

Microsoft Dynamics 365 Service Industries Solution

Microsoft Dynamics 365

Today's professional services organizations operate in a highly competitive and fast-paced environment. Ensuring proper management of financial resources, optimizing intellectual capital and resource management practices, and having the flexibility to meet unique client needs have never been more critical to a professional services firm's success.

The Microsoft Dynamics 365 Service Industries software system was designed specifically to help professional services organizations integrate key financial, project, resource, and client management processes in order to streamline key project-related processes, improve visibility across the firm, and maximize project delivery success - all helping to set your firm apart from its competition.

Dynamics 365

Finance and Operations

Project management and accounting

Timesheets

All timesheets

US\$

Save

New

Delete

Workflow

TIMESHEET

OPTIONS

ALL TIMESHEETS

00000272 : Adam Thomas

Lines

Head

Timesheet

Draft

Resource

Adam Thomas

Timesheet period

5/21/2018 - 5/27/2018

Work week

5/21/2018 - 5/27/2018

Approval status

Draft

Timesheet total

39.00

Timesheet lines

+ New line

Remove

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Save as favorite

Legal entity	Customer	Name	Project ID	T	Project name	Activity number	Activity	Category	Mon 05/21	Tue 05/22	Wed 05/23	Thu 05/24	Fri 05/25	Sat
US\$	US_31_0122	Centroso Consulting	00000093		Centroso Consulting			AppDev	1.50	2.00	2.00	2.00	3.00	
US\$	US_31_0123	Cycles Sales and Repair	00000095		Cycles Sales and Repair	W00002416	Dev 1	Design	6.50	6.00	6.00	5.50	4.50	

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Line details

Comments

General

Financial dimensions

Day

Mon 05/21

Internal comment

External comment

Testing the feature

Integrated time and expense management capabilities in Microsoft Dynamics 365 help your firm streamline the time and billing process and accelerate cash flow.

Available for deployment either in the Microsoft Azure cloud or in your firm's data center, Microsoft Dynamics 365 is tightly integrated with the Microsoft technologies your firm already uses, including Microsoft Office, Microsoft SharePoint, and Power-BI.

In addition to helping your firm naturally leverage the investments you've already made with Microsoft, this integration maximizes employee productivity levels, removes complexity from your IT environment, and minimizes your IT Total Cost of Ownership (TCO). So you can focus on serving your customers and profitably growing your business, not on trying to integrate your disparate IT systems.

Projects+

Benefits

- ✓ **Connect your finances, projects, clients, and resources.** Streamline key project-related business processes, eliminate redundant and manual data entry, and drive standardization across your business by implementing a single integrated ERP software system
- ✓ **Gain insight into critical business information and trends.** Make informed decisions that optimize your firm's performance through the use of best-in-class business intelligence and reporting tools
- ✓ **Improve project execution.** Gain real-time access to project details for monitoring project profitability, avoiding cost overruns, and ensuring on-time, on-budget project delivery
- ✓ **Optimize resource management.** Effectively manage employee skills, maximize resource utilization, and ensure optimal resource allocations to help drive project success
- ✓ **Enhance project team collaboration.** Empower your project teams with integrated project collaboration sites, unified communications tools, and enterprise social networking

Features:

Comprehensive project lifecycle support

Manage all aspects of your client-facing projects, from business development through project execution and close-out, all in a single system.

Flexible project management capabilities

Address a wide variety of project management requirements through the use of flexible work breakdown structures (WBS), progress tracking, and project budget management.

Integrated resource planning and scheduling

Manage all aspects of your client-facing projects, from business development through project execution and close-out, all in a single system.

Configurable billing and revenue recognition rules

Easily configure your billing and revenue recognition rules to accommodate a variety of project styles, including Time & Materials, Fixed Fee, Cost Plus, and others.

Powerful billing features

Deliver timely and accurate invoices and accelerate cash flow through online invoice review and approval, configurable invoice formatting, and automated invoice backup document generation.

Detailed project inquiries and analysis

View project costs and budgets and analyze project profitability at any level of the project hierarchy using standard project reports, inquiries, and analytics.

Subcontractor Management

Maintain control over your subcontractors through subcontractor compliance tracking, purchase order and commitment tracking, pay-when-paid, and retainage features.

Web-based and mobile time and expense entry

Simplify time and expense entry with a modern web-based time and expense system that supports tablets and phones on all platforms and form factors (iOS, Android, and Windows).

