



# proRM Fast Start

## User Guide

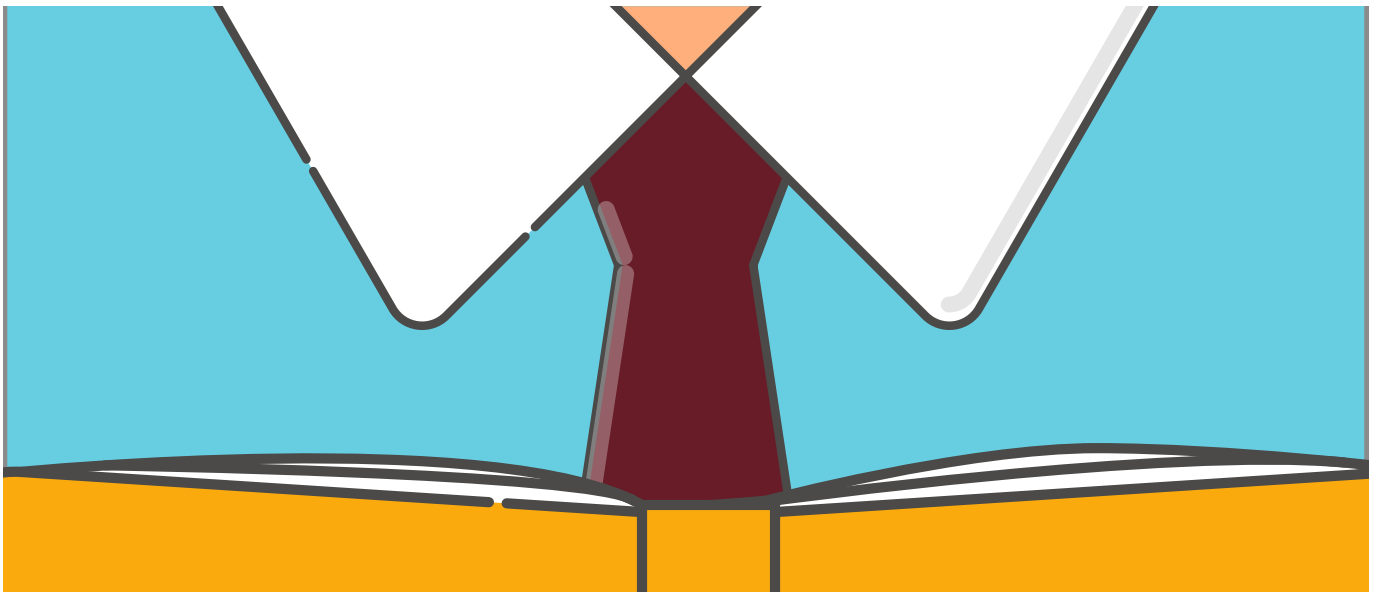
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# 1. Introduction

This user guide describes the functions offered by proRM Fast Start, a solution for Microsoft Dynamics 365.

proRM Fast Start was initiated and developed by proMX AG.  
To reach us, please visit our [contact page](#).

## 1.1 About proRM Fast Start

proRM Fast Start is an essential add-on for project and resource management in Microsoft Dynamics 365. It includes four features offering time and expense tracking capabilities, approval and invoicing functionality, and Project Gantt for planning and structuring of project processes.

Project managers, team leaders and CEOs may also create reports using [Microsoft Power BI](#).

proRM Fast Start is available on [Microsoft AppSource](#) and from the [proMX AppStore](#).

## 1.2 proRM Fast Start Navigation

Once proRM Fast Start is installed in Microsoft Dynamics 365, an additional area called Project Service will be added to the navigation pane.

The Project Service area is divided into five groups:

The **My Work** group includes related Dynamics 365 entities, similar to all My Work Groups in default Dynamics 365.

The **Time Recording** group includes the features Tracking and Approval Manager. You will also find the entities Time Entries, Expenses and Coming/Going here.

The **Project Management** group includes the features Project Gantt. You will also find the entities Projects, Project Tasks and Project Task Assignments here.

The **Invoice Management** group includes the feature Invoicing Manager. You will also find the entities Actuals, Journals and Invoices here.

The **Resources** group is the last main group in the Project Service area. You will find the Dynamics 365 entities Bookable Resources, Working Hours, Bookable Resource Categories and Characteristics here.

The **Settings** group includes the items Configurations and Rating Models.

## 1.3 Key Features

proRM Fast Start for Microsoft Dynamics 365 extends the default Dynamics 365 capabilities by project management entities and additional functionality.

All utilized entities (Projects, Project Tasks, Project Task Assignments, Time Entries, Expenses, Coming/Going, Project Templates and Working Hours) are listed in the Project Service navigation area. These entities are required for use of the HTML applications Tracking, Approval Manager, Project Gantt and Invoicing Manager.

proRM Fast Start also uses default Microsoft Dynamics 365 entities, such as Bookable Resources, Bookable Resource Categories, Characteristics, Rating Models, Accounts, as well as the main sales entities Leads, Contacts, Opportunities, Quotes, Orders and Invoices.

## Tracking

The Tracking feature allows employees to track their efforts and costs for assigned project tasks by creating Time Entries and Expenses. A calendar view is used for simple tracking. Employees also receive direct feedback on their working time within the current time period via the Working Time overview

and charts within the application.

Employees may also use the Coming/Going function to record the beginning and end of their working day.

## Project Gantt

The Project Gantt feature enables project managers to create, plan and control the structure of projects they are responsible for.

With the help of Gantt charts, they may plan and monitor ongoing and upcoming projects as well as project task dependencies.

## Approval Manager

The Approval Manager feature is employed in the final phase of the project management process, readying expenses and time entries for the invoicing process. Project managers check and approve records at the end of each reporting period.

If records appear to be incorrect, approval may be denied and records edited or directed back to the employee in question.

Filtering options and charts provide project managers with additional control over project progression.

## Invoicing Manager

The Invoicing Manager feature allows users to quickly create flawless invoices merely by dragging and dropping approved time entries and expenses from one side of the screen to the other. It's the fastest and easiest way to create invoices.

## Sales Process

A business process flow, which guides users through the sales process into the project phase, assists sales teams. This process flow provides a guide line on how to set up the best conditions for project managers.

It is also possible to create new projects based on sales orders and assigned products.

In the entity Accounts, Account Tiles grant an overview of a

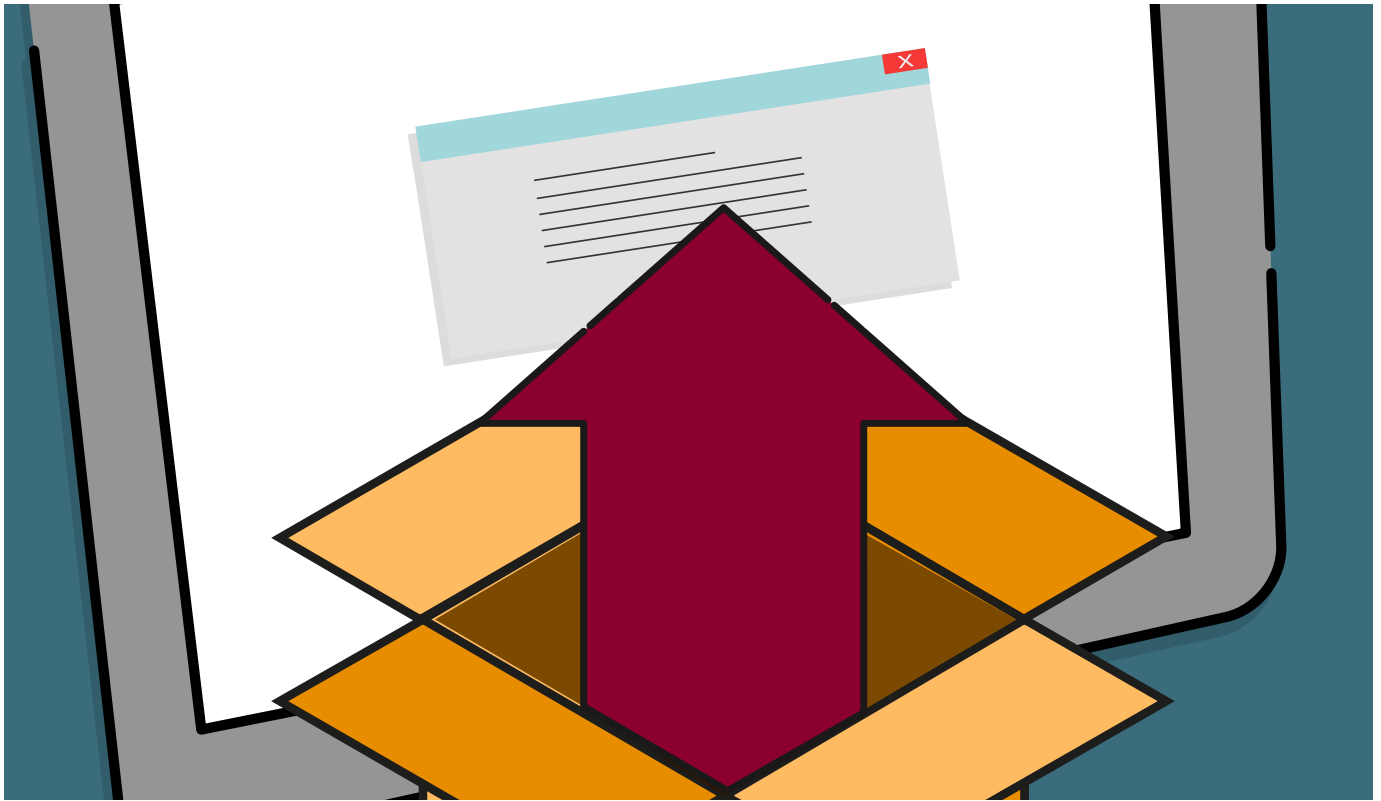
company's opportunities, quotes, orders and projects including the most important details. A tile's color symbolizes the status of each entity:

Entity	Tile Color	Status
Opportunity	Yellow	Open
	Green	Won
	Red	Lost
Quote	Grey	Draft
	Yellow	Active
	Green	Won
	Red	Closed
Order	Yellow	Active
	Green	Fulfilled
	Red	Canceled

Project tiles are marked blue by default. However, this may be changed to green, yellow or red during execution to reflect the status more accurately.

The corresponding entities may be opened via click.





## 2. proRM Fast Start Set-Up

For full functionality of proRM Fast Start, basic configuration is required.

### 2.1 Security Concept and Roles

proRM Fast Start provides a security concept to prevent unauthorized users from accessing data. Therefore, project managers and employees have different access rights. These security roles also affect the permissions in Microsoft Dynamics 365.

There are three different security roles:

#### proRM-Employee

The security role **Employee** is a prerequisite for work with proRM Fast Start. Employees may create time entries, expenses, and time stamps as well as read projects, project tasks and project task assignments.

## proRM-Project Manager

A **Project Manager** has additional rights and may create new projects, project tasks and project task assignments.



Please note: The Project Manager role builds upon the Employee role. Therefore, each project manager must be assigned both roles.

## proRM-Resource Manager

Users that are assigned the **proRM-Resource Manager** security roll have access to the resources area within Tracking and can thus edit other resources' time entries and expenses as well as create bookings in their name.

## proRM-Invoice Manager

The security role **proRM-Invoice Manager** grants users full access to the invoicing functionality of the app.

## proRM-Administration

The **Administration** role grants full access to all proRM data. This role is similar to the System Administrator in Dynamics 365



For more information on assigning a Security Role in Microsoft Dynamics 365, please visit [Microsoft Dynamics 365 Help & Training](#)

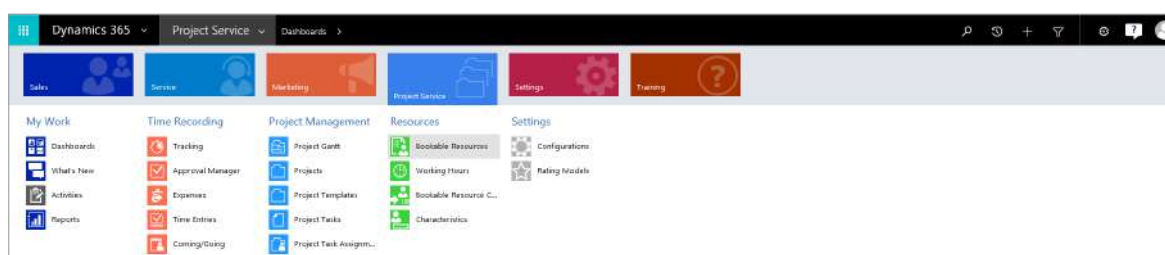
# 2.2 proRM Fast Start Entities Configuration

Before proRM Fast Start may be used, basic entities need to be set up.

## 2.2.1 Creating Bookable Resources

Bookable Resources describe a company's resources and employees. Without a Bookable Resource, it is impossible to work on a project task or create time entries in the system.

**Step 1:** Navigate to the Project Service area and select **Bookable Resources** in the Resources group.




**Dynamics 365** | **Project Service** | **Bookable Resources**

NEW | DELETE | EMAIL & LINK | RUN/REPORT | EXCEL TEMPLATES | EXPORT TO EXCEL | IMPORT DATA | CHART FIBRE | VIEW

Active Bookable Resources

Name	Resource Type
Brenden Bering	Contact
Cade Bauder	Contact
Cesar Bauder	Contact
Calvin Sheppard	Contact
Caesla Batten	Contact
Cyckle Oyer	Contact
Calen Collier	Contact
Danwan Montgomery	Contact
Danwan Montgomery	Contact
Danji Weeks	Contact
Enika Nolan	Contact
Ellen King	Contact
Enija Matthews	Contact
Ferni Schulte	Contact
Frederic Burgess	Contact
Joshua Patrick	Contact
Joshua Patrick	Contact
Mara Drake	Contact
Mary Higgins	Contact
Maren Baker	Contact
Matthew Baker	Contact
Matthew Hardy	Contact
Niki Ross	Contact

 Please note: For employees who work with proRM Fast Start, a system user and Bookable Resource of the Resource Type: User is required.

Dynamics 365

Project Service

Bookable Resources

New Bookable Resource...

SAVE

SAVE & CLOSE

NEW

FORM EDITOR

BOOKABLE RESOURCE (INFORMATION)

New Bookable Resource

General

Resource Type \*

User \*

Name \*

Time Zone \*

Unit \*

1001-01000 Belgarda, Bratislava, Bratislava, Ljubljana, Prague

RESOURCE CHARACTERISTICS

Characteristics: 1

Rating Value

To make this correct, create the second.

RESOURCE CATEGORIES

Resource Category: 1

To make this correct, create the second.

Dynamics 365

Project Service

Bookable Resources

New Bookable Resource

Save

Cancel & Close

New

Team Editor

New Bookable Resource

General

Resource Type\*

User

Role\*

Bookable Resource

Name\*

Book Room

Time Zone\*

(GMT+01:00) British, British, Budapest, Ljubljana, Prague

Resource Characteristics

Characteristic

Rating Value

To enable this control, create the record.

Resource Categories

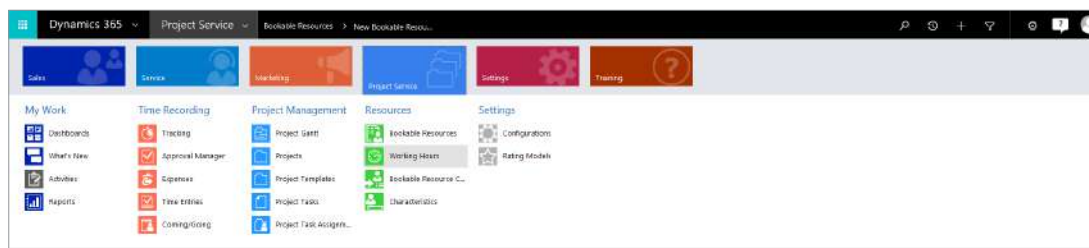
Resource Category

To enable this control, create the record.

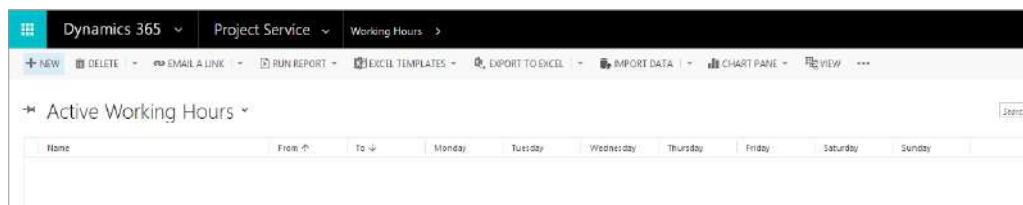
## 2.2.2 Creating and Configuring Working Hours

Working Hours stipulate each employee's weekly working hours. It is possible to create different working models for bookable resources.

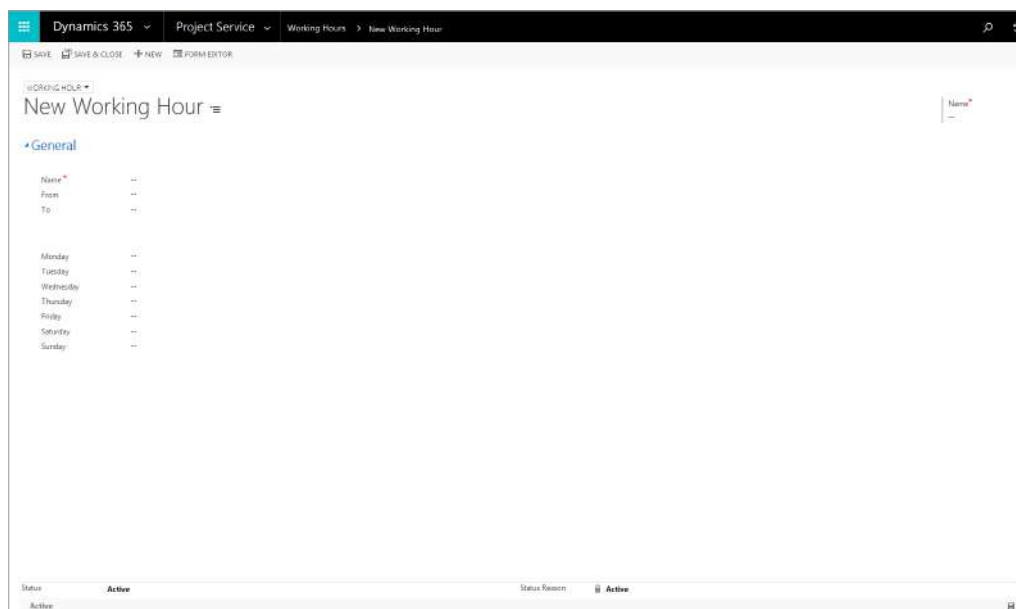
**Step 1:** Navigate to the Project Service area and select **Working Hours** in the Resource group.



**Step 2:** In the task bar, click **New**.



**Step 3:** Fill in all required data (fields marked with \*).



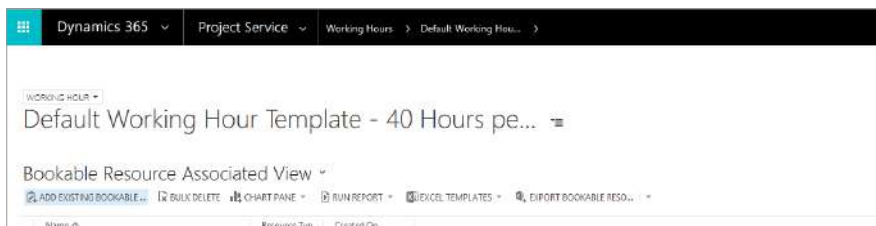
**Step 4:** In the task bar, click **Save**.



**Step 5:** Open the desired **Working Hours** record. Then, open the navigation menu and select **Bookable Resources**.



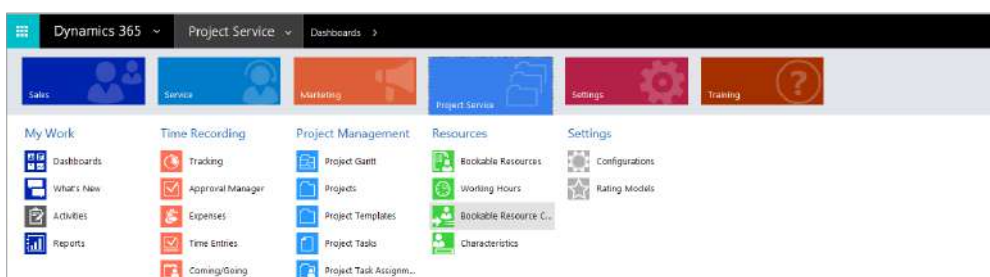
**Step 6:** Click **Add existing bookable resource**.



## 2.2.3 Bookable Resource Categories

Categories describe a bookable resource's position in the company. A bookable resource can be assigned to multiple resource categories.

**Step 1:** Navigate to the Project Service area and select **Bookable Resource Category** in the Resources group.



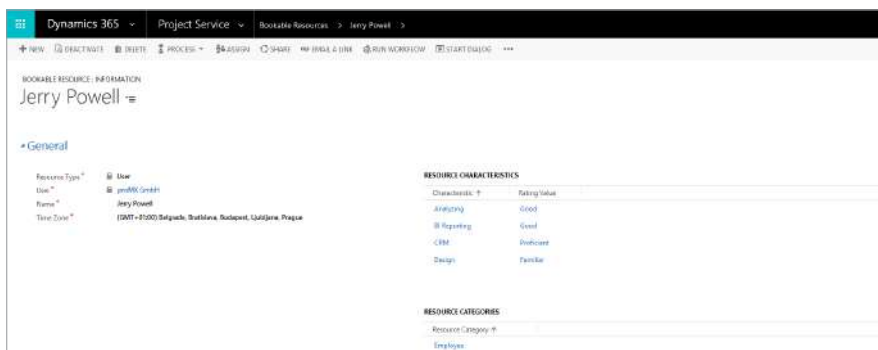
**Step 2:** In the task bar, click **New**.



**Step 3:** Fill in all required data (fields marked with \*). Then, in the task bar, click **Save**.



**Step 4:** Open the desired **Bookable Resource**. Via the in-line grid **Resource Categories**, add existing Bookable Resource Categories from the system.



## 2.2.4 Creating and Configuring Characteristics

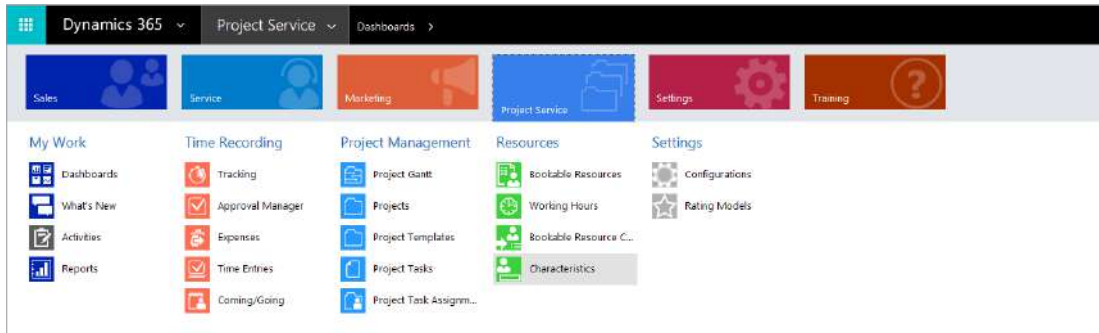
The Characteristics entity is used to assign skills to employees. Based on a rating model, a value ranking the employee's experience can be defined individually for each employee.

An unlimited number of skills may be assigned to a resource.

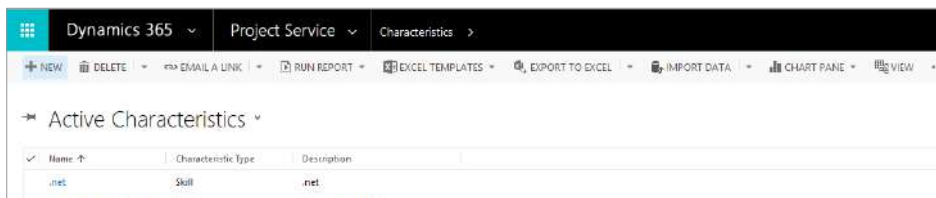
There are two characteristic types, Skill and Certification.

**Step 1:** Navigate to the Project Service area and select

## Characteristics in the Resources group.



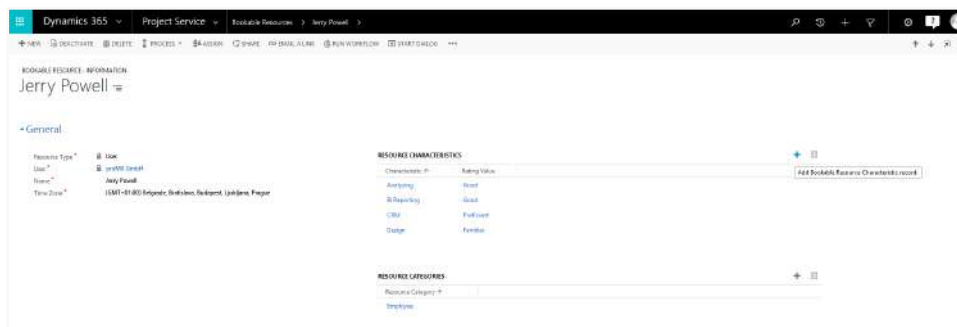
**Step 2:** In the task bar, click **New**.



**Step 3:** Fill in all required data (fields marked with \*) and click **Save** in the task bar.

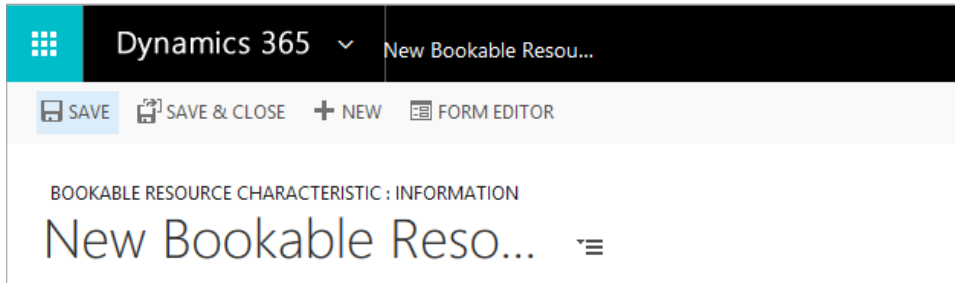


**Step 4:** Open the desired **Bookable Resource**. Via the inline grid **Resource Characteristics**, add existing Characteristics from the system.



**Step 5:** In the new tab, set the characteristic and experience

based on the rating model. Save the record to confirm the assignment.



### 3. proRM Fast Start Functionality

This chapter describes various functions of proRM Fast Start. It includes instructions to:

- Creating a project
- Creating a project task
- Assigning a resource to a project task
- Creating a time entry
- Creating an expense
- Coming/Going
- Submitting time entries
- Submitting expenses
- Approving time entries
- Approving expenses
- Using reporting tools

#### 3.1 Projects

Projects are the focal point of proRM Fast Start. The solution is organized according to a strict hierarchy, at the top of which should ideally sit a customer, i.e. an Account or a Contact in Dynamics 365.

Each project has to be assigned to a customer. It is possible to assign several projects to the same customer. Each project may include several project tasks.

Resources may not be assigned directly to a project but to project tasks only; this is called Project Task Assignment.



Customer

Project

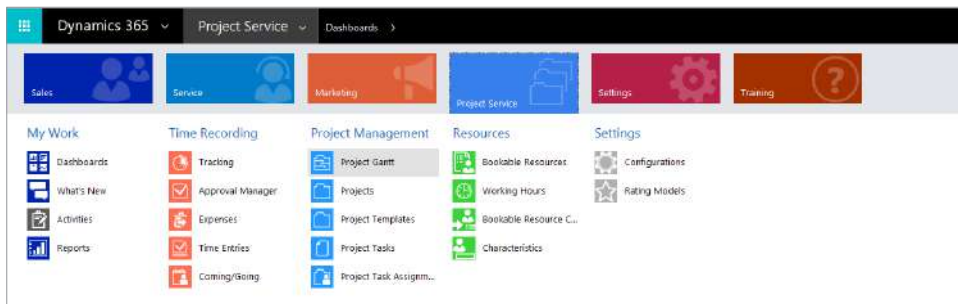
Project Task

Project Task Assignment

New projects may be created using the Dynamics 365 form, Quick Create feature or Project Gantt application.

