Internal User / D365 Admin

ProjectSync 365

Created by: Blackwater Tech

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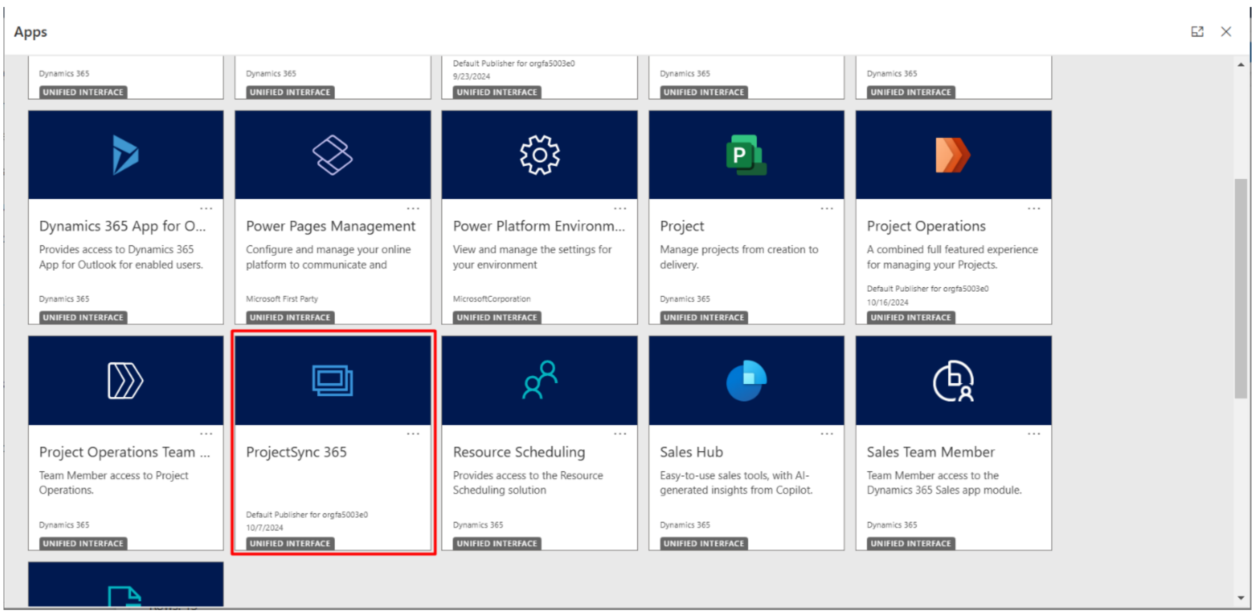
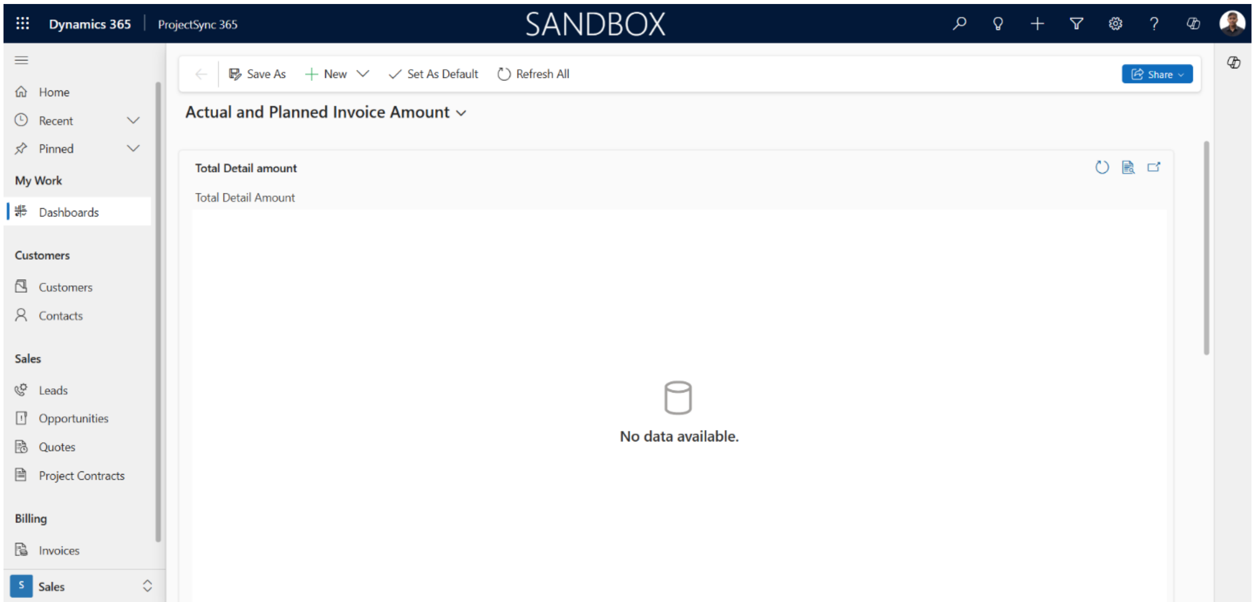
Following is the series of steps that outline the path a user takes to complete a specific business process. It provides a structured and guided experience for users to navigate through various stages of a process, ensuring consistency and efficiency in performing tasks.

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.

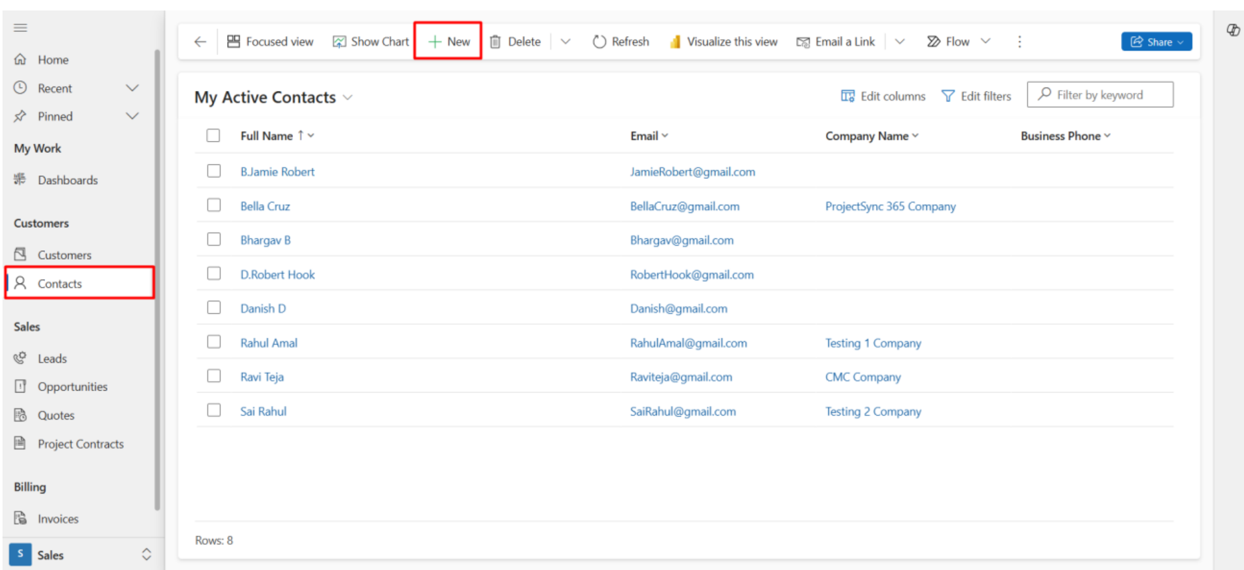


- You will be redirected to dynamics.



Creating Contact: -

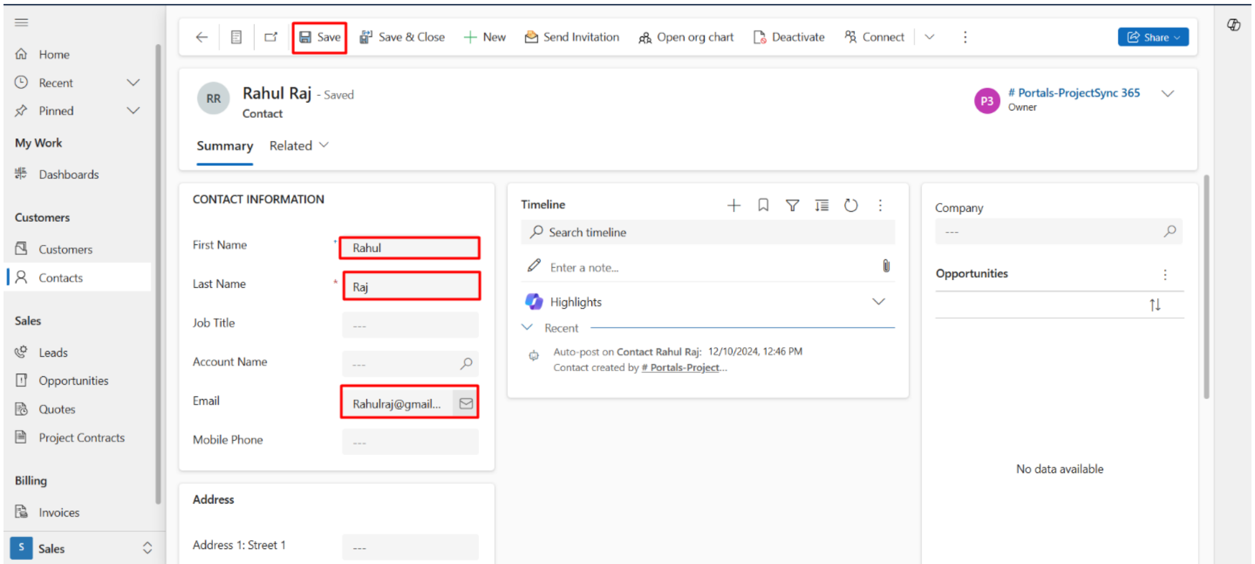
- Navigate to Contacts on the left panel.
- Click on New to create a new contact.



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

o Address

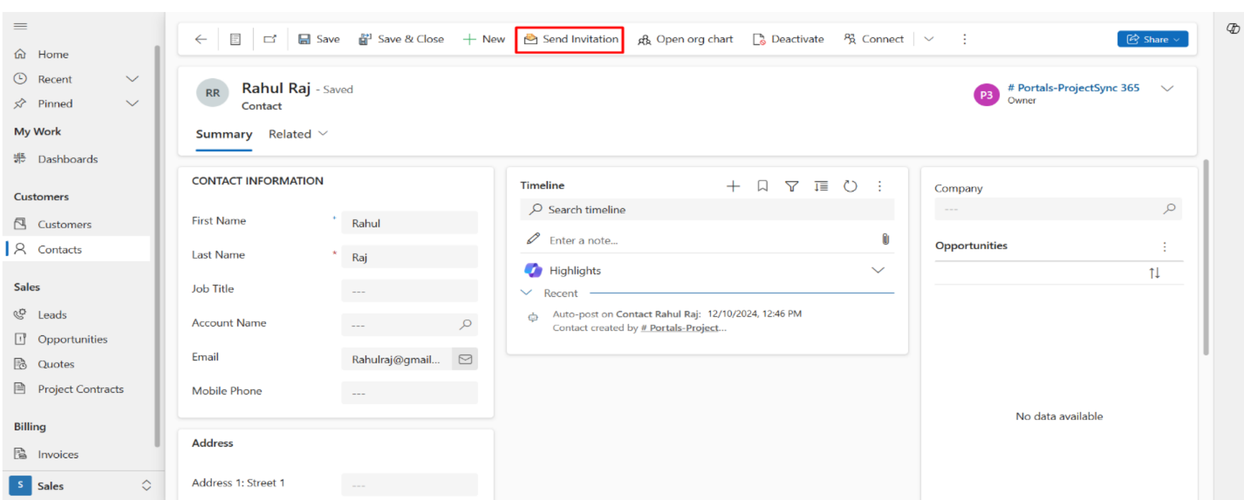
- Click on Save.



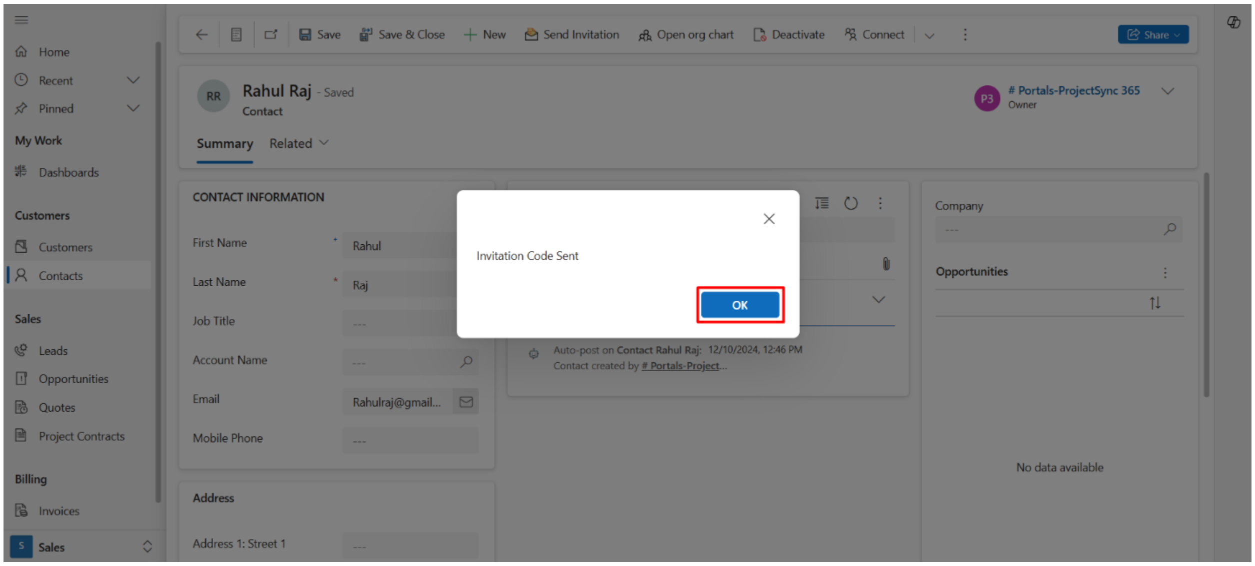
Send Portal Login Invitation to Contact: -

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

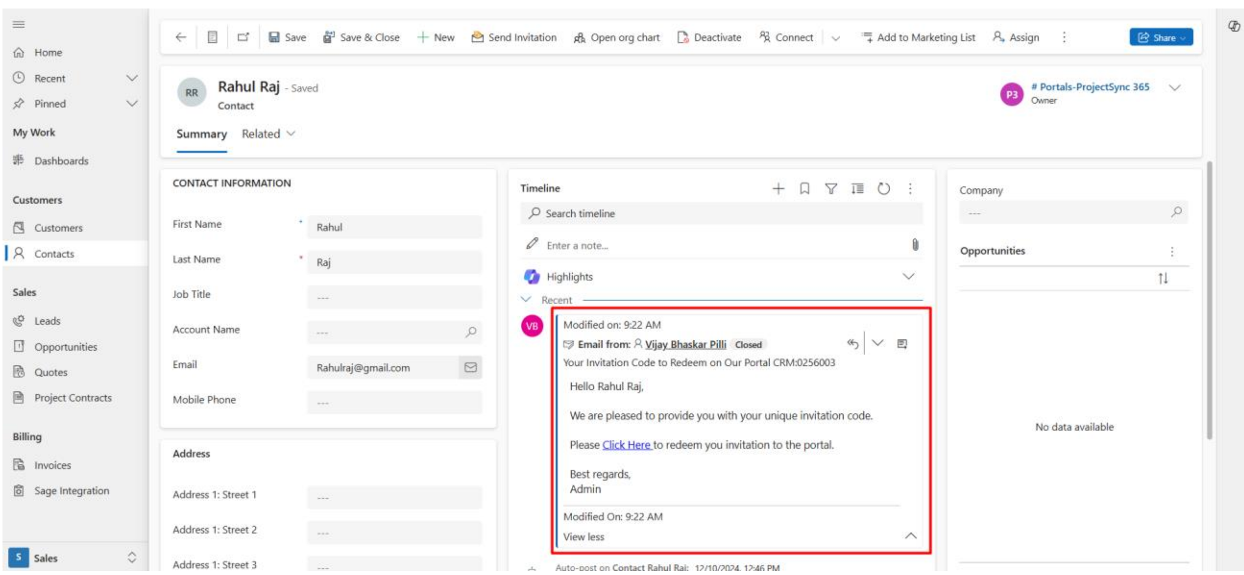
- In the contact details page, click on the Send Invitation button to send a portal invitation code to the contact so that the contact can redeem the code to login on the portal.



