

Project Service for Dynamics 365

Course Level: 200

This instructor-led course provides a key step for Microsoft Dynamics 365 administrators and customizers whose organization will be leveraging the Project Service module of Microsoft Dynamics 365 to plan and deliver billable projects. In this course, you will get a jump start to your project implementation with a deep dive of the setup, configuration, and management of projects, resources, expenses, and much more. Learn these concepts through lecture, hands-on-labs, and real-world scenarios.

DYNAMICS 365
UNIVERSITY 



At A Glance: Project Service for Dynamics 365

Why Enroll?

Train admins and core users on setting up and administering Project Service..



Who to Enroll?

System Administrators -
Application Administrators -
Core Users -



Key Takeaways

Overview; Setup; Project General Settings; Project Functionality and Configuration; Projects; Resources; Scheduling; Agreements; Reporting and Analytics



Learn More

Click to register for Project Service training.

[Click to register.](#)

About this Training



Intended Audience

This course is designed to support individuals who will be setting up and administering Project Service within Dynamics 365. It is not intended for front of house users.



Recommended Prerequisites

Prerequisites are recommendations, and while not required, they are *highly* advised to ensure a successful learning experience:

- Understanding of data or relational databases is helpful
- Dynamics 365 University CRM Boot Camp is recommended

Key Takeaways

This Training Will Allow You To:

- Understand configuration and set up
- Understand resource set up
- Understand the concepts of time, expenses and collaboration regarding project service
- Understand tracking project process
- Understand cost consumption



DAY 1



DAY 2



DAY 3



DAY 4



DAY 5

OVERVIEW & SETUP

Overview and History of Service in CRM

Prerequisites

- CRM Org
- Network and hardware Requirements

Solution Deployment

Licensing and Security

- CRM User Security and roles

PROJECT GENERAL SETTINGS

**Entity diagram
Administration settings**

PROJECT FUNCTIONALITY & CONFIGURATION

Account Management

- Service Accounts
- Billing Accounts

PROJECTS

**Configuration
Entity Relationship model
Prerequisites**



DAY 1



DAY 2



DAY 3



DAY 4



DAY 5

RESOURCES

- Configuration**
- Skills**
- Team Collaboration**
- Capturing Time: Forecast vs Actuals**

SCHEDULING

- Capabilities**
- Managing the Sale Process**

AGREEMENTS

- Configuration**
- Estimation**
- Quote**
- Contract Work**
- Invoicing**

REPORTING AND ANALYTICS

- Leverage CRM charts and dashboards**
- Define KPIs and Metrics**
- Extend with Power BI**

DYNAMICS 365 UNIVERSITY

Dynamics 365 University is designed to be **foundational training for those responsible for implementing and supporting Dynamics 365** within your organization. Dynamics 365 University focuses on out-of-the-box features and functionality **training for your core team**. Participants get an understanding of how the Dynamics 365 processes and architecture can be leveraged and customized to **support your unique organizational processes**.

GET STARTED