### 3.1.1 Creating a Project in Project Gantt

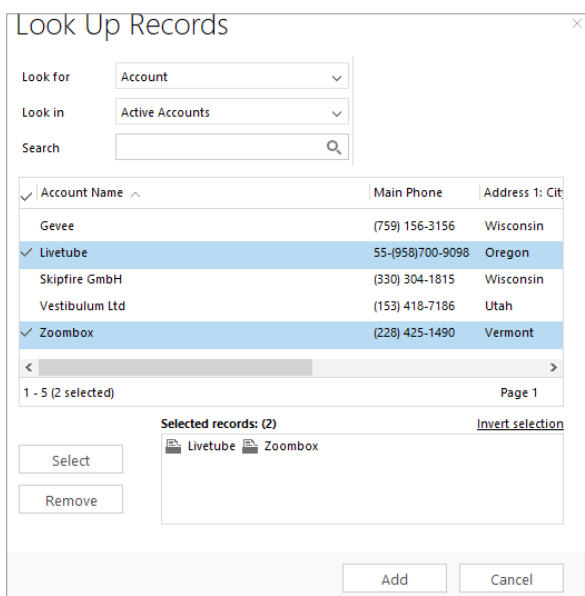
**Step 1:** Navigate to the Project Service area and select **Project Gantt** in the Project Management group.



**Step 2:** Select the desired customer in the **Filter** lookup. Keeping the filter empty will load all data in the system.

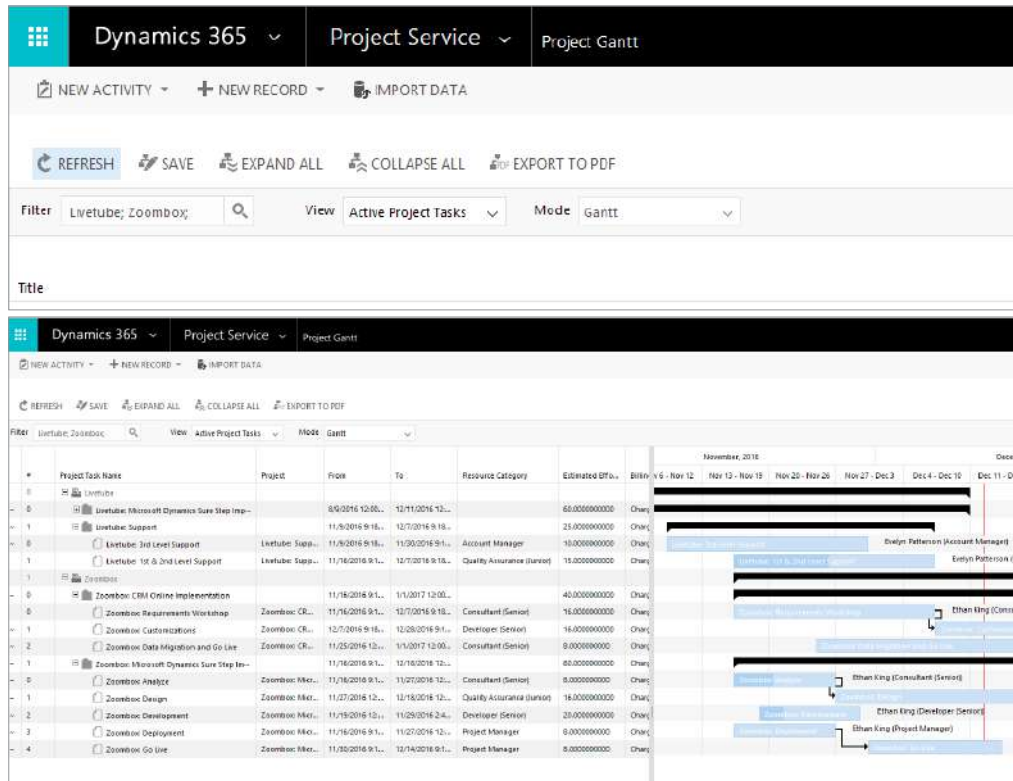


Please note: Loading all available data will decrease performance.

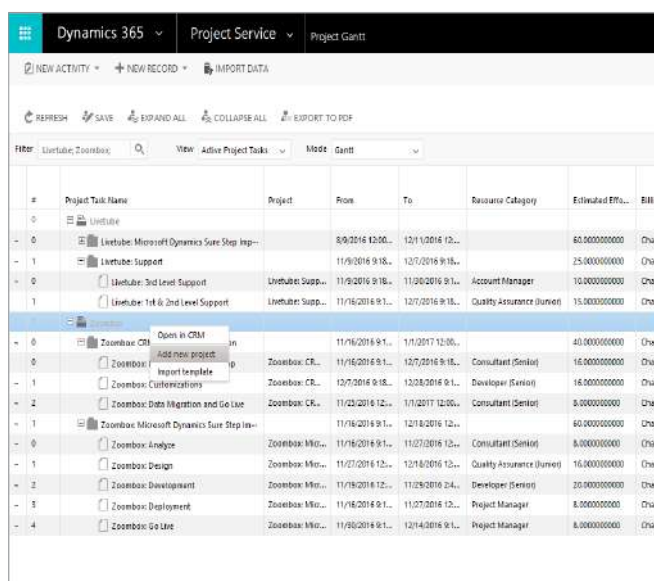


**Step 3:** Click **Refresh** to load data.


On the left-hand side, a project tree illustrates the project hierarchy. You will find the corresponding Gantt charts on the right-hand side of the application.



**Step 4:** Select a customer and right-click to open the context menu. Select **Add new project**.



**Step 5:** A new dialog pops out. Fill in data for the new project. Then, confirm with **OK** to create the project.

 For a more general overview of the functionality and content of the Quick Create Feature, please visit [Microsoft Dynamics 365 Help & Training](#).

### 3.1.2 Creating a Project via Quick Create

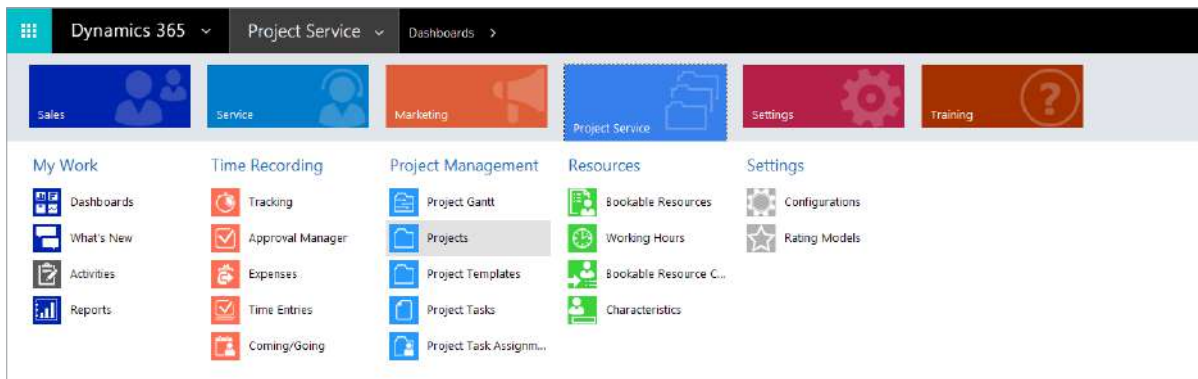
**Step 1:** Open the Quick Create form by navigating to the + icon in the menu bar and select **Project** in the Records group.

**Step 2:** Fill in all required data (fields marked with \*) to create the new record. Then, click **Save**.

### 3.1.3 Creating a Project via Dynamics 365 Form

**Step 1:** Navigate to the Project Service area and select **Projects**

in the Project Management group.



Step 2: Click **New** in the task bar.

Projectname	Project Number	Customer	From	To	Estimated Effort	Billing Type	Project Manage...	Status Reason	Progress %
Geeve: Microsoft Dynamics Suite Step Implementation	16887-50	Geeve	11/18/2016 1:30...	12/18/2016 1:30...	60.0000000000	Chargeable	Mason Baker	3 Execution	8.00
Geeve: Product Development	16887-11	Geeve	11/18/2016 1:30...	12/18/2016 1:30...	110.0000000000	Chargeable	Mason Baker	3 Execution	4.00
LiveTube: Microsoft Dynamics Suite Step Implementation	13035-16	LiveTube	11/18/2016 1:30...	12/18/2016 1:30...	60.0000000000	Chargeable	Evelyn Patterson	3 Execution	12.00
LiveTube: Support	13035-28	LiveTube	11/18/2016 1:30...	12/18/2016 1:30...	25.0000000000	Chargeable	Evelyn Patterson	3 Execution	28.00
Skipfire: Product Development	24790-09	Skipfire GmbH	11/18/2016 1:30...	12/18/2016 1:30...	90.0000000000	Chargeable	Emma Nolan	3 Execution	14.00
Skipfire: Support	24790-77	Skipfire GmbH	11/18/2016 1:30...	12/18/2016 1:30...	25.0000000000	Chargeable	Emma Nolan	3 Execution	12.00
Vestibulum: CRM Online Implementation	20047-05	Vestibulum Ltd	11/18/2016 1:30...	12/18/2016 1:30...	40.0000000000	Chargeable	Matthew Parker	3 Execution	41.00

Step 3: Enter the required data (fields marked with \*).

You can fill the data directly into the form or use the proRM Business Process Flow at the top of the page, which will guide you through the different stages of the project.



For more information about the business process flow feature, please visit the [Microsoft TechNet website](#).

**New Project**

Project Name: \*  
Customer: \*  
From: \*  
To: \*  
Billing Type: \*  
Project Manager: \*  
Status Reason: \*  
Project Information: \*  
Estimated Effort (h): \*  
Estimated Effort vs Actual (h): \*  
Overheadable: \*  
Internal Price (h): \*

**Step 4:** Click the **Save** button in the task bar or at the bottom right corner of the screen.

The screenshot displays the Dynamics 365 Project Service interface for a project named "CRM Implementation". The top navigation bar shows "Dynamics 365" and "Project Service". The breadcrumb trail indicates the path: "Projects > CRM Implementation". The main header area includes a "PROJECT" dropdown, the project name "CRM Implementation", and fields for "Project Number", "Progress %", and "Completed" (set to "No"). Below this is a progress bar with stages: "1 Initiation (Active)", "2 Planning", "3 Execution", "4 Controlling", "5 Closed", and "6 Archived". The "Initiation (Active)" stage is selected, showing details for "Customer", "Project Name", and "From". The "Summary" section on the left contains "GENERAL" information (Project Name, Customer, From, To, Billing Type, Project Manager, Status Reason) and "PROJECT INFORMATION" (Scheduled From, Scheduled To, Estimated Effort, Estimated Effort vs Actual, Overbookable, Internal Price). The "ACTIVITIES" section on the right shows a list of activities with columns for "Name", "Add Phone Call", and "Add Task". The "PROJECT TASKS" section on the right shows a table with columns for "Project Task Name", "From", and "To", with a "Looking records" message.

### 3.1.4 Project Templates

Frequently used project structures may be saved as Project Templates.

In order to save time while creating Project Tasks, giving estimations for assignments, or planning project structures, these templates may be imported for different customers or projects via the Project Gantt application.

## 3.2 Project Tasks

Projects are made up of one or more project tasks. Project tasks can be subordinate to each other.

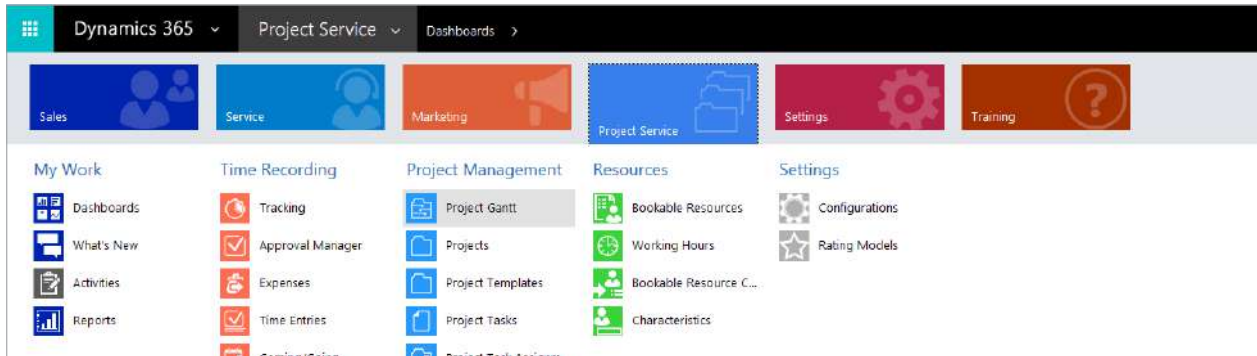
Project managers may add resources to the project task which is lowest in the hierarchy.

New tasks may be created using the Dynamics 365 form, Quick Create feature or Project Gantt application.


### 3.2.1 Creating a Project Task in Project Gantt

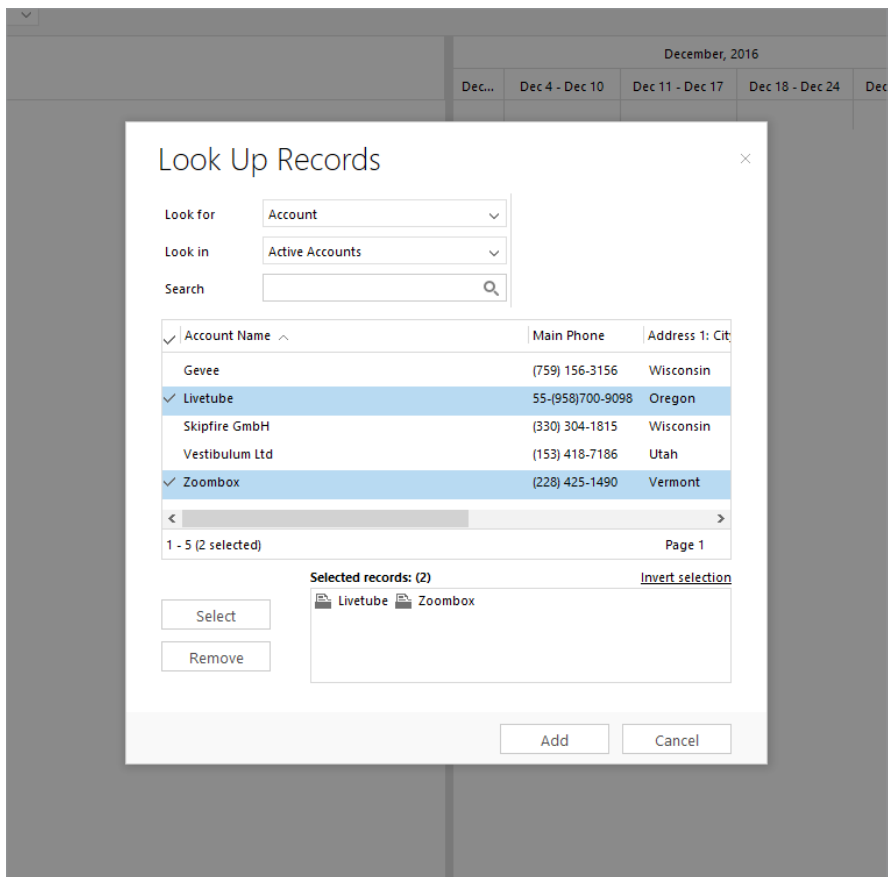
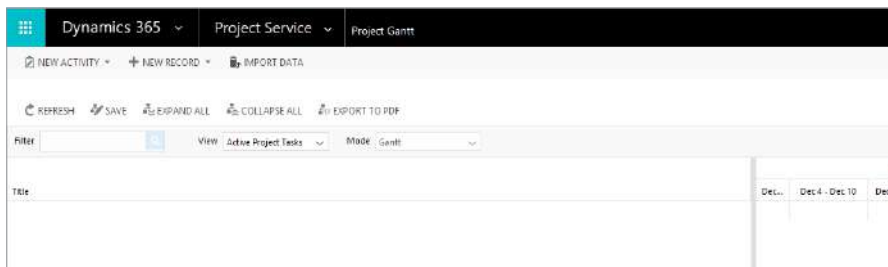
**Step 1:** Navigate to the Project Service area and select

Project Gantt in the Project Management group.



**Step 2:** Select a customer via the lookup **Filter**. Leaving the filter empty will load all data in the system.

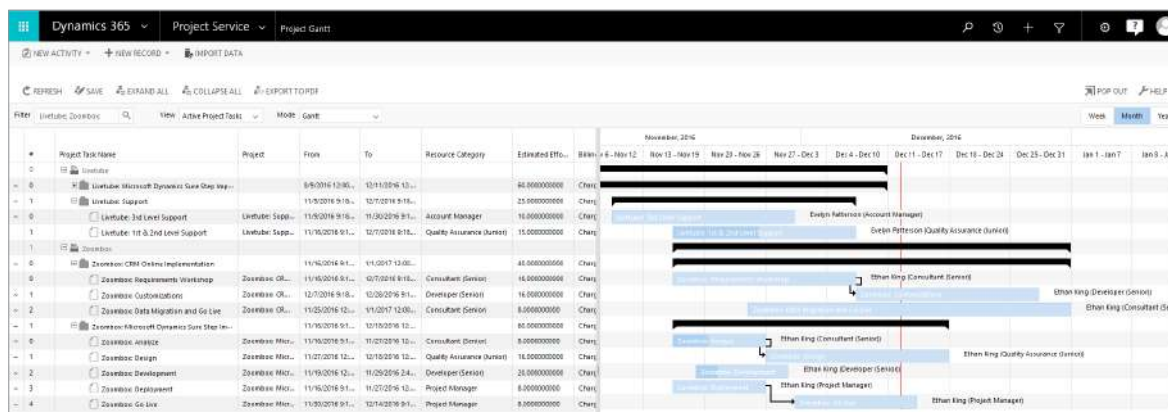
 Please note: Loading all available data will decrease performance.



**Step 3:** After choosing the desired filter, click **Refresh** to load data into the application.



On the left-hand side, a project tree illustrates the project hierarchy. You will find the corresponding Gantt charts on the right-hand side of the application.



**Step 4:** Select the project or project task for which you wish to create a new project task. Right-click to open the context menu and select **Add child task**.

When creating a subordinate project task, the **Add child task** functionality will be hidden in the submenu **Project Task**.

Dynamics 365 Project Service - Project Garritt							
NEW ACTIVITY + NEW RECORD IMPORT DATA							
REFRESH SAVE EXPAND ALL COLLAPSE ALL EXPORT TO PDF							
Filter: Livelube, Zoombox View: Active Project Tasks Mode: Gantt							
#	Project Task Name	Project	From	To	Resource Category	Estimated Effo...	Billi...
0	Livelube						
0	Livelube: Microsoft Dynamics Sure Step Imp...		11/16/2016 9:1...	12/16/2016 9:1...		60.0000000000	Char
1	Livelube: Support		11/4/2016 12:0...	1/1/2017 12:00...		25.0000000000	Char
0	Livelube: 3rd Level Support	Livelube: Supp...	11/16/2016 9:1...	1/1/2017 12:00...	Account Manager	10.0000000000	Char
1	Livelube: 1st & 2nd Level Support	Livelube: Supp...	11/4/2016 12:0...	11/25/2016 12:...	Quality Assurance (Junior)	15.0000000000	Char
1	Zoombox						
0	Zoombox: CRM Online Implementation		11/9/2016 9:18...	1/1/2017 12:00...		40.0000000000	Char
0	Zoombox: Require Open in CRM	Zoombox: CR...	11/9/2016 9:18...	11/30/2016 9:1...	Consultant (Senior)	16.0000000000	Char
1	Zoombox: Custom Edit	Zoombox: CR...	12/7/2016 9:18...	12/18/2016 12:...	Developer (Senior)	16.0000000000	Char
2	Zoombox: Data M Set Status Reason	Zoombox: CR...	11/9/2016 9:18...	1/1/2017 12:00...	Consultant (Senior)	9.0000000000	Char
1	Zoombox: Microsoft Completed		11/16/2016 9:1...	1/1/2017 12:00...		60.0000000000	Char
0	Zoombox: Analyze Project Task		11/16/2016 9:1...	11/30/2016 9:1...	Consultant (Senior)	8.0000000000	Char
1	Zoombox: Design Resources		11/30/2016 9:1...	12/11/2016 12:...	Quality Assurance (Junior)	10.0000000000	Char
2	Zoombox: Develop Details		11/16/2016 9:1...	1/1/2017 12:00...	Developer (Senior)	20.0000000000	Char
3	Zoombox: Deployment	Zoombox: Mic...	11/16/2016 9:1...	12/11/2016 12:...	Project Manager	8.0000000000	Char
4	Zoombox: Go Live	Zoombox: Mic...	12/14/2016 9:1...	12/28/2016 9:1...		8.0000000000	Char

**Step 5:** A dialog window pops out. Fill in required data for the project task. When all fields are filled in, confirm with **OK** to create the project task.

### Create task

☐ Milestone

Project Task Name

From

To

Parent

Project Task Manager

Resource Category

Estimated Effort (h)

Billing Type

Internal Price (h)

☐ Overbookable

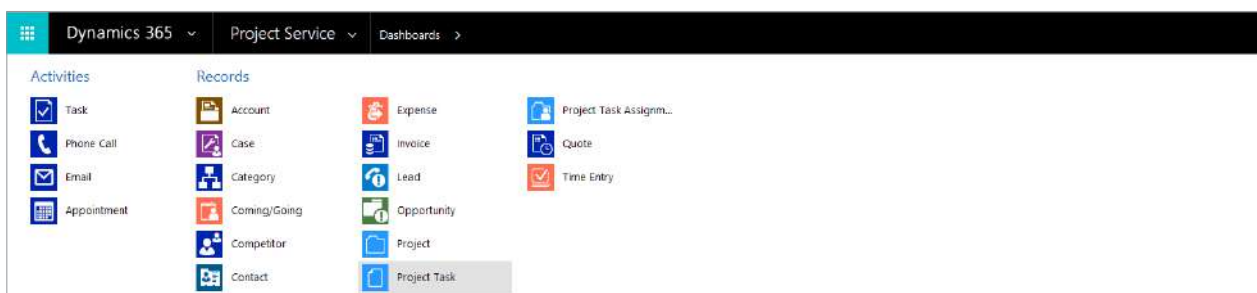
External Price (h)

OK

Cancel

## 3.2.2 Creating a Project Task via Quick Create

**Step 1:** Open the Quick Create form by clicking the + icon in the menu bar and select **Project Task** in the Records group.





**Step 2:** A form appears. Fill in all required data (fields marked with \*). Click **Save** to create the project task.



For an overview of the functionality and content of the Quick Create Feature, please visit [Microsoft Dynamics 365 Help & Training](#).

### 3.2.3 Creating a Project Task via Dynamics 365 Form



Please note: Loading all available data in the system will decrease performance.

**Step 1:** Navigate to the Project Service area and select **Project Tasks** in the Project Management group.

**Step 2:** Click **New** in the task bar.

Dynamics 365   Project Service   Project Tasks										
<a href="#">NEW</a> <a href="#">DELETE</a> <a href="#">EMAIL A LINK</a> <a href="#">RUN REPORT</a> <a href="#">EXCEL TEMPLATES</a> <a href="#">EXPORT TO EXCEL</a> <a href="#">IMPORT DATA</a> <a href="#">CHART PANE</a> <a href="#">VIEW</a>										
Active Project Tasks										
✓	Project	Project Task Name ↑	From	To	Resource Category	Estimated Effor...	Billing Type	Milestone	Status Reason	Progress %
	Gevee: Micros...	Gevee: Analyzing	11/16/2016 9:18...	11/30/2016 9:18...	Consultant (Senior)	8.0000000000	Chargeable	No	3 Execution	
	Gevee: Product ...	Gevee: Conception	11/16/2016 9:18...	12/16/2016 9:18...	Production Manager	24.0000000000	Chargeable	No	3 Execution	
	Gevee: Micros...	Gevee: Deployment	11/16/2016 9:18...	11/30/2016 9:18...	Project Manager	8.0000000000	Chargeable	No	3 Execution	
	Gevee: Micros...	Gevee: Design	11/16/2016 9:18...	12/7/2016 9:18 ...	Quality Assurance (Junior)	16.0000000000	Chargeable	No	3 Execution	
	Gevee: Micros...	Gevee: Development	11/16/2016 9:18...	12/16/2016 9:18...	Developer (Senior)	20.0000000000	Chargeable	No	3 Execution	
	Gevee: Micros...	Gevee: Go Live	11/16/2016 9:18...	11/30/2016 9:18...	Project Manager	8.0000000000	Chargeable	No	3 Execution	
	Gevee: Product ...	Gevee: HTML Development	11/16/2016 9:18...	12/7/2016 9:18 ...	Developer (Senior)	16.0000000000	Chargeable	No	3 Execution	
	Gevee: Product ...	Gevee: Process and Plug-In Develo...	11/16/2016 9:18...	12/16/2016 9:18...	Developer (Senior)	35.0000000000	Chargeable	No	3 Execution	
	Gevee: Product ...	Gevee: Quality Assurance	11/16/2016 9:18...	12/7/2016 9:18 ...	Quality Assurance (Senior)	15.0000000000	Chargeable	No	3 Execution	
	Livetube: Supp...	Livetube: 1st & 2nd Level Support	11/16/2016 9:18...	12/7/2016 9:18 ...	Quality Assurance (Junior)	15.0000000000	Chargeable	No	3 Execution	
	Livetube: Supp...	Livetube: 3rd Level Support	11/16/2016 9:18...	12/7/2016 9:18 ...	Account Manager	10.0000000000	Chargeable	No	3 Execution	
	Livetube: Micro...	Livetube: Analyzing	11/16/2016 9:18...	11/30/2016 9:18...	Consultant (Senior)	8.0000000000	Chargeable	No	3 Execution	
	Livetube: Micro...	Livetube: Deployment	11/23/2016 9:18...	11/23/2016 9:18...	Project Manager	8.0000000000	Chargeable	Yes	3 Execution	
	Livetube: Micro...	Livetube: Design	11/16/2016 9:18...	12/7/2016 9:18 ...	Quality Assurance (Junior)	16.0000000000	Chargeable	No	3 Execution	
	Livetube: Micro...	Livetube: Development	11/16/2016 9:18...	12/16/2016 9:18...	Developer (Senior)	20.0000000000	Chargeable	No	3 Execution	
	Livetube: Micro...	Livetube: Go Live	11/16/2016 9:18...	11/30/2016 9:18...	Project Manager	8.0000000000	Chargeable	No	3 Execution	
	Skipfire: Support	Skipfire: 1st & 2nd Level Support	11/16/2016 9:18...	12/7/2016 9:18 ...	Quality Assurance (Junior)	15.0000000000	Chargeable	No	3 Execution	
	Skipfire: Support	Skipfire: 3rd Level Support	11/16/2016 9:18...	12/7/2016 9:18 ...	Account Manager	10.0000000000	Chargeable	No	3 Execution	
	Skipfire: Produ...	Skipfire: Conception	11/16/2016 9:18...	12/16/2016 9:18...	Production Manager	24.0000000000	Chargeable	No	3 Execution	
	Skipfire: Produ...	Skipfire: HTML Development	11/16/2016 9:18...	12/7/2016 9:18 ...	Developer (Senior)	16.0000000000	Chargeable	No	3 Execution	
	Skipfire: Produ...	Skipfire: Process and Plug-In Develo...	11/16/2016 9:18...	12/16/2016 9:18...	Developer (Senior)	35.0000000000	Chargeable	No	3 Execution	

**Step 3:** Fill in all required data (fields marked with \*).

**Dynamics 365** | Project Service | Project Tasks > New Project Task

SAVE | SAVE & CLOSE | NEW | FORM EDITOR

PROJECT TASK ▾  
New Project Task =

Summary

**GENERAL**

Project \*  
Project Task Name \*  
From \*  
To \*  
Project Task Manager \*  
Project Task Status \*  
Status Reason 1 Initiation

**ACTIVITIES** **NOTES**  
No records found.

**TASK INFORMATION**

Scheduled From \*  
Scheduled To \*  
Resource Category \*  
Estimated Effort (h)  
Estimated Effort vs Actual Effort Grey  
Overbookable Yes

**SALES INFORMATION**

Internal Price (h) \*  
External Price (h) \*  
Sales Order Account

**Step 4:** Click the **Save** button in the task bar or in the bottom right corner of the screen.

**Dynamics 365** | Project Service | Project Tasks > New Project Task

SAVE | SAVE & CLOSE | NEW | FORM EDITOR

PROJECT TASK ▾  
New Project Task =

Summary

**GENERAL** **ACTIVITIES** **NOTES**

**Dynamics 365** | Project Service | Project Tasks > Kick Off Meeting

SAVE | SAVE & CLOSE | NEW | FORM EDITOR

PROJECT TASK ▾  
Kick Off Meeting =

Summary

**GENERAL**

Project \* Kick Off Meeting  
Project Task Name \* Kick Off Meeting  
From \* 12/10/2016 10:00 AM  
To \* 12/10/2016 10:00 AM  
Project Task Manager \* Ludo Thompson  
Project Task Status \* Yellow  
Status Reason 1 Initiation

**ACTIVITIES** **NOTES**  
No records found.

**TASK INFORMATION**

Scheduled From \*  
Scheduled To \*  
Resource Category \* Account Manager  
Estimated Effort (h) 600.00  
Estimated Effort vs Actual Effort Grey  
Overbookable Yes

**SALES INFORMATION**

Internal Price (h) \* 600.00  
External Price (h) \* 375.00  
Sales Order Account

**PROJECT INFORMATION**

Project \* Veridium CRM Online Implementation  
From \* 12/10/2016 10:00 AM  
To \* 12/10/2016 10:00 AM

**ASSIGNED RESOURCES**

Bookable Resource \* Estimated Effort \* Progress %  
No Project Task Assignments are available.

