

# proMX 365 for Construction

## User Guide



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# 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.

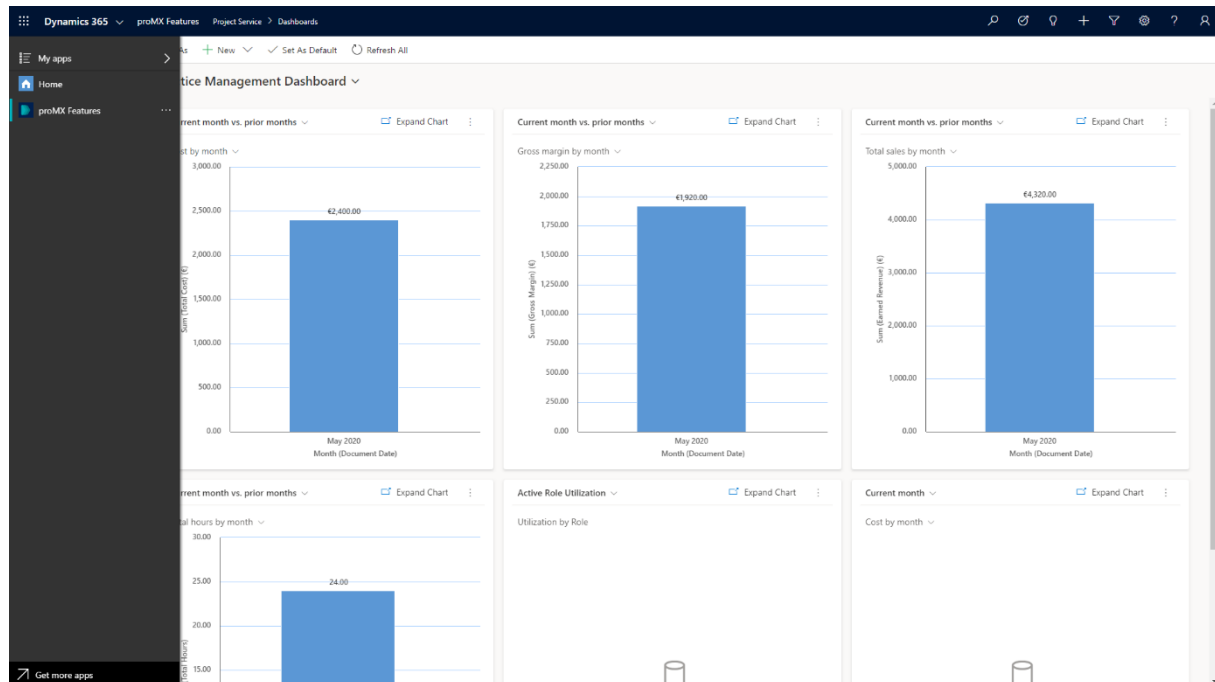
proMX 365 for Construction includes these main features and more:

- 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.

The screenshot shows the Dynamics 365 Opportunities form for 'Reconstruction Hospital'. The form is divided into several sections:

- Header:** Includes the Dynamics 365 logo, navigation tabs (Home, Recent, Pinned), and a command bar with actions like Save, Save & Close, New, Copy, Refresh, Close as Won, Close as Lost, Close all quotes, Recalculate Opportunity, Convert to Work Order, Assign, Email a Link, Delete, and Process.
- Opportunity Details:** Shows the opportunity name 'Reconstruction Hospital', estimated close date '7/22/2020', estimated revenue '€9,700.00', and total amount '€0.00'. The owner is 'Sebastian'.
- Process Flow:** A horizontal bar shows the sales process stages: Sales Qualification Process (Active for 52 days), Develop, Follow Up (current stage), Propose, Project Planning, Contract, and Close.
- Summary Tab:** Contains fields for Topic (Reconstruction Hospital), Object (Sacred Heart Hospital), Category (Rebuilding / Rehabilitation), Purchase Timeframe (Next Quarter), Revenue (User Provided), Budget Amount (€65,000.00), Probability (85), and Rating (Warm).
- Customer Information:** Includes Customer (Vestibulum Ltd), Customer Contact (Matthew Parker Jr.), Customer Industry (Construction), Account Manager (Sebastian), Product Price List (Region A Price List), and Currency (Euro).
- Follow Up:** Shows the follow-up date (6/11/2020) and reason (Call with Customer).
- Timeline:** A list of events including 'Appointment from Sebastian', 'Quote closed by Sebastian', and 'Auto-post on Reconstruction Hospital'.
- Current Situation:** A text box describing the hospital's renovation needs.
- Customer Need:** A text box describing the need for facade renovation.
- Proposed Solution:** A text box describing the solution using Project Service Automation and proMX.

