proMX 365
for Construction

User Guide

What is proMX 365 for Construction?

proMX 365 for Construction is an industry solution for Microsoft Dynamics 365. It was specifically developed by proMX AG for construction suppliers. It is built on Dynamics 365 Project Service Automation (Dynamics 365 Project Operations once it becomes available).

Microsoft Dynamics 365 Project Service Automation (PSA) is a project management tool focused on front office project management business that connects seamlessly with sales and lets users plan, staff, document and invoice projects.

Microsoft Dynamics 365 Project Operations will combine the capabilities of three existing Microsoft project management solutions and offer functionality for more personas involved in the project process. The app will become available in October 2020 and replace PSA.

proMX 365 for Construction includes these main features and more:

- construction specific categories for Opportunities
- refer to an object to specify the kind of building concerned for the project
- extended functionality for choosing an additional customer industry
- multi Project Gantt HTML client to structure and edit construction projects
- tracking calendar HTML application
- start and end time handling for time entries
- enhanced time entry reporting on project level
- holiday and travel management for building suppliers
- booking restrictions per time entry or construction project
- customized business process flow to maintain projects with different stages
- approval of larger budget plannings in construction projects
- project specific bill and cost rates

Opening the solution

Go to **Dynamics 365 > proMX Features**

Once you have opened the solution, you get access to all Sales and Project Service functionalities.
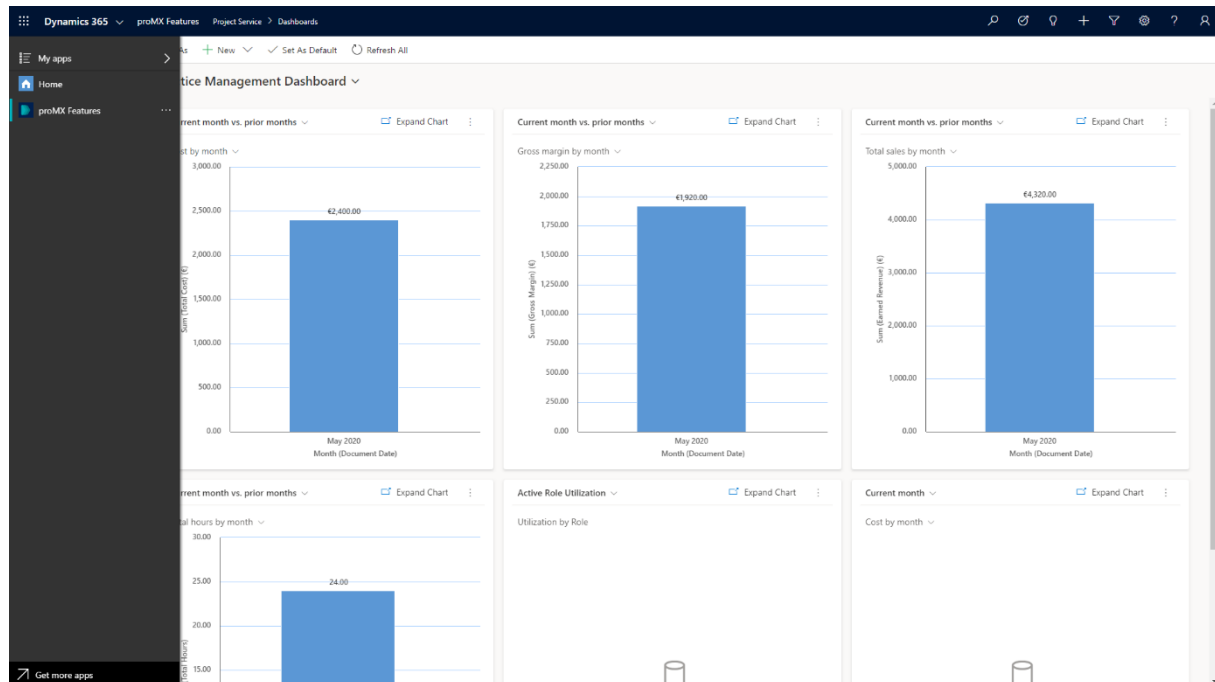
Sales process

1. Opportunities

To start the sales process, go to the **Sales** area and click **Opportunities**.
Click **New** to create a new Opportunity.

Fill in the form.
Specify the object to which the opportunity relates. Choose a construction-specific category for the Opportunity. You can also select an additional industry that may differ from the industry in the account record.

After you have filled in all details, click **Save** in the command bar.

2. Quotes

The business process flow then guides you to the creation of a new **Quote**.
Provide details by filling in the form.

The Quote structure was optimized in this solution and contains the same custom fields for the construction industry as the Opportunity form.

After you have filled in all details, click **Save** in the command bar.

3. Order

The **Project Contract** (= Order) is the next step in the business process.

Create it by filling in the form. You may add invoices as an attachment in the billing section.