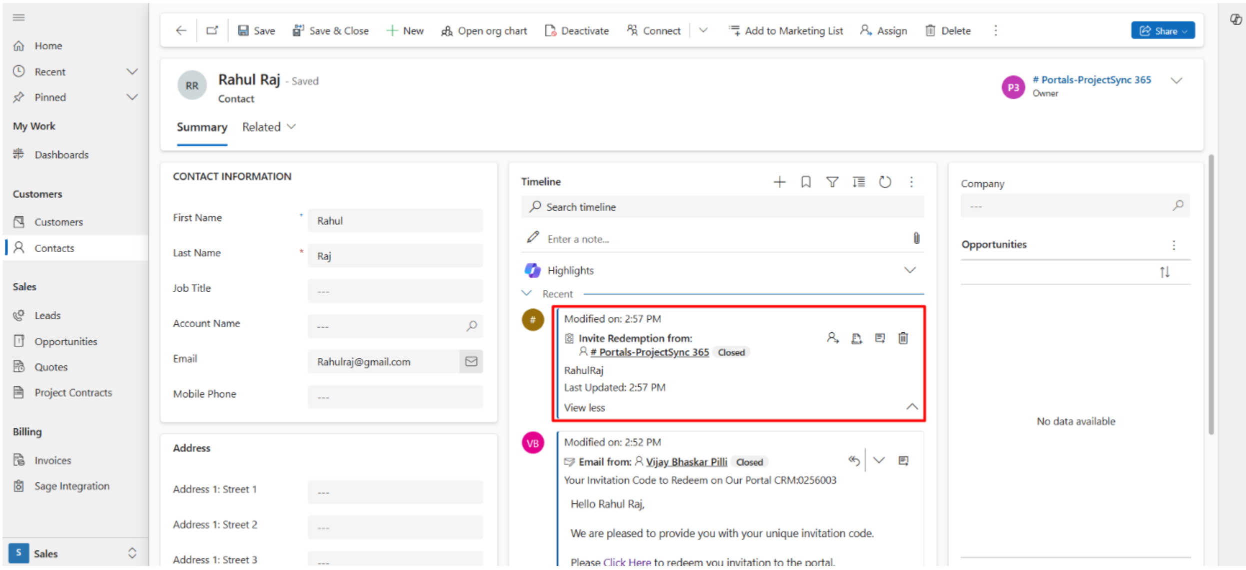
- A pop-up dialog box will be displayed saying that the invitation code has been sent. Click on Ok.



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

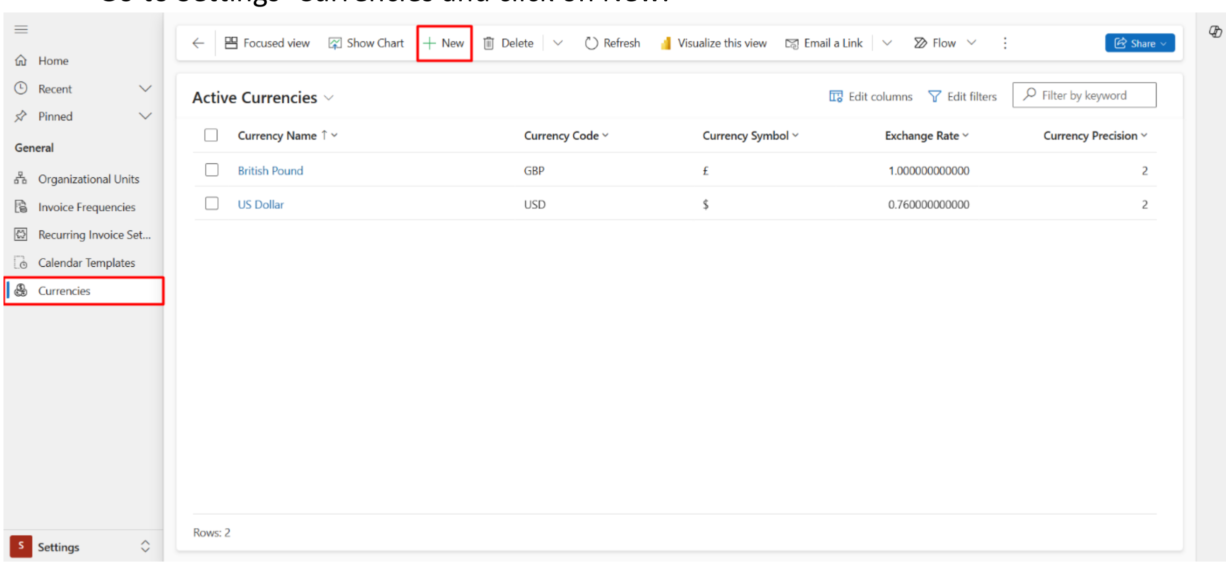


- On Successful redemption of the code by the contact, it will be updated in the timeline section.

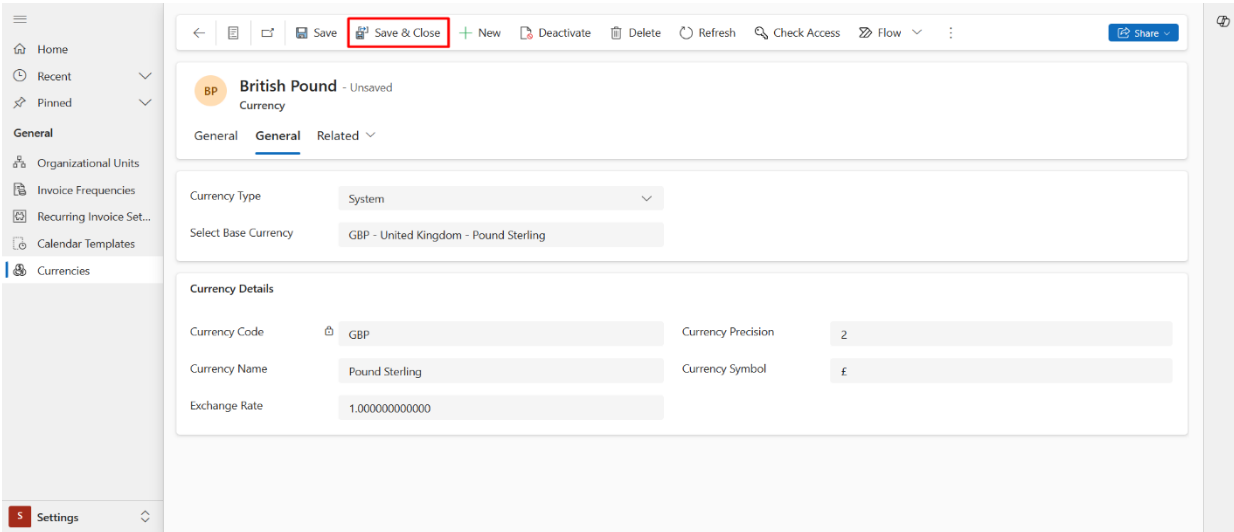


Creating Currency: -

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

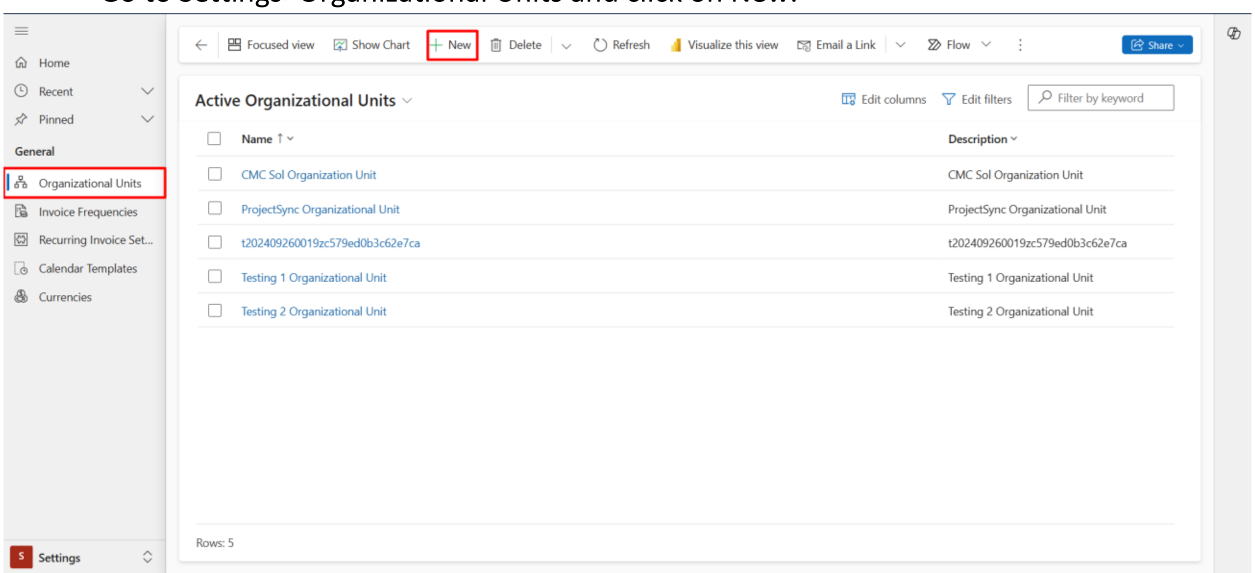


- Fill in the details such as Base Currency, Exchange Rate and click on Save and Close.

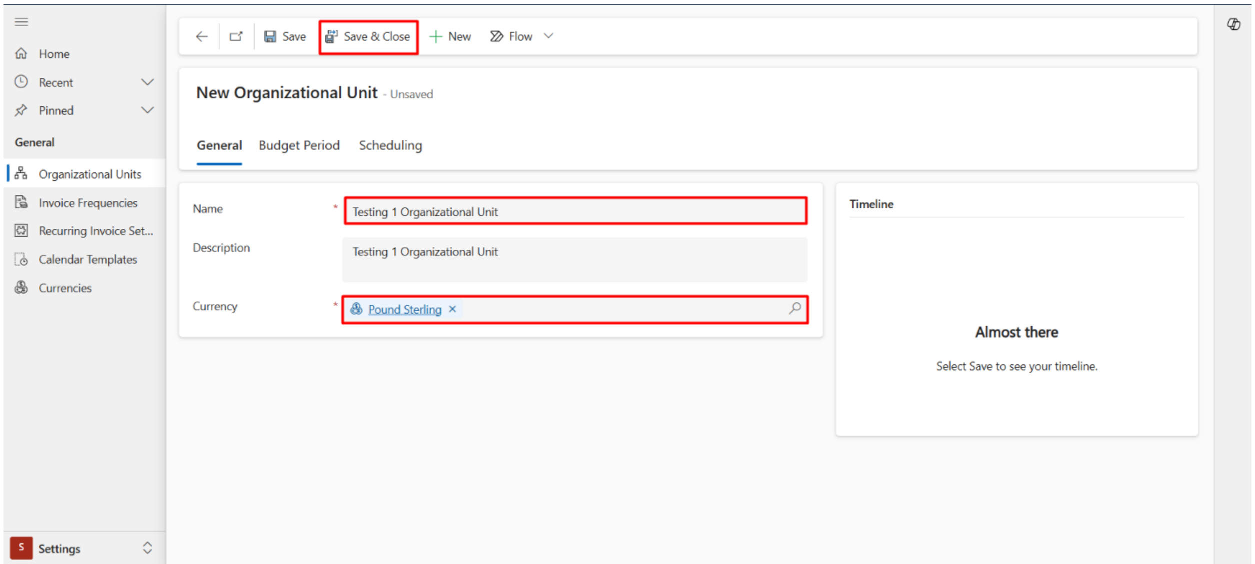


Creating Organizational Units: -

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

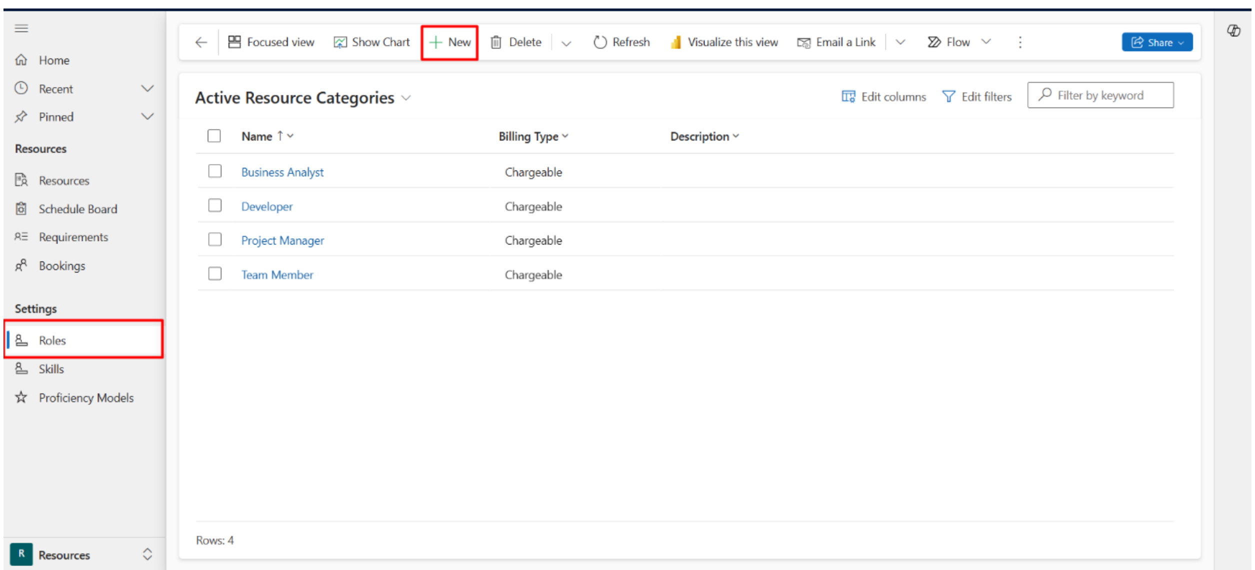


- Fill in details such as Name, Currency and click on Save and Close.

