365 mobile application is available for phones, tablets and Windows (starting with 8.1) in the Windows
App store. It provides access to the entities Activities, Accounts, Contacts, Leads, Dashboards and custom entities, allowing users to track their daily work progress.

**Step 1:** Open the application on your phone, tablet or PC.

For further information regarding the app, please click [here](#).

For Windows PCs the application is available via the [Microsoft Store](#).

**Step 2:** Navigate to the menu icon in the in-app navigation and select **Time Entries**.
Upon opening the entity, you will get an overview of the current week, including existing time entries.

Step 3: Open Creation Form

To create a new time entry, right-click or (when using a mobile device) tap anywhere to open the context menu. Click the **New** (+) icon in the bottom right corner.
Step 4: A form opens. Enter all required data and click **Save**.

### 3.5 Expense Tracking

In addition to time entries, proRM Fast Start also allows tracking of project-related expenses.

The following expense types are available: Hotel, Car rental, Meal, Airfare, Public Transportation, Taxi and Miscellaneous.

Expenses may be created using the Dynamics 365 form, Quick Create feature, Tracking application or Microsoft Dynamics 365 mobile app.

#### 3.5.1 Creating an Expense in Tracking

**Step 1:** Navigate to the Project Service area and select **Tracking** in the Time Recording group.
Step 2: Select the day for which an expense should be created. Right-click anywhere in that day’s column to open the context menu and select **Create new Expense**.

Step 3: This opens an expense creation form which is made up of two areas. In the project tree structure on the left hand side, select the desired project task assignment.
Fill the necessary data into the fields on the right. Confirm with **Save**.

### 3.5.2 Creating an Expense with Quick Create

**Step 1:** Navigate to the + Icon in the menu bar and select **Expense** in the Records group.

**Step 2:** Fill in all required data (fields marked with *). Then, click **Save**.

### 3.5.3 Creating an Expense via Dynamics 365 Form

**Step 1:** Navigate to the Project Service area and select
Expenses in the Time Recording group.

**Step 2:** Click **New** in the task bar.

**Step 3:** Enter all required data (fields marked with *), either by filling it directly into the form or by following the proRM Business Process Flow at the top of the page.

For more information about the business process flow feature, please visit the Microsoft TechNet website.

**Step 4:** Click **Save** in the task bar or in the bottom right corner of the screen.
3.5.4 Creating an Expense in the Microsoft Dynamics 365 Mobile Application

The Microsoft Dynamics 365 mobile application is available for phones, tablets and Windows (starting with 8.1) in the Windows App store. It provides access to the entities Activities, Accounts, Contacts, Leads, Dashboards and custom entities, allowing users to track their daily work progress.

Step 1: Open the mobile application on your phone, tablet or PC.

For further information regarding the app, please click here.

The application for PCs is available in the Microsoft Store.
Step 2: Navigate to the menu icon in the in-app navigation and select **Expenses**.

Upon opening, you will get an overview of the current week including existing expenses.
Step 3: To create a new expense, right-click or (when using a mobile) tab anywhere to open the context menu. Click **New (+)** in the bottom right corner.

Step 4: Enter all required data (fields marked with *) into the form. Click **Save** to create the expense.

3.6 Coming/Going

The Coming/Going function allows employees to record the
start and end of their working day, parallel to time tracking for work on a specific project task.

The Coming/Going record may be created using the Quick Create feature or Tracking application.

3.6.1 Record Coming/Going in Tracking

**Step 1:** Navigate to the Project Service area and select **Tracking** in the Time Recording group.

**Step 2:** Depending on which record was last created, you will find a **Coming** or **Going** button above the calendar. Click it to record the start or end of your working day, respectively.
3.6.2 Record Coming/Going via Quick Create

**Step 1:** Click the + icon in the menu bar and select **Coming/Going** in the Records group.

**Step 2:** Choose either Come or Go and click **Save**.

3.7 Submitting a Time Entry

Time Entries are created as drafts and thus remain editable for the employee. To enable time entries for the invoicing process, they have to be submitted. At this stage, employees can check the accuracy of the booking details.