Integrated project collaboration and document management

Improve project team communication and collaboration through the use of integrated Microsoft SharePoint project team sites for managing project documents, calendars, tasks, discussions, etc.

Robust financial management backend

Confidently manage your firm's finances with a powerful financial management and accounting platform that supports unlimited companies, currencies and reporting dimensions. Easily expand globally with multi-language and multi-statutory support.



Microsoft
Partner

Gold Enterprise Resource Planning
Gold Cloud Platform
Gold Application Development
Silver Cloud Customer Relationship Management

Winner

Microsoft Partner

2017 Partner of the Year
Enterprise Resource Planning (ERP)
Award

2017/2018
INNER CIRCLE
for Microsoft Dynamics



Embedded business development capabilities

Integrate your business development and project execution activities with client relationship management (CRM), project lead and opportunity tracking, and project quoting capabilities.

Broad human capital management solution

Manage the full employee hire-to-retire lifecycle with an integrated HR system for recruiting, performance management, compensation management, and payroll processing.

Flexible workflow driven processes

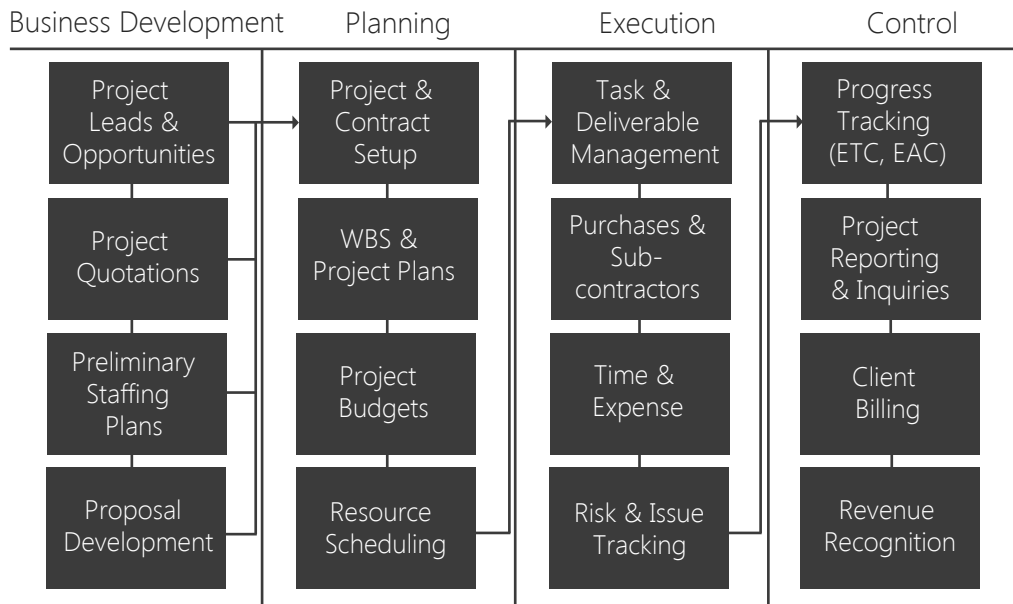
Streamline key processes and ensure proper controls with a powerful workflow engine for approving timesheets, expense reports, draft invoices, project quotations, and any other event.

Best-in-class Business Intelligence and Reporting

Take advantage of Microsoft's latest in-memory business intelligence technology, including PowerBI, to put critical real-time information in the hands of your decision makers.




Comprehensive Project Lifecycle Support

The Microsoft Dynamics 365 Service Industries solution provides comprehensive support for managing all aspects of your projects, including key processes within the business development, project planning and execution, and project control phases of the project lifecycle.



SAGlobal Microsoft Dynamics 365 Service Industries Solution


Microsoft Dynamics 365 provides a complete business management solution that helps professional services firms manage their finances, projects, clients, and resources all in a single integrated application.

  SAGlobal Service Industries Features	Advanced Project Quoting 	Role-Based Resourcing 	Advanced Pricing Scenarios 	Enhanced Workflow Process 
	Subcontractor Management 	Advanced Billing 	Project Manager Reports 	Advanced Business Intelligence 
  Core Project Lifecycle Features	Project Accounting 	Work Breakdown Structures 	Project Budgeting 	Resource Scheduling 
	Time Entry & Approvals 	Expense Entry & Approvals 	Billing 	Revenue Recognition 
  Best-in-class Cross Industry Features	Financials 	Business Development (CRM) 	Inventory & Equipment 	Procurement 
	Global Financial Management 	HR & Payroll 	Internal Controls 	BI & Reporting 




 Let's talk

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