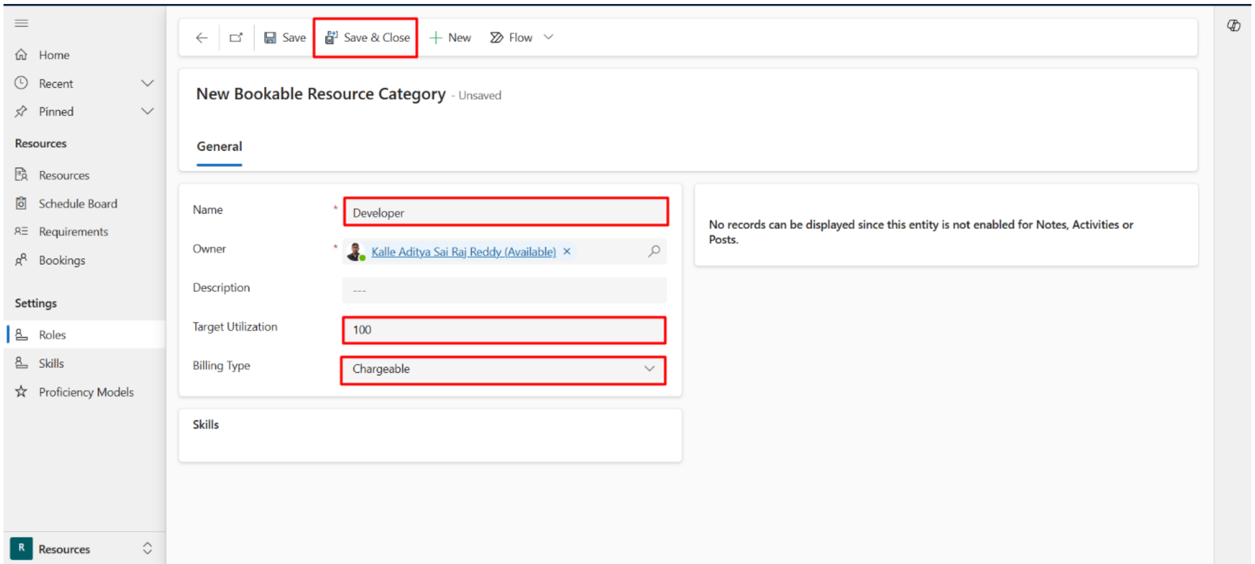


Creating Roles: -

- Go to Resources>Roles and click on New.

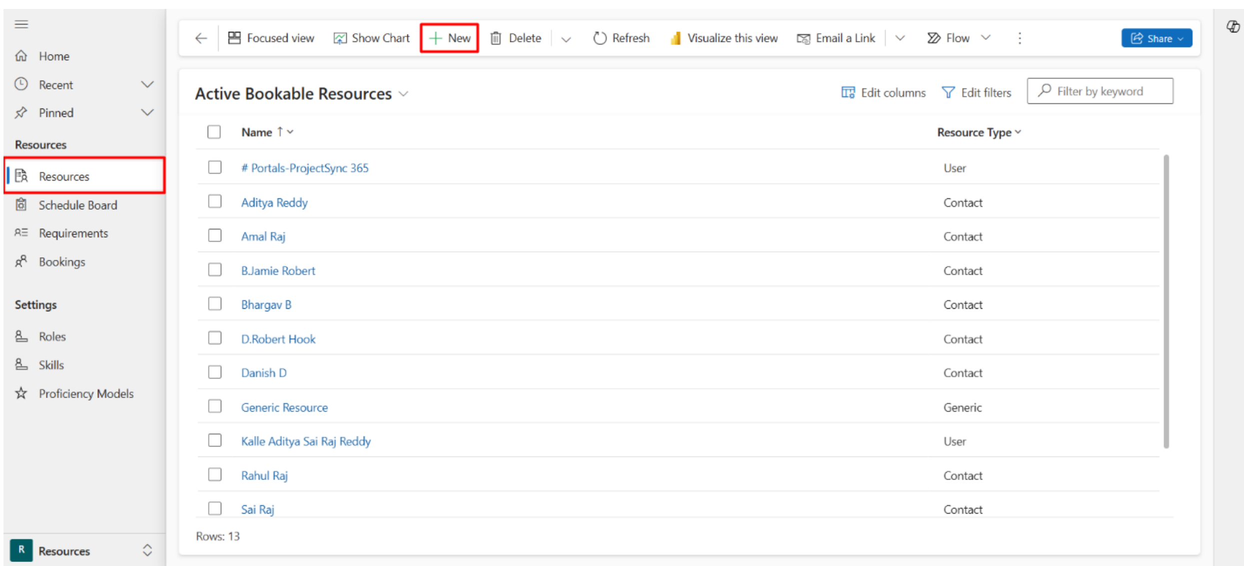


- Fill in the details such as Name, Target Utilization and Billing Type.
- Click on Save and Close.

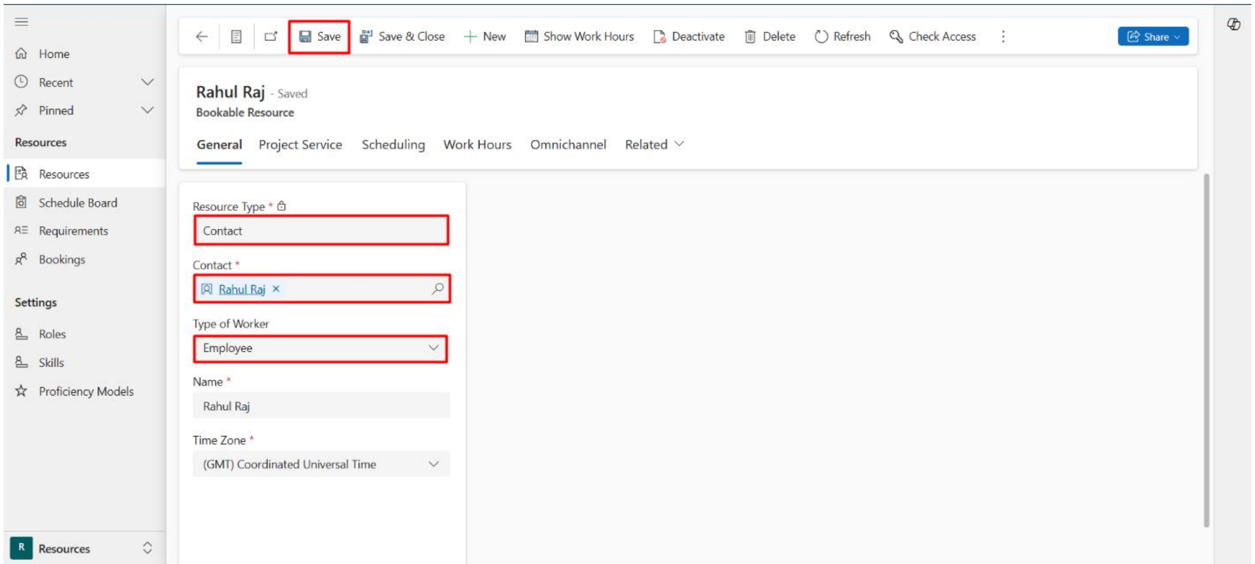


Creating Bookable Resources for contact: -

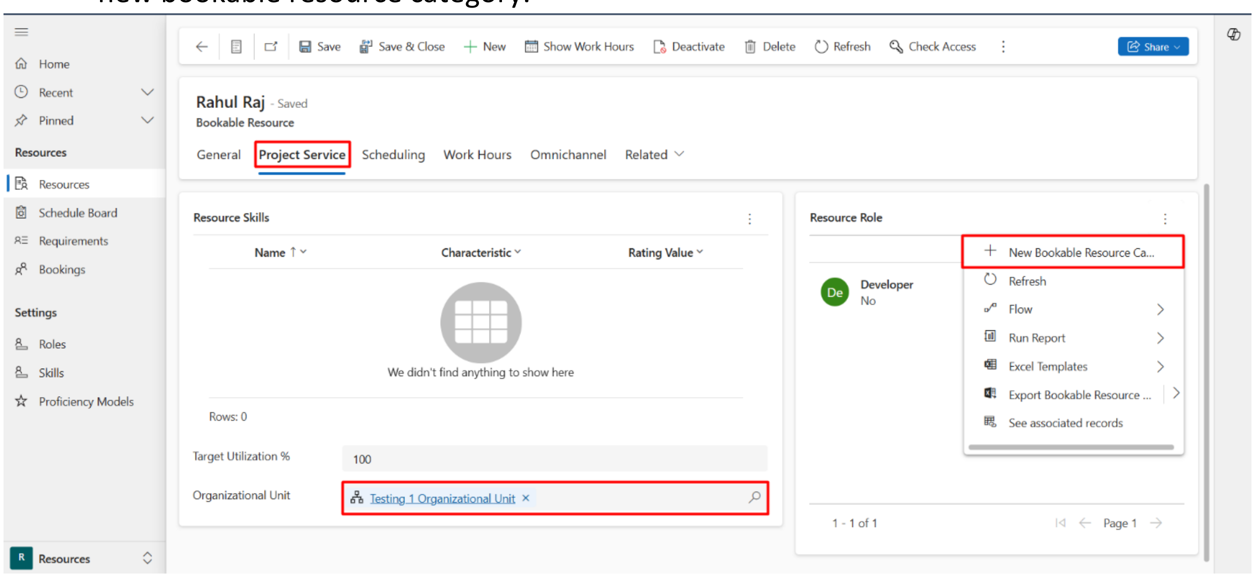
- Go to Resources>Resources and click on New.



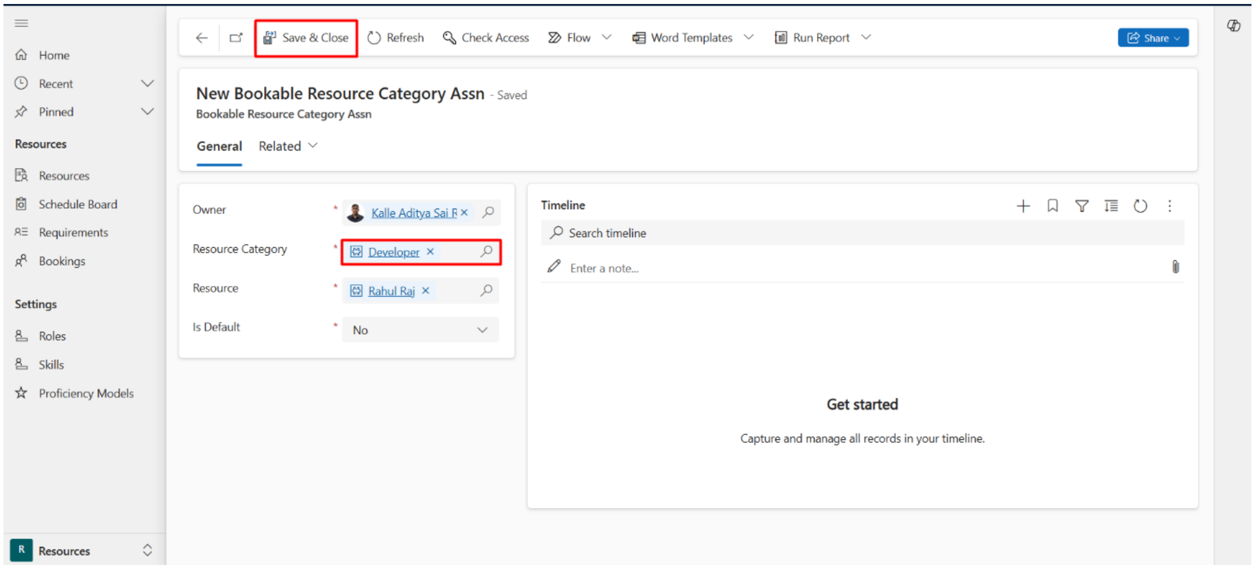
- Fill in the details such as Resource Type, Contact, etc. And click on Save.



