

Internal User / D365 Admin

ProjectSync 365



Created by: Blackwater Tech



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Following is the series of steps that outline the path a user takes to complete a specific business process. It provides a structured and guided experience for users to navigate through various stages of a process, ensuring consistency and efficiency in performing tasks.

CRM Authentication

- Open your web browser and navigate to your Dynamics CRM portal login page "https://projectsync365.crm11.dynamics.com/."
- Enter your credentials (username and password) and click "Sign In".
- Select the ProjectSync 365 app.



• You will be redirected to dynamics.



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Billing Billing Invoices Sales								

Creating Contact: -

- Navigate to Contacts on the left panel.
- Click on New to create a new contact.

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	Bella Cruz	BellaCruz@gmail.com ProjectSync 365 Company	
Customers	Bhargav B	Bhargav@gmail.com	
8 Contacts	D.Robert Hook	RobertHook@gmail.com	
C.L.	Danish D	Danish@gmail.com	
sales	Rahul Amal	RahulAmal@gmail.com Testing 1 Company	
Opportunities	Ravi Teja	Raviteja@gmail.com CMC Company	
🖹 Quotes	Sai Rahul	SaiRahul@gmail.com Testing 2 Company	
Project Contracts			
Billing			
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Sales	Rows: 8		

- Fill in the required details.
 - o First name
 - o Last name
 - o Email
 - o Phone



o Address

• Click on Save.

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© Leads	Account Name	Auto-post on Contact Rahul Raj: 12/10/2024, 12:46 PM	
Opportunities		Contact created by <u># Portals-Project</u>	
🚯 Quotes	Email Rahulraj@gmail 🖂		
Project Contracts	Mobile Phone		
			No data available
Billing	Address		
🗟 Invoices			
S Sales	Address 1: Street 1		

Send Portal Login Invitation to Contact: -

An invitation code is typically used to grant access to users or to facilitate their registration process.

• In the contact details page, click on the Send Invitation button to send a portal invitation code to the contact so that the contact can redeem the code to login on the portal.

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C Leads Opportunities	Account Name	P	Auto-post on Contact Rahul Raj: 12/10/2024, 12: Contact created by <u># Portals-Project</u>	46 PM		
Quotes	Email	Rahulraj@gmail 🖂				
Project Contracts	Mobile Phone					
Billing					No data available	
🖹 Invoices	Address					
S Sales	Address 1: Street 1					

• A pop-up dialog box will be displayed saying that the invitation code has been sent. Click on Ok.





• The email will be sent to the contact and will be updated in the timeline section of the contact too.

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R Contacts	Last Name *	Raj	Enter a note			Opportunities	1
Sales	Job Title		V Recent				1.
CeadsOpportunities	Account Name	P	Modified on: 9:22 AM	askar Pilli Closed «>	E,		
🗟 Quotes	Email	Rahulraj@gmail.com	Your Invitation Code to Re	deem on Our Portal CRM:0256003			
Project Contracts	Mobile Phone		We are pleased to provi	de you with your unique invitation code.		No data available	
Billing	Address		Please <u>Click Here</u> to red Best regards,	eem you invitation to the portal.			
Sage Integration	Address 1: Street 1		Admin				
	Address 1: Street 2		Modified On: 9:22 AM View less		~		
Sales	Address 1: Street 3		Auto-post on Contact Rahul Ra	ii: 12/10/2024. 12:46 PM			

• On Successful redemption of the code by the contact, it will be updated in the timeline section.



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A Contacts	Last Name * Raj	Enter a note	Opportunities :
Sales	Job Title	Highlights Kecent	
© Leads	Account Name D	Modified on: 2:57 PM	
Quotes	Email Rahulraj@gmail.com	A <u># Portals-ProjectSync 365</u> Closed RahulRaj	
Project Contracts	Mobile Phone	Last Updated: 2:57 PM View less	
Billing	Address	Modified on: 2-52 PM □ Email fearer 0 View Bhacker Bill: denot % ∨ ■	No data available
Sage Integration	Address 1: Street 1	Your Invitation Code Redeem on Our Portal CRM:0256003 Helln Rahul Rai	
	Address 1: Street 2	We are pleased to provide you with your unique invitation code.	
Sales	Address 1: Street 3	Please Click Here to redeem you invitation to the portal.	

Creating Currency: -

- Open Construction BT model driven app.
- Go to Settings>Currencies and click on New.