**DESCRIPTION**

Active

## 3.3 Project Task Assignments

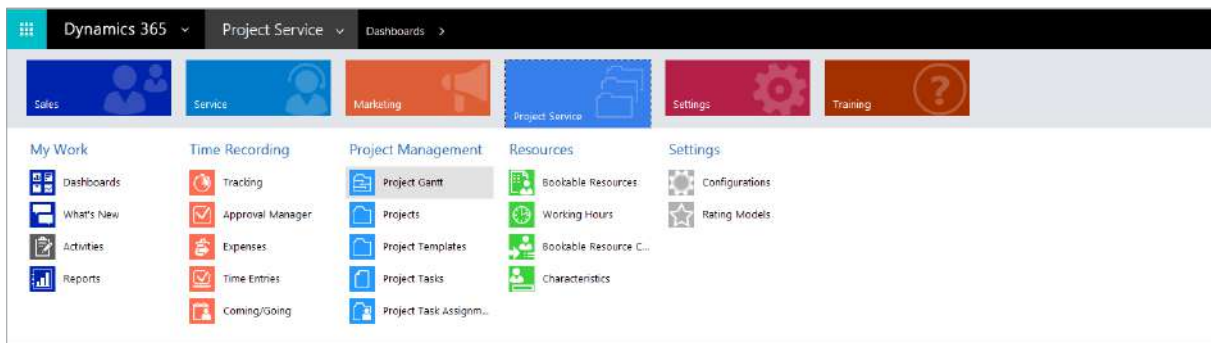
The Project Task Assignment entity connects Project Task and Bookable Resource and stores project related customer

and employee data. Only after an assignment was made is it possible for the employee to create Time Entries and Expenses.

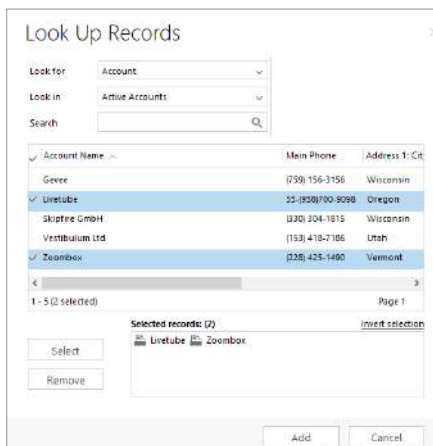
Project Task Assignments may be created using the Dynamics 365 form, Quick Create feature or Project Gantt application.

### 3.3.1 Creating an Assignment in Project Gantt

**Step 1:** Navigate to the Project Service area and select **Project Gantt** in the Project Management group.



**Step 2:** Select a customer through the lookup **Filter**. Leaving the filter empty will load all data into the system.



It is also possible to keep the filter empty to load all the data in the system.

**Step 3:** Click **Refresh** to load data into the application.

On the left-hand side, a project tree illustrates the project hierarchy. You will find the corresponding Gantt charts on the right-hand side of the application.



Project Task Name	Project	From	To	Resource Category	Estimated Effort
Zoombox Microsoft Dynamics 365 Step 1	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 1	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 2	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 3	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 4	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 5	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 6	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 7	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 8	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 9	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 10	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 11	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 12	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 13	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 14	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 15	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 16	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 17	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 18	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 19	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 20	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000



Please note: Loading all available data in the system decreases the performance of the application.

**Step 4:** Select the desired project task, right-click to open the context menu and select **Resources**.

Project Task Name	Project	From	To	Resource Category	Estimated Effort
Zoombox Microsoft Dynamics 365 Step 1	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 1	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 2	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 3	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 4	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 5	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 6	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 7	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 8	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 9	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 10	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 11	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 12	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 13	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 14	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 15	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 16	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 17	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 18	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 19	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000
Zoombox Step 20	Zoombox	11/15/2018 8:15	12/15/2018 12:00	Consultant Services	40,000,000,000

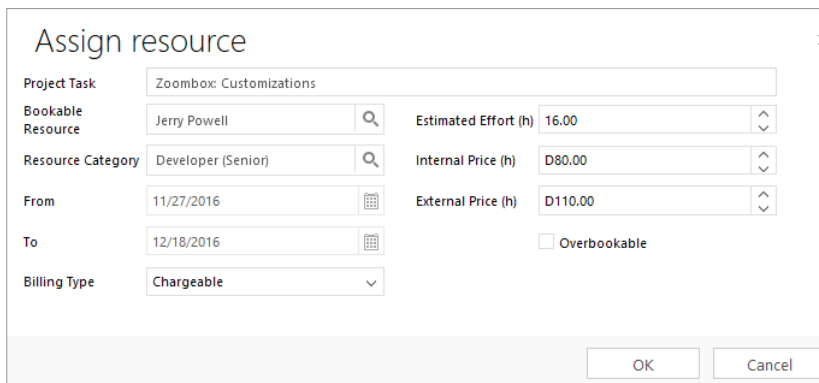
**Step 5:** The dialog window **Manage resources** opens. Click **New** in the bottom left corner. Then, fill in all fields and confirm with **OK** to create the Project Task Assignment.

Manage resources

Project Task: Zoombox Customizations

Bookable Res.	Resource Cat.	Billing Type	Estimated Eff.	Internal Price	External Price
Ethan King	Developer (Senior)	Chargeable	16.00	D60.00	D110.00

New Edit Delete Restore Close



**Assign resource**

Project Task: Zoombox: Customizations

Bookable Resource: Jerry Powell

Resource Category: Developer (Senior)

From: 11/27/2016

To: 12/18/2016

Billing Type: Chargeable

Estimated Effort (h): 16.00

Internal Price (h): D80.00

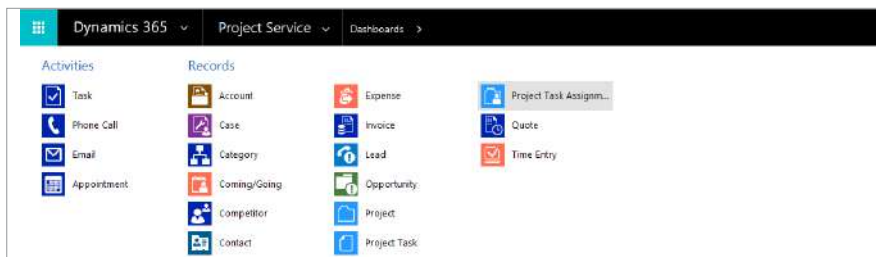
External Price (h): D110.00

☐ Overbookable

OK Cancel

### 3.3.2 Creating an Assignment via Quick Create

**Step 1:** Click the + icon in the menu bar and select **Project Task Assignment** in the Records group.



**Step 2:** Fill in all required data (fields marked with \*) and click **Save**.



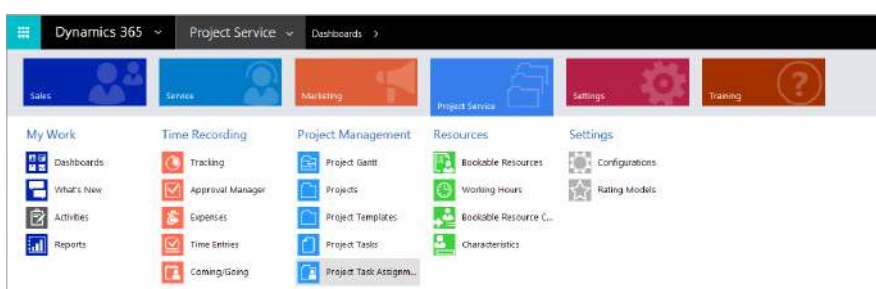
For an overview of the functionality and content of the Quick Create Feature, please visit [Microsoft Dynamics 365 Help & Training](#).



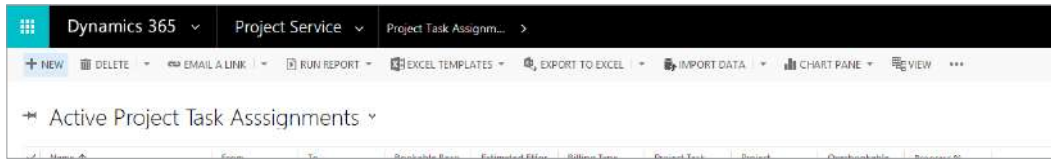
The image shows the 'Project Task Assignment' form in Dynamics 365. It has three tabs: GENERAL, ASSIGNMENT DETAILS, and SALES DETAILS. The GENERAL tab is active, showing fields for Project, Project Task, Bookable Resource, Name, and To. The ASSIGNMENT DETAILS tab shows fields for Billing Type, Resource Category, Estimated Effort, and Overbookable. The SALES DETAILS tab shows fields for Currency, Internal Price, and External Price.

### 3.3.3 Creating an Assignment via Dynamics 365 Form

**Step 1:** Navigate to the Project Service area and select **Project Task Assignments** in the Project Management group.



**Step 2:** Click **New** in the task bar.



**Step 3:** Fill in all required data (fields marked with \*).

The screenshot shows the 'New Project Task Assignment' form. The form is divided into several sections: 'Summary', 'GENERAL', 'ASSIGNMENT INFORMATION', and 'SALES INFORMATION'. The 'GENERAL' section includes fields for 'Project \*', 'Project Task \*', 'From \*', 'To \*', and 'Bookable Resource \*'. The 'ASSIGNMENT INFORMATION' section includes fields for 'Schedule From \*', 'Schedule To \*', 'Resource Category \*', 'Estimated Effort (h)', 'Estimated Effort vs Actual Effort', and 'Overbookable'. The 'SALES INFORMATION' section includes fields for 'Internal Price (h)' and 'External Price (h)'. The form also has a 'Status' field at the bottom, which is currently set to 'Active'.

**Step 4:** Save the record by clicking **Save** in the task bar or in the bottom right corner of the screen.

The screenshot shows the Dynamics 365 Project Service interface. The top navigation bar includes 'Dynamics 365', 'Project Service', and 'Project Task Assignm...'. Below this, a task bar contains several icons: 'SAVE', 'SAVE & CLOSE', '+ NEW', and 'FORM EDITOR'. The main area displays 'New Project Task Assignment' with a 'Summary' section.

The screenshot shows the 'Gevee - Gevee: Go Live - Camille Patton' record in Dynamics 365. The record is displayed in a detailed view with sections for 'Summary', 'GENERAL', 'ASSIGNMENT INFORMATION', 'SALES INFORMATION', 'PROJECT INFORMATION', 'TIME ENTRIES', and 'EXPENSES'. The 'GENERAL' section includes fields for 'Project \*', 'Project Task \*', 'From \*', 'To \*', and 'Bookable Resource \*'. The 'ASSIGNMENT INFORMATION' section includes fields for 'Schedule From \*', 'Schedule To \*', 'Resource Category \*', 'Estimated Effort (h)', 'Estimated Effort vs Actual Effort', and 'Overbookable'. The 'SALES INFORMATION' section includes fields for 'Internal Price (h)' and 'External Price (h)'. The 'PROJECT INFORMATION' section includes fields for 'Project \*', 'Project Task \*', 'From \*', 'To \*', and 'Bookable Resource \*'. The 'TIME ENTRIES' section includes a table for 'Subject \*', 'Bookable Resource', and 'Changeable Resource'. The 'EXPENSES' section includes a table for 'Subject \*', 'Service Date', and 'Bookable Resource'. The record is currently set to 'Active'.



## 3.4 Time Tracking

Once an employee has been assigned to a project task, they may create Time Entries for this project task. These allow employees to track their working time on the task and enable project managers to supervise the progress of their projects.

There are three different types of time entries:

**Work:** default type for work on project tasks

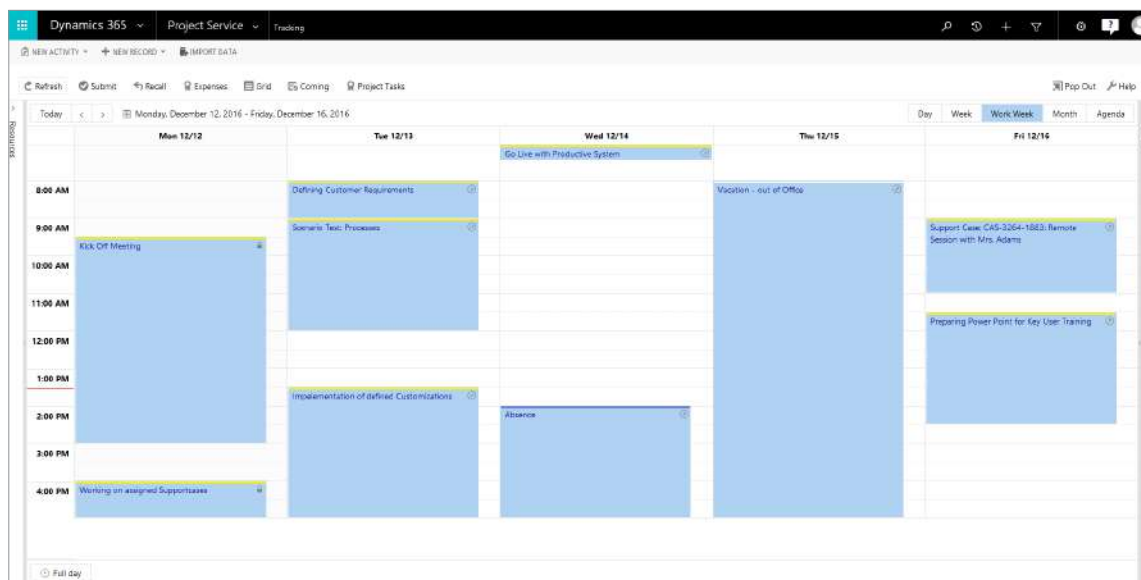
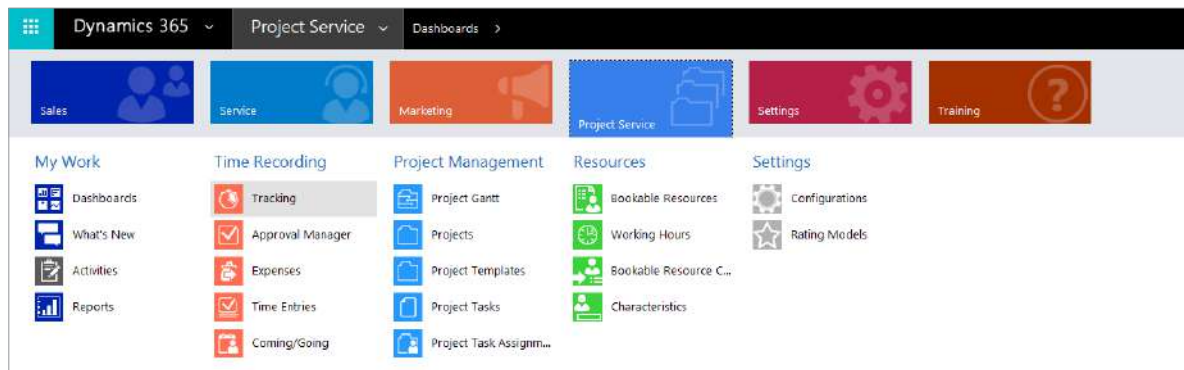
**Absence:** for absences, e.g. due to illness

**Holiday:** for vacation or public holidays

Time entries may be created using the Dynamics 365 form, Quick Create feature, Tracking application or Microsoft Dynamics 365 mobile application.

### 3.4.1 Creating a Time Entry in Tracking

**Step 1:** Navigate to the Project Service area and select Tracking in the Time Recording group.



## Step 2: Create a Time Entry

There are two kinds of time entries. **Full-day time entries** do not feature a start and end time, only duration. However, **start-and-end-time** entries are supported as well. Here, the duration will be automatically calculated based on the start and end time.

The preferred entry type may be an individual choice, management decision or depend on the project.

### Step 2.1: Create a Full-Day Time Entry

Select the day for which a time entry should be created. Right-click at the top of that day's column to open the context menu and select **Create new Time Entry**.

This opens the Time Entry creation form which is made up of two areas. In the project tree structure on the left hand side, select the desired project task assignment. Fill the necessary data into the fields on the right. Confirm with **Save**.

The screenshot displays the Dynamics 365 Project Service Tracking interface. The top navigation bar includes 'Dynamics 365', 'Project Service', and 'Tracking'. Below the navigation bar, there are buttons for 'NEW ACTIVITY', 'NEW RECORD', and 'IMPORT DATA'. A toolbar contains 'Refresh', 'Submit', 'Recall', 'Expenses', 'Grid', 'Coming', and 'Project Tasks'. The main area shows a Gantt chart for the period 'Monday, December 12, 2016 - Friday, December 16, 2016'. The left sidebar is labeled 'Resources'. The Gantt chart has two columns: 'Mon 12/12' and 'Tue 12/13'. On 'Mon 12/12', there is a large blue block from 8:00 AM to 4:00 PM labeled 'Kick Off Meeting'. On 'Tue 12/13', there are two blue blocks: one from 8:00 AM to 12:00 PM labeled 'Defining Customer Requirements', and another from 1:00 PM to 4:00 PM labeled 'Impelementation of defined Customizations'. A context menu is open over the 'Mon 12/12' column, showing options 'Create new Time Entry' and 'Create new Expense'. At the bottom left, there is a 'Full day' button.



Time Entry

Expand

Collapse

Search

Name	From	To
Livetube		
Skipfire GmbH		
Vestibulum Ltd		
Gevee		

Subject

Date 12/12/2016

Duration (h)

Full Day ☒

Break (h) 0.00

Internal Details

External Detail

Type Work

Resource

Category

Save Cancel

Time Entry

Expand

Collapse

Search

Name	From	To
Livetube		
Livetube Microsoft Dynamics S...	11/16/2016 9:18 AM	12/16/2016 9:18 AM
Livetubes Development	11/16/2016 9:18 AM	12/16/2016 2:00 PM
Jerry Powell	11/16/2016 9:18 AM	12/16/2016 2:00 PM
Skipfire GmbH		
Vestibulum Ltd		
Gevee		

Subject Enter your Subject here

Date 12/12/2016

Duration (h) 8.00

Full Day ☒

Break (h) 0.00

Internal Details Internal Details for colleagues and Project Manager

External Detail External Details for relevant information to the Customer

Type Work

Resource Developer (Senior)

Category

Save Cancel

## Step 2.2: Create a Start-and-End-Time Entry

Click and drag the mouse to mark the desired time frame in the calendar. Then, right-click to open the context menu and select **Create new Time Entry**.

Dynamics 365

Project Service

Tracking

NEW ACTIVITY

NEW RECORD

IMPORT DATA

Refresh

Submit

Recall

Expenses

Grid

Coming

Project Tasks

Today

Monday, December 12, 2016 - Friday, December 16, 2016

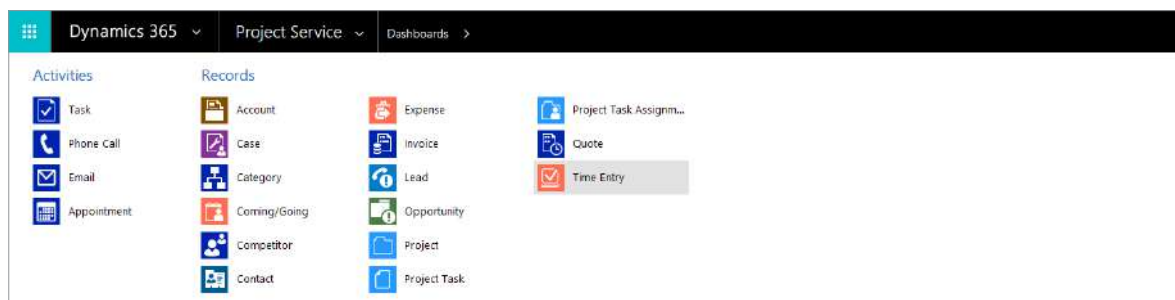
Day Week Work Week

	Mon 12/12	Tue 12/13	Wed 12/14	Thu 12/15	Fri 12/16
8:00 AM		Defining Customer Requirements	Go Live with Productive System	Vacation - out of Office	
9:00 AM		Scenario Test Processes			Support Case: CAS-3264-1683: Re Session with M/s. Adams
10:00 AM	Kick Off Meeting		Create new Time Entry Create new Expense		Preparing Power Point for Key Use
11:00 AM					
12:00 PM					
1:00 PM					
2:00 PM		Implementation of defined Customizations	Absence		
3:00 PM					
4:00 PM	Working on assigned Supportcases				

This opens the Time Entry creation form which is made up of two areas. In the project tree structure on the left hand side, select the desired project task assignment. Fill the necessary data into the fields on the right. Confirm with **Save**.

### 3.4.2 Creating a Time Entry via Quick Create

**Step 1:** Click the + icon in the menu bar and select **Time Entry** in the Records group.



For an overview of the functionality and content of the Quick Create Feature, please visit [Microsoft Dynamics 365 Help & Training](#).

Dynamics 365

Project Service

Dashboards

Time Entry

GENERAL

Subject

--

Type

Work

Full Day

No

From

--

To

--

TIME ENTRY DETAILS

Break (h)

--

Duration (h)

--

Bookable Resource

--

Billing Type

Chargeable

**Step 1:** Navigate to the Project Service area and select **Time Entries** in the Time Recording group.

Dynamics 365
Project Service
Dashboards

Sales

Service

Marketing

Project Service

Settings

Training

My Work

Dashboards

What's New

Activities

Reports

Time Recording

Tracking

Approval Manager

Expenses

Time Entries

Coming/Going

Project Management

Project Gantt

Projects

Project Templates

Project Tasks

Project Task Assignm...

Resources

Bookable Resources

Working Hours

Bookable Resource C...

Characteristics

Settings

Configurations

Rating Models

**Dynamics 365** | **Project Service** | Time Entries >

+ NEW | DELETE | EMAIL LINK | RUN REPORT | EXCEL TEMPLATES | EXPORT TO EXCEL | IMPORT DATA | CHART PANEL | VIEW ...

### My Time Entries

Search for records

Type	Subject	From	To	Break (H)	Billing Type	Chargeable Dur...	Bookable Resou...	Task	Project	Status Reason
Absentee	Absence	12/14/2016 2:00...	12/14/2016 5:00...	0.0000000000	Chargeable	3.0000000000	Jerry Powell	UreTube: Devel...	UreTube: Micro...	Draft
Work	Defining Customer Requirements	12/13/2016 8:00...	12/13/2016 9:00...	0.0000000000	Chargeable	1.0000000000	Jerry Powell	UreTube: Devel...	UreTube: Micro...	Draft
Work	Go Live with Productize System	12/14/2016 12:00...		0.0000000000	Chargeable	6.0000000000	Jerry Powell	UreTube: Devel...	UreTube: Micro...	Draft
Work	Implementation of defined Customizations	12/13/2016 1:30...	12/18/2016 5:00...	0.0000000000	Chargeable	5.5000000000	Jerry Powell	Gewe: Concept...	Gewe: Product...	Draft
Work	Kick Off Meeting	12/12/2016 9:30...	12/12/2016 3:00...	0.0000000000	Chargeable	5.5000000000	Jerry Powell	Gewe: Concept...	Gewe: Product...	Submitted
Work	Preparing Power Point for Key User Training	12/16/2016 11:15...	12/16/2016 2:30...	0.0000000000	Chargeable	3.0000000000	Jerry Powell	Kick Off Meeting	UreTube: CK...	Draft
Work	Scenario Test Processes	12/13/2016 9:00...	12/13/2016 12:00...	0.0000000000	Chargeable	3.0000000000	Jerry Powell	Gewe: Concept...	Gewe: Product...	Draft
Work	Support Case: CAS-3254-1883; Resolve Session with M...	12/16/2016 9:00...	12/16/2016 11:00...	0.0000000000	Chargeable	2.0000000000	Jerry Powell	UreTube: Devel...	UreTube: Micro...	Draft
Vacation	Vacation - out of Office	12/15/2016 8:00...	12/15/2016 5:00...	0.0000000000	Chargeable	9.0000000000	Jerry Powell	UreTube: Devel...	UreTube: Micro...	Draft
Work	Working on assigned Supportcases	12/12/2016 4:00...	12/12/2016 5:00...	0.0000000000	Chargeable	1.0000000000	Jerry Powell	UreTube: Deve...		



For more information about the business process flow feature, please visit the [Microsoft TechNet website](#).

through the different stages of time entry creation.

**TIME ENTRY**  
New Time Entry

Create New Time Entry (Active) Submit Time Entry

Project \* click to enter Full Day \* No Duration (h) click to enter  
 Task \* click to enter Subject \* click to enter Break (h) 0.0000000000  
 Assignment \* click to enter Date \* ---

**Summary**

**GENERAL**  
 Project \* ---  
 Task \* ---  
 Assignment \* ---  
 Subject \* ---  
 From \* ---  
 To \* ---  
 Break (h) 0.0000000000  
 Duration (h) ---

**ACTIVITIES** **NOTES**  
 No records found.

Status: Review Draft

**Step 4:** Click the **Save** button in the task bar or in the bottom right corner of the screen.

**TIME ENTRY**  
New Time Entry

Create New Time Entry (Active) Submit Time Entry

Project \* ✓ Skipfire Product Development Full Day \* No Duration (h) click to enter  
 Task \* ✓ Skipfire Quality Assurance Subject \* ✓ Processed Break (h) 0.0000000000  
 Assignment \* ✓ Skipfire Credit - Skipfire Date \* 12/4/2016 6:06 AM

**Summary**

**TIME ENTRY**  
Process test

Create New Time Entry (Active) Submit Time Entry

Project \* ✓ Skipfire Product Development Full Day \* No Duration (h) click to enter  
 Task \* ✓ Skipfire Quality Assurance Subject \* ✓ Processed Break (h) 0.0000000000  
 Assignment \* ✓ Skipfire Credit - Skipfire Date \* 12/4/2016 6:06 AM

**Summary**

**GENERAL**  
 Project \* Skipfire Product Development  
 Task \* Skipfire Quality Assurance  
 Assignment \* Skipfire Credit - Skipfire Quality Assurance - Credit Notes  
 Subject \* Processed  
 From \* 12/4/2016 6:06 AM  
 To \* 12/4/2016 1:00 AM  
 Break (h) 0.0000000000  
 Duration (h) ---

**ACTIVITIES** **NOTES**  
 No records found.

**PROJECT INFORMATION**  
 Project Name \* Skipfire Product Development  
 Break \* 12/4/2016 6:06 AM  
 To \* 12/4/2016 1:00 AM

**ASSIGNMENT INFORMATION**  
 Project Task \* Skipfire Quality Assurance  
 Break \* 12/4/2016 6:06 AM  
 To \* 12/4/2016 1:00 AM  
 Assignment (h) 0.0000000000  
 Project ID \* ---

Status: Review Draft

### 3.4.4 Creating a Time Entry in the Microsoft Dynamics 365 Mobile Application

The Microsoft Dynamics 365 mobile application is available for phones, tablets and Windows (starting with 8.1) in the Windows

App store. It provides access to the entities Activities, Accounts, Contacts, Leads, Dashboards and custom entities, allowing users to track their daily work progress.