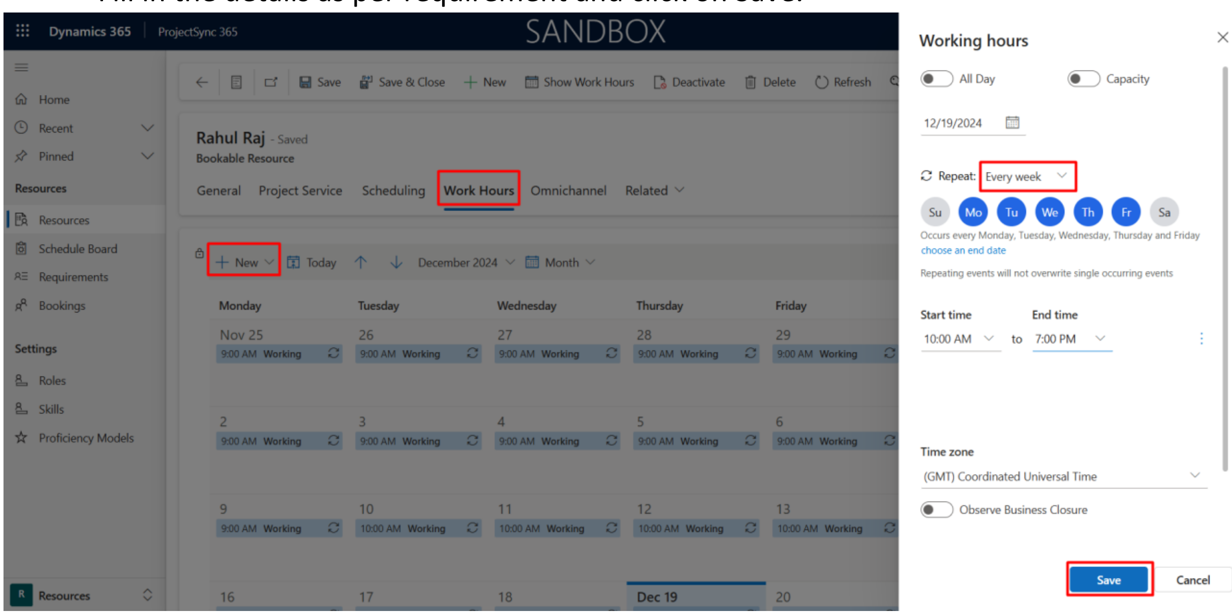
- Now, go to Project Service and Click on Ellipse in Resource Role Sub grid and click on new bookable resource category.



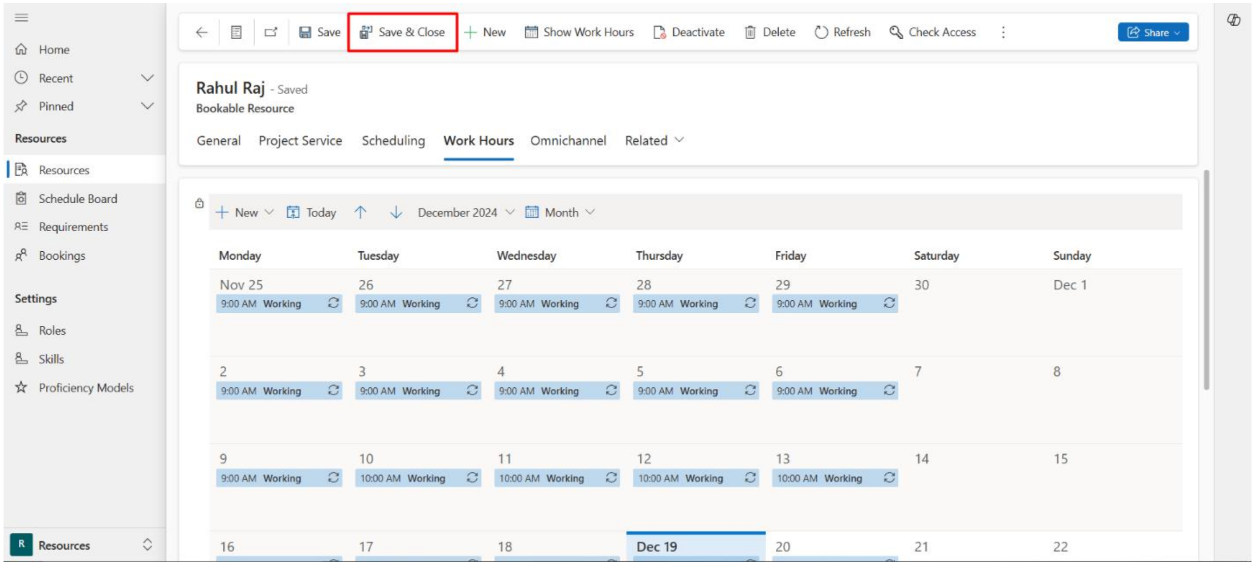
- Fill in the details such as Resource Category and click on Save and Close.



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

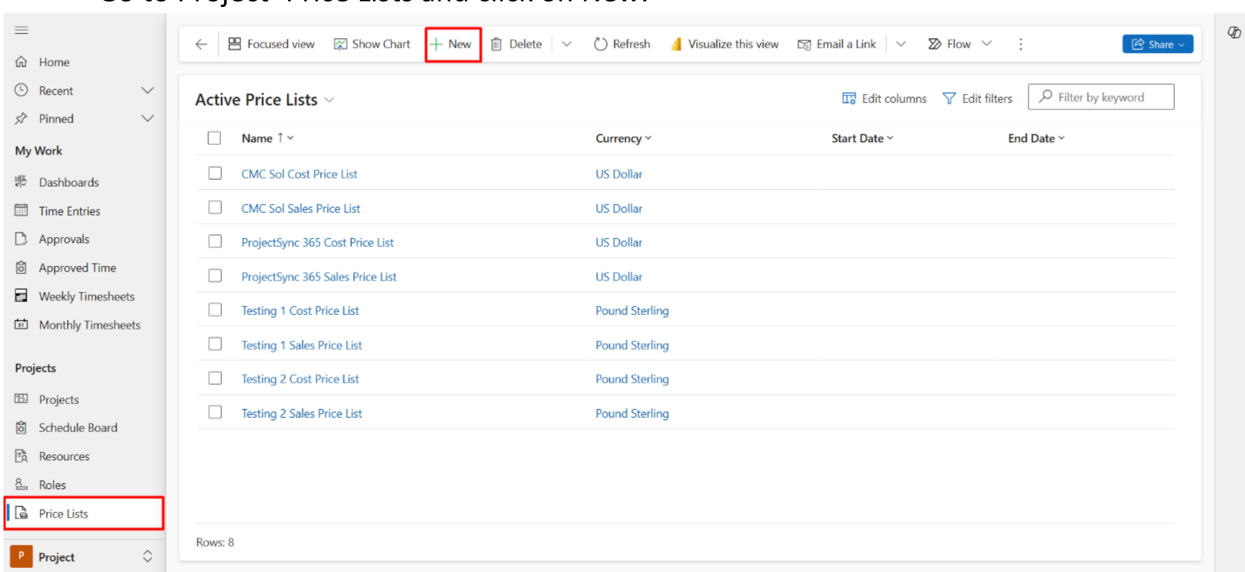


- Click on Save and Close.

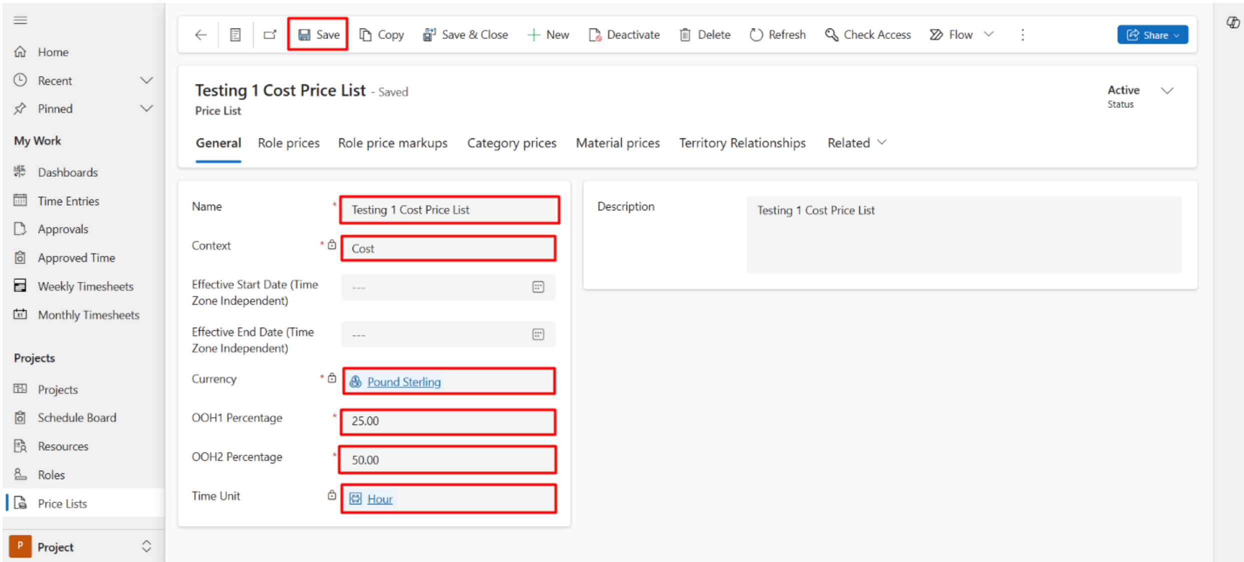


Creating Pricelists: -

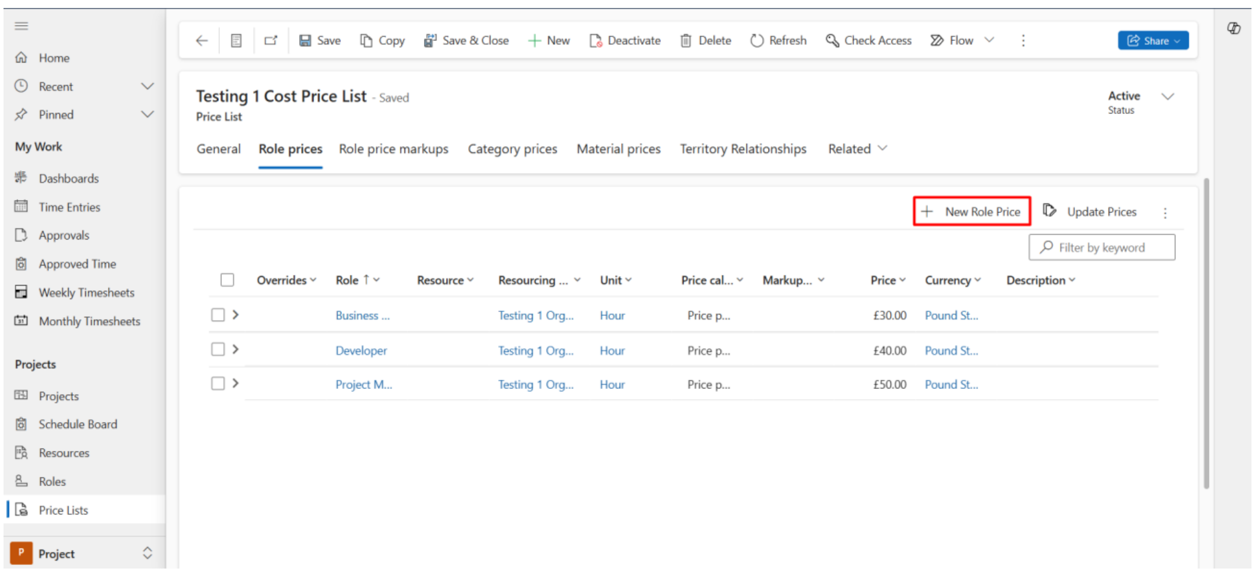
- Go to Project>Price Lists and click on New.



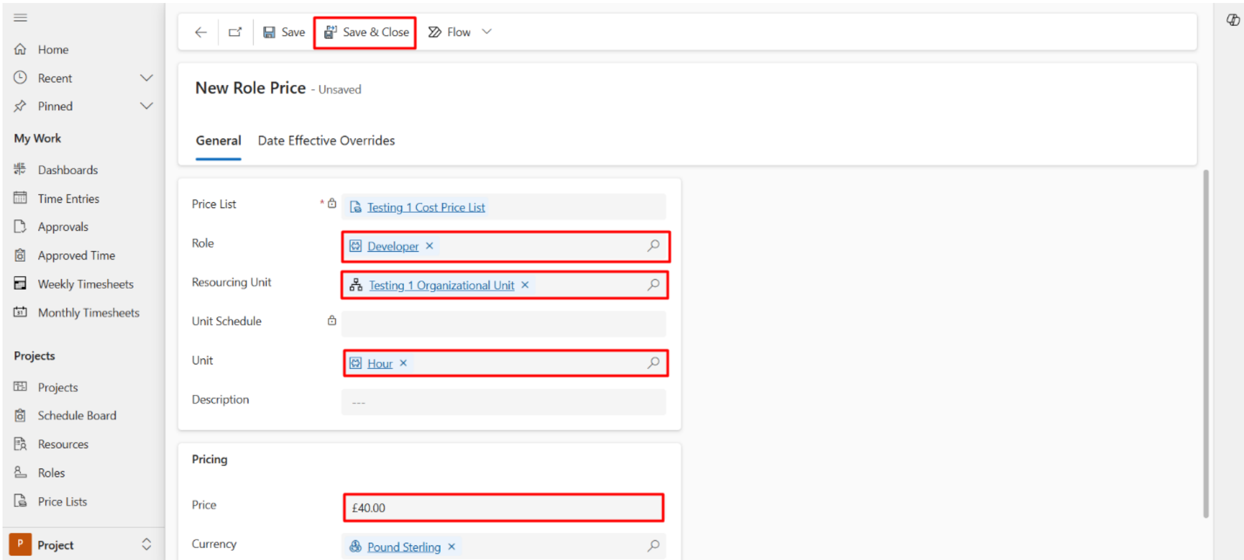
- Fill in the Details such as Name, Context, Currency, OOH1, OOH2 and Time Unit. Click on Save.



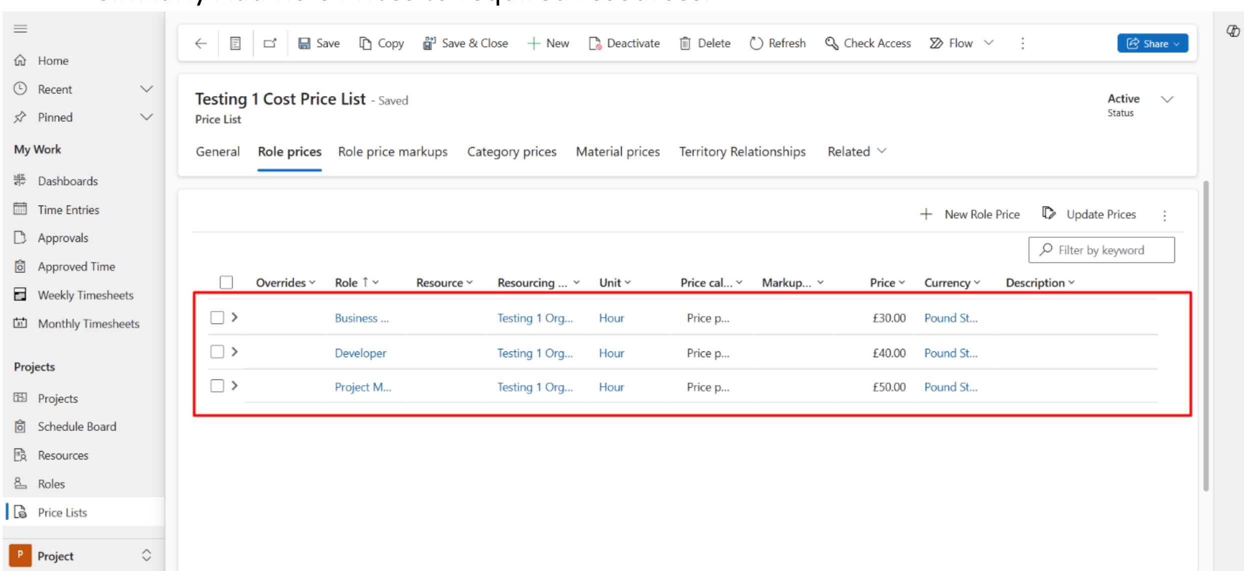
- Go to Role Prices click on New Role Price.