## 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.

**Dynamics 365** | proMX Features | Sales > Quotes > Reconstruction Hospital

Read-only This record's status: Won

**Reconstruction Hospital** | Quote | €65,000.00 Total Amount | Won | Status Reason | Sebastian Owner

Sales Qualification Process Active for 52 days

Develop Follow Up Propose Project Planning Contract Close

Summary Quote Lines Profitability Analysis Customer Expectations Billing Sales Contracts Related

Quote ID: QUO-01002-W2H855  
Revision ID: 0  
Name: Reconstruction Hospital  
Object: Sacred Heart Hospital  
Requested Delivery Date: 11/4/2022  
Quote Expires On: 6/30/2020  
Status Reason: Won  
Opportunity: Reconstruction Hospital

Potential Customer: Vestibulum Ltd  
Account Manager: Sebastian  
Contracting Unit: proMX  
Product Price List: Region A Price List  
Currency: Euro

Timeline

Quote closed by Sebastian  
Accepted quote Reconstruction Hospital  
5/28/2020 4:54 PM

### 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.

**Dynamics 365** | proMX Features | Sales > Project Contracts > Reconstruction Hospital

Save Save & Close New Copy Confirm Close as Lost Delete Refresh Create Invoice Recalculate Look Up Address Assign Share Email a Link

**Reconstruction Hospital** | Order | €66,480.00 Total Amount | Draft | Contract Status Reason | Sebastian Owner

Sales Qualification Process Active for 52 days

Develop Follow Up Propose Project Planning Contract (17 Min) Close

Summary Contract Lines Project Billing Related

ID: ORD-01003-Q5K0H4  
Name: Reconstruction Hospital  
Object: Sacred Heart Hospital  
Requested Delivery Date: 11/4/2022  
Opportunity: Reconstruction Hospital  
Quote: Reconstruction Hospital

Customer: Vestibulum Ltd  
Account Manager: Sebastian  
Contracting Unit: proMX  
Product Price List: Region A Price List  
Currency: Euro

Timeline

Phone Call from Sebastian  
@Maik - could you please call proMX?  
Active 3:32 PM

Note modified by Sebastian  
Appointment: Clarify open legal topics  
Meeting to find out what's missing in the contract details  
3:32 PM