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Pinned V	Currency Name 1 ~	Currency Code $^{\vee}$	Currency Symbol ~	Exchange Rate $^{\vee}$	Currency Precision ~
Organizational Units	British Pound	GBP	£	1.000000000000	2
Invoice Frequencies	US Dollar	USD	\$	0.76000000000	2
Recurring Invoice Set					
Calendar Templates					
Currencies					
	Rows: 2				
Settings 🗘					

• Fill in the details such as Base Currency, Exchange Rate and click on Save and Close.



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S Currencies	Currency Details Currency Code Currency Name Exchange Rate	GBP Pound Sterling 1.0000000000	Currency Precision Currency Symbol	2 £	
5 Settings					

Creating Organizational Units: -

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neral	□ Name ↑ ∽	Description ~
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Invoice Frequencies	ProjectSync Organizational Unit	ProjectSync Organizational Unit
Recurring Invoice Set	t202409260019zc579ed0b3c62e7ca	t202409260019zc579ed0b3c62e7ca
Calendar Templates	Testing 1 Organizational Unit	Testing 1 Organizational Unit
Currencies	Testing 2 Organizational Unit	Testing 2 Organizational Unit
	Romer 5	

• Go to Settings>Organizational Units and click on New.

• Fill in details such as Name, Currency and click on Save and Close.



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© Recent ∨ ☆ Pinned ∨	New Organizational Unit - Unsaved	
General	General Budget Period Scheduling	
Organizational Units Invoice Frequencies	Name * Testing 1 Organizational Unit Timeline	
Calendar Templates	Description Testing 1 Organizational Unit	
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	Almost there Select Save to see your timeline.	
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Creating Roles: -

• Go to Resources>Roles and click on New.

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Resources	Name ↑ × Billing Type × Description ×
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C Schedule Board	Developer Chargeable
RE Requirements	Project Manager Chargeable
e ^q Bookings	Team Member Chargeable
Settings	
🖺 Roles	
A Skills	
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R Resources	Rows: 4

- Fill in the details such as Name, Target Utilization and Billing Type.
- Click on Save and Close.



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Resources	General	
🖹 Resources		
Schedule Board	Name * Developer	
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gr Bookings	Description	
Settings		
윤 Roles	larger Guitzaubri 100	
욘 Skills	Billing Type Chargeable 🗸	
☆ Proficiency Models		
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R Resources		

Creating Bookable Resources for contact: -

• Go to Resources>Resources and click on New.

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Schedule Board	Aditya Reddy	Contact
R≡ Requirements	Amal Raj	Contact
я ^д Bookings	BJamie Robert	Contact
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A Roles	D.Robert Hook	Contact
욘 Skills	Danish D	Contact
☆ Proficiency Models	Generic Resource	Generic
	Kalle Aditya Sai Raj Reddy	User
	Rahul Raj	Contact
	🗌 Sai Raj	Contact
R Resources	Rows: 13	

• Fill in the details such as Resource Type, Contact, etc. And click on Save.



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図 Schedule Board RE Requirements x ^A Bookings Settings Bookings A Roles A Skills ☆ Proficiency Models	Resource Type * D Contact Contact * RabuLRaj × Type of Worker Employee Name * RabuL Raj Time Zone * (GMT) Coordinated Universal Time	
R Resources		

• Now, go to Project Service and Click on Ellipse in Resource Role Sub grid and click on new bookable resource category.

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	1-1of1	${ m I} \triangleleft \ \leftarrow \ { m Page 1} \ ightarrow$
R Resources		

• Fill in the details such as Resource Category and click on Save and Close.



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R Resources									

- Go to Work Hours click on new select Working hours.
- Fill in the details as per requirement and click on Save.

Dynamics 365 P	rojectSync 365		SANDB	OX		Working hours	×
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Requirements	🕆 + New 🗠 🗊 Today	↑ ↓ December 2	1024 V 🛅 Month V	Thursday	Eviday	choose an end date Repeating events will not overwrite single occurring events	
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≗ Skills ☆ Proficiency Models	2 9:00 AM Working Q	3 9:00 AM Working 📿	4 9:00 AM Working C	5 9:00 AM Working 2	6 9:00 AM Working C	Time zone	
	9 9:00 AM Working C	10 10:00 AM Working 📿	11 10:00 AM Working C	12 10:00 AM Working 2	13 10:00 AM Working <i>C</i>	Observe Business Closure	
R Resources	16	17	18	Dec 19	20	Save Cancel	

• Click on Save and Close.