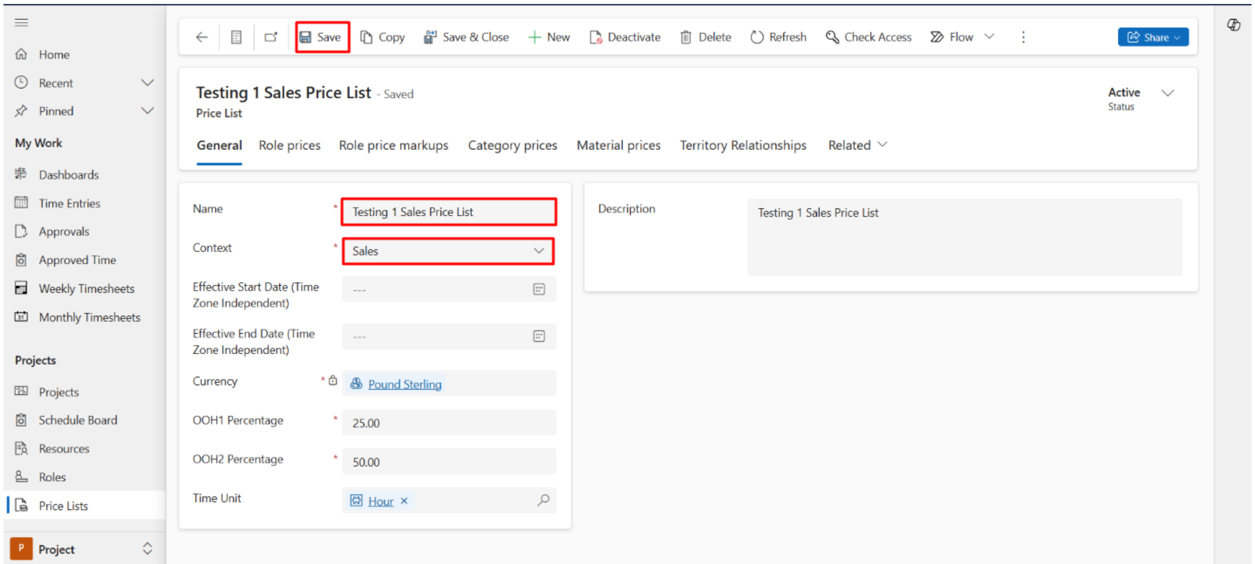
- Fill in the details such as Role, Resourcing Unit, Unit and Price.
- Click on Save.
- Associate the cost price list with organizational units.



- Similarly Add Role Prices to required resources.

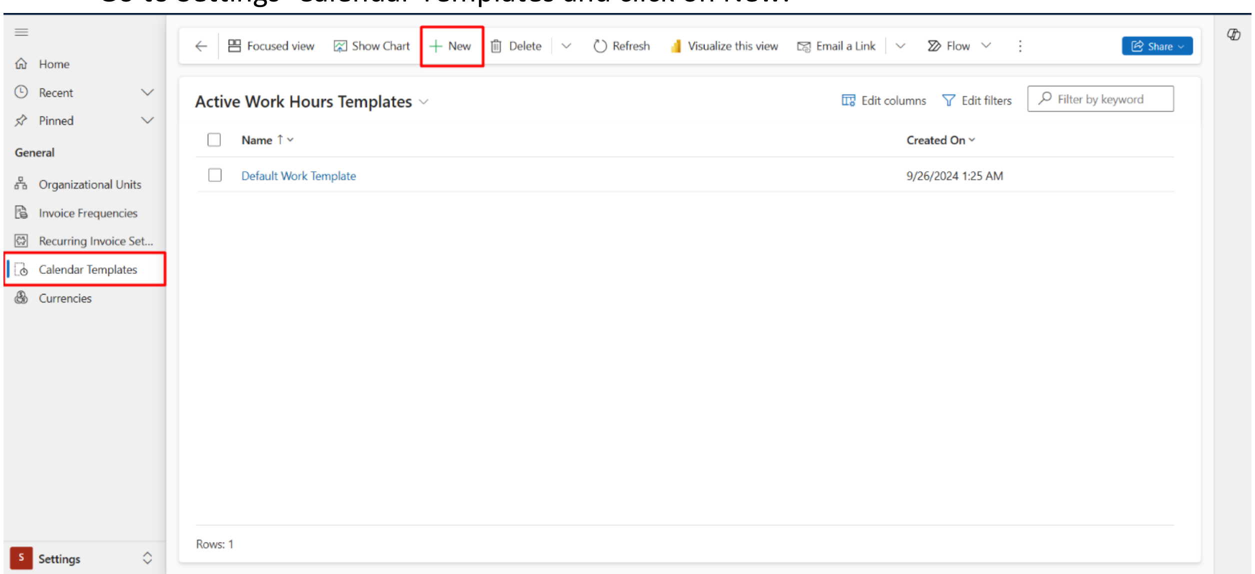


- Similarly Create a sales Price List and assign the role prices to the price list.

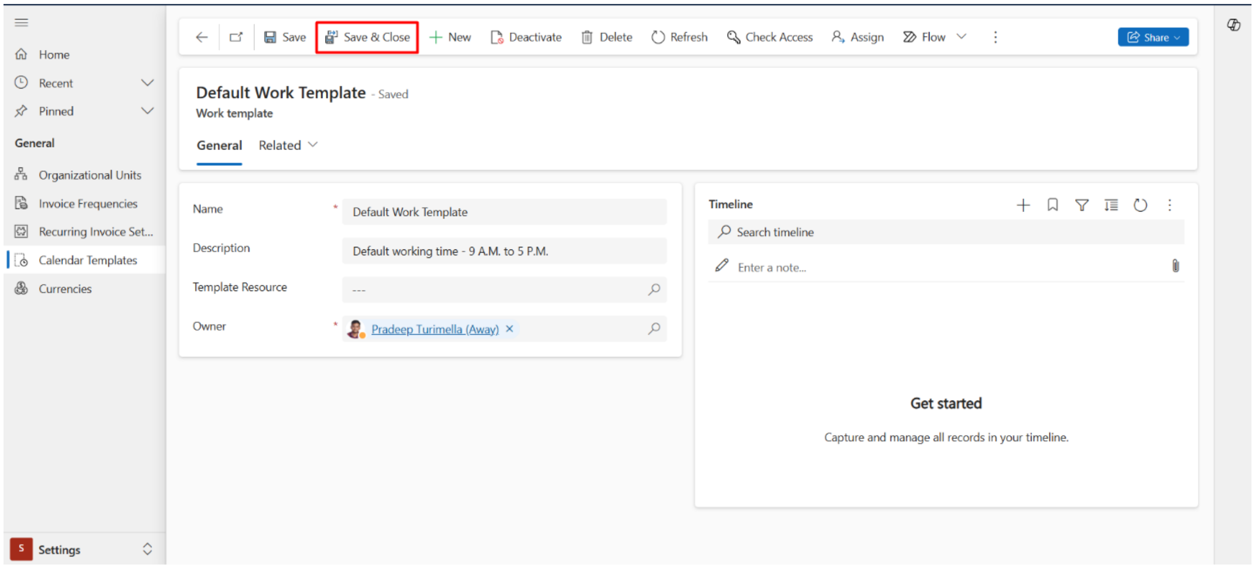


Creating Calendar Template: -

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

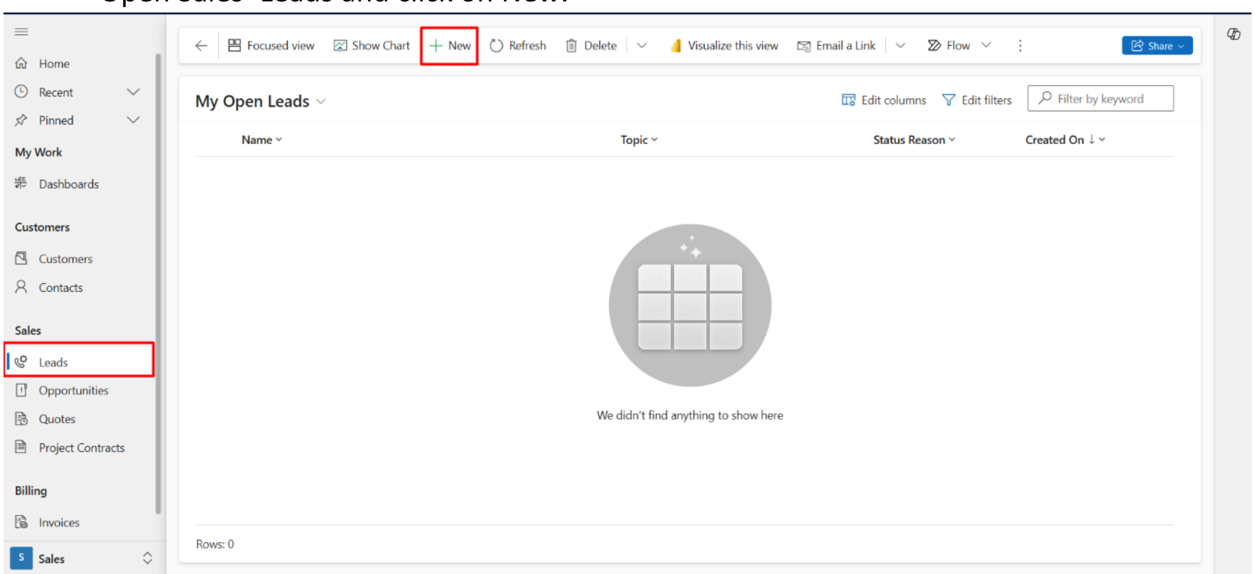


- Fill in the details such as Name, Template resource and click on Save and Close.

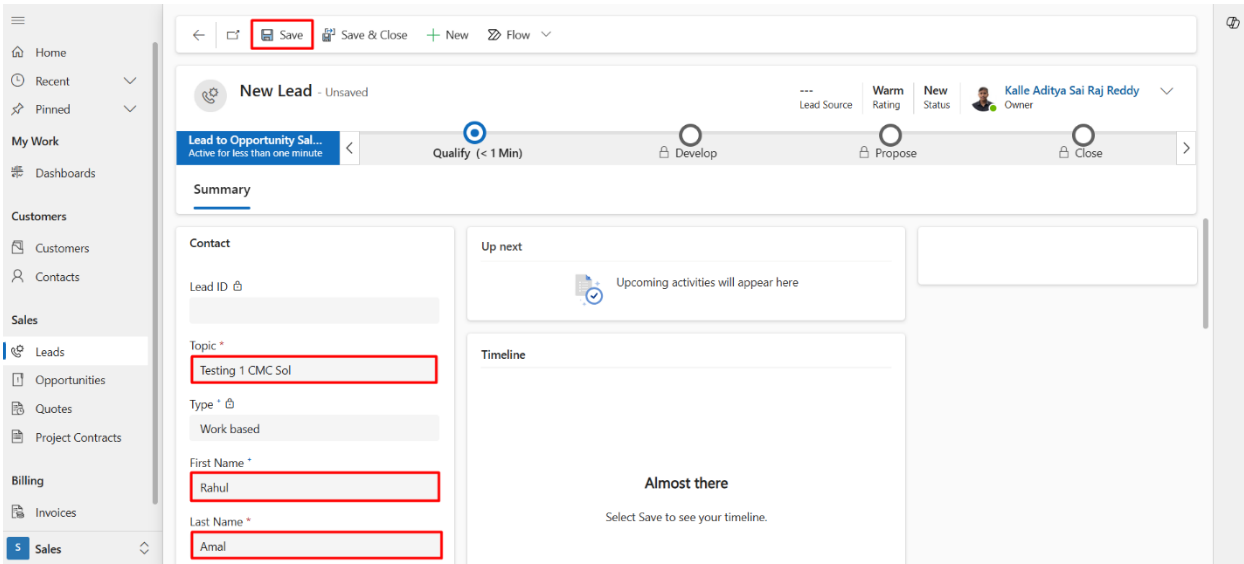


Lead Generation and Qualification: -

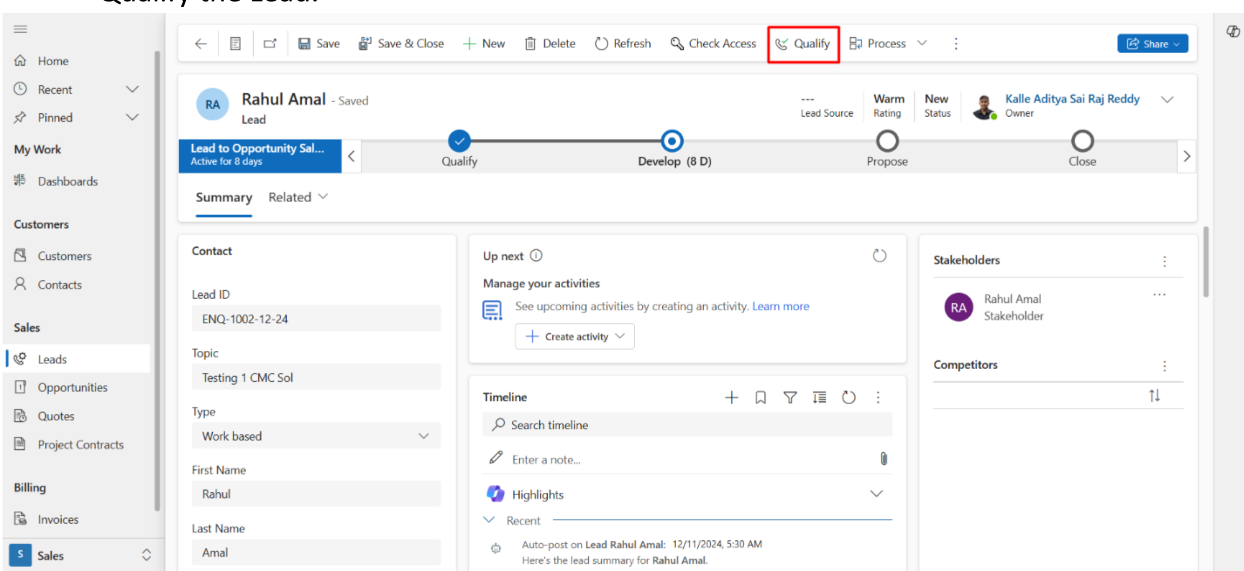
- Open Sales>Leads and click on New.