To finish, click **Save** in the command bar.
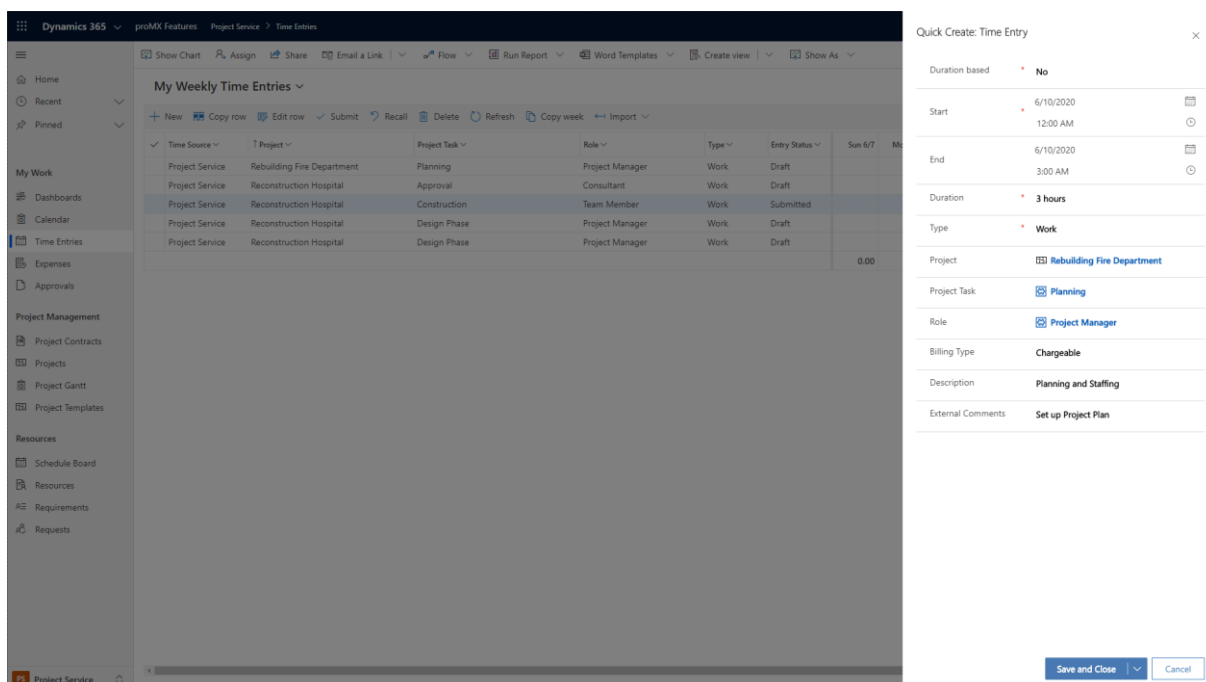
Project Service