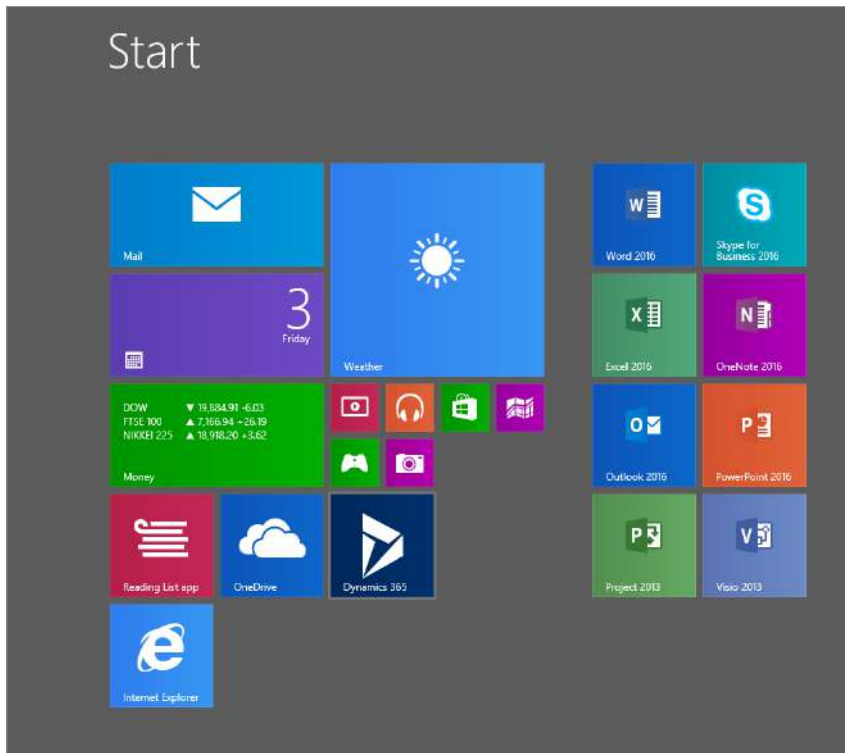


For further information regarding the app, please click [here](#).

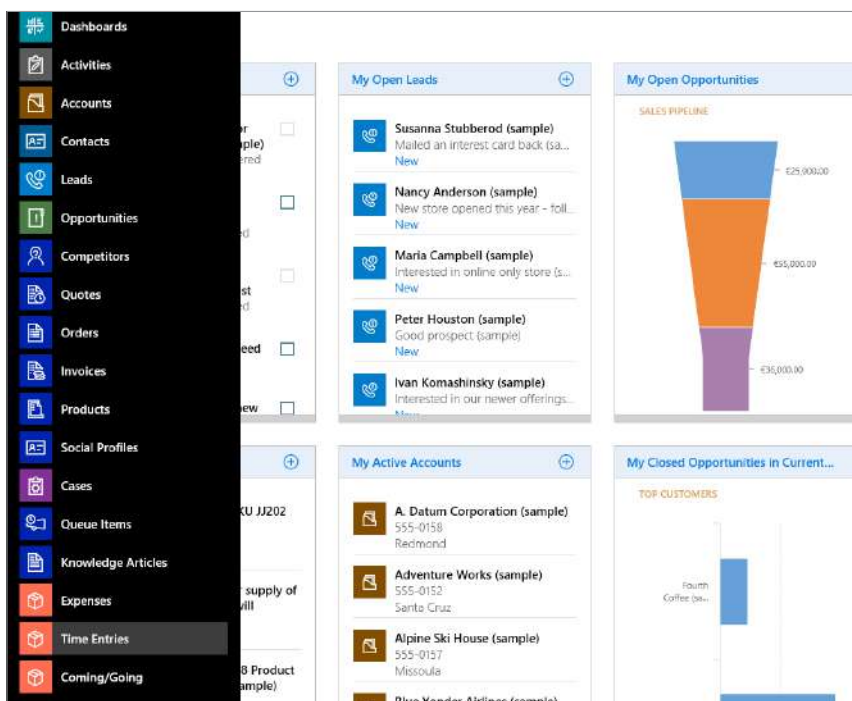
**Step 1:** Open the application on your phone, tablet or PC.



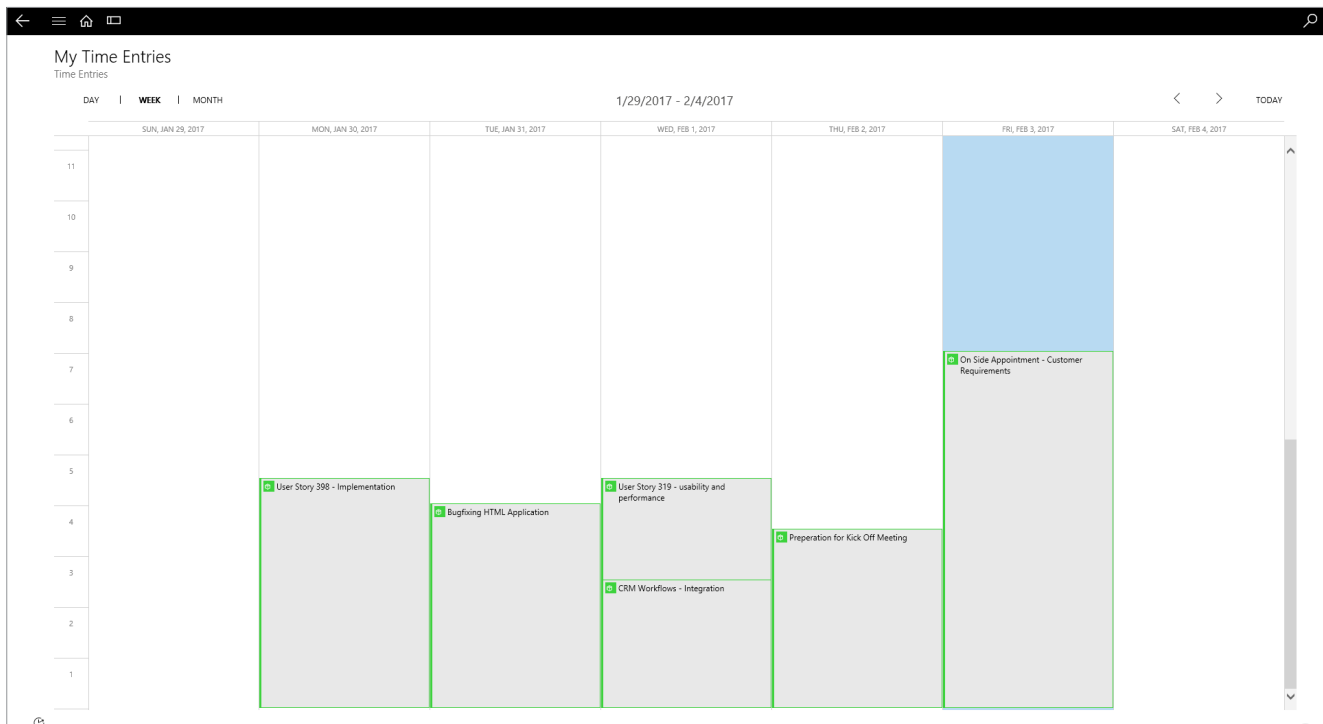
For Windows PCs the application is available via the [Microsoft Store](#).



**Step 2:** Navigate to the menu icon in the in-app navigation and select **Time Entries**.

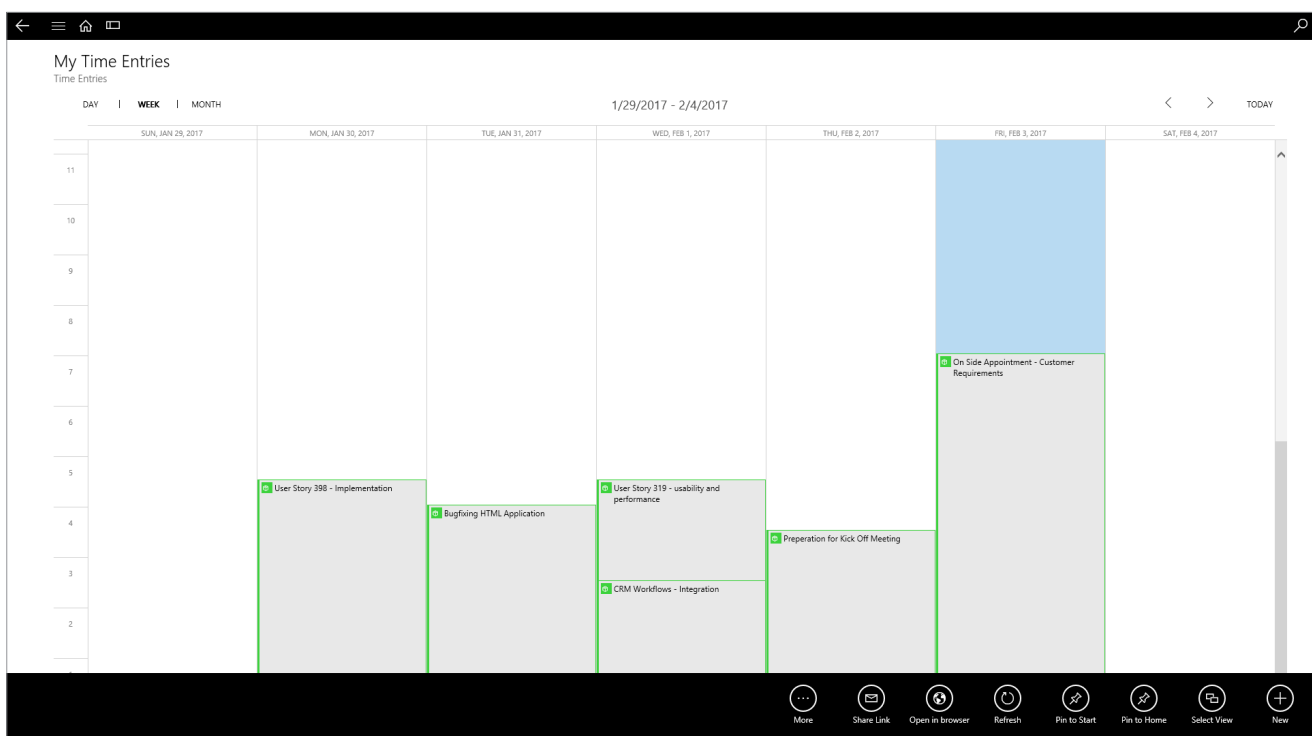


Upon opening the entity, you will get an overview of the current week, including existing time entries.



### Step 3: Open Creation Form

To create a new time entry, right-click or (when using a mobile device) tap anywhere to open the context menu. Click the **New** (+) icon in the bottom right corner.



**Step 4:** A form opens. Enter all required data and click **Save**.

## 3.5 Expense Tracking

In addition to time entries, proRM Fast Start also allows tracking of project-related expenses.

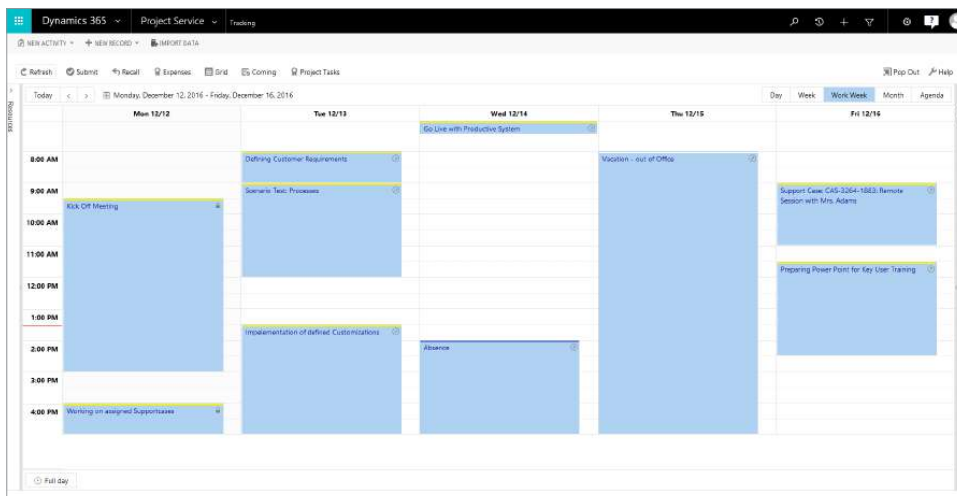
The following expense types are available: Hotel, Car rental, Meal, Airfare, Public Transportation, Taxi and Miscellaneous.

Expenses may be created using the Dynamics 365 form, Quick Create feature, Tracking application or Microsoft Dynamics 365 mobile app.

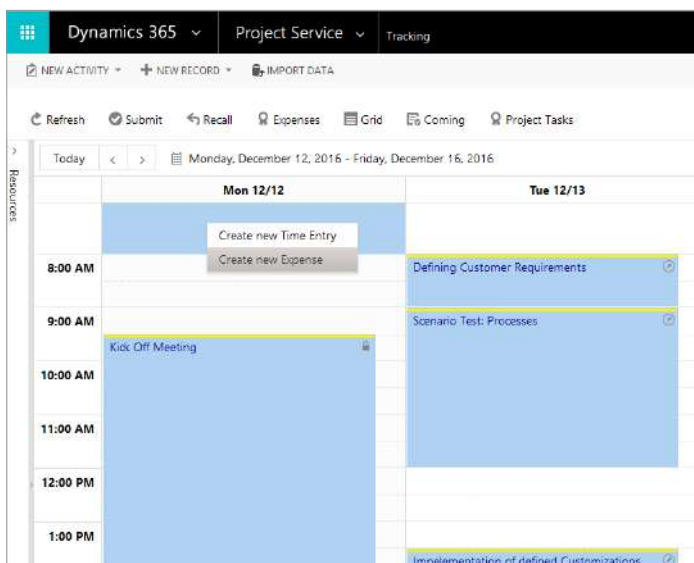
### 3.5.1 Creating an Expense in Tracking

**Step 1:** Navigate to the Project Service area and select **Tracking** in the Time Recording group.





**Step 2:** Select the day for which an expense should be created. Right-click anywhere in that day's column to open the context menu and select **Create new Expense**.



**Step 3:** This opens an expense creation form which is made up of two areas. In the project tree structure on the left hand side, select the desired project task assignment.

Expense

Expand Collapse Search

Name	From	To
Livetube		
Skipfire GmbH		
Veritulum Ltd		
Genex		

Subject

Service Date: 12/12/2016

Amount: 0.00

Internal Details

External Detail

Expense Type: Hotel

Save Cancel



Fill the necessary data into the fields on the right. Confirm with **Save**.

### 3.5.2 Creating an Expense with Quick Create

**Step 1:** Navigate to the + Icon in the menu bar and select **Expense** in the Records group.



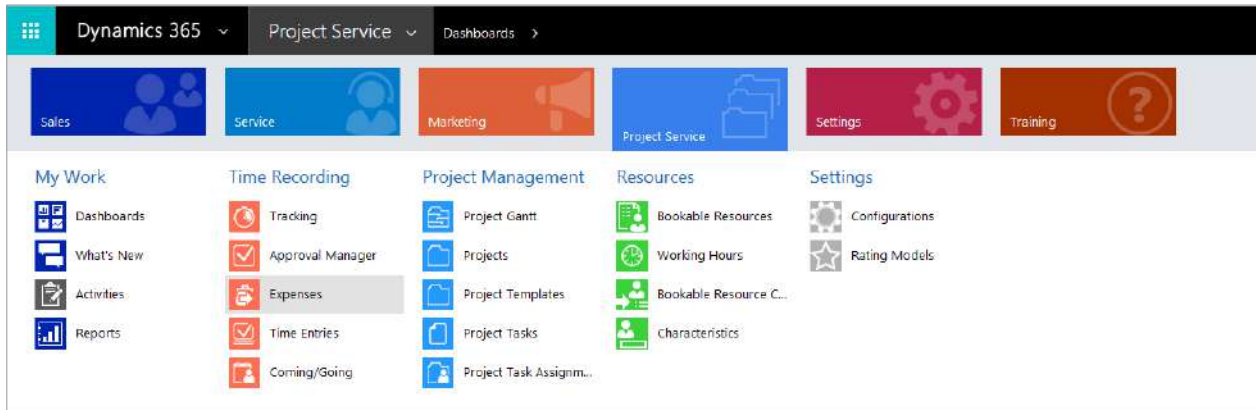
For an overview of the functionality and content of the Quick Create Feature, please visit [Microsoft Dynamics 365 Help & Training](#).

**Step 2:** Fill in all required data (fields marked with \*). Then, click **Save**.

### 3.5.3 Creating an Expense via Dynamics 365 Form

**Step 1:** Navigate to the Project Service area and select

**Expenses** in the Time Recording group.



**Step 2:** Click **New** in the task bar.

The screenshot shows the Dynamics 365 Project Service Expenses page. The top navigation bar includes 'Dynamics 365', 'Project Service', and 'Expenses'. Below this, there is a task bar with buttons for 'NEW', 'DELETE', 'EMAIL A LINK', 'RUN REPORT', 'EXCEL TEMPLATES', 'EXPORT TO EXCEL', 'IMPORT DATA', 'CHART PANE', and 'VIEW'. The main content area is titled 'Active Expenses' and contains a table of expenses.

Expense Type	Subject	Bookable Resource	Service Date	Amount	Billing Type	Chargeable Amount
Airfare	Arrival Munich	Marcus Baker	11/16/2016	D114.00	Chargeable	D114.00
Car rental	Arrival to Customer Side	Evelyn Patterson	11/16/2016	D50.00	Chargeable	D50.00
Meal	Breakfast	Ethan King	11/16/2016	D11.60	Chargeable	D11.60
Meal	Catering	Marcus Baker	11/16/2016	D38.00	Chargeable	D38.00
Meal	Catering	Matthew Parker	11/23/2016	D26.90	Chargeable	D26.90
Car rental	Costs Car Rental	Marcus Baker	11/21/2016	D163.00	Chargeable	D163.00
Car rental	Costs Car Rental	Matthew Parker	12/2/2016	D80.90	Chargeable	D80.90
Car rental	Journey to Customer Meeting	Matthew Parker	11/16/2016	D125.00	Chargeable	D125.00
Car rental	Journey to Customer Meeting	Matthew Parker	11/30/2016	D90.50	Chargeable	D90.50
Meal	Lunch	Evelyn Patterson	11/17/2016	D23.50	Chargeable	D23.50
Meal	Lunch	Ethan King	11/23/2016	D20.50	Chargeable	D20.50
Hotel	Overnight Stay at Hotel	Evelyn Patterson	11/18/2016	D70.00	Chargeable	D70.00
Miscellaneous	Parking costs	Emma Italian	11/16/2016	D15.00	Chargeable	D15.00
Hotel	Stay	Emma Italian	11/21/2016	D56.00	Chargeable	D56.00

**Step 3:** Enter all required data (fields marked with \*), either by filling it directly into the form or by following the proRM Business Process Flow at the top of the page.



For more information about the business process flow feature, please visit the [Microsoft TechNet website](https://technet.microsoft.com/en-us/dynamics365/project-service-expenses).

The screenshot shows the Dynamics 365 Project Service New Expense form. The top navigation bar includes 'Dynamics 365', 'Project Service', and 'Expenses'. Below this, there is a task bar with buttons for 'SAVE', 'SAVE & CLOSE', 'NEW', and 'FORM EDITOR'. The main content area is titled 'New Expense' and contains a form with various fields. The 'Expense Type' field is set to 'Airfare', the 'Subject' field is set to 'Arrival Munich', the 'Bookable Resource' field is set to 'Marcus Baker', the 'Service Date' field is set to '11/16/2016', the 'Amount' field is set to 'D114.00', and the 'Billing Type' field is set to 'Chargeable'. The 'Summary' section shows the 'Expense Type' as 'Airfare' and the 'Amount' as 'D114.00'.

**Step 4:** Click **Save** in the task bar or in the bottom right corner of the screen.

The screenshot shows the Dynamics 365 Project Service New Expense form. The top navigation bar includes 'Dynamics 365', 'Project Service', and 'Expenses'. Below this, there is a task bar with buttons for 'SAVE', 'SAVE & CLOSE', 'NEW', and 'FORM EDITOR'. The main content area is titled 'New Expense' and contains a form with various fields. The 'Expense Type' field is set to 'Airfare', the 'Subject' field is set to 'Arrival Munich', the 'Bookable Resource' field is set to 'Marcus Baker', the 'Service Date' field is set to '11/16/2016', the 'Amount' field is set to 'D114.00', and the 'Billing Type' field is set to 'Chargeable'. The 'Summary' section shows the 'Expense Type' as 'Airfare' and the 'Amount' as 'D114.00'. The 'Save' button is highlighted in the task bar.

The screenshot shows the 'Create New Expense (Active)' form in the Microsoft Dynamics 365 mobile application. The form is titled 'Lisaboa - Dusseldorf' and includes a 'Submit Expense' button. The form is divided into several sections: 'GENERAL' (Expense Type, Subject, Location, Date, Amount, Currency), 'PROJECT INFORMATION' (Project Name, Project Start, Project End), and 'DETAILS' (Flight Details, Flight Status). The 'GENERAL' section is currently active, showing fields for 'Expense Type', 'Subject', 'Location', 'Date', 'Amount', and 'Currency'. The 'PROJECT INFORMATION' section shows 'Project Name' as 'General Microsoft Dynamics 365 Step Implementation' and 'Project Start' as '10/10/2016 9:18 AM'. The 'DETAILS' section shows 'Flight Details' as 'Flight from Home Customer' and 'Flight Status' as 'Flight'. A large white arrow points to the right, indicating the next step in the process.

### 3.5.4 Creating an Expense in the Microsoft Dynamics 365 Mobile Application

The Microsoft Dynamics 365 mobile application is available for phones, tablets and Windows (starting with 8.1) in the Windows App store. It provides access to the entities Activities, Accounts, Contacts, Leads, Dashboards and custom entities, allowing users to track their daily work progress.

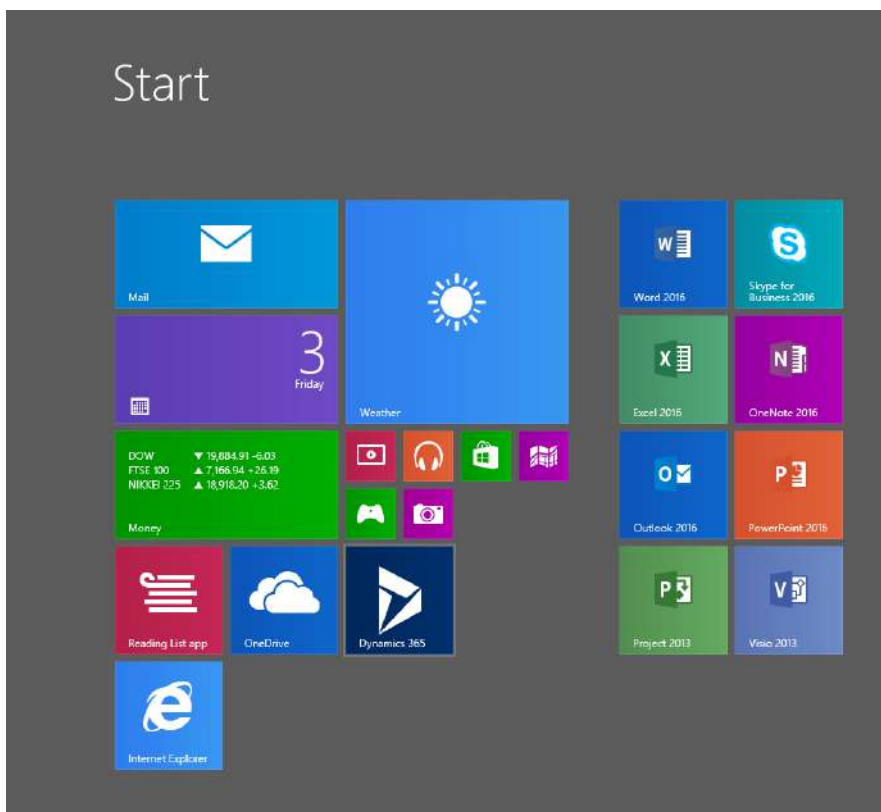
**Step 1:** Open the mobile application on your phone, tablet or PC.



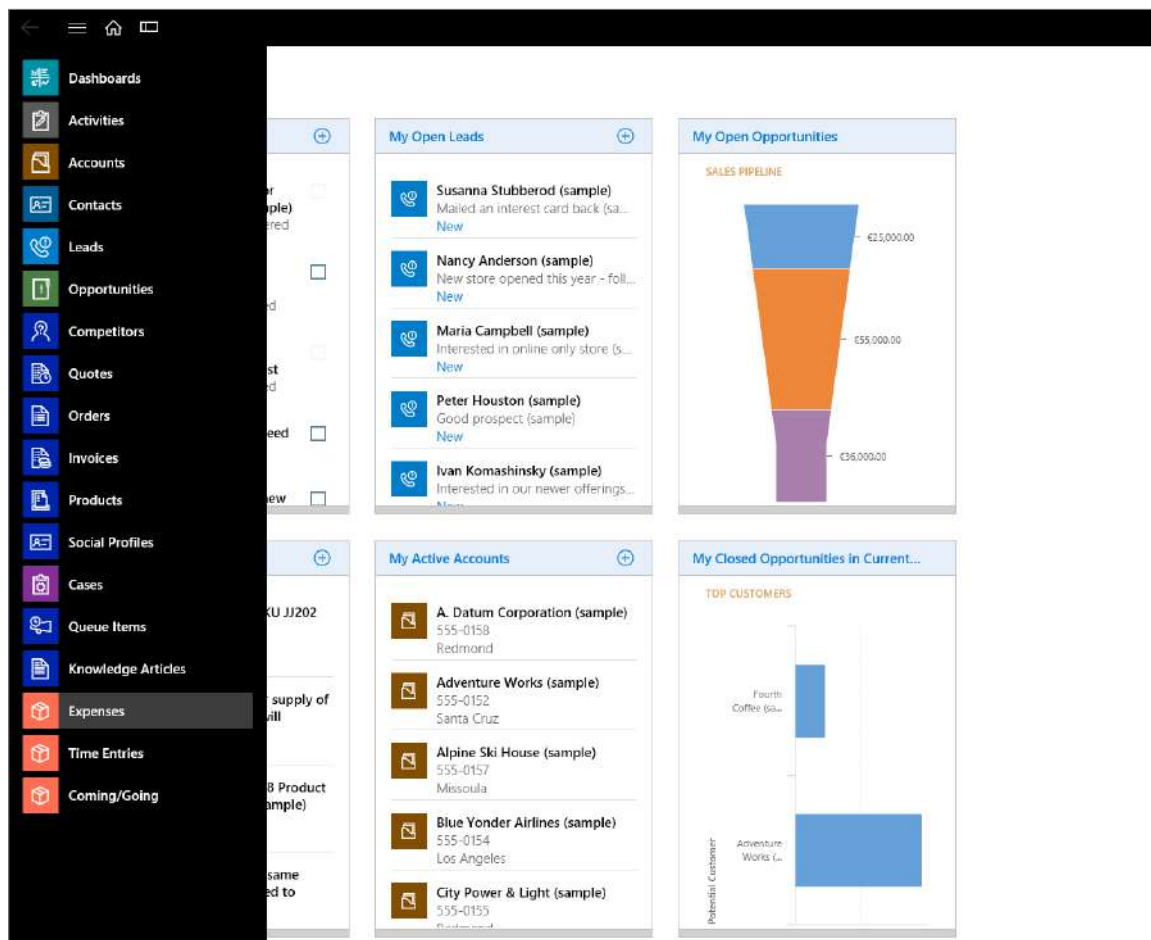
For further information regarding the app, please click [here](#).