Time entries may be submitted using the Dynamics 365 form or Tracking application.

3.7.1 Submitting and Recalling a Time Entry in Tracking

**Step 1:** Navigate to the Project Service area and select **Tracking** in the Time Recording group.
Step 2: Click **Submit** to open the dialog window.

Step 3: All draft time entries for the current period are listed in the Submit Records dialog window. Select the entries you wish to submit with a left mouse click. It is possible to select several entries at once by holding the CTRL key.

Step 4: Click **Submit** to submit all selected time entries. Once entries are submitted, they are no longer editable for the employee.

Step 5: Recalling a Time Entry

In case a time entry was submitted by mistake or needs to be changed afterwards, you may recall this entry. To do this, open the Tracking application and click **Recall**.
Select the entries you would like to recall and click **Recall**.

These entries will now go back into draft phase enabling you to make the desired changes.

### 3.7.2 Submitting a Time Entry via Dynamics 365 Form

**Step 1:** Navigate to the Project Service area and select **Time Entries** in the Time Recording group.

**Step 2:** Select the desired time entry in the list of bookings and open it via double-click or with the help of the context menu.
Step 3: Follow the proRM Fast Start Business Process Flow for Time Entries to the second step **Submit Time Entry** by clicking the **Next Stage** button.

Step 4: Ensure all entry details are correct and submit it by changing the option **Submit Time Entry?** to **Yes** via a click. Click **Save** in the bottom right corner.
3.8 Submitting an Expense

Expenses are created as drafts and thus remain editable for the employee. To enable expenses for the invoicing process, they have to be submitted. At this stage, employees can check the accuracy of the booking and whether the project assignment is correctly selected.

Expenses may be submitted using the Dynamics 365 form or Tracking application.

3.8.1 Submitting and Recalling an Expense in Tracking

**Step 1:** Navigate to the Project Service area and select **Tracking** in the Time Recording Group.

**Step 2:** Click **Submit**.

**Step 3:** In the **Submit Records** dialog window, select the **Expenses** tab. All draft expenses for the current time period are listed. Select the expenses you wish to submit. It is possible to select several entries at once by holding the CTRL key.
Step 4: Click **Submit** to change the status of all selected expenses from draft to submitted. Once entries are submitted, they are no longer editable for the employee.

Step 5: Recalling Expenses

In case an expense was submitted by mistake or needs to be changed retroactively, you may recall this expense.

To do this, open the Tracking application and click **Recall**.

Select the expenses you wish to recall and click **Recall**.

These expenses will now go back into draft phase enabling you to make the desired changes.
3.8.2 Submitting an Expense via Dynamics 365 Form

Step 1: Navigate to the Project Service area and select Expenses in the Time Recording group.

Step 2: Select the desired expense in the list of bookings and open it via double-click or with the help of the context menu.

Step 3: Follow the proRM Fast Start Business Process Flow to the stage Submit Expense by clicking the Next Stage button.

Step 4: Ensure all expense details are correct and submit it by changing the option Submit Expense? to Yes via a click. Click Save in the bottom right corner.
3.9 Approval Manager

The Approval Manager application enables project managers to check submitted time entries and expenses and, if necessary, edit or unapprove them. Approved time entries and expenses are free for invoicing.

3.9.1 Approving, Editing and Unapproving Time Entries

**Step 1:** Navigate to the Project Service area and select **Approval Manager** in the Time Recording group.
Step 2: Select an account or project through the lookup Filter. Click **Select** and **Add** to load the data.

Leaving the filter empty will load all data in the system.

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Step 3: Click **Refresh** to load the data into the application.
Step 4: By expanding the project tree on the left hand side and selecting a record within the structure, you may filter the displayed time entries by employee or project.

Please note: This feature is not available unless a filter was selected in step #2

Step 5: Editing Time Entries

Time entries may be edited inline. Double-click the field which should be changed and key in the new value. Click Save to confirm your changes.
Step 6: Approving Time Entries

To approve time entries, tick the check box in front of the record. You may select multiple records at once. Click Approve.