Attachments

Dynamics365\_PowerPlatform\_ReleaseNotes\_April19.pdf Delete

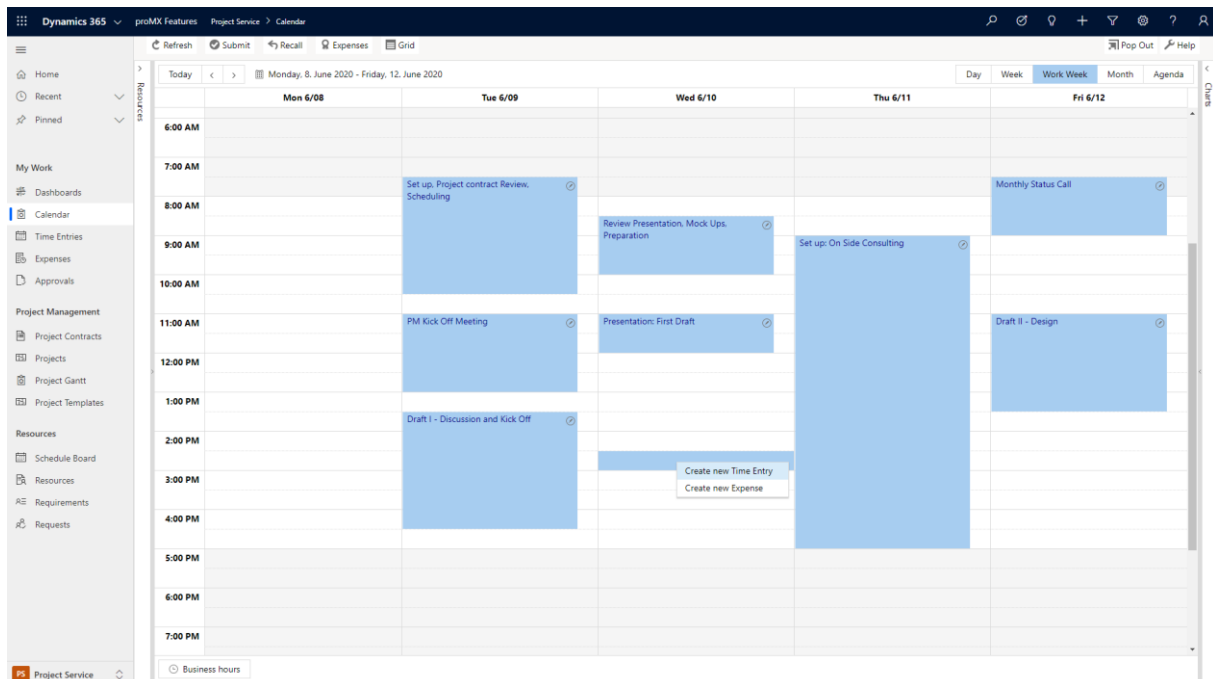
D:\C5GBX00AA\J\_4.jpg Delete

Choose File No file chosen

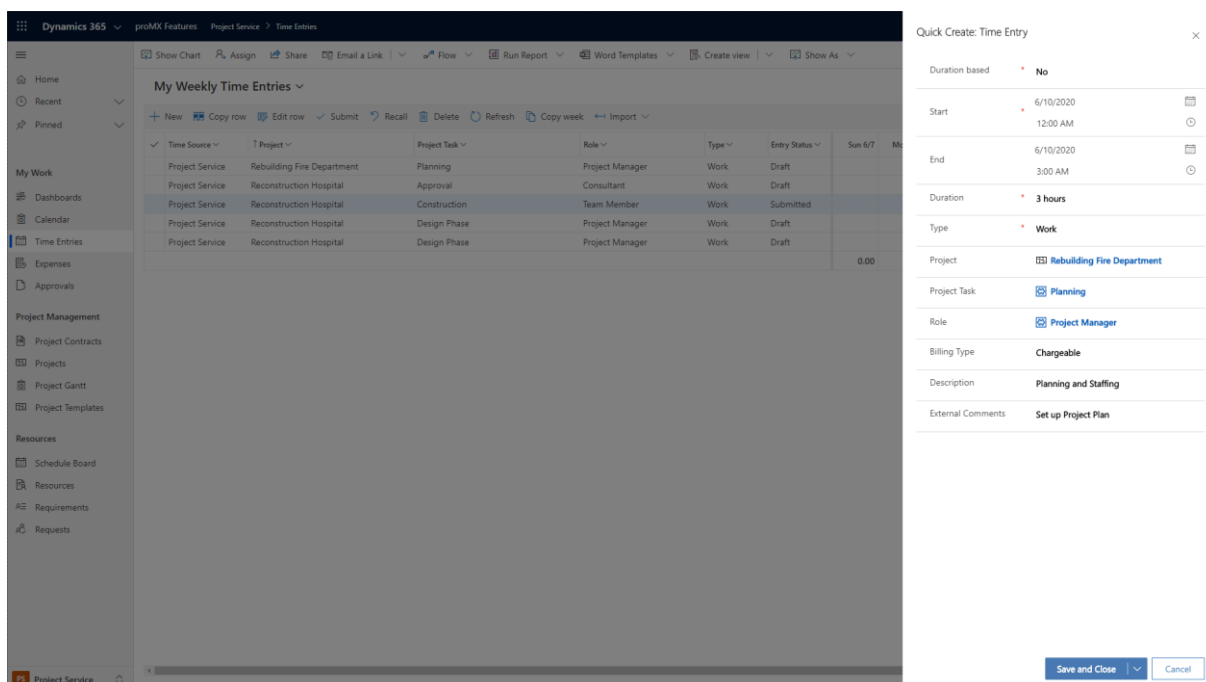
# Project Service

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.