- Fill in the Summary Details and click on Save.

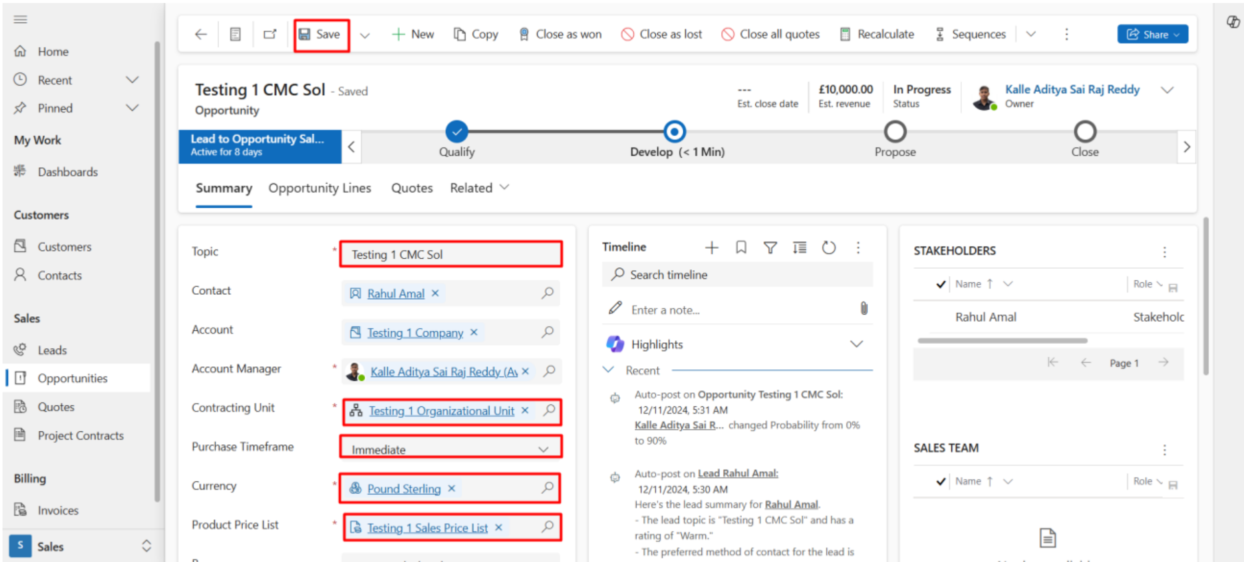


- Qualify the Lead.

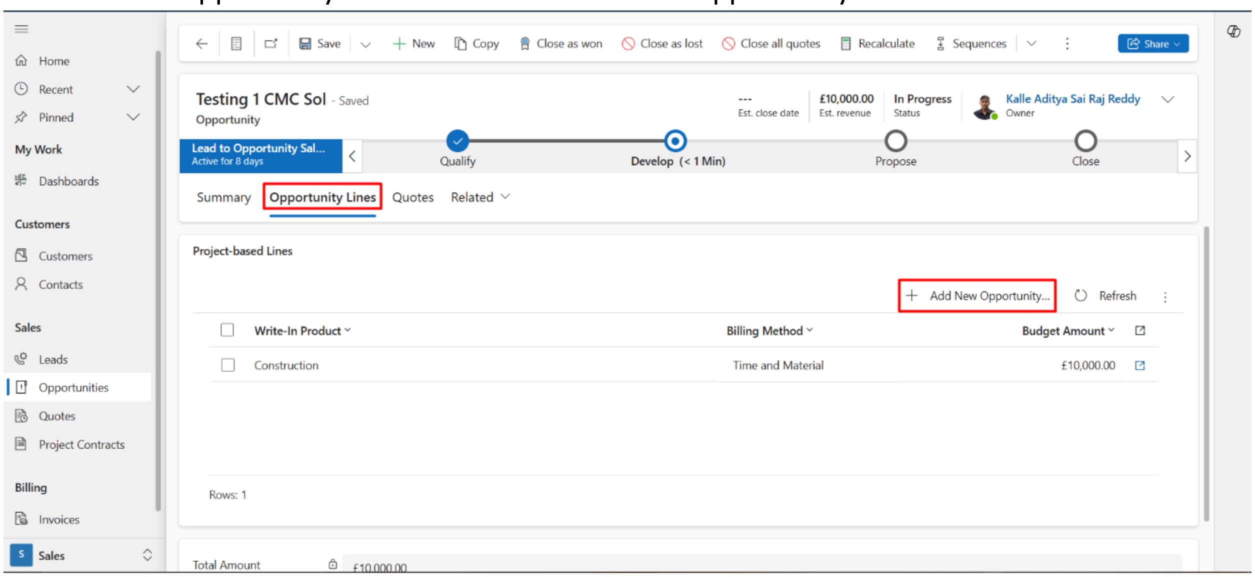


Opportunity is created: -

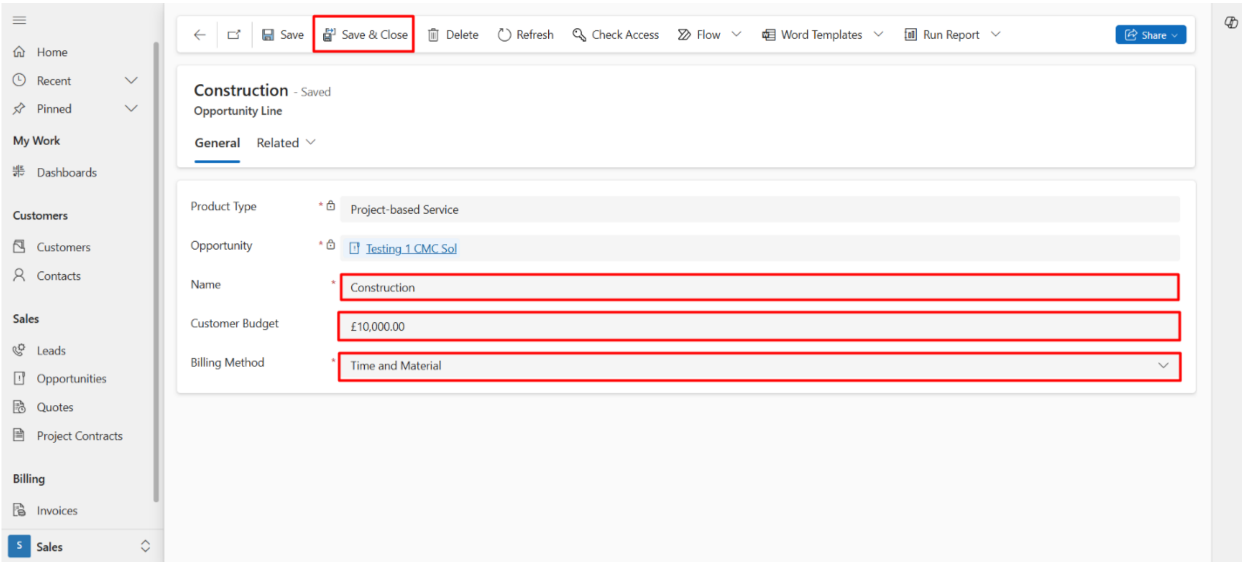
- Opportunity is created in Opportunity Entity.
- Fill in the details of summary tab and click on Save.



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

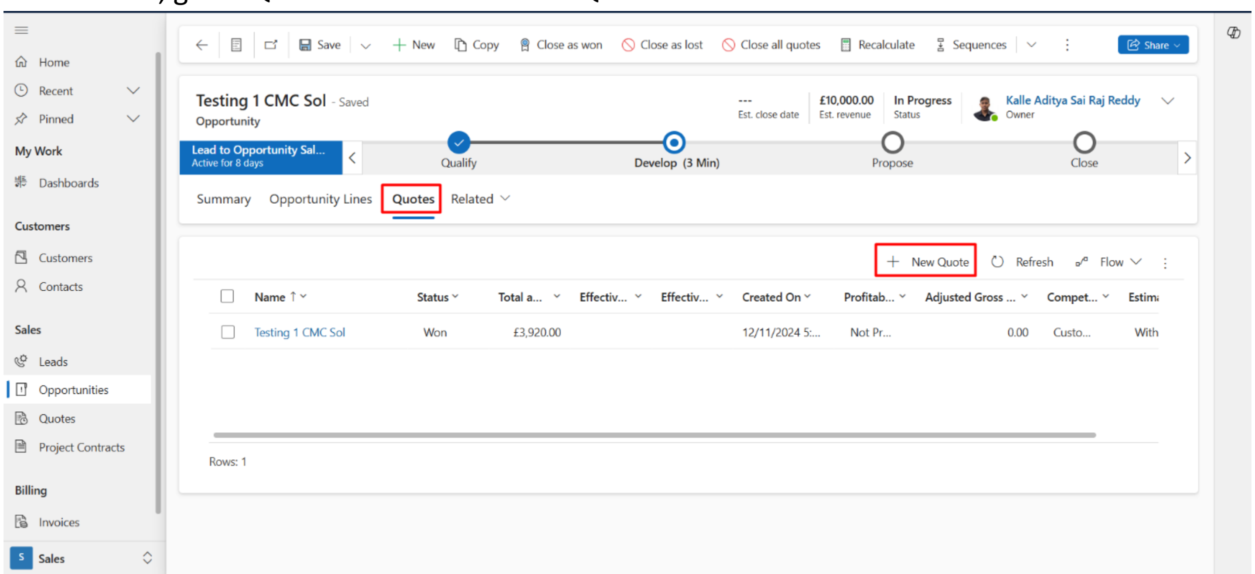


- Fill in the details such as Name, Budget, Billing Method.
- Click on Save and Close.

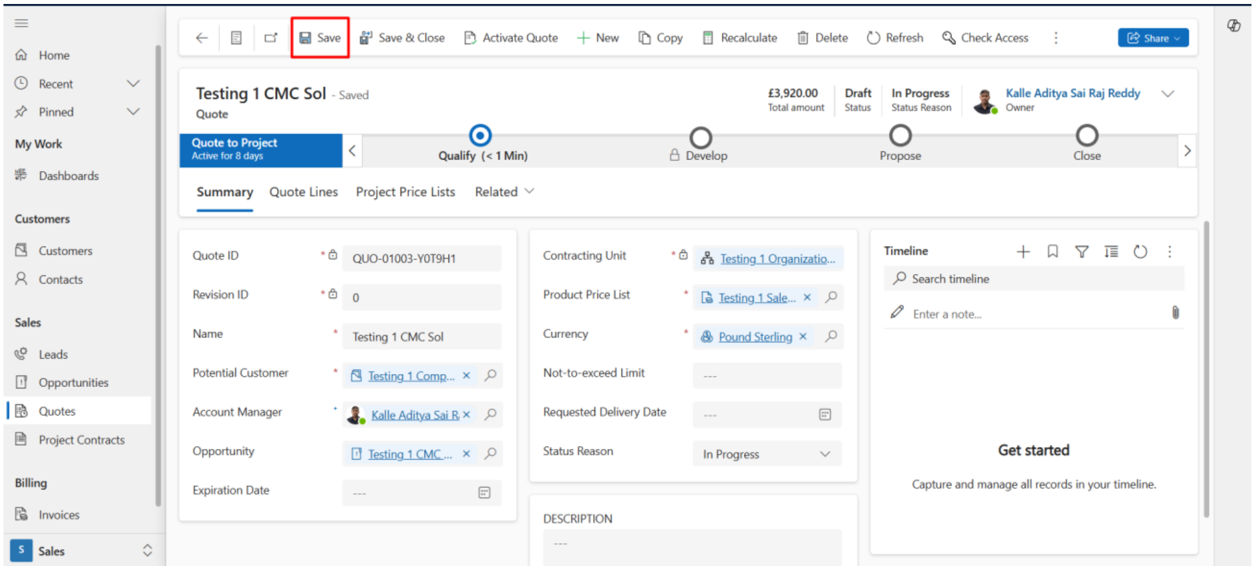


Create a Quote: -

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

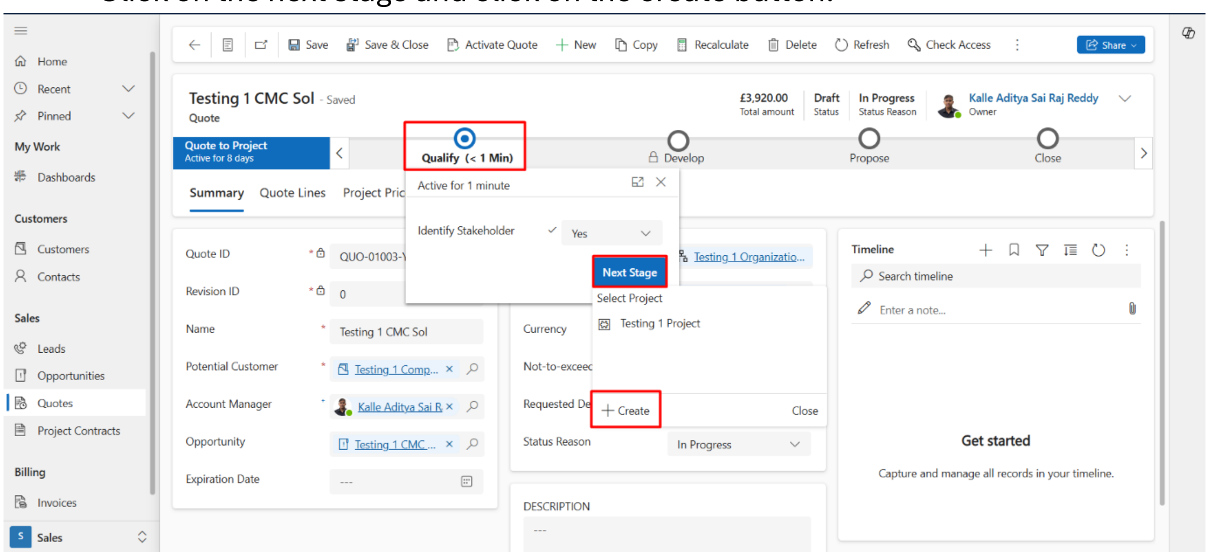


- A Quote is created and click on Save.