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Resources	General Project Service	Scheduling Work H	ours Omnichannel	Related \checkmark			
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g ^A Bookings	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Settings	Nov 25 9:00 AM Working C	26 9:00 AM Working 📿	27 9:00 AM Working 📿	28 9:00 AM Working C	29 9:00 AM Working C	30	Dec 1
& Roles							
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	9	10	11	12	13	14	15
	9:00 AM Working \square	10:00 AM Working \square	10:00 AM Working \square	10:00 AM Working $ \mathbb{C} $	10:00 AM Working \square		
R Resources	16	17	18	Dec 19	20	21	22

Creating Pricelists: -

• Go to Project>Price Lists and click on New.

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My Work	Name ⊢ *	Currency *	Start Date *	End Date *
Dashboards	CMC Sol Cost Price List	US Dollar		
Time Entries	CMC Sol Sales Price List	US Dollar		
D Approvals	ProjectSync 365 Cost Price List	US Dollar		
Approved Time	ProjectSync 365 Sales Price List	US Dollar		
Weekly Timesheets	Testing 1 Cost Price List	Pound Sterling		
Monthly Timesheets	Testing 1 Sales Price List	Pound Sterling		
Projects	Testing 2 Cost Price List	Pound Sterling		
🖽 Projects	Testing 2 Salas Brice List	Pound Starling		
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Resources				
& Roles				
Price Lists				
P Project 🗘	Rows: 8			

• Fill in the Details such as Name, Context, Currency, OOH1, OOH2 and Time Unit. Click on Save.



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© Recent ∨ ☆ Pinned ∨	Testing 1 Cost Price List - Saved Price List	Active V Status	
My Work 泰 Dashboards	General Role prices Role price markups Category prices Material prices Territory Relationships Related \vee		
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部 Projects 窗 Schedule Board	Currency * a <u>A Pound Sterling</u>		
Resources	OOH2 Percentage * 50.00		
Price Lists Project			
Go to	Role Prices click on New Role Price.		
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S Recent ✓	Testing 1 Cost Price List - Saved Active Price List Status	~
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の Dashboards		
Time Entries	+ New Role Price D Update Prices	
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Approved Time	□ Overrides × Bole 1 × Becource × Becourcing × Unit × Brice cal × Markup × Brice × Currency × Description ×	-
Weekly Timesheets	Overlides - Role - Resource - Resourcing Onic - Price Cat Markup Price - Carrenky - Description -	
Monthly Timesheets	Business Testing 1 Org Hour Price p £30.00 Pound St	
Projects	Developer Testing 1 Org Hour Price p £40.00 Pound St	
The Projects	▷ Project M Testing 1 Org Hour Price p £50.00 Pound St	
Schedule Board		
Resources		
8_ Roles		
Price Lists		
P Project		

- Fill in the details such as Role, Resourcing Unit, Unit and Price.
- Click on Save.
- Associate the cost price list with organizational units.

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☆ Home		
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문 Dashboards		
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D Approvals		
Approved Time	Role 🖾 Developer × 🔎	
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🖽 Projects	Description	
Schedule Board		
🖹 Resources		
A Roles	Pricing	
Price Lists	Price £40.00	
P Project 🗘	Currency & Pound Sterling × P	

• Similarly Add Role Prices to required resources.

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☆ Home								
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Monthly Timesheets	□ >	Business	Testing 1 Org Hour	Price p	£30.00	Pound St		
Projects	□ >	Developer	Testing 1 Org Hour	Price p	£40.00	Pound St		
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12 Projects								
Scriedule Board								
En Resources								
🛆 Roles								
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P Project								

• Similarly Create a sales Price List and assign the role prices to the price list.



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Projects	Zone Independent)								
🖽 Projects	Currency * 🗄	& Pound Sterling							
Schedule Board	OOH1 Percentage	25.00							
Resources	OOH2 Percentage	54 AA							
A Roles	OOH2 Percentage	50.00							
Price Lists	Time Unit	Hour ×	9						
P Project 🗘									

Creating Calendar Template: -

• Go to Settings>Calendar Templates and click on New.



• Fill in the details such as Name, Template resource and click on Save and Close.



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西 Organizational Units						
Invoice Frequencies	Name *	Default Work Template		Timeline	+ 0 4 1 0	
않 Recurring Invoice Set	Description	Default working time - 9.4 M to 5 P.M		\mathcal{P} Search timeline		
Calendar Templates		Delaut working time - 9 A.M. to 5 F.M.		Enter a note		Û
& Currencies	Template Resource		Q			
	Owner *	Pradeep Turimella (Away) ×	Q			
					Get started	
				Capture and	manage all records in your timeline.	
S Settings						

Lead Generation and Qualification: -

• Open Sales>Leads and click on New.