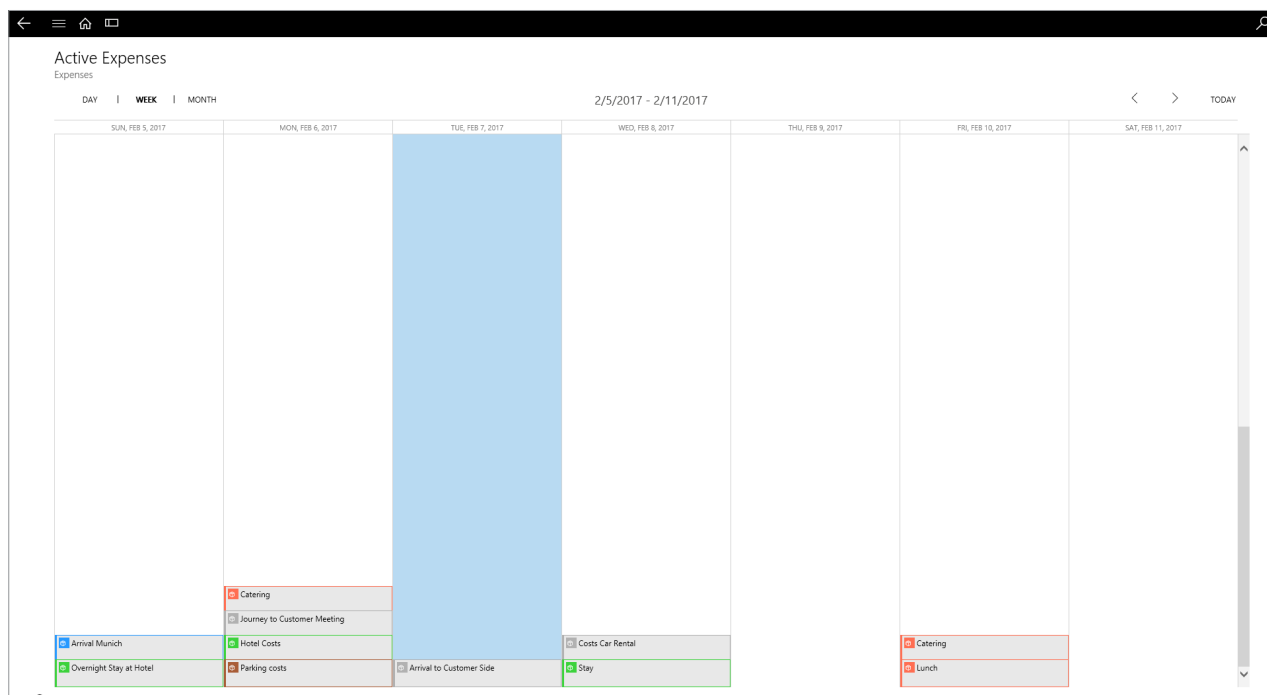
The application for PCs is available in the [Microsoft Store](#).



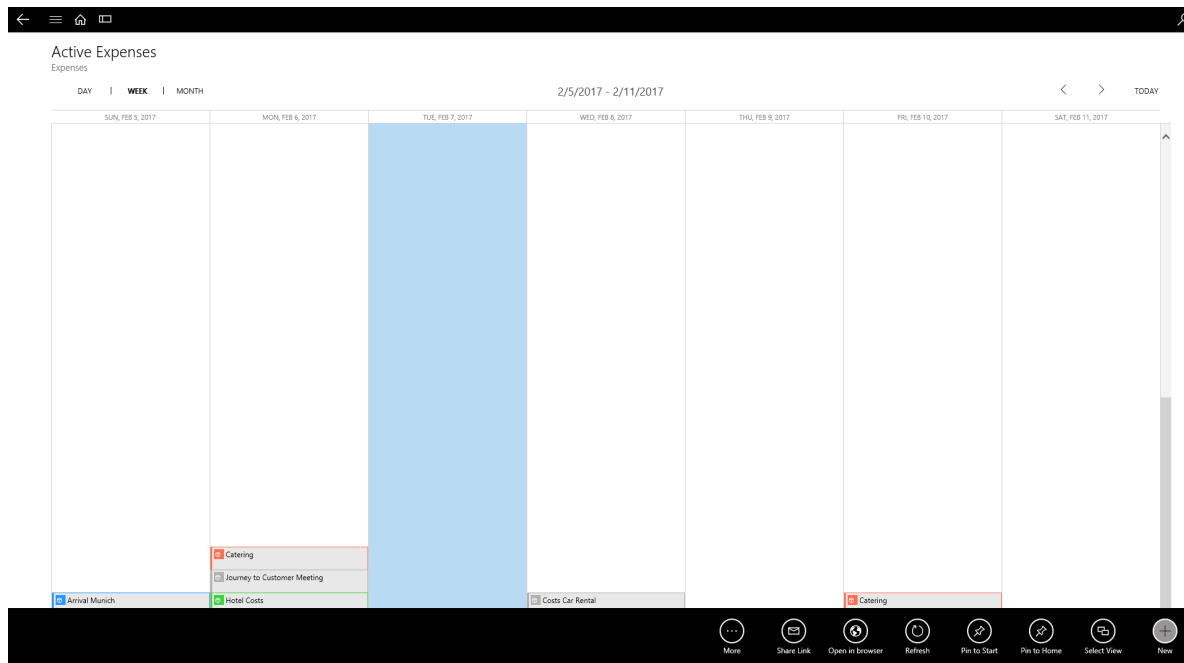
**Step 2:** Navigate to the menu icon in the in-app navigation and select **Expenses**.



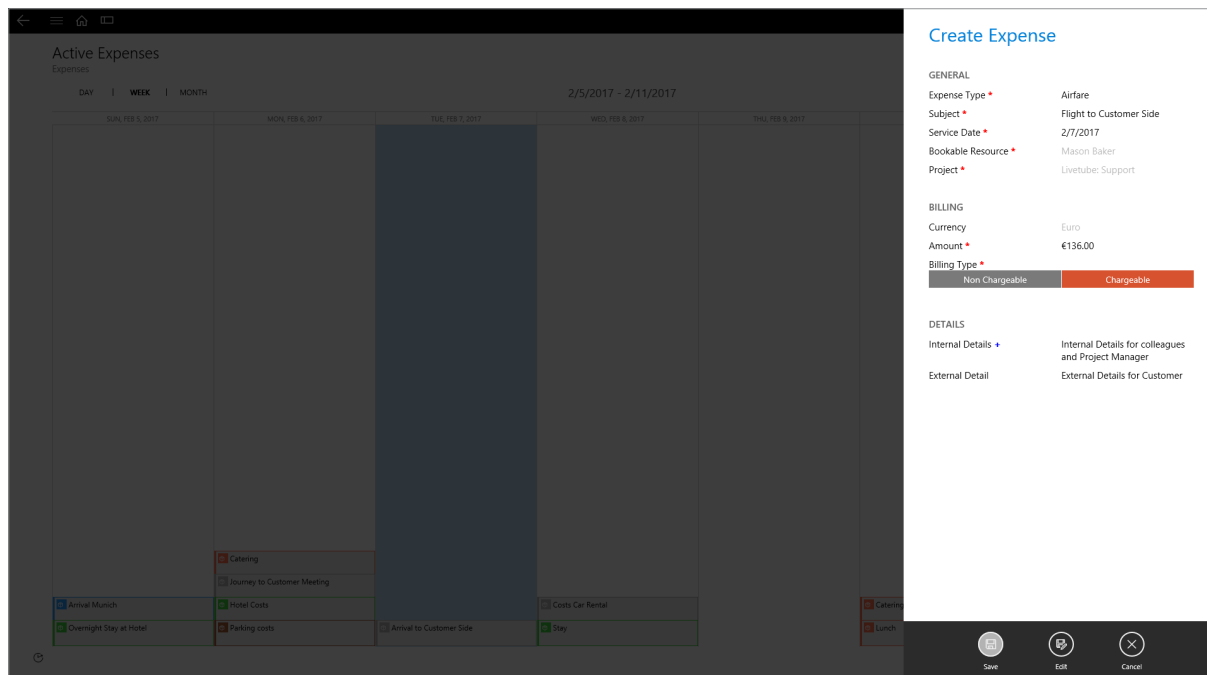
Upon opening, you will get an overview of the current week including existing expenses.



**Step 3:** To create a new expense, right-click or (when using a mobile) tap anywhere to open the context menu. Click **New (+)** in the bottom right corner.



**Step 4:** Enter all required data (fields marked with \*) into the form. Click **Save** to create the expense.



## 3.6 Coming/Going

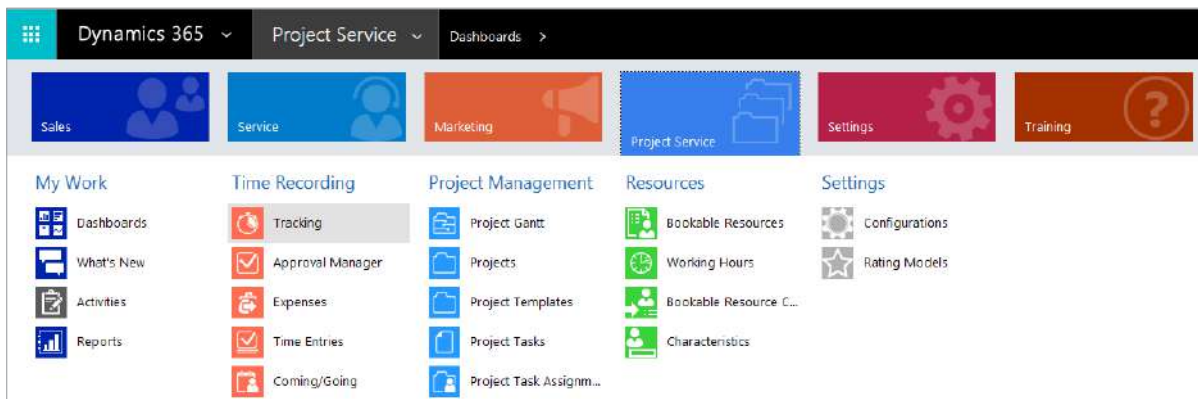
The Coming/Going function allows employees to record the

start and end of their working day, parallel to time tracking for work on a specific project task.

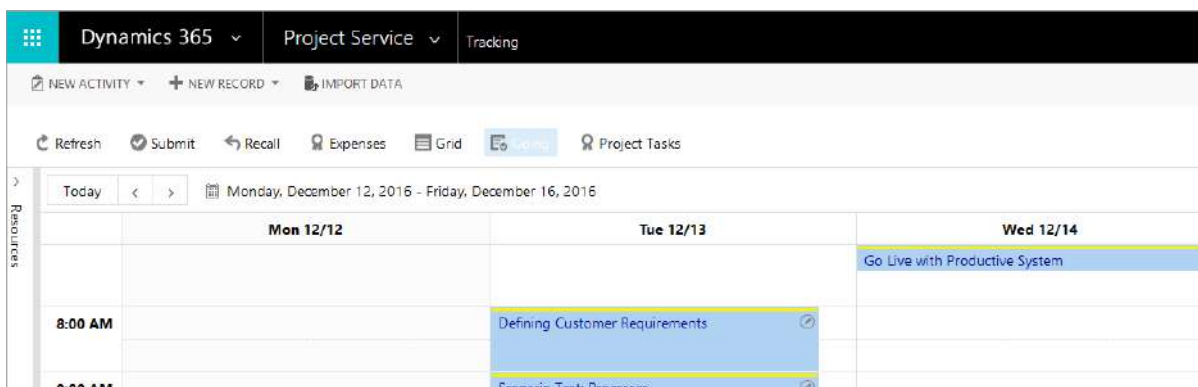
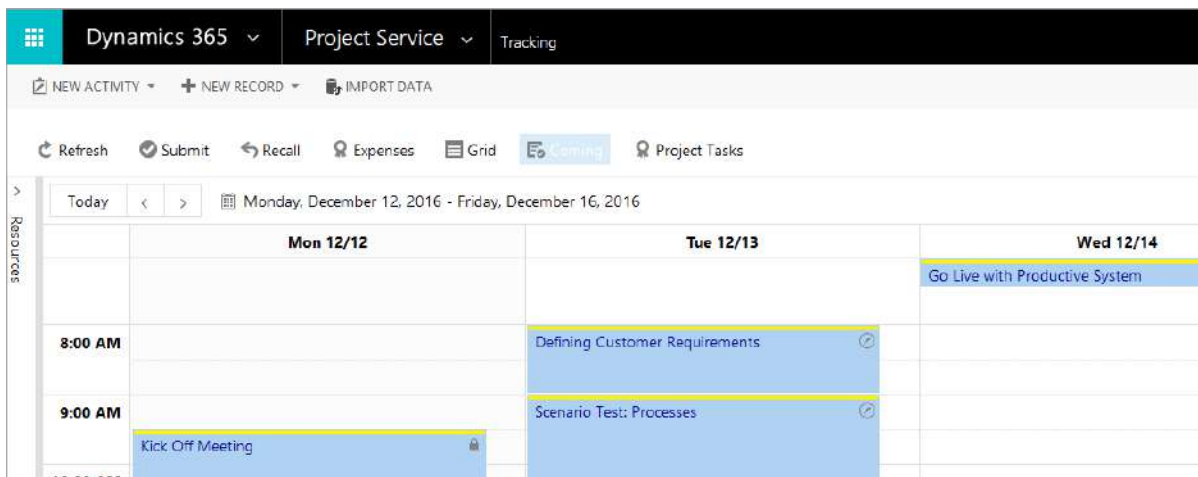
The Coming/Going record may be created using the Quick Create feature or Tracking application.

### 3.6.1 Record Coming/Going in Tracking

**Step 1:** Navigate to the Project Service area and select **Tracking** in the Time Recording group.



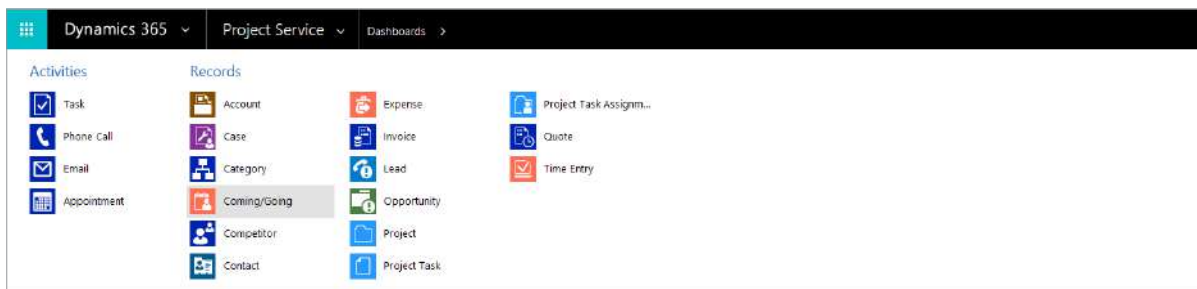
**Step 2:** Depending on which record was last created, you will find a **Coming** or **Going** button above the calendar. Click it to record the start or end of your working day, respectively.



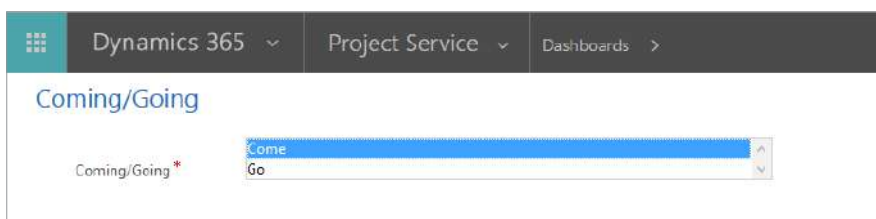


## 3.6.2 Record Coming/Going via Quick Create

**Step 1:** Click the + icon in the menu bar and select **Coming/Going** in the Records group.



**Step 2:** Choose either Come or Go and click **Save**.



For an overview of the functionality and content of the Quick Create Feature, please visit [Microsoft Dynamics 365 Help & Training](#).

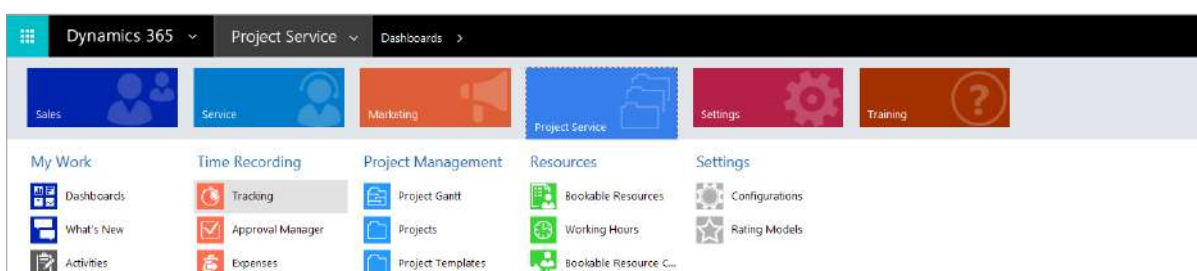
## 3.7 Submitting a Time Entry

Time Entries are created as drafts and thus remain editable for the employee. To enable time entries for the invoicing process, they have to be submitted. At this stage, employees can check the accuracy of the booking details.

Time entries may be submitted using the Dynamics 365 form or Tracking application.

### 3.7.1 Submitting and Recalling a Time Entry in Tracking

**Step 1:** Navigate to the Project Service area and select **Tracking** in the Time Recording group.



**Step 2:** Click **Submit** to open the dialog window.



**Step 3:** All draft time entries for the current period are listed in the Submit Records dialog window. Select the entries you wish to submit with a left mouse click. It is possible to select several entries at once by holding the CTRL key.

Submit Records							
Time Entry Expense							
From	To	Duration (h)	Type	Subject	Task	Status Reason	
12/13/2016	12/13/2016	1	Work	Defining Customer Requirements	Livetube: Development	Draft	
12/13/2016	12/13/2016	3	Work	Scenario Test: Processes	Gevee: Conception	Draft	
12/13/2016	12/13/2016	3.5	Work	Implementation of defined Customizations	Gevee: Conception	Draft	
12/14/2016	12/14/2016	6	Work	Go Live with Productive System	Livetube: Development	Draft	
12/14/2016	12/14/2016	3	Absence	Absence	Livetube: Development	Draft	

**Submit**

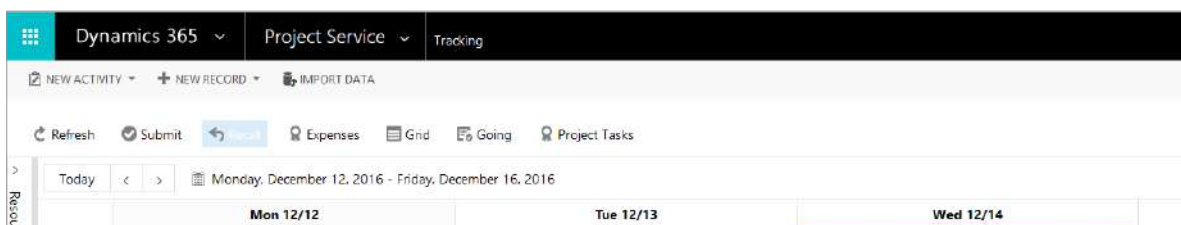
**Step 4:** Click **Submit** to submit all selected time entries. Once entries are submitted, they are no longer editable for the employee.

Submit Records							
Time Entry Expense							
From	To	Duration (h)	Type	Subject	Task	Status Reason	
12/13/2016	12/13/2016	1	Work	Defining Customer Requirements	Livetube: Development	Draft	
12/13/2016	12/13/2016	3	Work	Scenario Test: Processes	Gevee: Conception	Draft	
12/13/2016	12/13/2016	3.5	Work	Implementation of defined Customizations	Gevee: Conception	Draft	
12/14/2016	12/14/2016	6	Work	Go Live with Productive System	Livetube: Development	Draft	
12/14/2016	12/14/2016	3	Absence	Absence	Livetube: Development	Draft	

**Submit**

**Step 5:** Recalling a Time Entry

In case a time entry was submitted by mistake or needs to be changed afterwards, you may recall this entry. To do this, open the Tracking application and click **Recall**.





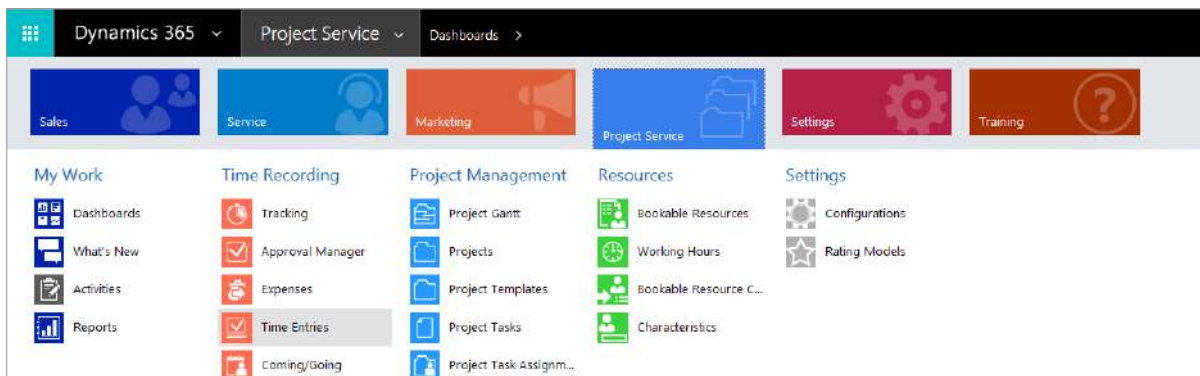
Select the entries you would like to recall and click **Recall**.

Recall Records							
Time Entry		Expense					
From	To	Duration (h)	Type	Subject	Task	Status Reason	
12/12/2016	12/12/2016	5.5	Work	Kick Off Meeting	Gevee: Conception	Submitted	
12/12/2016	12/12/2016	1	Work	Working on assigned Supportcases	Livetube: Development	Submitted	
12/13/2016	12/13/2016	1	Work	Defining Customer Requirements	Livetube: Development	Submitted	
12/13/2016	12/13/2016	3	Work	Scenario Test: Processes	Gevee: Conception	Submitted	
12/13/2016	12/13/2016	3.5	Work	Impelementation of defined Customizations	Gevee: Conception	Submitted	

These entries will now go back into draft phase enabling you to make the desired changes.

### 3.7.2 Submitting a Time Entry via Dynamics 365 Form

**Step 1:** Navigate to the Project Service area and select **Time Entries** in the Time Recording group.



**Step 2:** Select the desired time entry in the list of bookings and open it via double-click or with the help of the context menu.

Type	Subject	From	To	Duration (h)	Booking Type	Chargeable (h)	Bookable (h)	Task	Project	Status Reason
Absence	Absence	8/1/2016 8:00...	8/1/2016 10:00...	0.00000000	Non Chargeable	0.00000000	0.00000000	Project: Project	Project: Project	Draft
Absence	Absence	12/14/2016 2:00...	12/14/2016 5:00...	0.00000000	Chargeable	3.00000000	0.00000000	Project: Project	Project: Project	Draft
Work	Analysis - Kick Off Meeting	12/12/2016 9:30...	12/12/2016 12:30...	0.00000000	Chargeable	3.00000000	0.00000000	Project: Project	Project: Project	Draft
Work	Configure of migration mapping	11/25/2016 9:15...	11/25/2016 9:15...	0.00000000	Chargeable	4.00000000	0.00000000	Project: Project	Project: Project	Draft
Work	Consultation of Development Team	11/17/2016 9:15...	11/17/2016 9:15...	0.00000000	Chargeable	2.00000000	0.00000000	Project: Project	Project: Project	Draft
Work	Created customer specific entries	11/01/2016 9:15...	11/01/2016 9:15...	0.00000000	Chargeable	3.00000000	0.00000000	Project: Project	Project: Project	Draft
Work	Customer Side Kick Off Meeting	11/01/2016 9:15...	11/01/2016 9:15...	0.00000000	Chargeable	8.00000000	0.00000000	Project: Project	Project: Project	Draft
Work	Customization of system settings	11/01/2016 9:15...	11/01/2016 9:15...	0.00000000	Chargeable	2.00000000	0.00000000	Project: Project	Project: Project	Draft
Work	Defining Customer Requirements	11/16/2016 9:15...	11/16/2016 9:15...	0.00000000	Chargeable	6.50000000	0.00000000	Project: Project	Project: Project	Draft
Work	Defining of Customizations within the Te...	11/17/2016 9:15...	11/17/2016 9:15...	0.00000000	Chargeable	1.00000000	0.00000000	Project: Project	Project: Project	Draft
Work	Defining of Tasks to implement	11/17/2016 9:15...	11/17/2016 9:15...	0.00000000	Chargeable	6.00000000	0.00000000	Project: Project	Project: Project	Draft
Work	F2D: Draft Summary	11/16/2016 9:15...	11/16/2016 9:15...	0.00000000	Chargeable	5.00000000	0.00000000	Project: Project	Project: Project	Draft
Work	Full Meeting to define possible goals	11/16/2016 9:15...	11/16/2016 9:15...	0.00000000	Chargeable	3.00000000	0.00000000	Project: Project	Project: Project	Draft
Work	F2D: Overview	11/16/2016 9:15...	11/16/2016 9:15...	0.00000000	Chargeable	3.00000000	0.00000000	Project: Project	Project: Project	Draft
Work	F2D: Overview	11/16/2016 9:15...	11/16/2016 9:15...	0.00000000	Chargeable	5.00000000	0.00000000	Project: Project	Project: Project	Draft
Work	Go Live with Production System	11/16/2016 9:15...	11/16/2016 9:15...	0.00000000	Chargeable	4.00000000	0.00000000	Project: Project	Project: Project	Draft
Work	Go Live with Production System	12/14/2016 12:00...	12/14/2016 12:00...	0.00000000	Chargeable	6.00000000	0.00000000	Project: Project	Project: Project	Draft
Work	Going through the High price Development Tasks	11/23/2016 9:15...	11/23/2016 9:15...	0.00000000	Chargeable	4.00000000	0.00000000	Project: Project	Project: Project	Draft
Work	Implementation of defined Customizations	11/16/2016 9:15...	11/16/2016 9:15...	0.00000000	Chargeable	1.00000000	0.00000000	Project: Project	Project: Project	Draft
Work	Implementation of defined Customizations	11/20/2016 9:15...	11/20/2016 9:15...	0.00000000	Chargeable	5.00000000	0.00000000	Project: Project	Project: Project	Draft
Work	Implementation of documented Processes	11/23/2016 9:15...	11/23/2016 9:15...	0.00000000	Chargeable	6.00000000	0.00000000	Project: Project	Project: Project	Draft
Work	Implementation of RPA App	11/20/2016 9:15...	11/20/2016 9:15...	0.00000000	Chargeable	2.50000000	0.00000000	Project: Project	Project: Project	Draft

**Step 3:** Follow the proRM Fast Start Business Process Flow for Time Entries to the second step **Submit Time Entry** by clicking the **Next Stage** button.

**Created customer specific entities**

Time Entry Business Process Flow (Active for 3 days, 4 hours) **Next Stage**

**Summary**

**GENERAL**

Project: Veribooks CRM Online Implementation  
Task: Veribooks Customizations  
Assignment: Veribooks Ltd - Veribooks Customizations - Matthew Parker

Subject: Created customer specific entities  
From: 11/06/2016 9:18 AM  
To: 12/08/2016 9:18 AM  
Work (H): 0.000000000  
Duration (H): 3.000000000

**PROJECT INFORMATION**

Project Name: Veribooks CRM Online Implementation  
From: 11/06/2016 9:18 AM  
To: 12/08/2016 9:18 AM  
Actual Effort (H): 0.000000000

**ASSIGNMENT INFORMATION**

Project Task: Veribooks Customizations  
From: 11/06/2016 9:18 AM  
To: 12/08/2016 9:18 AM  
Actual Effort (H): 0.000000000

**Step 4:** Ensure all entry details are correct and submit it by changing the option **Submit Time Entry?** to **Yes** via a click. Click **Save** in the bottom right corner.