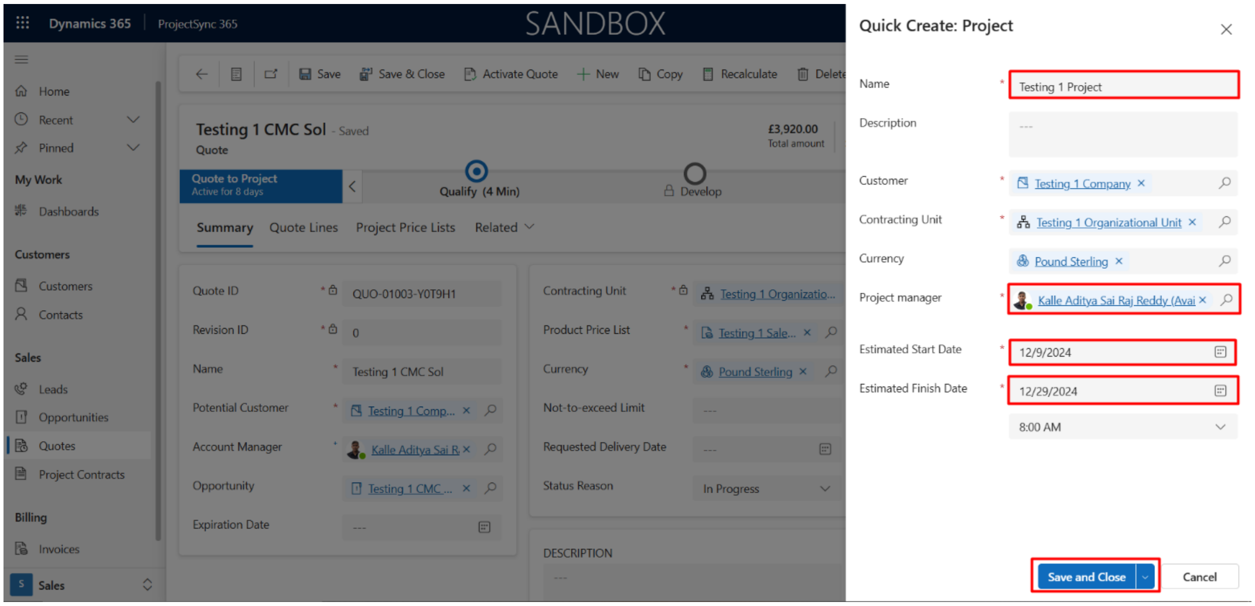


Creating Project: -

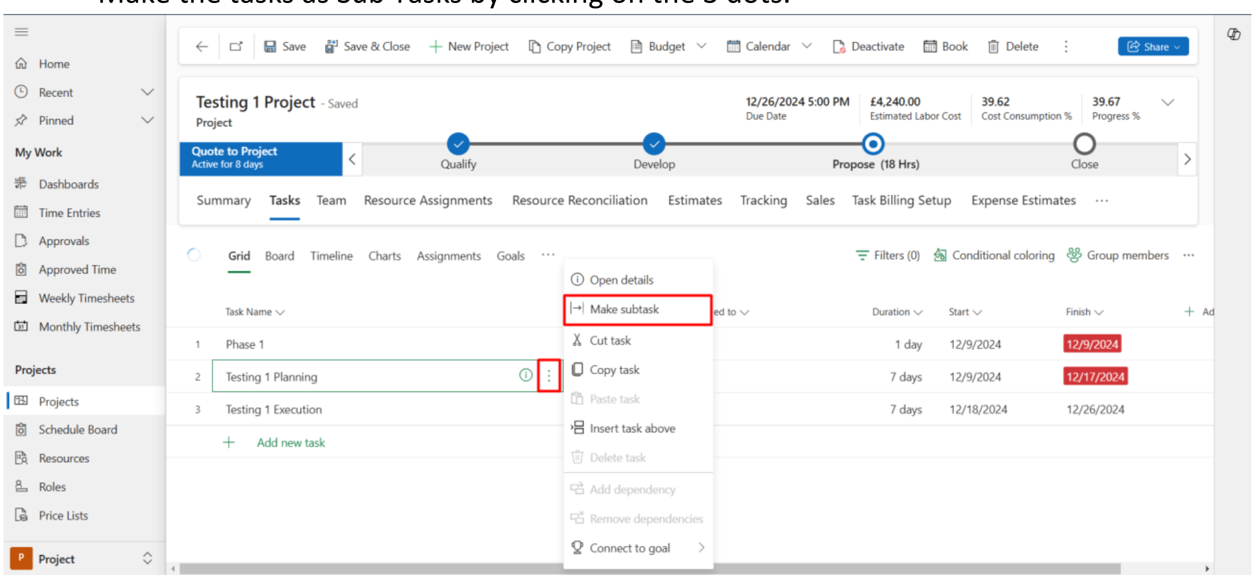
- Click on Qualify and Change the Identify Stakeholder field value to yes.
- Click on the next stage and click on the create button.



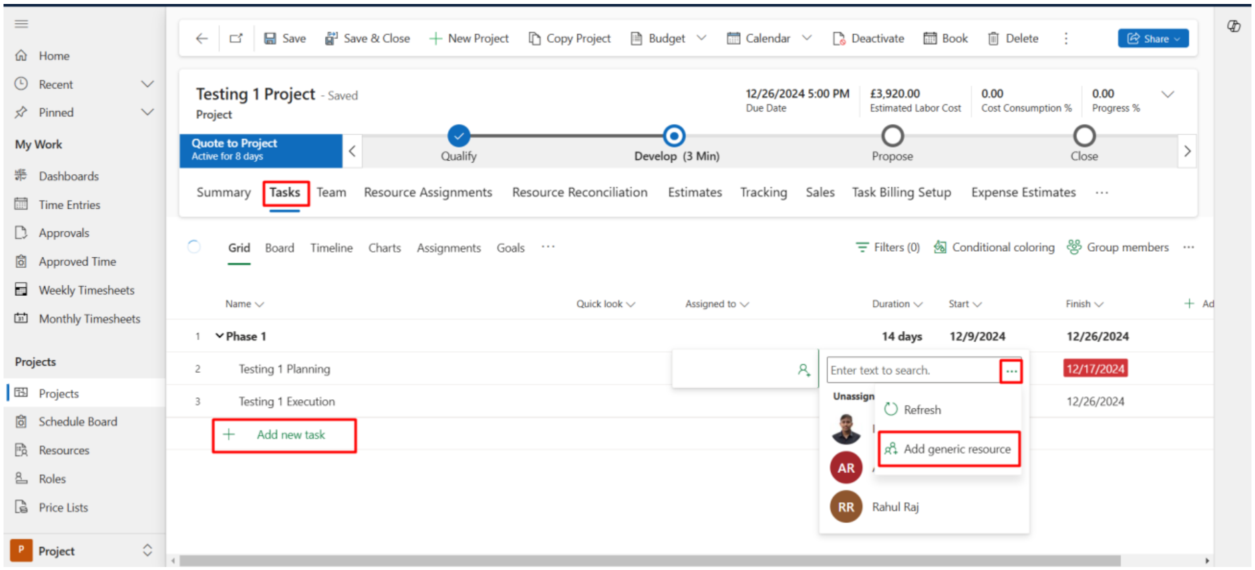
- Fill in the details such as Name, Customer, Client Project Name, Contracting Unit, Calendar Template and Start and End Date.



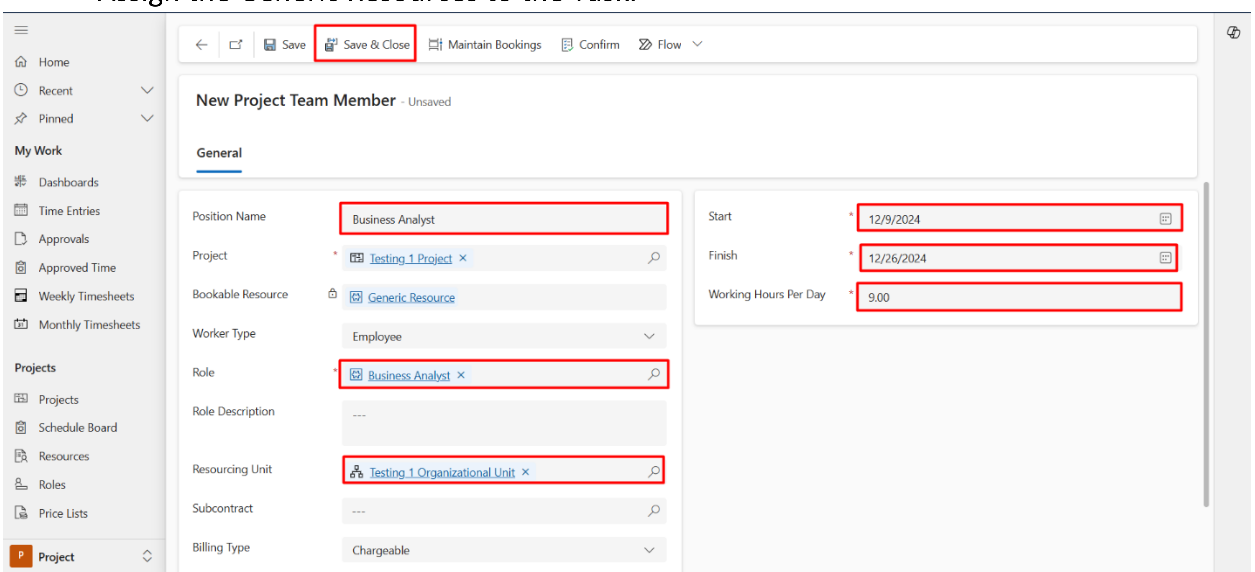
- Project will be created.
- Now, go to Tasks and click on Add new task and create tasks.
- Make the tasks as Sub Tasks by clicking on the 3 dots.



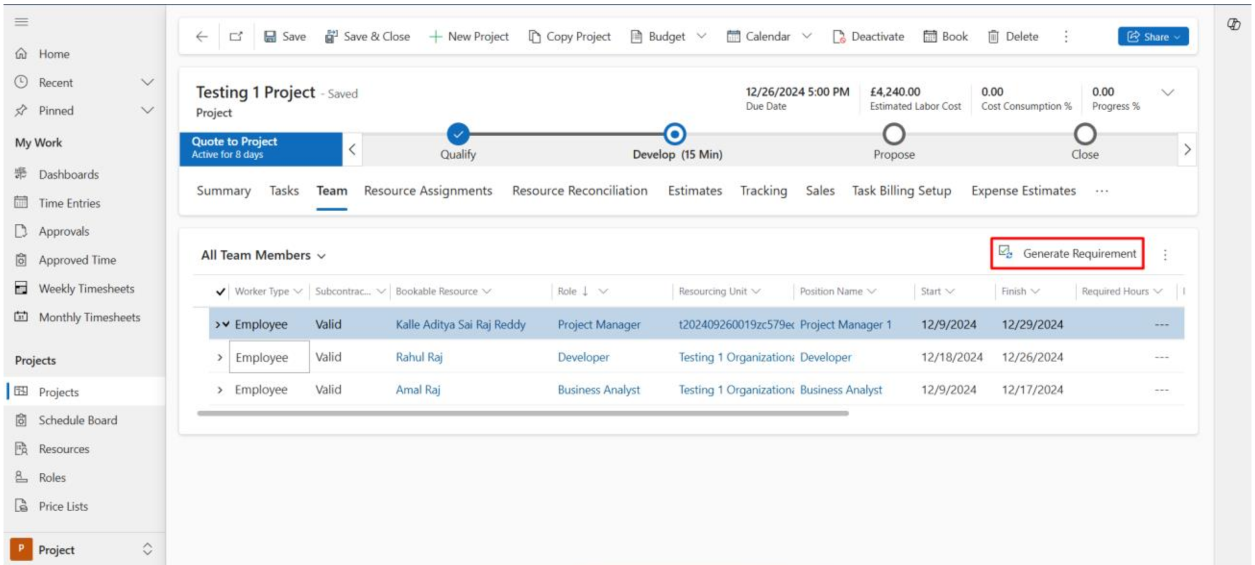
- Click on Assigned to symbol and click on Ellipse and click on Add generic resource.



- 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.

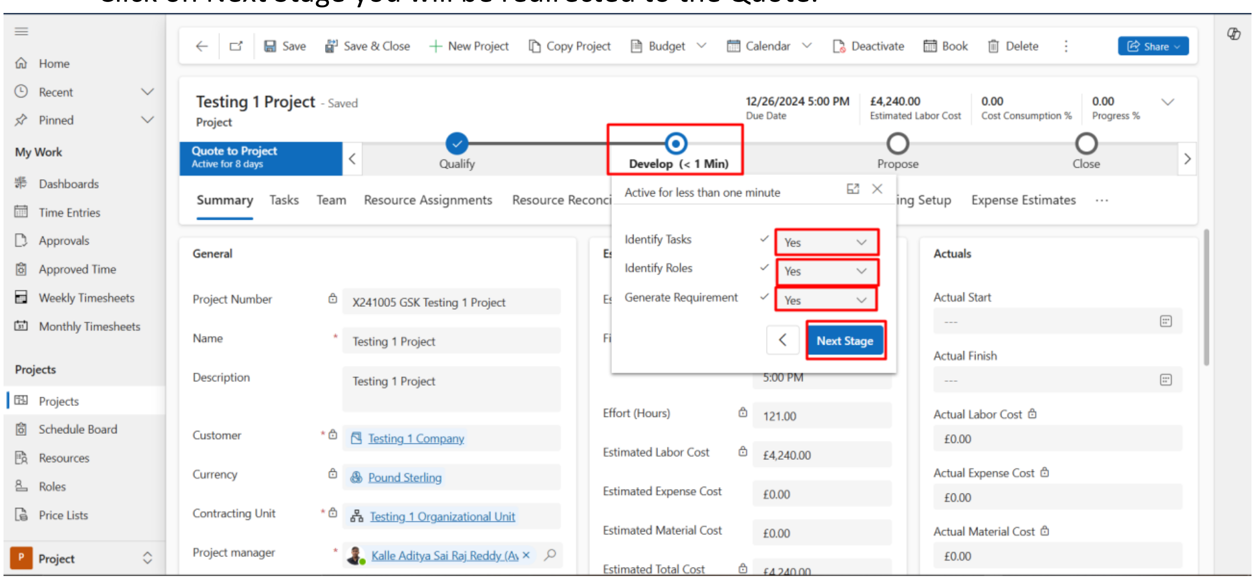


- Now, go to Team tab and select Generic Resources and click on Generate Requirement.