	Focused view S Show Chart + New O Refresh Delete V Visualize this view S Email a Link V S Flow V :	Ъ
Recent	My Open Leads \lor Bdit columns \checkmark Edit filters \checkmark Filter by keyword	
My Work	Name × Topic × Status Reason × Created On ↓ ×	
## Dashboards		
Customers		
Customers		
A Contacts		
Sales		
& Leads		
Opportunities		
🗟 Quotes	We didn't find anything to show here	
Project Contracts		
Billing		
lnvoices		
Sales	NUVIS: U	

• Fill in the Summary Details and click on Save.





Opportunity is created: -

- Opportunity is created in Opportunity Entity.
- Fill in the details of summary tab and click on Save.

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• Go to Opportunity Line and click on Add New Opportunity Line.

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- Fill in the details such as Name, Budget, Billing Method.
- Click on Save and Close.



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Create a Quote: -

• Now, go to Quotes and click on New Quote.

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• A Quote is created and click on Save.





Creating Project: -

- Click on Qualify and Change the Identify Stakeholder field value to yes.
- Click on the next stage and click on the create button.

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• Fill in the details such as Name, Customer, Client Project Name, Contracting Unit, Calendar Template and Start and End Date.



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- Project will be created.
- Now, go to Tasks and click on Add new task and create tasks.
- Make the tasks as Sub Tasks by clicking on the 3 dots.

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• Click on Assigned to symbol and click on Ellipse and click on Add generic resource.



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- Fill in the details such as Name, Role, Resourcing Unit, Start, Finish and Working Hours. • Click on Save and Close.
- Assign the Generic Resources to the Task.

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• Now, go to Team tab and select Generic Resources and click on Generate Requirement.



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Updating Quote Lines Detail: -

- Click on Develop and Change the Identify Tasks, Roles, and Generate Requirement field values to yes.
- Click on Next Stage you will be redirected to the Quote.

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• Go to the Quote Lines tab and open the Quote Line.

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• Head to Chargeable tasks and check if the tasks are updated or not.



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• Go to Quote Line details and click on Ellipse and click on Import from Project Estimates.

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- Check if Quote Lines Details are updated or not.
- Click on Save and Close.

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• Activate the Quote.





Creating Project Contract: -

• Project Contract is created in Project Contracts.



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• Click on the Invoice Schedule Tab and add the Invoice Frequency and Billing start Date and Click on Generate Invoice Schedule.



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Azure DevOps: -

• Project is created in the Azure DevOps after Project Contract is created.

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• The Project, Project Main Task and Project Sub Tasks are created in the backlog.

BLACKWATERTECH

Azure DevOps BlackwaterTechEast	/ Testing 1 Project / Boards / Backlogs	Q Search ﷺ ₫ © & KR
Testing 1 Project +	 As a stakeholder, you can access the backlog, task and Kanban boards, work items and manual statements. 	anage approvals for Releases. Learn more
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• The CRM is synchronized with Azure DevOps. If we update the Subtasks name and status in CRM it will update the related User Story.

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• For updating the Task status click on the info icon and click on View details you will be redirected to Task Record.





• Click on the dropdown and update the status and click on Save and close the Azure Devops status will be updated as well.

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Booking Resources: -

• Go to Project> Schedule Board and click on Book.



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- Select the Resources, Click on Book, and Fill in details such as Requirement, Start and End Date, Booking type, Status.
- Click on Book.

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• Similarly, Book the other Resources as well.

Time Entries, Weekly Time Sheets and Monthly Time Sheets: -

• Open Time Entries and click on new.





• Fill in details such as Project, Task and click on save and close.

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- Fill in Time Entries for Each day.
- Select the Time Entries and click on Submit.



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Weekly Time Sheets: -

- The Weekly Time Sheets are generated every Monday.
- These are the Weekly Time Sheets that are generated by the Flows.

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• The Project Manager Can Approve/Reject the Time Entry Submitted in the Weekly Time Sheet.



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Monthly Time Sheets: -

• These are the Monthly Time Sheets that are generated by the Flows.



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• The Advances and Retainers are also created by running the Monthly Timesheet (5) - Create Advances and Retainers for Order flow manually.

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Creating Invoice: -

- Go to Project Contracts and open the order and click on advances and retainers.
- Select the Advances and Retainers and click on Create Invoice.



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• Confirm the Invoice.