To start the project process, navigate to the ***Project Service*** area. There you will find two proMX add-ons for PSA: Calendar for time tracking functionalities, and Project Gantt.
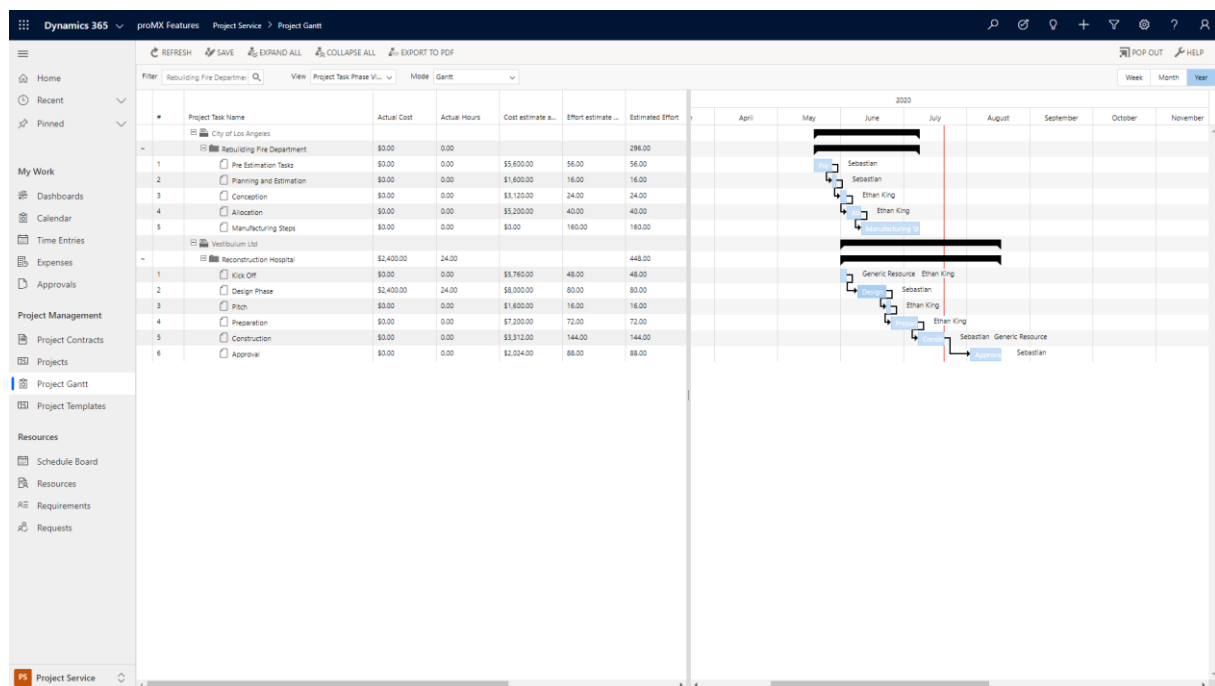
Time Entries can be planned in Outlook and will then be automatically tracked in Dynamics 365.
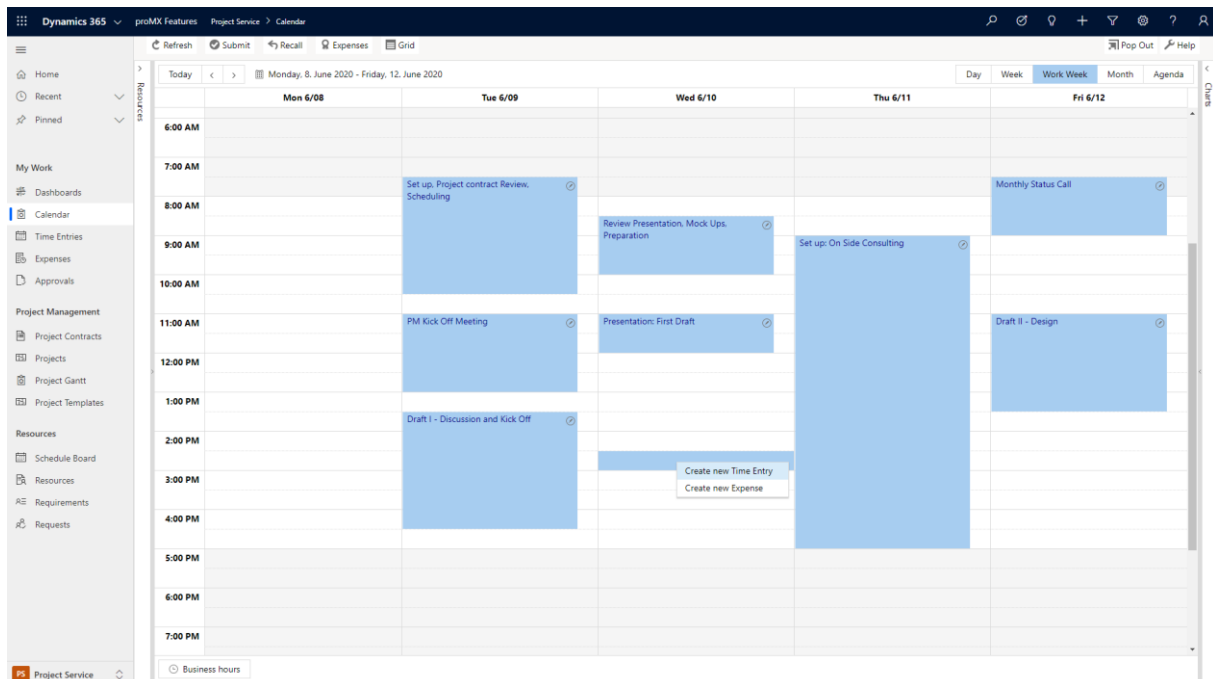
Calendar

Time Entries

Project Gantt

Projects

1. Go to the **Projects** entity in the side bar.

To create a new customer project, you need an underlying Project Contract. Navigate to the **Contract Lines** tab in the **Project Contract** section. Here you can create project-based lines which will be linked to a project.

If you want to create a stand-alone project not related to a project contract, such as an internal project, click on **New Project**.

Fill in the form.
You may choose a scope for your construction project. For customer-driven projects you need to select a customer.
To structure the project, you may also specify details such as project type, status and trend.

Then click **Save** in the command bar.

2. The **Controlling** section in the Projects entity provides extended custom calculated fields which give an overview about the project progress.

Fill in the form and click **Save** in the command bar.

3. The **Risks** section in the Projects entity provides extended features for your risk management.

Click on **New Risk** to create a new Risk.
Risks can be created to help fulfill your project needs. They give you an overview of shortages, i.e. time or knowledge, that need to be taken into account.

Fill in the form and click **Save** in the command bar.

4. The **Project Rate** section in the Projects entity provides the possibility to set custom pricing for sales and cost based on your construction project.

Click on **New Project Rate**, fill in the form, then click **Save** in the command bar.

Resources

1. Click on the entity **Resources** in the side bar.

2. To create a new bookable resource, click on **New**.

Fill in the form.

As an additional feature, the form provides a field to select a department for your resource.

You may set up a custom cost rate for the specific resource role a bookable resource may fill in a construction project.

Click **Save** in the command bar to store your entry.

Contact

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

proMX AG
Nordring 100
90409 Nuremberg
Germany

E-Mail: look@proMX.net
Phone: +49 (911) 81523-0
Fax: +49 (911) 239804-20

www.proMX.net