**Created customer specific entities**

Time Entry Business Process Flow (Active for 3 days, 4 hours) **Save**

**Summary**

**GENERAL**

Project: Veribooks CRM Online Implementation  
Task: Veribooks Customizations  
Assignment: Veribooks Ltd - Veribooks Customizations - Matthew Parker

Subject: Created customer specific entities  
From: 11/06/2016 9:18 AM  
To: 12/08/2016 9:18 AM  
Work (H): 0.000000000  
Duration (H): 3.000000000

**PROJECT INFORMATION**

Project Name: Veribooks CRM Online Implementation  
From: 11/06/2016 9:18 AM  
To: 12/08/2016 9:18 AM  
Actual Effort (H): 0.000000000

**ASSIGNMENT INFORMATION**

Project Task: Veribooks Customizations  
From: 11/06/2016 9:18 AM  
To: 12/08/2016 9:18 AM  
Actual Effort (H): 0.000000000  
Progress %: 0.00

**Created customer specific entities**

Time Entry Business Process Flow (Active for 3 days, 4 hours) **Save**

**Summary**

**GENERAL**

Project: Veribooks CRM Online Implementation  
Task: Veribooks Customizations  
Assignment: Veribooks Ltd - Veribooks Customizations - Matthew Parker

Subject: Created customer specific entities  
From: 11/06/2016 9:18 AM  
To: 12/08/2016 9:18 AM  
Work (H): 0.000000000  
Duration (H): 3.000000000

**PROJECT INFORMATION**

Project Name: Veribooks CRM Online Implementation  
From: 11/06/2016 9:18 AM  
To: 12/08/2016 9:18 AM  
Actual Effort (H): 0.000000000

**ASSIGNMENT INFORMATION**

Project Task: Veribooks Customizations  
From: 11/06/2016 9:18 AM  
To: 12/08/2016 9:18 AM  
Actual Effort (H): 0.000000000  
Progress %: 0.00

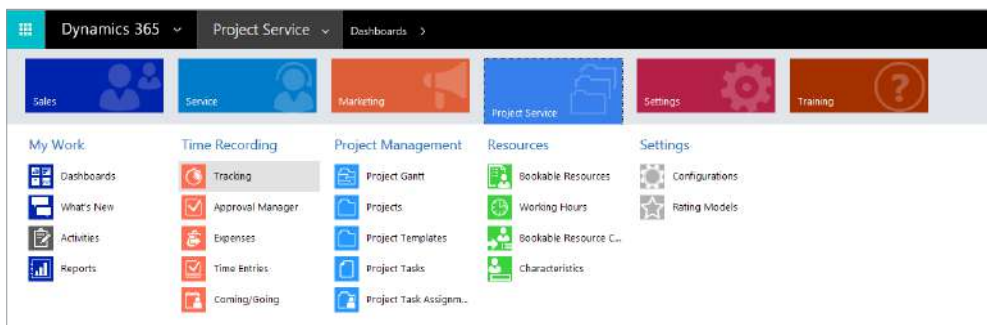
## 3.8 Submitting an Expense

Expenses are created as drafts and thus remain editable for the employee. To enable expenses for the invoicing process, they have to be submitted. At this stage, employees can check the accuracy of the booking and whether the project assignment is correctly selected.

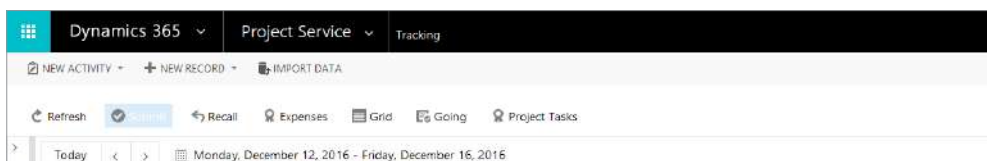
Expenses may be submitted using the Dynamics 365 form or Tracking application.

### 3.8.1 Submitting and Recalling an Expense in Tracking

**Step 1:** Navigate to the Project Service area and select **Tracking** in the Time Recording Group.



**Step 2:** Click Submit.



**Step 3:** In the **Submit Records** dialog window, select the **Expenses** tab. All draft expenses for the current time period are listed. Select the expenses you wish to submit. It is possible to select several entries at once by holding the CTRL key.

Submit Records					
Time Entry Expense					
Subject	Project	Service Date	Amount	Expense Type	Status Reason
Lunch	Livetube: Microsoft Dynamics Sure Step Implementation	12/12/2016	D23.50	Meal	Draft
Journey to Customer Meeting	Vestibulum: CRM Online Implementation	12/12/2016	\$123.60	Car rental	Draft
Parking Costs	Gevee: Product Development	12/12/2016	D15.00	Miscellaneous	Draft

**Step 4:** Click **Submit** to change the status of all selected expenses from draft to submitted. Once entries are submitted, they are no longer editable for the employee.

Submit Records					
Time Entry		Expense			
Subject	Project	Service Date	Amount	Expense Type	Status Reason
Lunch	Livtube: Microsoft Dynamics Sure Step Implementation	12/12/2016	D23.50	Meal	Draft
Journey to Customer Meeting	Vestibulum: CRM Online Implementation	12/12/2016	\$123.60	Car rental	Draft
Parking Costs	Gevee: Product Development	12/12/2016	D15.00	Miscellaneous	Draft

## Step 5: Recalling Expenses

In case an expense was submitted by mistake or needs to be changed retroactively, you may recall this expense.

To do this, open the Tracking application and click **Recall**.

Dynamics 365 - Project Service - Tracking					
NEW ACTIVITY + NEW RECORD + IMPORT DATA					
Refresh Submit Expenses Grid Going Project Tasks					
Today < > Monday, December 12, 2016 - Friday, December 16, 2016					
Mon 12/12		Tue 12/13		Wed 12/14	
				Go Live with Productive System	
8:00 AM		Defining Customer Requirements			
9:00 AM		Scenario Test: Processes			
10:00 AM					
11:00 AM					
12:00 PM					
1:00 PM					
2:00 PM		Implementation of defined Customizations		Absence	
3:00 PM					

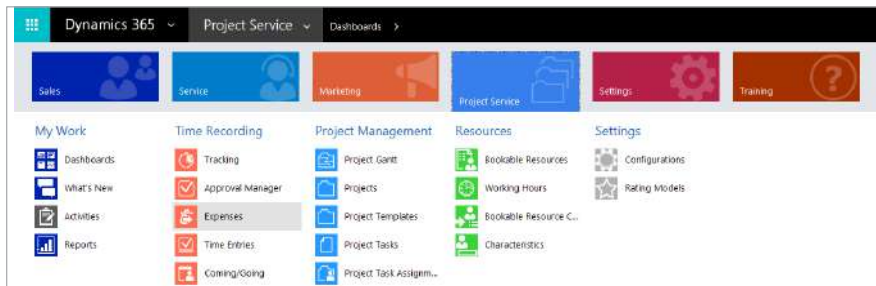
Select the expenses you wish to recall and click **Recall**.

Recall Records					
Time Entry		Expense			
Subject	Project	Service Date	Amount	Expense Type	Status Reason
Lunch	Livtube: Microsoft Dynamics Sure Step Implementation	12/12/2016	D23.50	Meal	Submitted

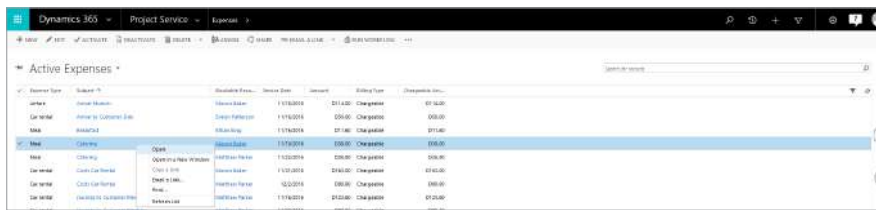
These expenses will now go back into draft phase enabling you to make the desired changes.

## 3.8.2 Submitting an Expense via Dynamics 365 Form

**Step 1:** Navigate to the Project Service area and select **Expenses** in the Time Recording group.



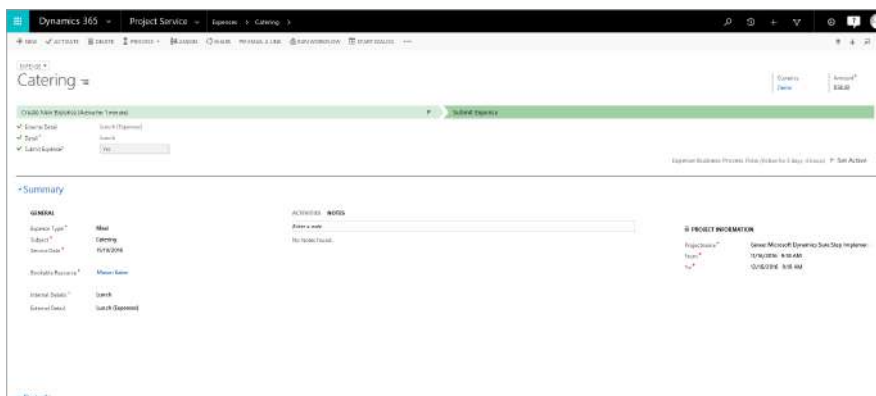
**Step 2:** Select the desired expense in the list of bookings and open it via double-click or with the help of the context menu.



**Step 3:** Follow the proRM Fast Start Business Process Flow to the stage **Submit Expense** by clicking the **Next Stage** button.



**Step 4:** Ensure all expense details are correct and submit it by changing the option **Submit Expense?** to **Yes** via a click. Click **Save** in the bottom right corner.



**Catering**

Create New Expense (Active for 1 minute) | Submit Expense

Expense Type: Meal  
Subject: Catering  
Service Date: 11/19/2016  
Bookable Resource: Maxon Baker  
Internal Details: Lunch  
External Details: Lunch (Expense)

**Project Information**  
Project Name: Microsoft Dynamics Sure Step Implementation  
From: 11/16/2016 9:18 AM  
To: 12/16/2016 9:18 AM

Status: Active | Status Reason: Draft

## 3.9 Approval Manager

The Approval Manager application enables project managers to check submitted time entries and expenses and, if necessary, edit or unapprove them.

Approved time entries and expenses are free for invoicing.

### 3.9.1 Approving, Editing and Unapproving Time Entries

**Step 1:** Navigate to the Project Service area and select **Approval Manager** in the Time Recording group.

**Dynamics 365 Project Service**

**My Work**  
Dashboards  
What's New  
Activities  
Reports

**Time Recording**  
Tracking  
Approval Manager  
Expenses  
Time Entries  
Coming/Going

**Project Management**  
Project Gantt  
Projects  
Project Templates  
Project Tasks  
Project Task Assignment

**Resources**  
Bookable Resources  
Working Hours  
Bookable Resource C...  
Characteristics

**Settings**  
Configurations  
Rating Models



**Step 2:** Select an account or project through the lookup Filter. Click **Select** and **Add** to load the data.

Leaving the filter empty will load all data in the system.



Please note: Loading all available data will decrease performance.

Look Up Records

Look for

Account

Look in

Active Accounts

Search

Account Name	Main Phone	Address 1: City
Gevee	(759) 156-3156	Wisconsin
Livetube	55-(958)700-9098	Oregon
Skipfire GmbH	(330) 304-1815	Wisconsin
Vestibulum Ltd	(153) 418-7186	Utah
Zoombox	(228) 425-1490	Vermont

1 - 5 (5 selected)

Page 1

Selected records: (5)

Gevee

Livetube

Skipfire GmbH

Vestibulum Ltd

Zoombox

Invert selection

Select

Remove

Add

Cancel

**Step 3:** Click **Refresh** to load the data into the application.

Dynamics 365

Project Service

Approval Manager

NEW ACTIVITY

NEW RECORD

IMPORT DATA

Refresh

Approve

Unapprove

Save

Filter

Gevee: Livetube: Skipfir

From

Until

View

My Time Entries

Time Entries

Expenses

Type	Subject	From	To	Break (h)	Billing Type	Chargeable Dura...	Bookable Resou...	Task	Project
------	---------	------	----	-----------	--------------	--------------------	-------------------	------	---------

Dynamics 365

Project Service

Approval Manager

NEW ACTIVITY

NEW RECORD

IMPORT DATA

Refresh

Approve

Unapprove

Save

Filter

Gevee: Livetube: Skipfir

From

Until

View

Active Time Entries

Time Entries

Expenses

Project tree

Gevee

Livetube

Skipfire GmbH

Vestibulum Ltd

Zoombox

Type	Subject	From	To	Break (h)	Billing Type	Chargeable Dura...	Bookable Resou...	Task	Project
Absence	Absence	8/11/2016 8:00 AM	8/11/2016 12:00 PM	0.0000000000	Non Chargeable	0.0000000000	Evelyn Patterson	Livetube: Analyzing Livetube:	
Absence	Absence	12/14/2016 2:00 PM	12/14/2016 5:00 PM	0.0000000000	Chargeable	3.0000000000	Jerry Powell	Livetube: Develop... Livetube:	
Work	Analyze - Kick Off Meeting	12/12/2016 9:30 AM	12/12/2016 12:30 ...	0.0000000000	Chargeable	3.0000000000	Evelyn Patterson	Livetube: Analyzing Livetube:	
Work	Configure of migration mapping	11/25/2016 9:19 AM	11/25/2016 9:19 AM	0.0000000000	Chargeable	4.0000000000	Ethan King	Zoombox: Data M... Zoombox:	
Work	Consultation of Development Team	11/17/2016 9:19 AM	11/17/2016 9:19 AM	0.0000000000	Chargeable	2.0000000000	Mason Baker	Gevee: Analyzing Gevee: M	
Work	Customer Side Kick Off Meeting	11/20/2016 9:19 AM	11/20/2016 9:19 AM	0.0000000000	Chargeable	6.0000000000	Ethan King	Zoombox: Requir... Zoombox:	
Work	Customization of System Entities	11/23/2016 9:19 AM	11/23/2016 9:19 AM	0.0000000000	Chargeable	2.0000000000	Ethan King	Zoombox: Custa... Zoombox:	
Work	Defining Customer Requirements	11/16/2016 9:19 AM	11/16/2016 9:19 AM	0.0000000000	Chargeable	6.5000000000	Mason Baker	Gevee: Analyzing Gevee: M	
Work	Defining of Customizations within the Team	11/17/2016 9:19 AM	11/17/2016 9:19 AM	0.0000000000	Chargeable	1.0000000000	Matthew Parker	Vestibulum: Cust... Vestibulu	
Work	Defining of Tasks to implement	11/17/2016 9:19 AM	11/17/2016 9:19 AM	0.0000000000	Chargeable	6.0000000000	Ethan King	Zoombox: Analyze Zoombox:	
Work	FRD: Short Summary	11/18/2016 9:19 AM	11/18/2016 9:19 AM	0.0000000000	Chargeable	3.0000000000	Ethan King	Zoombox: Design Zoombox:	
Work	First Meeting to define possible goals	11/18/2016 9:19 AM	11/18/2016 9:19 AM	0.0000000000	Chargeable	3.0000000000	Ethan King	Zoombox: Requir... Zoombox:	
Work	FRD Creation	11/18/2016 9:19 AM	11/18/2016 9:19 AM	0.0000000000	Chargeable	3.0000000000	Mason Baker	Gevee: Design Gevee: M	
Work	FRD Review	11/19/2016 9:19 AM	11/19/2016 9:19 AM	0.0000000000	Chargeable	5.5000000000	Mason Baker	Gevee: Design Gevee: M	
Work	Go Live with Productiv System	11/18/2016 9:19 AM	11/18/2016 9:19 AM	0.0000000000	Chargeable	4.0000000000	Evelyn Patterson	Livetube: Go Live Livetube:	
Work	Go Live with Productive System	12/14/2016 12:00 ...		0.0000000000	Chargeable	6.0000000000	Jerry Powell	Livetube: Develop... Livetube:	
Work	Going through the high prio Development Tasks	11/23/2016 9:19 AM	11/23/2016 9:19 AM	0.0000000000	Chargeable	4.0000000000	Emma Nolan	Skipfire: 3rd Level... Skipfire:	
Work	Implementation of defined Customizations	11/19/2016 9:19 AM	11/19/2016 9:19 AM	0.0000000000	Chargeable	1.0000000000	Mason Baker	Gevee: Developm... Gevee: M	
Work	Implementation of defined Customizations	11/20/2016 9:19 AM	11/20/2016 9:19 AM	0.0000000000	Chargeable	5.0000000000	Mason Baker	Gevee: Developm... Gevee: M	
Work	Implementation of documented Processes	11/23/2016 9:19 AM	11/23/2016 9:19 AM	0.0000000000	Chargeable	6.0000000000	Emma Nolan	Skipfire: Process ... Skipfire:	
Work	Initialization of HTML App	11/20/2016 9:19 AM	11/20/2016 9:19 AM	0.0000000000	Chargeable	2.5000000000	Emma Nolan	Skipfire: HTML De... Skipfire:	
Work	Interface Development	11/19/2016 9:19 AM	11/19/2016 9:19 AM	0.0000000000	Chargeable	9.0000000000	Ethan King	Zoombox: Deploy... Zoombox:	
Work	Meeting to review customer requirements	11/16/2016 9:19 AM	11/16/2016 9:19 AM	0.0000000000	Chargeable	5.0000000000	Ethan King	Zoombox: Analyze Zoombox:	

**Step 4:** By expanding the project tree on the left hand side and selecting a record within the structure, you may filter the displayed time entries by employee or project.



Please note: This feature is not available unless a filter was selected in step #2

Dynamics 365 Project Service Approval Manager

Filter: Gevee Livetube Skipton From View Active Time Entries

Type	Subject	From	To	Break (H)	Billing Type	Chargeable Duration	Bookable Resource	Task	Project	Status/Response
Work	Configure of integration mapping	11/25/2016 9:15 AM	11/25/2016 10:00 AM	0.00000000	Chargeable	4.00000000	Ethan King	Zoom	Zoom	
Work	Customer Side CRM Meeting	11/25/2016 9:15 AM	11/25/2016 10:00 AM	0.00000000	Chargeable	8.00000000	Ethan King	Zoom	Zoom	
Work	Customization of System Entities	11/23/2016 9:15 AM	11/23/2016 10:00 AM	0.00000000	Chargeable	2.00000000	Ethan King	Zoom	Zoom	
Work	First Meeting to define possible goals	11/18/2016 9:15 AM	11/18/2016 10:00 AM	0.00000000	Chargeable	3.00000000	Ethan King	Zoom	Zoom	
Work	Process Implementation	11/23/2016 9:15 AM	11/23/2016 10:00 AM	0.00000000	Chargeable	1.50000000	Ethan King	Zoom	Zoom	

Dynamics 365 Project Service Approval Manager

Filter: Gevee Livetube Skipton From View Active Time Entries

Type	Subject	From	To	Break (H)	Billing Type	Chargeable Duration	Bookable Resource	Task	Project	Status/Response
Work	Configure of integration mapping	11/25/2016 9:15 AM	11/25/2016 10:00 AM	0.00000000	Chargeable	4.00000000	Ethan King	Zoom	Zoom	
Work	Customer Side CRM Meeting	11/25/2016 9:15 AM	11/25/2016 10:00 AM	0.00000000	Chargeable	8.00000000	Ethan King	Zoom	Zoom	
Work	Customization of System Entities	11/23/2016 9:15 AM	11/23/2016 10:00 AM	0.00000000	Chargeable	2.00000000	Ethan King	Zoom	Zoom	
Work	First Meeting to define possible goals	11/18/2016 9:15 AM	11/18/2016 10:00 AM	0.00000000	Chargeable	3.00000000	Ethan King	Zoom	Zoom	
Work	Process Implementation	11/23/2016 9:15 AM	11/23/2016 10:00 AM	0.00000000	Chargeable	1.50000000	Ethan King	Zoom	Zoom	

## Step 5: Editing Time Entries

Time entries may be edited inline. Double-click the field which should be changed and key in the new value. Click **Save** to confirm your changes.

Dynamics 365 Project Service Approval Manager

Filter: Gevee Livetube Skipton From View Active Time Entries

Type	Subject	From	To	Break (H)	Billing Type	Chargeable Duration	Bookable Resource	Task	Project	Status/Response
Work	Configure of integration mapping	11/25/2016 9:15 AM	11/25/2016 10:00 AM	0.00000000	Chargeable	4.00000000	Ethan King	Zoom	Zoom	
Work	Customer Side CRM Meeting	11/25/2016 9:15 AM	11/25/2016 10:00 AM	0.00000000	Chargeable	8.00000000	Ethan King	Zoom	Zoom	
Work	Customization of System Entities	11/23/2016 9:15 AM	11/23/2016 10:00 AM	0.00000000	Chargeable	2.00000000	Ethan King	Zoom	Zoom	
Work	First Meeting to define possible goals	11/18/2016 9:15 AM	11/18/2016 10:00 AM	0.00000000	Chargeable	3.00000000	Ethan King	Zoom	Zoom	
Work	Process Implementation	11/23/2016 9:15 AM	11/23/2016 10:00 AM	0.00000000	Chargeable	1.50000000	Ethan King	Zoom	Zoom	



## Step 6: Approving Time Entries

To approve time entries, tick the check box in front of the record. You may select multiple records at once. Click **Approve**.

Type	Subject	From	To	Break (H)	Billing Type	Chargeable Date...	Bookable Resource...	Task	Project	Status Reason
Absence	Absence	8/11/2016 6:00 AM	8/11/2016 12:00 PM	0.00000000	Non Chargeable	8/8/2016000000	Evelyn Patterson	Unkilled: Analyzing Unkilled: Microsoft... Draft		
Absence	Absence	12/14/2016 2:00 PM	12/14/2016 5:00 PM	0.00000000	Chargeable	3/30/20160000	Jerry Powell	Unkilled: Develop... Unkilled: Microsoft... Draft		
Work	Analysis - Kick Off Meeting	12/15/2016 8:30 AM	12/15/2016 10:30 AM	0.00000000	Chargeable	3/30/20160000	Evelyn Patterson	Unkilled: Analyzing Unkilled: Microsoft... Draft		
Work	Configure of negative mapping	11/25/2016 9:15 AM	11/25/2016 9:15 AM	0.00000000	Chargeable	4/8/20160000	Ethan King	Unkilled: Data M... Unkilled: CRM D... Draft		
Work	Customization of System Entities	11/25/2016 9:15 AM	11/25/2016 9:15 AM	0.00000000	Chargeable	2/30/20160000	Ethan King	Unkilled: Custom... Unkilled: CRM D... Draft		
Work	Defining Customer Requirements	11/16/2016 9:15 AM	11/16/2016 9:15 AM	0.00000000	Chargeable	6/30/20160000	Marion Baker	Unkilled: Designing... Unkilled: Microsoft... Draft		
Work	Defining of Customizations within the Team	11/17/2016 9:15 AM	11/17/2016 9:15 AM	0.00000000	Chargeable	1/20/20160000	Matthew Parker	Unkilled: Custom... Unkilled: CRM D... Draft		
Work	Defining of Tasks to implement	11/17/2016 9:15 AM	11/17/2016 9:15 AM	0.00000000	Chargeable	4/8/20160000	Ethan King	Unkilled: Analyzing Unkilled: Microsoft... Draft		
Work	Final Review to define positive goals	11/16/2016 9:15 AM	11/16/2016 9:15 AM	0.00000000	Chargeable	3/30/20160000	Ethan King	Unkilled: Request... Unkilled: CRM D... Draft		
Work	FRD Creation	11/15/2016 9:15 AM	11/15/2016 9:15 AM	0.00000000	Chargeable	3/30/20160000	Marion Baker	Unkilled: Design... Unkilled: Microsoft... Draft		
Work	Go Live with Productive System	11/16/2016 9:15 AM	11/16/2016 9:15 AM	0.00000000	Chargeable	4/8/20160000	Evelyn Patterson	Unkilled: Go Live... Unkilled: Microsoft... Draft		
Work	Go Live with Productive System	12/14/2016 12:00 PM	12/14/2016 12:00 PM	0.00000000	Chargeable	6/30/20160000	Jerry Powell	Unkilled: Develop... Unkilled: Microsoft... Draft		
Work	Going through the high end Development Tasks	11/23/2016 9:15 AM	11/23/2016 9:15 AM	0.00000000	Chargeable	4/8/20160000	Emma Nolan	Unkilled: 3rd Level... Unkilled: Support... Draft		
Work	Implementation of defined Customizations	11/20/2016 9:15 AM	11/20/2016 9:15 AM	0.00000000	Chargeable	1/20/20160000	Marion Baker	Unkilled: Develop... Unkilled: Microsoft... Draft		
Work	Implementation of defined Customizations	11/20/2016 9:15 AM	11/20/2016 9:15 AM	0.00000000	Chargeable	3/30/20160000	Marion Baker	Unkilled: Develop... Unkilled: Microsoft... Draft		
Work	Implementation of documented Processes	11/25/2016 9:15 AM	11/25/2016 9:15 AM	0.00000000	Chargeable	6/30/20160000	Emma Nolan	Unkilled: Process... Unkilled: Product... Draft		
Work	Installation of HTML App	11/20/2016 9:15 AM	11/20/2016 9:15 AM	0.00000000	Chargeable	2/30/20160000	Emma Nolan	Unkilled: HTML De... Unkilled: Product... Draft		
Work	Interface Development	11/16/2016 9:15 AM	11/16/2016 9:15 AM	0.00000000	Chargeable	3/30/20160000	Ethan King	Unkilled: Develop... Unkilled: Microsoft... Draft		
Work	Meeting to review customer requirements	11/16/2016 9:15 AM	11/16/2016 9:15 AM	0.00000000	Chargeable	3/30/20160000	Ethan King	Unkilled: Analyzing Unkilled: Microsoft... Draft		
Work	Preparing Power Point for Key User Training	12/15/2016 11:30 AM	12/15/2016 2:30 PM	0.00000000	Chargeable	3/30/20160000	Jerry Powell	Unkilled: Kick Off Meeting... Unkilled: CRM D... Draft		
Work	Process Implementation	11/25/2016 9:15 AM	11/25/2016 9:15 AM	0.00000000	Chargeable	1/20/20160000	Ethan King	Unkilled: Custom... Unkilled: CRM D... Draft		

## Step 7: Unapproving Time Entries

In case a time entry was approved by mistake or needs to be edited retroactively, you may unapprove these entries by clicking **Unapprove**.

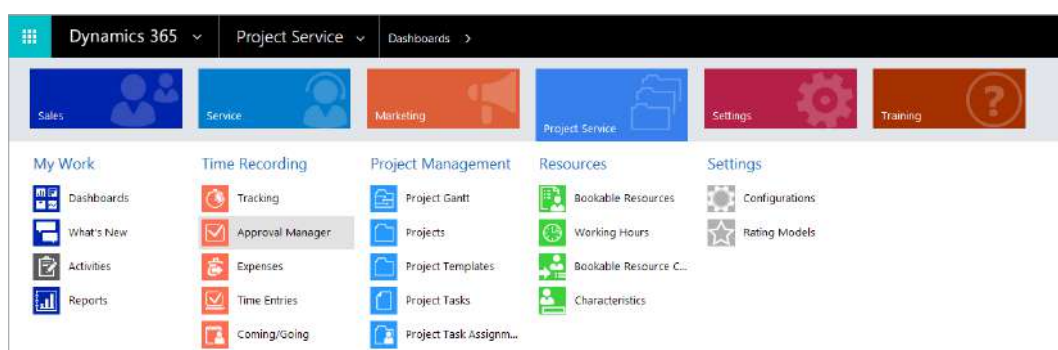


Please note: To display approved items, it is necessary to use a certain view and configuration.

