

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 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 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 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





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 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

	Stream Impler	nenta	ation -	Ξ				Project Type* Project Number B Proposit B 20143
Rollup	Refresh Start Date: 7/1/2017							
VBS	Task	Duration	Start	End	Progress	Resources	Status	July 02, 2017 July 00, 2017 July 16, 2017 July 23, 2017 July 23, 2017 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 16 19 20 21 22 23 24 25 20 27 28 29 20 21 22 23 24 25 20 27 28 29 20 21 22 23 24 25 26 27 28 29 20 21 22 23 24 25 26 27 28 29 20 21 22 23 24 25 26 27 28 29 20 21 22 24 25 26 27 28 24 25 26 27 28 26 27 28 26 27 28 26 27 28 26 27 <t< th=""></t<>
	* ProjectStream Implementation	24 days	07/03/2017	05/01/2017			Fatimate	
	Admin	1 day	07/01/2017	07/03/2017	0		Estimate	
	Software	1 day	07/01/2017	07/03/2017	0		Estimate	
	▼ Anahze	6 days	07/03/2017	07/10/2017	0		Estimate	
1	Gather Business Requirements	3 days	07/01/2017	07/05/2017	0	Solution Consultant Pro		Solution Consultant, Project Manager,
2	Conduct Fit Gap	1 day	07/06/2017	07/06/2017	0	Solution Consultant,	Estimate	Solution Consultant,
3	Business Process Design	2 days	67/07/2017	07/10/2017	0	Solution Consultant	Estimate	Solution Consultant,
	▼ Design	7 days	07/11/2017	07/19/2017	0		Estimate	
1	Functional Design Document	4 days	07/11/2017	07/14/2017	0	Solution Consultant,	Estimate	-Solution Consultant,
2	Solution Setup	3 days	07/17/2017	07/19/2017	0	Solution Consultant.	Estimate	Solution Consultant,
_	* Development	5 daya	07/20/2017	07/26/2017	0		Estimate	· · · · · · · · · · · · · · · · · · ·
1	Develop and Freeze Custom Code	5 days	67/28/2017	07/26/2017	0	Solution Consultant,	Estimate	Solution Consultan
	- Deploy	4 days	67/27/2017	03/01/2017	0		Estimate	
1	Production Load	2 days	07/27/2017	07/28/2017	0	Solution Consultant,	Estimate	Solution
2	Go Live Support	2 days	07/31/2017	03/01/2017	0	Solution Consultant	Estimate	

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