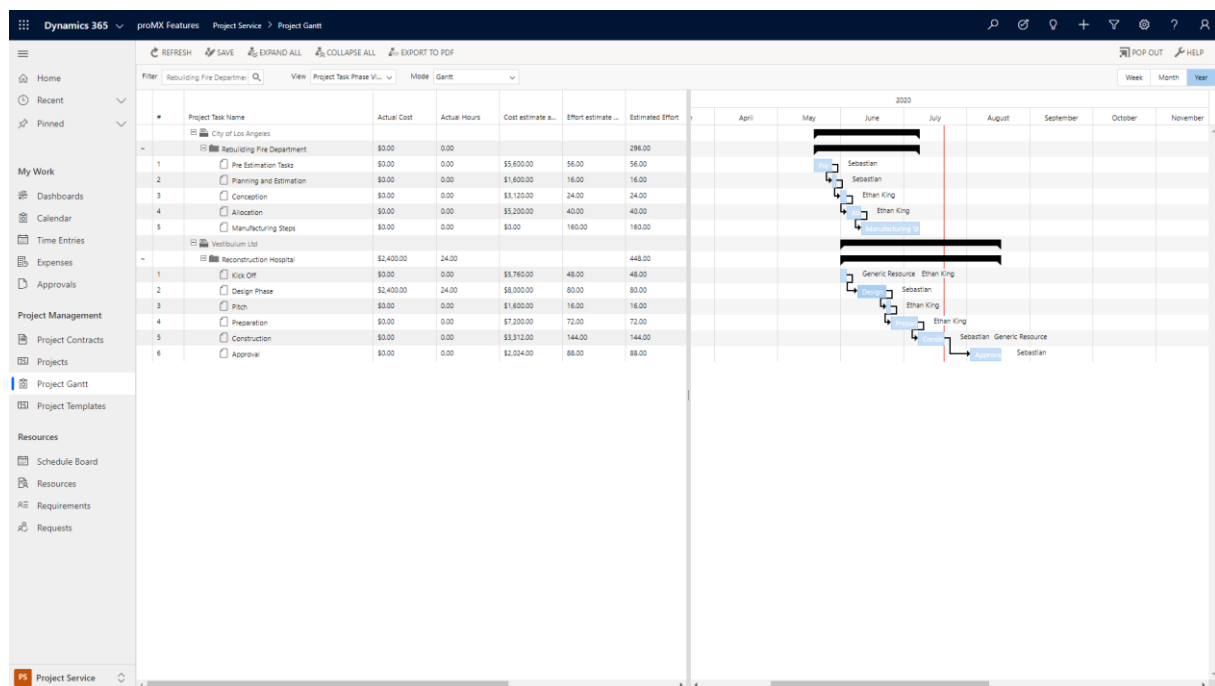
Time Entries can be planned in Outlook and will then be automatically tracked in Dynamics 365.



## 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.

**Reconstruction Hospital**  
Project

8/17/2020 Due Date | 33.41 Cost Consumption % | 5.36 Progress %

**Project Process** Active for 53 days  
**Active Stage** Active for 53 days

✓ Project Details **Hospital should be renovated. Mainly the external facade and electronics assembly.**  
✓ Project Status **Yellow**  
✓ Trend **Upward**

Recorded Hours **62.50**  
Hours Available **385.50**

**Summary** | Schedule | Project Team | Controlling | Project History | Resource Assignments | Resource Reconciliation | Estimates | Tracking | Risks | Related

Project Template: ---  
Name: **Reconstruction Hospital**  
Description: **Hospital should be renovated. Mainly the external facade and electronics assembly.**  
Project Scope: **Customer driven**  
Customer: **Vestibulum Ltd**  
Object: **Sacred Heart Hospital**  
Project Type: **Standard**  
Contracting Unit: **proMX**  
Project Manager: **Sebastian**  
Project Status: **Yellow**  
Trend: **Upward**

**Actual Hours** 24  
**Chargeable Hours** 62.5  
**Total Recorded Hours** 62.50  
**Actual Assigned Hours** 448.00  
Last updated: 7/20/2020 5:00 PM

**Hours KPI** **Budget KPI** **Resource KPI** **Customer Satisfaction**

**Timeline**  
Search timeline  
Enter a note...  
Task completed by Sebastian  
Tasks Planned  
Plan all Tasks  
Closed 5/28/2020 5:42 PM

**Project Process** Active for 53 days  
**Active Stage** Active for 53 days  
Next Stage

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.

**Reconstruction Hospital**  
Project

8/17/2020 Due Date | 33.41 Cost Consumption % | 5.36 Progress %

**Project Process** Active for 52 days  
**Active Stage** Active for 52 days

**Summary** | Schedule | Project Team | **Controlling** | Project History | Resource Assignments | Resource Reconciliation | Estimates | Tracking | Risks | Related

**Estimates**  
Start Date: 6/1/2020  
Estimated Finish Date: 8/17/2020  
Estimated Hours: 448.00  
Estimated Labor Cost: €27,896.00  
Estimated Expense Cost: €2,500.00  
Estimated Total Cost: €30,396.00

**Actuals**  
Actual Start: 5/27/2020  
Actual End: ---  
Total Recorded Hours: 62.50  
Draft Hours: 38.50  
Actual Hours: 24.00  
Chargeable Hours: 66.50  
Non chargeable Hours: 12.00

**Sales and KPIs**  
Planned Sales: €63,500.00  
Remaining Sales: €53,344.00  
Open Hours: 385.50  
Hours KPI: **Green**  
Budget Calculation: 20,240.00  
Budget KPI: **Green**  
Resource KPI: **Green**

**Actual Costs**  
Actuals Cost: €2,400.00  
Draft Cost: €7,756.00  
Expense Cost: €1,250.00  
Actual Total Cost: €10,156.00



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.

