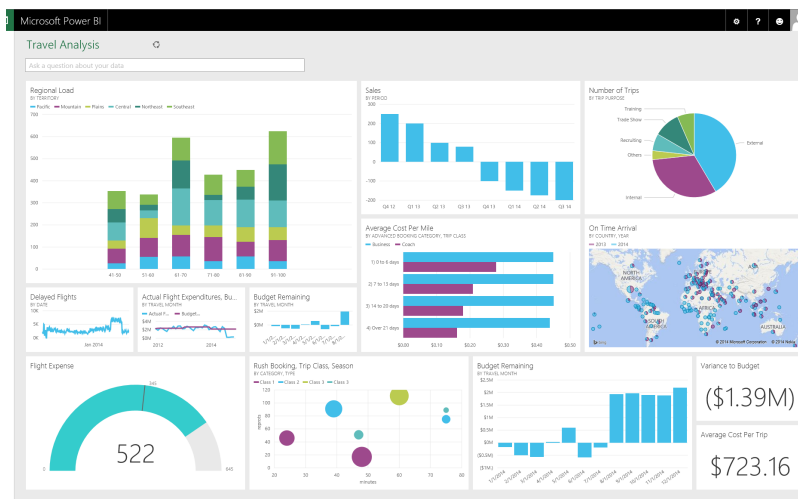


## Project Management for Microsoft Dynamics 365

### Project Estimating and Proposals

- Templates for easy estimating
- Project Configurator via Microsoft CRM Dialogs
- Automated proposal generation
- Cost/ Revenue types supported:
  - Labor resources
  - Expenses
  - Purchases/ Materials
  - Inventory
  - Equipment
- Product catalog integration
- Robust profit calculations
- Revisions



### Project Purchasing

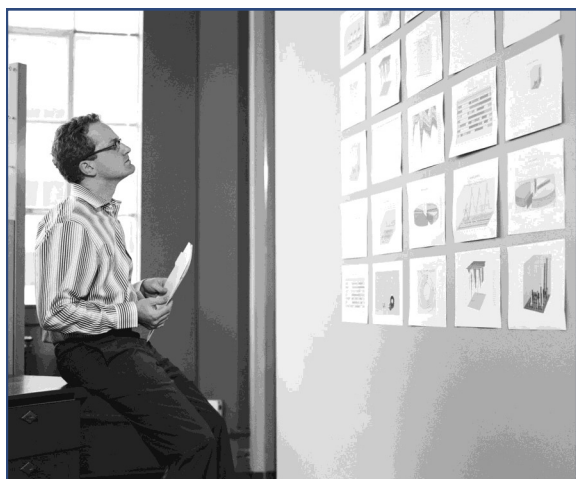
- Purchase Requisition Management
- Vendor RFQs
- Purchasing requirements planning
- Automated PO generation
- Microsoft Dynamics CRM workflow approvals
- Support for Project and Non-Project Purchase Orders
- PO Receiving and Invoicing
- Project Job Cost Updates in CRM
- Real-Time integration with back-office accounts payable systems

### Project and Resource Management

- Interactive editable Gantt Chart View
- Resource Assignments
- Detailed Task Estimates and Budgets
- Resource Team Building
- Resource Scheduling Integrated with Outlook Calendar
- Full Job Cost Accounting Solution
- Project Collaboration via SharePoint
- Program Management
- Project/Portfolio Reporting and Dashboards

### Project Timesheets

- Timesheet Entry via Calendar Entries/ Microsoft Outlook
- Timesheets Entry via Microsoft Dynamics CRM
- Timesheet Entry via ProjectStream Mobile
- Default Billing Note Entry
- Microsoft Dynamics CRM Workflow Approval Process
- Project Job Cost Updates in CRM
- Real-Time Integration with Back-Office GL and Payroll



## Project Expense Reports

- Expense Entry via Microsoft Dynamics CRM
- Expense Entry via ProjectStream Mobile
- Integration with Credit Card data
- Microsoft Dynamics CRM workflow approval process
- Employee re-imbursement for personal payment methods
- Integration to Financial / ERP solutions

## Project Inventory Management

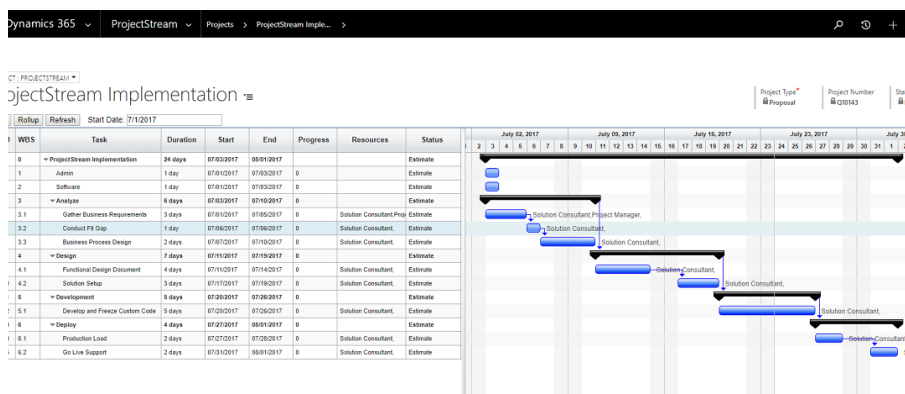
- Purchase receipts directly to projects or inventory
- Inventory adjustments
- Issues and returns to projects
- Transaction entry via Microsoft Dynamics CRM
- Project job cost updates in CRM
- Real-time integration with GL

## Change Order Management

- Dynamics CRM Workflow driven process
- Allows for submission and workflow approval of Project Change orders
- Allows changes to Baseline and/or Forecasted Project Budget
- Changes can be made against existing Project Tasks / Budget or creates new Tasks / Budget
- Supports both Increase and Decrease Change Orders
- Proposed Changes are merged into main project when approved

## Project Billing

- Robust billing capabilities including batch / cycle billing
- Fixed Price and Time & Material Project and billing types
- Flexible and customizable billing formats
- Project job cost updates in CRM
- Integration to Financial / ERP solutions



## Project Portfolio Management and Reporting

- Project/Portfolio Tracking Views
- Project/Portfolio Dashboards
- Project/Portfolio Cost and Revenue Forecasting
- Project/Portfolio Resource Requirements Forecasting
- Project/Portfolio Summary and Detail Reporting
- Project Accounts Receivable Reporting