Project Services Automation Workshop (CRM)

Length

- 1 day

Prerequisites

- Working knowledge of Dynamics 365
- Project Service Automation works differently from other modules; it could be considered new learning experience.

Audience

- Those who use the Project Service Automation module
- IT professionals, implementation consultants, system integrators, or support professionals

What You'll Learn

- Blueprint new projects
- Configure and manage projects
- Manage Resource requests
- Structure work breakdown
- Configure and manage resources to include: skills, roles, scheduling and assignments, track time and expenses
- Include project estimates in the sales process
- Integrate with Microsoft Project
- Manage multi-currency and multi-time zone projects
- Understand reporting and analysis of project data using native tools and Power BI

This one-day workshop provides you with the skills to deploy and manage the Project Service Automation module of Dynamics 365. This course focuses on a deploying and working with Microsoft Dynamics 365 Project Service Automation.

Workshop Outline

Module 1: Introduction to Project Service Automation

- Key capabilities
- Opportunity management
- Project planning
- Resource management
- Team collaboration
- Time and expense management
- Customer billing
- Service analytics

Module 2: Managing projects with Project Service Automation

- Solution selling
- Project planning
- Resource scheduling
- Mobile productivity
- Time and expenses
- Service analytics

Module 3: Getting Started with Dynamics 365 Project Service Automation

- Requirements for Project Service Automation
- Accessing Microsoft Dynamics 365
- Planning a Deployment
- Deploying the Project Service Automation Application
- Import Data
- Post-Install Steps

- Testing Project Service Automation

Module 4: Setting-up your organization in Project Service Automation

- Install and customize
- Experiment with demo data
- Configure Project Service Automation
- Set up time units
- Set up currencies and exchange rates
- Create organizational units
- Set up invoice frequencies
- Configure transaction categories
- Configure expense categories
- Create product catalog items
- Create a price list
- Set up resources

Module 5: Managing Resources

- Managing resource request
- schedule resources for a project
- you resource availability
- you resource utilization
- resource scheduling optimization
- scheduling with universal resources

Module 6: The Sales Process

- Leads
- Creating a Customer Account
- Create a project Opportunities
- Create a project Quotes
- Create a project contract

Module 7: Planning, Delivery and Billing

- Provide work estimates
- Create a project
- Schedule a project with a work breakdown structure
- Determine project cost and revenue estimates
- Track project progress and cost
- Create a project template
- Submit resource requests
- Create an Office 365 Group for a project
- Add documents to a project
- Track a project's status
- View project team members and manage bookings
- View and edit project estimates

- Approve time and expenses
- Review project actuals
- View and send invoices
- View dashboards and reports
- Use the add-in to plan work in Microsoft Project

Module 8: Working with Project Server Automation

- Practice Management Dashboard
- Opportunity Quotes and Pricing
- Project Planning & Estimation
- Resource Management
- Collaboration
- Time & Expense
- Approvals
- Invoicing
- Integration

Module 9: Project Management and Resources Management

- Practice Management Dashboard
- Opportunity Quotes and Pricing
- Project Planning & Estimation
- Resource Management

Module 10: Project Services Automation Reporting

- PSA reports
- PSA Custom Dashboards
- Power BI Integration

Module 11: Review

- Work with Project Service Automation
- Managing projects with Project Service Automation
- Getting Started with Dynamics 365 Project Service Automation
- Setting-up your organization in Project Service Automation
- Managing Resources
- The Sales Process
- Planning, Delivery and Billing
- Working with Project Server Automation
- Project Management and Resources Management
- Project Services Automation Reporting

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