The screenshot displays the Dynamics 365 Project Service interface for the 'Reconstruction Hospital' project. The project is in the 'Active (52 D)' state, with a progress bar indicating 5.36% completion. The 'Risks' section is active, showing a list of risks: Budget, COVID19 Lockdown, Management Decisions, Other Projects, Time Management, and Vacation and Absences. A 'Risk Matrix' is displayed on the right, showing a 5x5 grid of risk levels (1-5) based on Likelihood and Consequence.

Consequence \ Likelihood	1	2	3	4	5
5	1	2	3	4	5
4	1	2	3	4	5
3	1	2	3	4	5
2	1	2	3	4	5
1	1	2	3	4	5

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.

The screenshot displays the Dynamics 365 Project Service interface. The top navigation bar shows the breadcrumb path: Dynamics 365 > proMX Features > Project Service > Projects > Reconstruction Hospital - €21.00- Euro >> Reconstruction Hospital - Architect - €150.00- Euro. The left-hand navigation pane includes sections for 'My Work' (Home, Recent, Pinned, Dashboards, Calendar, Time Entries, Expenses, Approvals), 'Project Management' (Project Contracts, Projects, Project Gantt, Project Templates), and 'Resources' (Schedule Board, Resources, Requirements, Requests). The main content area is titled 'Reconstruction Hospital - Architect - €150.00- Euro' and 'Project Rate'. It features a 'General' tab and a 'Related' section. The 'General' section contains a table with the following data:

Project	Reconstruction Hospital
Price List Context	Cost
Bookable Resource Role	Architect
Hourly Rate	€150.00
Currency	Euro

The bottom status bar shows 'Project Service' and 'Active'.

## 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.

The screenshot displays the 'New' form for a 'Bookable Resource' in Dynamics 365 Project Service. The form is titled 'Ethan King' and is categorized as a 'Bookable Resource'. The left sidebar shows the navigation menu with 'Resources' selected. The main form area is divided into several sections:

- General**: Contains fields for 'Resource Type' (set to 'User'), 'User' (set to 'Ethan King'), 'Name' (set to 'Ethan King'), 'Department' (set to 'Design'), and 'Time Zone' (set to '(GMT+01:00) Amsterdam, Berlin, Bern, Rome, Stockh').
- Resource Skills**: A table with columns 'Characteristic' and 'Rating Value'. It lists skills such as 'Administration' (Familiar), 'Engineer Level 8' (Good), 'Project Management' (Proficient), and 'Sales' (Familiar). A 'Target Utilization' bar is shown at 75%.
- Resource Roles**: A table with columns 'Resource Category' and 'Is Default'. It lists roles such as 'Architect' (Yes) and 'Project Manager' (No). A 'Resource Cost Role' is set to 'Architect'.
- Timeline**: A section for notes and events. It includes a search bar and two notes: 'Note modified by Sebastian' (Vacation: Ethan will be on Vacation 2nd and 3rd week of August) and 'Note modified by Sebastian' (Schedule HR Meeting with Ethan to be discussed how to proceed with this goals and tasks).

The bottom of the screen shows the 'Project Service' logo and the 'Active' status.

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

**Dynamics 365** | proMX Features | Project Service | Resources | Ethan King

Save Save & Close New Show Work Hours Deactivate Delete Refresh Process Assign Share Email a Link Flow Word Templates Run Report

### Ethan King

Bookable Resource

General Scheduling Work Hours Related

Resource Type **User**

User **Ethan King**

Name **Ethan King**

Department **Design**

Time Zone **(GMT+01:00) Amsterdam, Berlin, Bern, Rome, Stockh**

**Resource Skills**

Characteristic	Rating Value
Administration	Familiar
Engineer Level 8	Good
Project Management	Proficient
Sales	Familiar

Target Utilization **75**

**Resource Roles**

Resource Category	Is Default
Architect	Yes
Project Manager	No
<b>Resource Cost Role</b>	<b>Architect</b>

**Timeline**

Search timeline

Enter a note...

**Note modified by Sebastian**  
Vacation  
Ethan will be on Vacation 2nd and 3rd week of August

**Note modified by Sebastian**  
Schedule HR Meeting with Ethan  
to be discussed how to proceed with this goals and tasks

Project Service | Active | Save

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

# Contact

For questions, wishes or feedback, please contact us via [look@proMX.net](mailto:look@proMX.net) or the details below.

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