Type	Subject	From	To	Break (H)	Billing Type	Chargeable Date...	Bookable Resource...	Task	Project	Status Reason
Work	Consultation of Development Team	11/17/2016 9:15 AM	11/17/2016 9:15 AM	0.00000000	Chargeable	2/30/20160000	Marion Baker	Unkilled: Analyzing Unkilled: Microsoft... Approved		
Work	Creating Process Flow Charts	11/17/2016 9:15 AM	11/17/2016 9:15 AM	0.00000000	Chargeable	7/30/20160000	Emma Nolan	Unkilled: Process... Unkilled: Product... Approved		
Work	Customer Side Kick Off Meeting	11/20/2016 9:15 AM	11/20/2016 9:15 AM	0.00000000	Chargeable	6/30/20160000	Ethan King	Unkilled: Request... Unkilled: CRM D... Approved		
Work	Development - Outlining and Planning	8/15/2016 8:30 AM	8/15/2016 10:30 AM	0.00000000	Chargeable	5/30/20160000	Evelyn Patterson	Unkilled: Develop... Unkilled: Microsoft... Approved		
Work	Execution of a migration from OnPremise to an Online S...	11/12/2016 9:15 AM	11/12/2016 9:15 AM	0.00000000	Chargeable	5/30/20160000	Matthew Parker	Unkilled: Data... Unkilled: CRM D... Approved		
Work	FRD Short Summary	11/16/2016 9:15 AM	11/16/2016 9:15 AM	0.00000000	Chargeable	3/30/20160000	Ethan King	Unkilled: Design... Unkilled: Microsoft... Approved		
Work	FRD Review	11/16/2016 9:15 AM	11/16/2016 9:15 AM	0.00000000	Chargeable	5/30/20160000	Marion Baker	Unkilled: Design... Unkilled: Microsoft... Approved		
Work	Implementing of Validation checks	11/20/2016 9:15 AM	11/20/2016 9:15 AM	0.00000000	Chargeable	4/30/20160000	Ethan King	Unkilled: Design... Unkilled: Microsoft... Approved		
Work	Kick Off Meeting on Customer side	11/20/2016 9:15 AM	11/20/2016 9:15 AM	0.00000000	Chargeable	1/20/20160000	Marion Baker	Unkilled: Develop... Unkilled: CRM D... Approved		
Work	Kick Off Meeting with responsibilities	11/16/2016 9:15 AM	11/16/2016 9:15 AM	0.00000000	Chargeable	4/30/20160000	Emma Nolan	Unkilled: Contact... Unkilled: Product... Approved		
Work	Requirements Workshop on Customer Side	11/16/2016 9:15 AM	11/16/2016 9:15 AM	0.00000000	Chargeable	5/30/20160000	Matthew Parker	Unkilled: Request... Unkilled: CRM D... Approved		

## 3.9.2 Approving, Editing and Unapproving Expenses

**Step 1:** Navigate to the Project Service area and select **Approval Manager** in the Time Recording group.



**Step 2:** Select an account or project via the lookup **Filter**. Leaving the filter empty will load all data in the system.



Please note: Loading all available data will decrease performance.

Look Up Records

Look for

Account

Look in

Active Accounts

Search

Account Name	Main Phone	Address 1: City
Gevee	(759) 156-3156	Wisconsin
Livetube	55-(958)700-9098	Oregon
Skipfire GmbH	(330) 304-1815	Wisconsin
Vestibulum Ltd	(153) 418-7186	Utah
Zoombox	(228) 425-1490	Vermont

1 - 5 (5 selected) Page 1

Select

Remove

Selected records: (5)

Invert selection

Gevee

Livetube

Skipfire GmbH

Vestibulum Ltd

Zoombox

Add

Cancel

**Step 3:** Click **Refresh** to load the data into the application. Select the tab **Expenses**.

The main panel in the center of the application displays records based on the selected view, date range, and filter.

Dynamics 365

Project Service

Approval Manager

NEW ACTIVITY

NEW RECORD

IMPORT DATA

Approve

Unapprove

Save

Filter

Gevee Livetube Skipfir

From

Until

View

My Time Entries

Time Entries

Expenses

Type	Subject	From	To	Break Int	Billing Type	Chargeable Dura...	Bookable Resou...	Task	Project	Status Reason
No records to display										

Dynamics 365

Project Service

Approval Manager

NEW ACTIVITY

NEW RECORD

IMPORT DATA

Refresh

Approve

Unapprove

Save

Filter

Gevee Livetube Skipfir

From

Until

View

Active Expenses

Time Entries

Expenses

Expense Type	Subject	Bookable Resou...	Service Date	Amount	Billing Type	Chargeable Amo...
Airfare	Airfare Munich	Mason Baker	11/18/2016	D114.00	Chargeable	D114.00
Car rental	Airfare to Customer Side	Evelyn Patterson	11/16/2016	D50.00	Chargeable	D50.00
Meal	Breakfast	Ethan King	11/16/2016	D11.60	Chargeable	D11.60
Meal	Catering	Matthew Parker	11/03/2016	D26.90	Chargeable	D26.90
Car rental	Costs Car Rental	Mason Baker	11/21/2016	D163.00	Chargeable	D163.00
Car rental	Costs Car Rental	Matthew Parker	12/2/2016	D89.90	Chargeable	D89.90
Car rental	Journey to Customer Meeting	Matthew Parker	11/16/2016	D123.60	Chargeable	D123.60
Car rental	Journey to Customer Meeting	Matthew Parker	11/30/2016	D90.50	Chargeable	D90.50
Car rental	Journey to Customer Meeting	Jeany Powell	12/12/2016	\$123.60	Chargeable	\$123.60
Airfare	Ulsabook - Düsseldorf	Mason Baker	12/06/2016	\$400.00	Chargeable	\$400.00
Meal	Lunch	Evelyn Patterson	11/17/2016	D23.50	Chargeable	D23.50
Meal	Lunch	Ethan King	11/23/2016	D20.50	Chargeable	D20.50
Hotel	Overnight Stay at Hazel	Evelyn Patterson	11/18/2016	D70.00	Chargeable	D70.00
Miscellaneous	Parking costs	Enisa Nolan	11/16/2016	D15.00	Chargeable	D15.00
Miscellaneous	Parking Costs	Jeany Powell	12/10/2016	D15.00	Chargeable	D15.00
Hotel	Stay	Enisa Nolan	11/21/2016	D56.00	Chargeable	D56.00
Taxi	Trip to the Customer	Enisa Nolan	11/30/2016	D23.50	Chargeable	D23.50

**Step 4:** By expanding the project tree on the left hand side and selecting a record within the structure, you may filter the displayed expenses by employee or project.



Please note: This feature is not available unless a filter was selected in step #2

Expense Type	Subject	Bookable Resource	Service Date	Amount	Billing Type	Chargeable Am...
Car rental	Journey to Customer Site	Evelyn Patterson	11/16/2016	\$20.00	Chargeable	\$20.00
Meal	Breakfast	Evelyn Patterson	11/16/2016	\$20.00	Chargeable	\$20.00
Hotel	Overnight Stay at Hotel	Evelyn Patterson	11/16/2016	\$70.00	Chargeable	\$70.00

## Step 5: Editing Expenses

Expenses may be edited inline. Double-click the field which should be changed and key in the new value. Click **Save** to confirm your changes.

Expense Type	Subject	Bookable Resource	Service Date	Amount	Billing Type	Chargeable Am...
Airfare	Arrival Munich	Maxon Baker	11/16/2016	\$114.00	Chargeable	\$114.00
Car rental	Arrival to Customer Site	Evelyn Patterson	11/16/2016	\$20.00	Chargeable	\$20.00
Meal	Breakfast	Evelyn Patterson	11/16/2016	\$20.00	Chargeable	\$20.00
Meal	Catering	Matthew Parker	11/23/2016	\$26.00	Chargeable	\$26.00
Car rental	Costs Car Rental	Maxon Baker	11/23/2016	\$163.00	Chargeable	\$163.00
Car rental	Costs Car Rental	Matthew Parker	11/23/2016	\$60.00	Chargeable	\$60.00
Car rental	Journey to Customer Meeting	Matthew Parker	11/16/2016	\$123.00	Chargeable	\$123.00

## Step 6: Approving Expenses

To approve expenses, tick the check column in front of the record. You may select multiple records at once. Click **Approve**.

Expense Type	Subject	Bookable Resource	Service Date	Amount	Billing Type	Chargeable Am...
Airfare	Arrival Munich	Maxon Baker	11/16/2016	\$114.00	Chargeable	\$114.00
Car rental	Arrival to Customer Site	Evelyn Patterson	11/16/2016	\$20.00	Chargeable	\$20.00
Meal	Breakfast	Evelyn Patterson	11/16/2016	\$20.00	Chargeable	\$20.00
Meal	Catering	Matthew Parker	11/23/2016	\$26.00	Chargeable	\$26.00
Car rental	Costs Car Rental	Maxon Baker	11/23/2016	\$163.00	Chargeable	\$163.00
Car rental	Costs Car Rental	Matthew Parker	11/23/2016	\$60.00	Chargeable	\$60.00
Car rental	Journey to Customer Meeting	Matthew Parker	11/16/2016	\$123.00	Chargeable	\$123.00
Car rental	Journey to Customer Meeting	Maxon Baker	11/23/2016	\$400.00	Chargeable	\$400.00
Airfare	Leaveback - Düsseldorf	Maxon Baker	11/23/2016	\$200.00	Chargeable	\$200.00

## Step 7: Unapproving Expenses

In case an expense was approved by mistake or needs to be edited retroactively, you may unapprove these expenses by clicking **Unapprove**.



Please note: To display approved items, it is necessary to use a certain view and configuration.

Expense Type	Subject	Bookable Resource	Service Date	Amount	Billing Type	Chargeable Am...
Car rental	Costs Car Rental	Matthew Parker	11/23/2016	\$60.00	Chargeable	\$60.00
Car rental	Journey to Customer Meeting	Maxon Baker	11/23/2016	\$400.00	Chargeable	\$400.00
Airfare	Leaveback - Düsseldorf	Maxon Baker	11/23/2016	\$200.00	Chargeable	\$200.00
Meal	Lunch	Evelyn Patterson	11/17/2016	\$20.00	Chargeable	\$20.00
Hotel	Overnight Stay at Hotel	Evelyn Patterson	11/16/2016	\$70.00	Chargeable	\$70.00

## 3.10 Invoicing

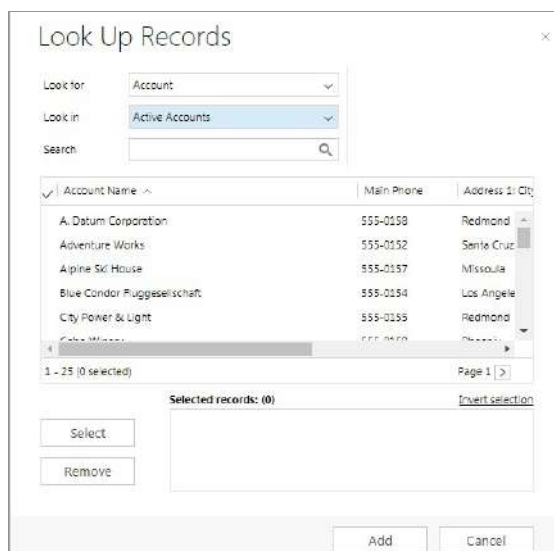
Based on the time entries and expenses already tracked by project team members, you can now create flawless invoices quickly and effortlessly.

### 3. 10.1 Creating an Invoice in Invoicing Manager

**Step 1:** Navigate to the Project Service area and select **Invoicing Manager** in the Invoice Management group.



**Step 2:** Select the records you would like to display through the lookup Filter. Click **Select** and then **Add** to load the data.



**Step 3:** Click **Refresh** to load the data into the application.

Dynamics 365

▼

Project Service

▼

Invoicing Manager

NEW ACTIVITY

▼

NEW RECORD

▼

IMPORT DATA

REFRESH

SAVE

EXPAND ALL

COLLAPSE ALL

Filter

A. Datum Corporation;

🔍

From

7/1/2017

📅

To

7/31/2017

📅

Once the data is loaded, you will see accounts and associated projects as well as approved time entries and expenses, which may be invoiced, in the left half of the screen. On the right side, you will find the accounts and any invoices that may already have been created.



Loading all available data will decrease performance.

**Step 4:** To create an invoice, select an account on the right side of the screen and right click to open the context menu and select **Create Invoice**.



Please note: By default the date range is set to the previous month. Change the date range in fields From and To if necessary.

Name	Invoice Date	Invoice State	From	To	
Training					
INV-01013-N0H4X3 - Imos07/2017	7/3/2017	New			
RFD Document					
Training					
Workshop					
Demo C					
Fabrika					
Fourth Coffee					
Fourth Coffee					
INV-01003-M0D8C0 - Fourth coffee		New			
Gevee					
INV-01001-87L8G8 - Invoice 230893		Billed			
Material	3/10/2017		2/1/2017 1:00 AM	2/28/2017 1:00 AM	Material
Expenses	3/10/2017		3/10/2017 1:00 AM	3/10/2017 1:00 AM	Expense
Arrival Munich	3/10/2017		3/11/2017 12:11 PM		Expense
Gevee - Gevee: Analyzing - Mason Baker	3/10/2017		3/10/2017 1:00 AM	3/10/2017 1:00 AM	Time
Consultation of Development Team	3/10/2017		3/10/2017 12:12 PM	3/10/2017 12:12 PM	Time
Configuratin Data Endpoint	3/10/2017		3/16/2017 12:12 PM	3/16/2017 12:12 PM	Time



In the Create Invoice window fill in all required data: give your invoice a name, select a price list and choose the invoice date.



Please note: Currency and Price List have to be set to the same currency, e.g. US Dollar – US Dollar Price List

Create Invoice

Name\*

Currency\*

US Dollar

Price List\*

Project

Description

Customer\*

Demo Comp2

Invoice Date\*

8/1/2017

OK

Cancel

Click **OK** to create the invoice.

**Step 5:** To add items to the invoice, simply drag and drop the desired items from the left-hand side to the right side. You don't have to be very precise here, since the selected items will automatically be added to the correct account.



Please note: Product line items must be invoiced separately from tracking entries.

Dynamics 365

Project Service

Invoicing Manager

SANDBOX

NEW ACTIVITY

NEW RECORD

IMPORT DATA

REFRESH

SAVE

EXPAND ALL

COLLAPSE ALL

Filter

A Datum Corporation

From

7/1/2017

To

7/31/2017

Name	From	To	Price per Unit	Quantity	Discount	Total Am
Consultancy			50 US Dollar	8	0 US Dollar	400
Development			65 US Dollar	24	0 US Dollar	1560
Imos: proRM Fast Start						
Workshop						
Demo - Workshop - John Adam						
Workshop	7/6/2017 10:30 AM	7/6/2017 3:00 PM	300 US Dollar	4.5		1350
123	7/20/2017 9:00 AM	7/20/2017 12:30 PM	300 US Dollar	3.5		1050
Prince AG: Dyn 365						
Schulung						
Demo - Schulung - John Adam						
test	7/5/2017 10:30 AM	7/5/2017 11:00 AM	2000 US Dollar	0.5		1000
Demo Comp2						
Demo						0
Consulting			35 US Dollar	100	0 US Dollar	3500
Development			60 US Dollar	150	0 US Dollar	9000
Demo						
Consulting						
Demo Comp2 - Consulting - John Adam						
1233	7/20/2017 1:30 PM		0 US Dollar	1		0
Febrkam, Inc.						
Fourth Coffee						
Fourth Coffee						
New store opened this year - follow up						0
Harbour maintenance			300 US Dollar	365	0 US Dollar	182500
Gevee						
hirschle						
Litware, Inc.						

Contoso Pharmaceuticals

Default Company

Demo

INV-01012-PLP383 - 07/2016

Schulung

Training

INV-01013-NQ4X3 - Imos07/2017

RFD Document

Training

Workshop

Demo Comp2

Demo Corp Inv 2

Febrkam, Inc.

Fourth Coffee

Fourth Coffee

INV-01003-MOD8C0 - Fourth coffee

Gevee

INV-01001-87L8G8 - Invoice 230893

Material

Expenses

Arrival Munich

Gevee - Gevee: Analyzing - Meson Baker

Consultation of Development Team

Configuratn Data Endpoint

hirschle

Litware, Inc.

Litware, Inc.

**Step 6:** To keep track of your invoices, you may change their state. To do so, select the invoice in question and right click to open the context menu. Select **Change State** and choose Billed, Booked or Cancel.

The screenshot shows the Dynamics 365 Project Service Invoicing Manager interface. The top navigation bar includes 'Dynamics 365', 'Project Service', and 'Invoicing Manager'. Below the navigation bar, there are tabs for 'NEW ACTIVITY', '+ NEW RECORD', and 'IMPORT DATA'. A filter bar shows 'Filter: A. Datum Corporation' and date ranges 'From: 7/1/2017' and 'To: 7/31/2017'. The main area displays a table of invoices with columns: Name, From, To, Price per Unit, Quantity, Discount, Total, and Invoice Date. The 'Demo Corp Inv 2' invoice is selected, and a right-click context menu is open, showing options: 'Open in CRM', 'Create Invoice (Data)', 'Change State', 'Billed', 'Booked', and 'Cancel'.

**Step 7:** To finish Invoice creation, click **Save** in the top menu. Your invoice has been created.

The screenshot shows the top navigation bar of the Dynamics 365 Project Service Invoicing Manager. It includes the 'Dynamics 365' logo, 'Project Service' dropdown, and 'Invoicing Manager' dropdown. Below the navigation bar, there are tabs for 'NEW ACTIVITY', '+ NEW RECORD', and 'IMPORT DATA'. At the bottom, there are action buttons: 'REFRESH', 'SAVE', 'EXPAND ALL', and 'COLLAPSE ALL'.

## 3.10. 2 Creating an Invoice via Dynamics 365 Form

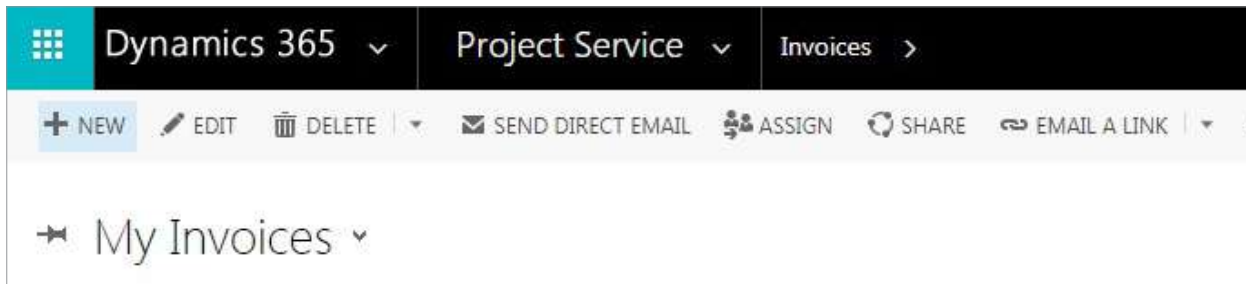
**Step 1:** Navigate to the Project Service area and select **Invoices** in the Invoice Management group.



Please note: You may only add default Dynamics entities to your invoice when creating an invoice via Dynamics 365 form. Actuals cannot be included.

The screenshot shows the Dynamics 365 Project Service area. The top navigation bar includes 'Dynamics 365', 'Sales', 'Orders', and 'Inv Manager Demo I...'. Below the navigation bar, there are tabs for 'Sales', 'Service', 'Marketing', 'Project Service', 'Settings', and 'Training'. The 'Project Service' tab is selected, and the 'Invoices' option is highlighted in the 'Invoice Management' group. A tooltip is visible over the 'Invoices' option, stating: 'Go to your list of Invoices, status info, and total amounts.' The 'Invoices' option is part of the 'Invoice Management' group, which also includes 'Actuals', 'Journals', and 'Invoicing Manager'.

Step 2: Click **New**.



Step 3: Fill in all required data (fields marked with \*).

**INVOICE**  
New Invoice

**Initial Information (Active)**

Invoice ID\* [click to enter](#) Price List\* CRM Service USA  
 Name\* Demo Inv for Inv Manager Total Amount [click to enter](#)  
 Currency\* US Dollar Description [click to enter](#)

**Summary**

Invoice ID\*  
 Name\* Demo Inv for Inv Manager  
 Currency\* US Dollar  
 Price List\* CRM Service USA  
 Price Locked\* No

**PRODUCTS**

Product Name	Properties	Unit	Price Per Unit	Quantity	Discount	Extended Amount	Suggestions
To enable this content, create the record.							

**SALES INFORMATION**

Opportunity Inv Manager Demo Inv  
 Order Inv Manager Demo Inv  
 Customer\* Damon Skala

**SHIPPING DATES**

Date Delivered  
 Due Date

**SHIPPING INFORMATION**

Shipping Method  
 Payment Terms

**ADDRESSES**

Bill To Address

**Amounts**

Amount	Amount
Total Amount	
(-) Discount (0)	
(-) Discount	
Pre-Freight Amount	
(+) Freight Amount	

Step 4: Click **Save** to apply changes.

**INVOICE**  
New Invoice

**Initial Information (Active)**

Invoice ID\* [click to enter](#) Price List\* CRM Service USA  
 Name\* Demo Inv for Inv Manager Total Amount [click to enter](#)  
 Currency\* US Dollar Description [click to enter](#)



**Step 5:** Get product line items from the corresponding opportunity or create a write-in or existing product

**PRODUCTS**

Product Name	Properties	Unit	Price Per Unit	Quantity	Discount	Extended Amount	Suggestions
No Invoice Product records are available in this view.							

**SALES INFORMATION**

Existing Product  
Write-in Product  
Get Products

Get Products

Description  
..

Detail Amount **\$0.00**

**Get Products**

Get Products from a previously created opportunity.

Opportunity

OK Cancel

**Dynamics 365** | Project Service | Invoices | Demo Inv for Invoice Manager

**INVOICE**

Demo Inv for Invoice Manager

Total Amount: \$2,265.00 | Status: Active | Status Reason: None | Owner: Thya Arslan

**Initial Information (Active)**

Invoice ID: INV-02019-CRM4CD | Invoice Name: Demo Inv for Invoice Manager | Currency: US Dollar | Price List: CRM Service USA | Total Amount: \$2,265.00 | Description: click to enter

**Summary**

Invoice ID: INV-02019-CRM4CD  
Name: Demo Inv for Invoice Manager  
Currency: US Dollar  
Price List: CRM Service USA  
Prices Loaded: No

**PRODUCTS**

Product Name	Properties	Unit	Price Per Unit	Quantity	Discount	Extended Amount	Suggestions
Demo Pro			\$145.00	7.0000	\$0.00	\$1,015.00	
Demo Pro			\$250.00	5.0000	\$0.00	\$1,250.00	

**SALES INFORMATION**

Opportunity: Inv Manager Demo Inv  
Order: Inv Manager Demo Inv  
Customer: Derman Skirata

Description: ..

**SHIPPING DATES**

Date Delivered: ..  
Due Date: ..

**SHIPPING INFORMATION**

Shipping Method: ..  
Payment Terms: ..

**ADDRESSES**

Bill To Address: ..

**Summary**

Detail Amount	\$2,265.00
(-) Discount (EU)	[...]
(-) Discount	..
Pre-Freight Amount	\$2,265.00
(+) Freight Amount	..

Active

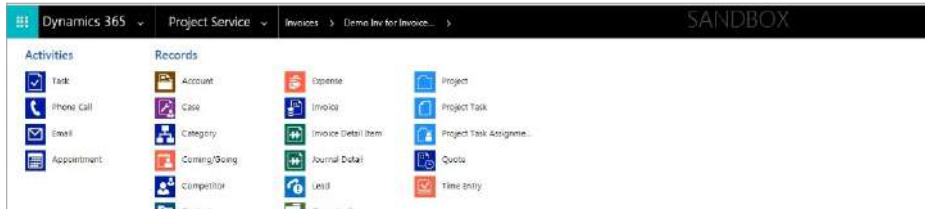
Your invoice is now ready to be sent.

### 3.10.3 Creating an Invoice via Quick Create

**Step 1:** Open the Quick Create form by navigating to the + icon in the menu bar and select **Invoice** in the Records group..



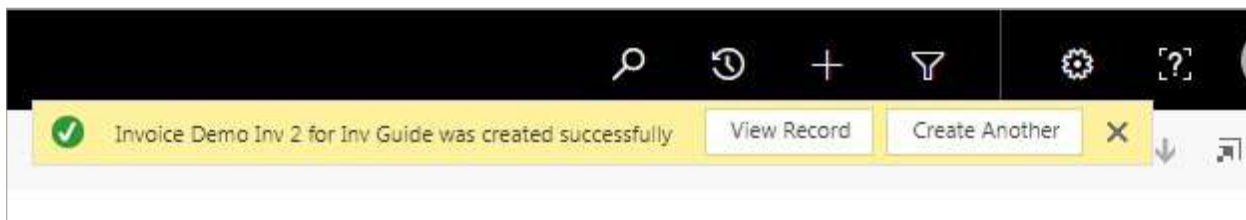
Please note: You may only add default Dynamics entities to your invoice when creating an invoice via Quick Create. Actuals cannot be included.



**Step 2:** Fill in all required data (fields marked with \*). Then, click **Save**.

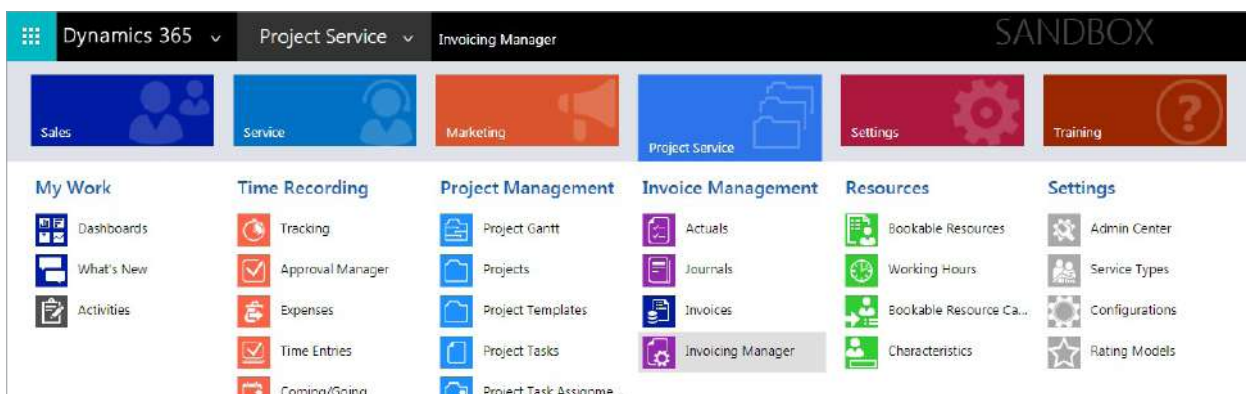


You will get a notification if your invoice was successfully created.



### 3.10.4 Cancelling an Invoice

**Step 1:** Navigate to the Project Service area and select **Invoicing Manager** in the Invoice Management group.



Step 2: Select records through the lookup Filter. Click **Select** and **Add** to load the data.



Please note: Loading all available data will decrease performance

Look Up Records

Look for: Account

Look in: Active Accounts

Search:

Account Name	Main Phone	Address 1: City
A. Datum Corporation	555-0158	Redmond
Adventure Works	555-0152	Santa Cruz
Alpine Ski House	555-0157	Missoula
Blue Condor Fluggesellschaft	555-0154	Los Angeles
City Power & Light	555-0155	Redmond
Contoso Pharmaceuticals	555-0156	Redmond

1 - 25 (3 selected)

Page 1

Selected records: (0)

Invert selection

Select

Remove

Add

Cancel

Step 3: Click **Refresh** to load the data into the application.



Please note: By default, the date range is set to the previous month. You may change the date range in fields From and To.

Once the data is loaded, you will see accounts and their approved project tasks and products which are ready to be invoiced in the left half of the screen. On the right side, you will find the accounts and any invoices that may already have been created.