Step 7: Unapproving Time Entries

In case a time entry was approved by mistake or needs to be edited retroactively, you may unapprove these entries by clicking Unapprove. Please note: To display approved items, it is necessary to use a certain view and configuration.

3.9.2 Approving, Editing and Unapproving Expenses

Step 1: Navigate to the Project Service area and select Approval Manager in the Time Recording group.
Step 2: Select an account or project via the lookup Filter. Leaving the filter empty will load all data in the system. Please note: Loading all available data will decrease performance.

Step 3: Click Refresh to load the data into the application. Select the tab Expenses.

The main panel in the center of the application displays records based on the selected view, date range, and filter.
Step 4: By expanding the project tree on the left hand side and selecting a record within the structure, you may filter the displayed expenses by employee or project.

Step 5: Editing Expenses
Expenses may be edited inline. Double-click the field which should be changed and key in the new value. Click Save to confirm your changes.

Step 6: Approving Expenses
To approve expenses, tick the check column in front of the record. You may select multiple records at once. Click Approve.

Step 7: Unapproving Expenses
In case an expense was approved by mistake or needs to be edited retroactively, you may unapprove these expenses by clicking Unapprove.

Please note: This feature is not available unless a filter was selected in step #2.

Please note: To display approved items, it is necessary to use a certain view and configuration.
3.10 Invoicing

Based on the time entries and expenses already tracked by project team members, you can now create flawless invoices quickly and effortlessly.

3. 10.1 Creating an Invoice in Invoicing Manager

Step 1: Navigate to the Project Service area and select **Invoicing Manager** in the Invoice Management group.

Step 2: Select the records you would like to display through the lookup Filter. Click **Select** and then **Add** to load the data.

Step 3: Click **Refresh** to load the data into the application.
Once the data is loaded, you will see accounts and associated projects as well as approved time entries and expenses, which may be invoiced, in the left half of the screen. On the right side, you will find the accounts and any invoices that may already have been created.

Step 4: To create an invoice, select an account on the right side of the screen and right click to open the context menu and select Create Invoice.

Loading all available data will decrease performance.

Please note: By default the date range is set to the previous month. Change the date range in fields From and To if necessary.
In the Create Invoice window fill in all required data: give your invoice a name, select a price list and choose the invoice date. Click **OK** to create the invoice.

**Step 5:** To add items to the invoice, simply drag and drop the desired items from the left-hand side to the right side. You don’t have to be very precise here, since the selected items will automatically be added to the correct account.

Please note: Currency and Price List have to be set to the same currency, e.g. US Dollar – US Dollar Price List. Please note: Product line items must be invoiced separately from tracking entries.
Step 6: To keep track of your invoices, you may change their state. To do so, select the invoice in question and right click to open the context menu. Select Change State and choose Billed, Booked or Cancel.

![Invoice Management in Dynamics 365](image)

Step 7: To finish Invoice creation, click Save in the top menu. Your invoice has been created.

![Invoice Management in Dynamics 365](image)

3.10. 2 Creating an Invoice via Dynamics 365 Form

Step 1: Navigate to the Project Service area and select Invoices in the Invoice Management group.

![Invoice Management in Dynamics 365](image)

Please note: You may only add default Dynamics entities to your invoice when creating an invoice via Dynamics 365 form. Actuals cannot be included.
Step 2: Click **New**.

Step 3: Fill in all required data (fields marked with *).

Step 4: Click **Save** to apply changes.
Step 5: Get product line items from the corresponding opportunity or create a write-in or existing product.

Your invoice is now ready to be sent.
3.10.3 Creating an Invoice via Quick Create

Step 1: Open the Quick Create form by navigating to the + icon in the menu bar and select **Invoice** in the Records group.

Step 2: Fill in all required data (fields marked with *). Then, click **Save**.

You will get a notification if your invoice was successfully created.

3.10.4 Cancelling an Invoice

Step 1: Navigate to the Project Service area and select **Invoicing Manager** in the Invoice Management group.