Step 4: To cancel an invoice, select the relevant invoice and right click to open the context menu

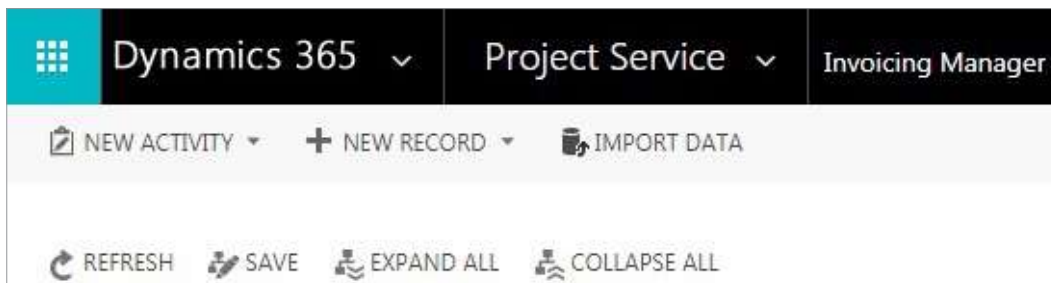
Dynamics 365 Project Service Invoicing Manager									
Sandbox									
<div> <div>NEW ACTIVITY</div> <div>NEW RECORD</div> <div>IMPORT DATA</div> </div> <div> <div>REFRESH</div> <div>SAVE</div> <div>EXPAND ALL</div> <div>COLLAPSE ALL</div> </div> <div> <div>Filter: A. Datum Corporation</div> <div>From: 7/1/2017</div> <div>To: 7/31/2017</div> </div>									
Name	From	To	Price per Unit	Quantity	Discount	Total Amount	Name	Invoice Date	Invoice State
A. Datum Corporation							Contoso Pharmaceuticals		
neuer Auftrag							Default Company		
Dienstleistung (in Stunden)			123 US Dollar	8	0 US Dollar	984	Demo		
Workshop (in Stunden)			450 US Dollar	48	0 US Dollar	21600	INV-01013-PIP083 - 07/2018	7/3/2017	New
Adventure Works							Schulung		
Particip Interest in Dynamics 365							INV-01013-N014X3 - Inroad7/2017	7/3/2017	New
analysis workshop			1000 US Dollar	1	0 US Dollar	1000	Training		
rfid document			1000 US Dollar	1	0 US Dollar	1000	Workshop		
training 365			1000 US Dollar	1	0 US Dollar	1000			
Aber Halo							Demo Comp2		
Aber			456 US Dollar	258	0 US Dollar	117648	Demo Corp Inv 2		
Halo			789 US Dollar	1	0 US Dollar	789	Expenses		
New store opened this year - follow up							1233		
Consultancy			100 US Dollar	60	0 US Dollar	6000	Fabrikam, Inc.		
Dev Team			150 US Dollar	20	0 US Dollar	3000	Fourth Coffee		
Redhouse Dynamics Implementierung							Fourth Coffee		
Documentation			1000 US Dollar	1	0 US Dollar	1000	INV-01009-MOODCO - Fourth coffee		New
Training			1000 US Dollar	1	0 US Dollar	1000	Genie		
Workshop			1000 US Dollar	1	0 US Dollar	1000	INV-01001-8718G8 - Invoice 200893		Billed
Alpine Ski House							Materia	3/10/2017	
Handys Implementierung Dynamics 365							Expenses	3/10/2017	
Customizing			1250 US Dollar	1	0 US Dollar	1250	Arrival Munich	3/10/2017	
Implementation			1250 US Dollar	1	0 US Dollar	1250			

Then, select **Change state** and **Cancel**. After that, a credit note will be created.

The screenshot shows the Dynamics 365 Invoicing Manager interface. The top navigation bar includes 'Dynamics 365', 'Project Service', and 'Invoicing Manager'. The main area displays a list of invoices with columns for Name, From, To, Price per Unit, Quantity, Discount, Total Amt, Invoice Date, Invoice State, and From. A detailed view of a specific invoice is shown on the right, highlighting the 'Change state' and 'Cancel' actions.

Name	From	To	Price per Unit	Quantity	Discount	Total Amt	Invoice Date	Invoice State	From
Consultancy			50 US Dollar	8	0 US Dollar	400			
Development			65 US Dollar	24	0 US Dollar	1680			
Workshop									
Demo - Workshop - John Adam									
Workshop	7/5/2017 10:30 AM	7/5/2017 3:00 PM	300 US Dollar	4.5		1350			
123	7/20/2017 8:00 AM	7/20/2017 12:30 PM	300 US Dollar	3.5		1050			
Printed All Dyn 365									
Schulung									
Demo - Schulung - John Adam									
Test	7/5/2017 10:30 AM	7/5/2017 11:00 AM	2000 US Dollar	0.5		1000			
Demo Corp2									
Demo									
Consulting			35 US Dollar	100	0 US Dollar	3500			
Development			60 US Dollar	150	0 US Dollar	9000			
Fabrikam, Inc.									
Fourth Coffee									
Fourth Coffee									
New store opened this year - follow up									
Labour maintenance			500 US Dollar	365	0 US Dollar	182500			
Genie									
Hatchie									
Schedule, Inc.									
CRM Training									
Chemical Substance			15 US Dollar	20	0 US Dollar	300			
CRM Online: Standard			40 US Dollar	10	0 US Dollar	400			

Click **Save** to confirm the cancellation. The invoice is now cancelled.



## 3.11 Reporting

proRM Fast Start also enables evaluation of the data recorded by employees and project managers. To that end, the following default Dynamics 365 features are supported.

### 3.11.1 Dashboards

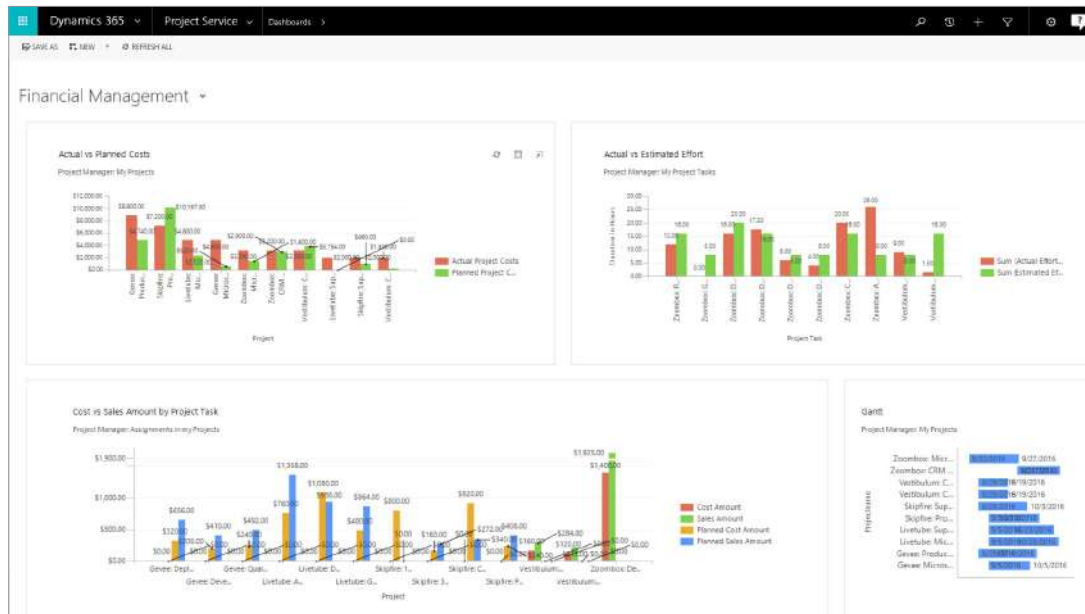
The proRM Fast Start dashboards are available in the Microsoft Dynamics 365 Dashboard selection in the areas Sales, Service, Marketing and Project Service. Any dashboard may be set as default.

### 3.11.1.1 Financial Management

**Financial Management** dashboards provide project managers with an overview of their projects' planned vs. actual costs and actual vs. estimated effort.

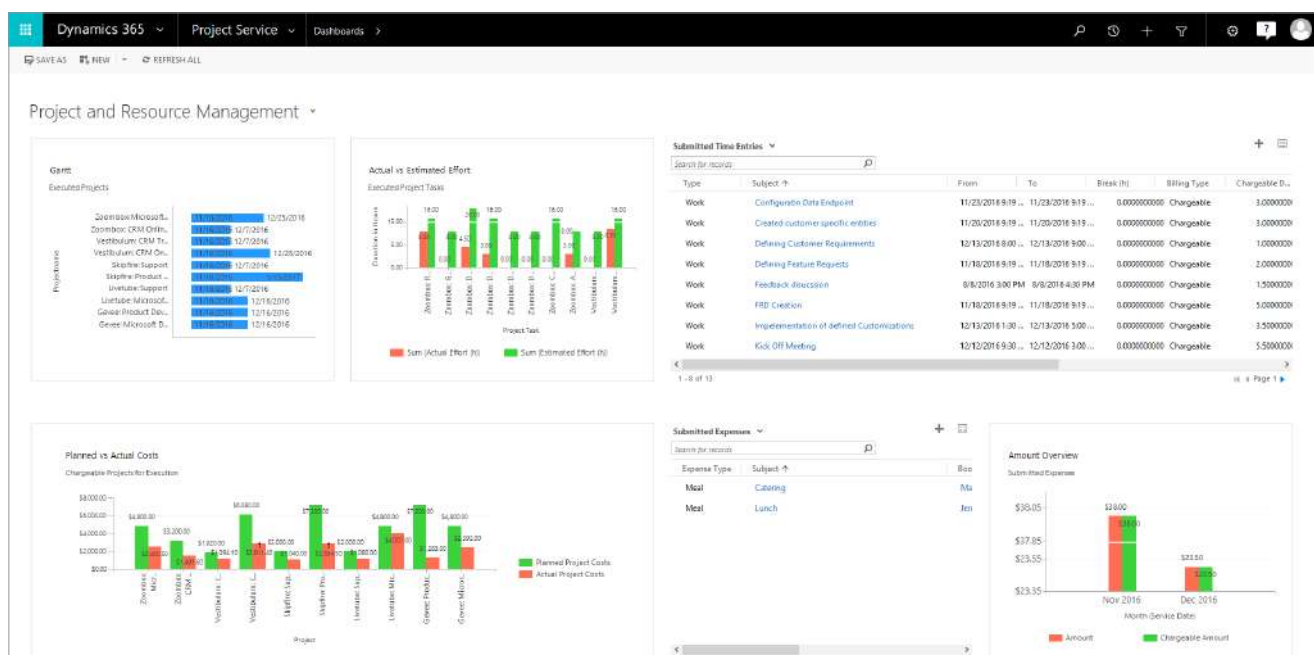


For more information about Dynamics 365 dashboards, please visit [Microsoft Dynamics 365 Help & Training](#).



### 3.11.1.2 Project and Resource Management

The **Project and Resource Management** dashboard additionally displays summaries of time entries and expenses and an overview of the total amount of submitted expenses.

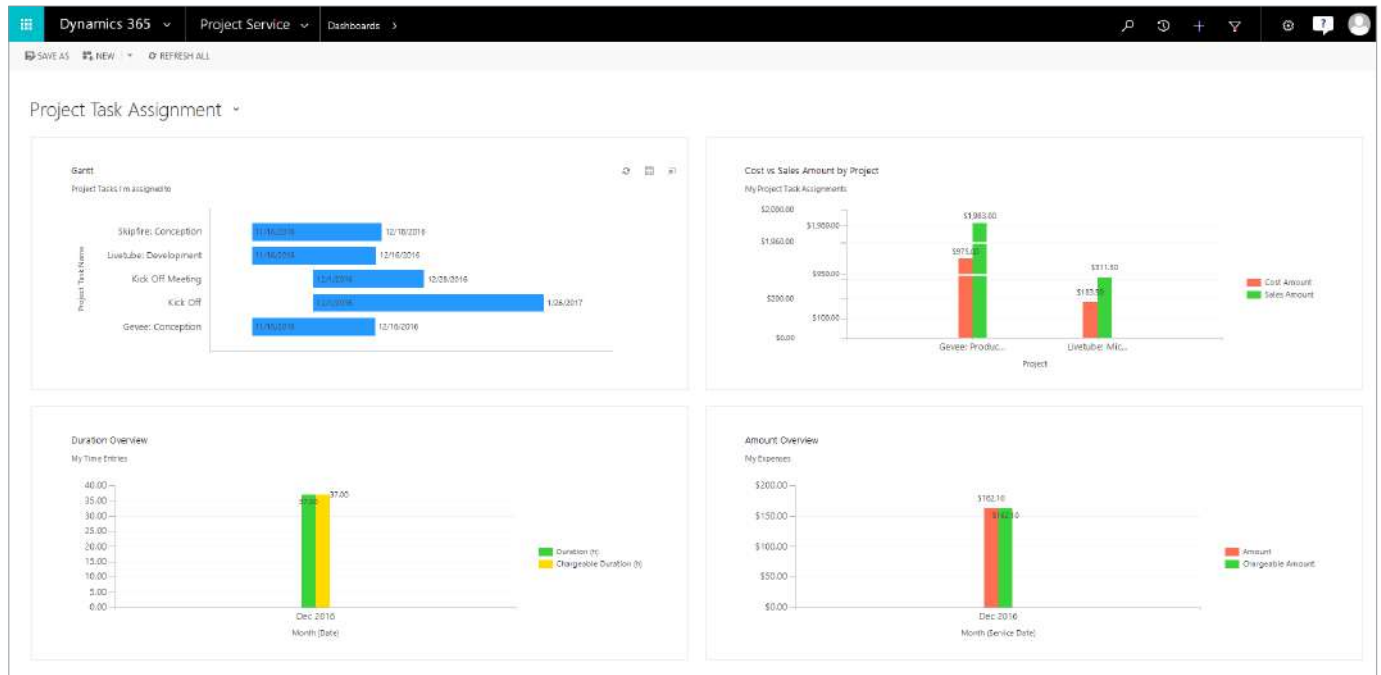


A dashboard based on the needs of a project manager may be created.



### 3.11.1.3 Project Task Assignment

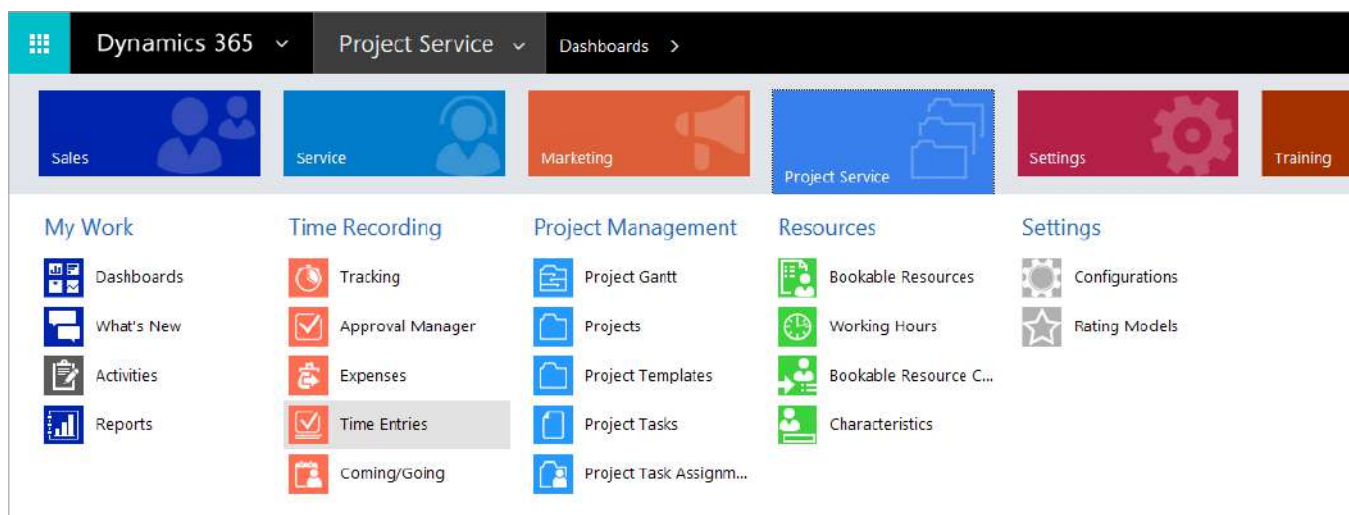
Each employee may gain an overview of their project tasks, durations and billing values in the **Project Task Assignment** dashboard. With the help of small Gantt charts, assigned project tasks are visualized based on their start and end date.



### 3.11.2 Charts

Each proRM Fast Start entity provides charts by default. The Charts tab can be found on the right hand side in the entity overview.

**Step 1:** Navigate to the Project Service area and select the desired entity (in this example, **Time Entries**).

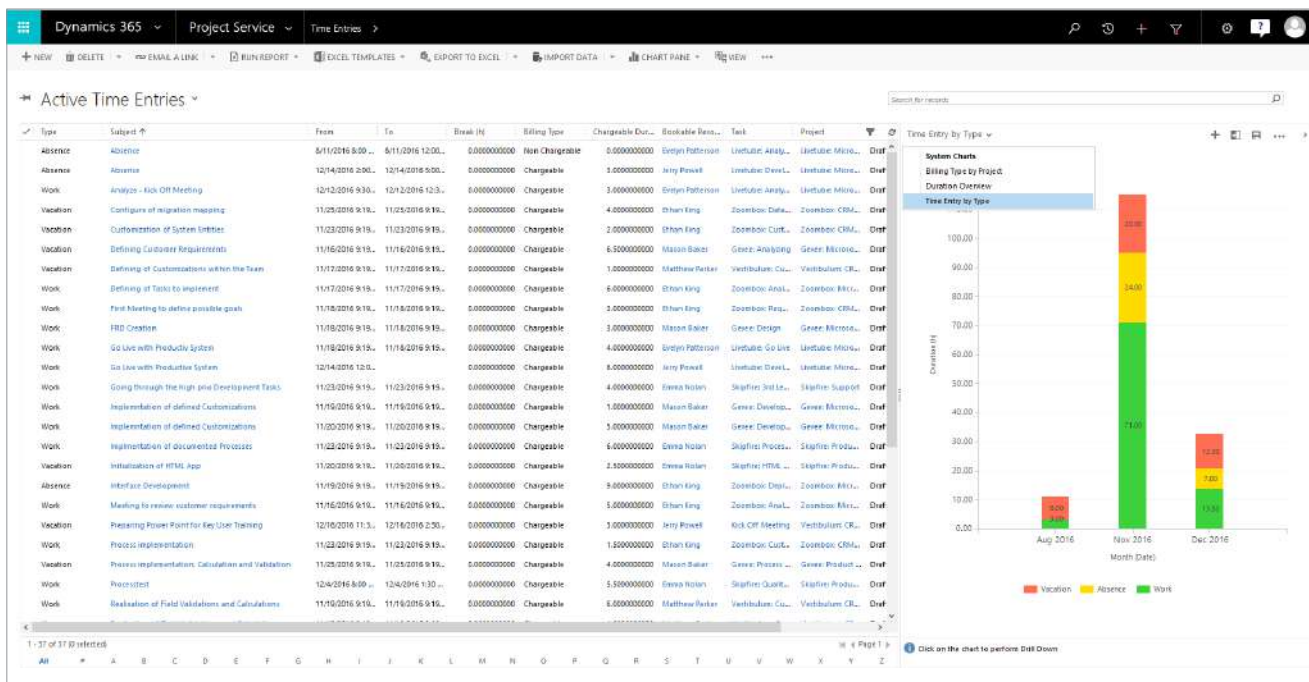


**Step 2:** Select the **Charts** tab at the right hand side of the window.

Active Time Entries

Type	Subject	From	To	Break (h)	Billing Type	Chargeable Dur.	Bookable Res.	Task	Project	Status Reason
Absence	Absence	8/11/2016 8:00..	8/11/2016 12:00..	0.000000000	Non Chargeable	0.000000000	Erlyn Patterson	Urbutek Anal.	Urbutek Micro...	Draft
Absence	Absence	12/14/2016 2:00..	12/14/2016 5:00..	0.000000000	Chargeable	3.000000000	Jerry Powell	Urbutek Devel.	Urbutek Micro...	Draft
Work	Analysis - Kick Off Meeting	12/12/2016 9:30..	12/12/2016 12:3..	0.000000000	Chargeable	3.000000000	Erlyn Patterson	Urbutek Anal.	Urbutek Micro...	Draft
Work	Configure of migration mapping	11/25/2016 9:15..	11/25/2016 9:15..	0.000000000	Chargeable	4.000000000	Ethan King	Zoombox Data..	Zoombox CRM...	Draft
Work	Customization of System Entities	11/23/2016 9:15..	11/23/2016 9:15..	0.000000000	Chargeable	2.000000000	Ethan King	Zoombox Cust..	Zoombox CRM...	Draft
Work	Defining Customer Requirements	11/16/2016 9:15..	11/16/2016 9:15..	0.000000000	Chargeable	6.500000000	Mason Baker	Genev Analysis	Genev Microso...	Draft
Work	Defining of Customizations within the Team	11/17/2016 9:15..	11/17/2016 9:15..	0.000000000	Chargeable	1.000000000	Matthew Parker	Veribulum Cu..	Veribulum CR...	Draft
Work	Defining of Tasks to implement	11/17/2016 9:15..	11/17/2016 9:15..	0.000000000	Chargeable	6.000000000	Ethan King	Zoombox Anal..	Zoombox Micro...	Draft
Work	First Meeting to define possible goals	11/18/2016 9:15..	11/18/2016 9:15..	0.000000000	Chargeable	3.000000000	Ethan King	Zoombox Res...	Zoombox CRM...	Draft
Work	PRD Creation	11/18/2016 9:15..	11/18/2016 9:15..	0.000000000	Chargeable	3.000000000	Mason Baker	Genev Design	Genev Microso...	Draft
Work	Go Live with Productive System	11/18/2016 9:15..	11/18/2016 9:15..	0.000000000	Chargeable	4.000000000	Erlyn Patterson	Urbutek Go Live	Urbutek Micro...	Draft
Work	Go Live with Productive System	12/14/2016 12:00..		0.000000000	Chargeable	6.000000000	Jerry Powell	Urbutek Devel.	Urbutek Micro...	Draft
Work	Going through the high point Development Tasks	11/23/2016 9:15..	11/23/2016 9:15..	0.000000000	Chargeable	4.000000000	Erlyn Patterson	Skiffree 3rd L...	Skiffree Support	Draft
Work	Implementation of defined Customizations	11/20/2016 9:15..	11/20/2016 9:15..	0.000000000	Chargeable	1.000000000	Mason Baker	Genev Develop...	Genev Microso...	Draft
Work	Implementation of defined Customizations	11/20/2016 9:15..	11/20/2016 9:15..	0.000000000	Chargeable	5.000000000	Mason Baker	Genev Develop...	Genev Microso...	Draft
Work	Implementation of documented Processes	11/23/2016 9:15..	11/23/2016 9:15..	0.000000000	Chargeable	6.000000000	Erlyn Patterson	Skiffree Process	Skiffree Product	Draft
Work	Installation of HTML App	11/20/2016 9:15..	11/20/2016 9:15..	0.000000000	Chargeable	2.500000000	Erlyn Patterson	Skiffree HTML...	Skiffree Product	Draft
Work	Interface Development	11/19/2016 9:15..	11/19/2016 9:15..	0.000000000	Chargeable	9.000000000	Ethan King	Zoombox Digita..	Zoombox Micro...	Draft
Work	Meeting to review customer requirements	11/16/2016 9:15..	11/16/2016 9:15..	0.000000000	Chargeable	5.000000000	Ethan King	Zoombox Anal..	Zoombox Micro...	Draft
Work	Preparing Power Point for Key User Training	12/16/2016 11:30..	12/16/2016 2:30..	0.000000000	Chargeable	3.000000000	Jerry Powell	Kick Off Meeting	Veribulum CR...	Draft
Work	Process Implementation	11/23/2016 9:15..	11/23/2016 9:15..	0.000000000	Chargeable	1.500000000	Ethan King	Zoombox Cust..	Zoombox CRM...	Draft
Work	Process Implementation: Calculation and Validation	11/25/2016 9:15..	11/25/2016 9:15..	0.000000000	Chargeable	4.000000000	Mason Baker	Genev Process...	Genev Product...	Draft
Work	Process Test	12/4/2016 8:00..	12/4/2016 1:30..	0.000000000	Chargeable	5.500000000	Erlyn Patterson	Skiffree Quar...	Skiffree Product	Draft
Work	Realization of Field Validations and Calculations	11/19/2016 9:15..	11/19/2016 9:15..	0.000000000	Chargeable	6.000000000	Matthew Parker	Veribulum Cu..	Veribulum CR...	Draft
Work	Realization of Field Validations and Calculations	11/19/2016 9:15..	11/19/2016 9:15..	0.000000000	Chargeable	4.000000000	Matthew Parker	Veribulum Cu..	Veribulum CR...	Draft

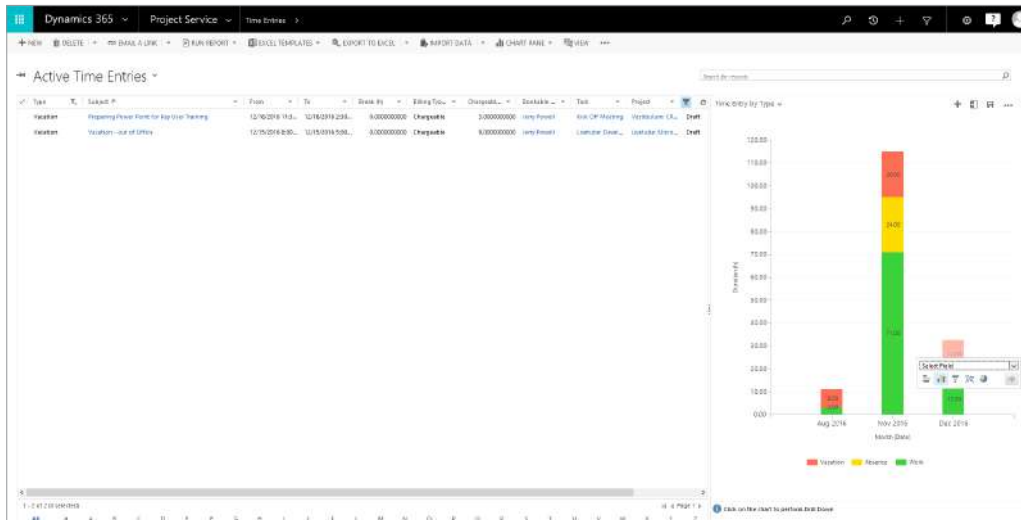
**Step 3:** Open the dropdown menu to select a chart.



**Step 4:** Charts can be filtered by changing the list view or filtering the columns. Click on the chart to drill down the



data (here, we selected the red colored field to display the corresponding vacation type time entries).



**Personal Views** may also be created. Please visit this [Microsoft TechNet article](#) for more information.

### 3.11.3 Power BI

You may also integrate proRM Fast Start in Microsoft Power BI to generate detailed, custom visualizations of your data with charts, graphs, waterfalls, and more.

To connect Power BI to proRM Fast Start, follow these steps:

1. Open Power BI and select **Get Data**.
2. In the category Content Pack Library, select **My organization** and click Get.
3. Select **Power BI for proRM Fast Start**.
4. Enter all necessary data into the dialog form **Connect to Power BI for proRM Fast Start** and click **Next**.

When your data has been successfully imported, the pre-configured proRM Fast Start Dashboard will appear. On this dashboard you will find several tiles, including the cumulative duration by project for the current and previous month. You may customize these tiles, delete them or add new tiles as you see fit.

Corresponding reports and datasets are also available.

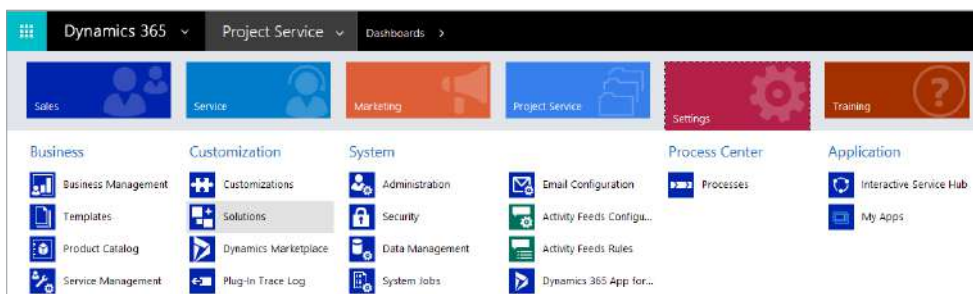


## 4. Uninstall proRM Fast Start

**Step 1:** Navigate to Settings area in Microsoft Dynamics 365 and select **Solutions**.



Please note: Uninstalling proRM Fast Start will remove all data created in Projects, Project Tasks, Project Task Assignments, Expenses, Time Entries, Configurations, Coming/Go in and Working Hours from the Microsoft Dynamics 365 environment.



**Step 2:** All installed solutions in the system are listed. Select **proRM Fast Start**.



For more information on how to delete a managed solution in Microsoft Dynamics 365, please visit the [Microsoft Developer Network](#).



**Step 3:** In the menu bar, click **Delete**.





## 5. Contact

For sales and licensing questions, please contact [sales@proMX.net](mailto:sales@proMX.net).

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



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