Please note: You may only add default Dynamics entities to your invoice when creating an invoice via Quick Create. Actuals cannot be included.
Step 2: Select records through the lookup Filter. Click **Select** and **Add** to load the data.

![Lookup Records](image)

Step 3: Click **Refresh** to load the data into the application.

Once the data is loaded, you will see accounts and their approved project tasks and products which are ready to be invoiced in the left half of the screen. On the right side, you will find the accounts and any invoices that may already have been created.

Step 4: To cancel an invoice, select the relevant invoice and right click to open the context menu.

Please note: By default, the date range is set to the previous month. You may change the date range in fields From and To.

Please note: Loading all available data will decrease performance.
Then, select **Change state** and **Cancel**. After that, a credit note will be created.

Click **Save** to confirm the cancellation. The invoice is now cancelled.

### 3.11 Reporting

proRM Fast Start also enables evaluation of the data recorded by employees and project managers. To that end, the following default Dynamics 365 features are supported.

#### 3.11.1 Dashboards

The proRM Fast Start dashboards are available in the Microsoft Dynamics 365 Dashboard selection in the areas Sales, Service, Marketing and Project Service. Any dashboard may be set as default.
3.11.1.1 Financial Management

**Financial Management** dashboards provide project managers with an overview of their projects’ planned vs. actual costs and actual vs. estimated effort.

A dashboard based on the needs of a project manager may be created.

For more information about Dynamics 365 dashboards, please visit [Microsoft Dynamics 365 Help & Training](https://microsoft.com).

3.11.1.2 Project and Resource Management

The **Project and Resource Management** dashboard additionally displays summaries of time entries and expenses and an overview of the total amount of submitted expenses.
3.11.1.3 Project Task Assignment

Each employee may gain an overview of their project tasks, durations and billing values in the **Project Task Assignment** dashboard. With the help of small Gantt charts, assigned project tasks are visualized based on their start and end date.

![Project Task Assignment dashboard](image)

3.11.2 Charts

Each proRM Fast Start entity provides charts by default. The Charts tab can be found on the right hand side in the entity overview.

**Step 1:** Navigate to the Project Service area and select the desired entity (in this example, **Time Entries**).

![Dashboard overview](image)
Step 2: Select the **Charts** tab at the right hand side of the window.

![Diagram showing the Charts tab](image)

Step 3: Open the dropdown menu to select a chart.

![Diagram showing the dropdown menu](image)

Step 4: Charts can be filtered by changing the list view or filtering the columns. Click on the chart to drill down the
data (here, we selected the red colored field to display the corresponding vacation type time entries).

Personal Views may also be created. Please visit this Microsoft TechNet article for more information.

3.11.3 Power BI

You may also integrate proRM Fast Start in Microsoft Power BI to generate detailed, custom visualizations of your data with charts, graphs, waterfalls, and more.

To connect Power BI to proRM Fast Start, follow these steps:

1. Open Power BI and select Get Data.
2. In the category Content Pack Library, select My organization and click Get.
4. Enter all necessary data into the dialog form Connect to Power BI for proRM Fast Start and click Next.

When your data has been successfully imported, the pre-configured proRM Fast Start Dashboard will appear. On this dashboard you will find several tiles, including the cumulative duration by project for the current and previous month. You may customize these tiles, delete them or add new tiles as you see fit.

Corresponding reports and datasets are also available.
4. Uninstall proRM Fast Start

Step 1: Navigate to Settings area in Microsoft Dynamics 365 and select Solutions.

Step 2: All installed solutions in the system are listed. Select proRM Fast Start.

Step 3: In the menu bar, click Delete.

Please note: Uninstalling proRM Fast Start will remove all data created in Projects, Project Tasks, Project Task Assignments, Expenses, Time Entries, Configurations, Coming/Going and Working Hours from the Microsoft Dynamics 365 environment.

For more information on how to delete a managed solution in Microsoft Dynamics 365, please visit the Microsoft Developer Network.
5. Contact

For sales and licensing questions, please contact sales@proMX.net.

For any other questions, wishes or feedback, please contact us via support@proMX.net or the below details.

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