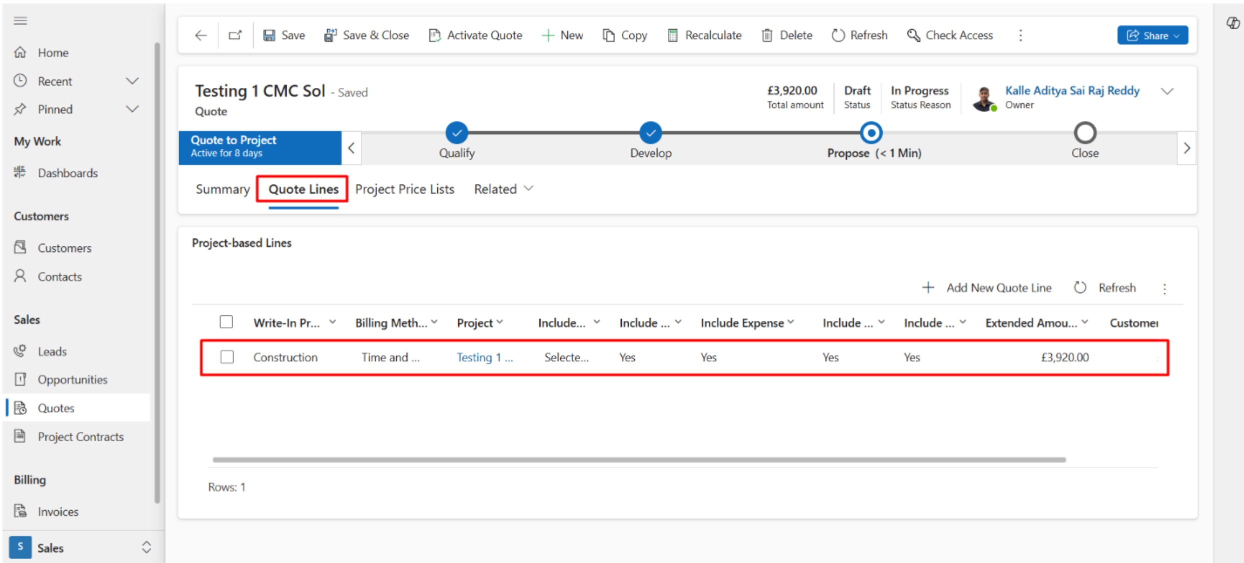


Updating Quote Lines Detail: -

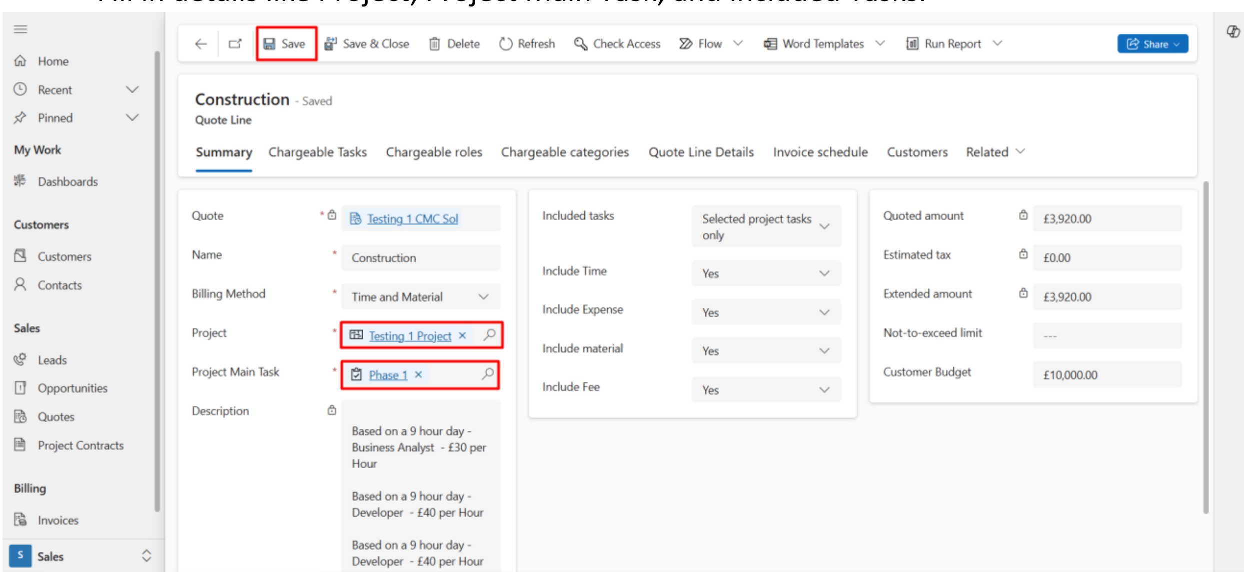
- Click on Develop and Change the Identify Tasks, Roles, and Generate Requirement field values to yes.
- Click on Next Stage you will be redirected to the Quote.



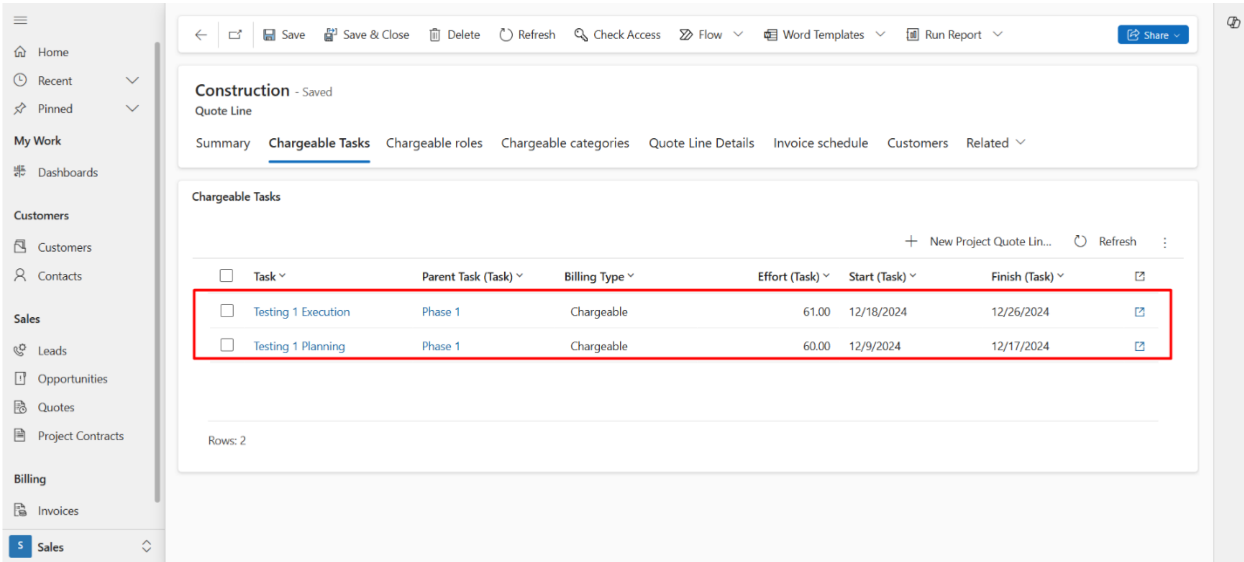
- Go to the Quote Lines tab and open the Quote Line.



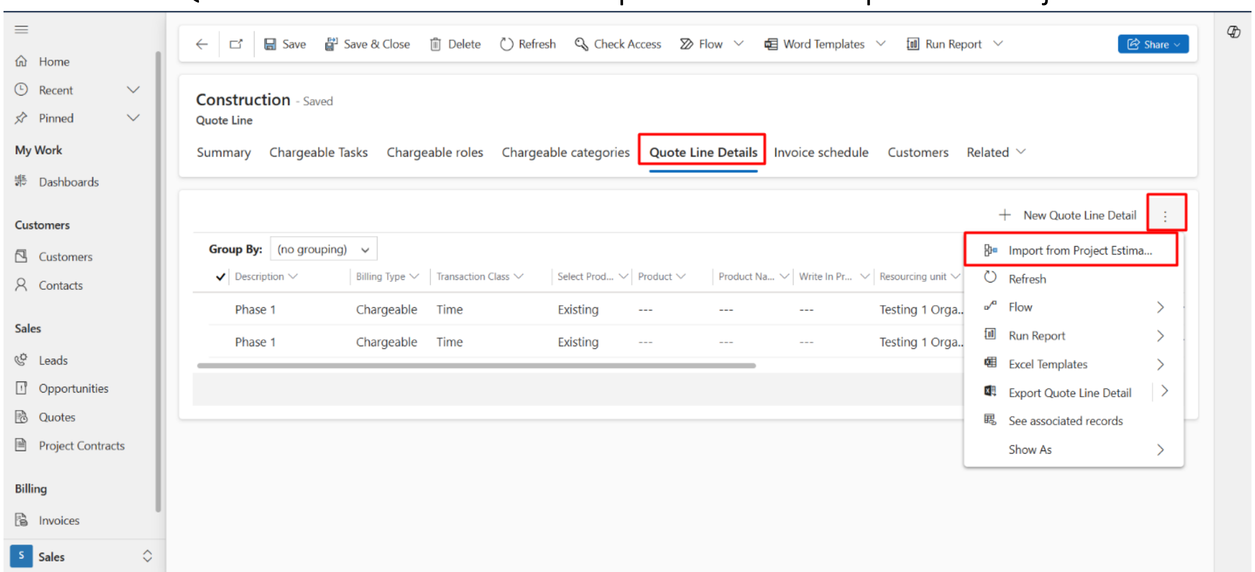
- Fill in details like Project, Project Main Task, and Included Tasks.



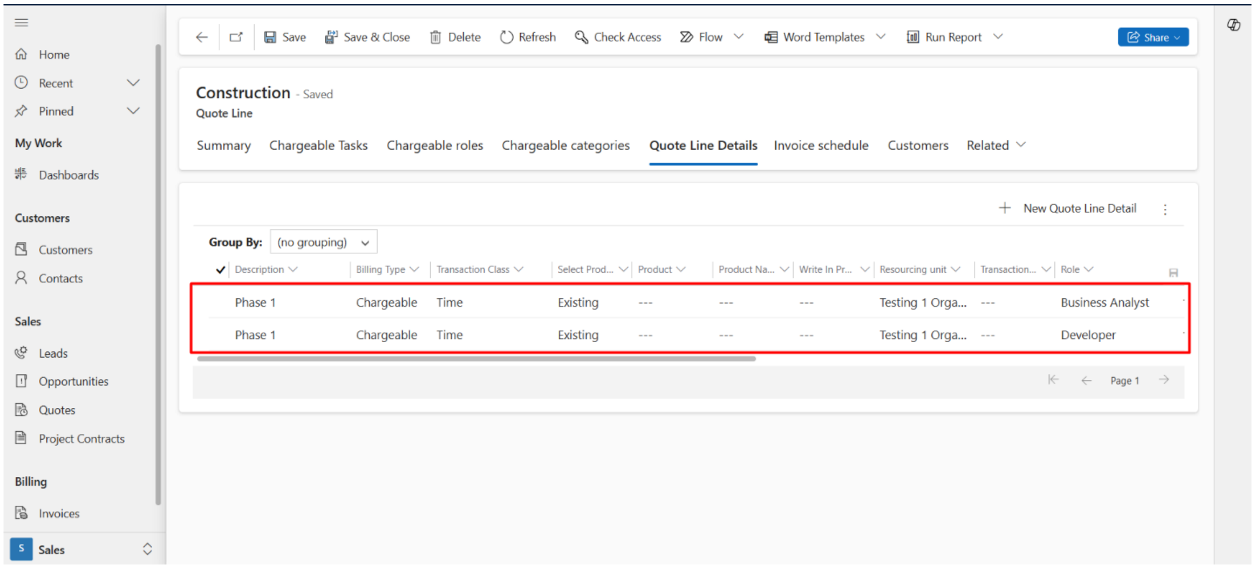
- Head to Chargeable tasks and check if the tasks are updated or not.



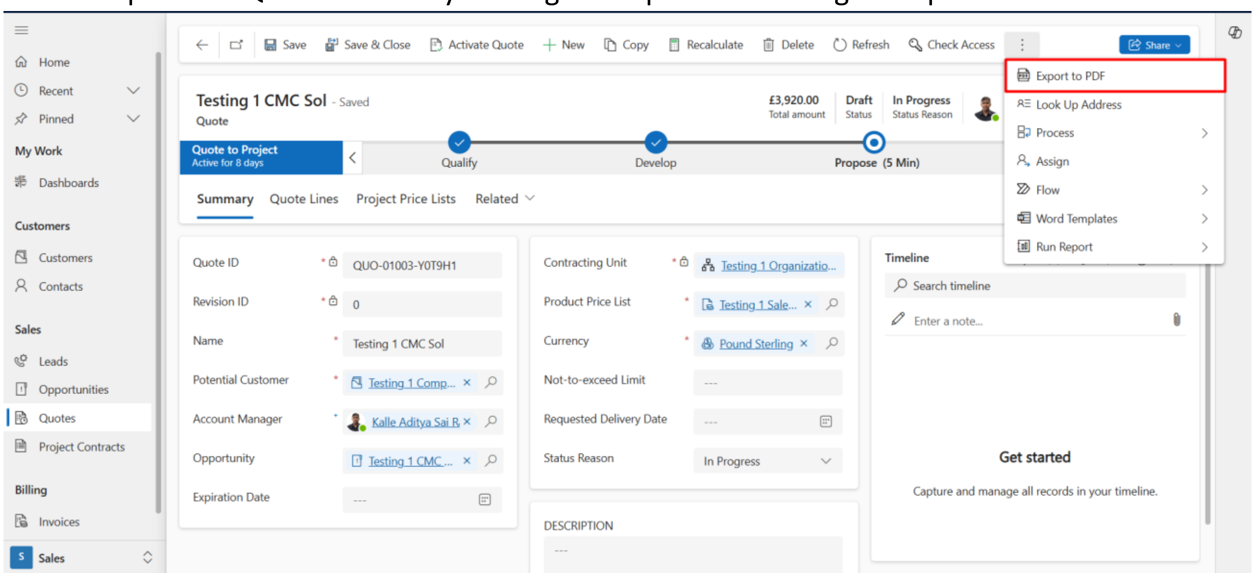
- Go to Quote Line details and click on Ellipse and click on Import from Project Estimates.



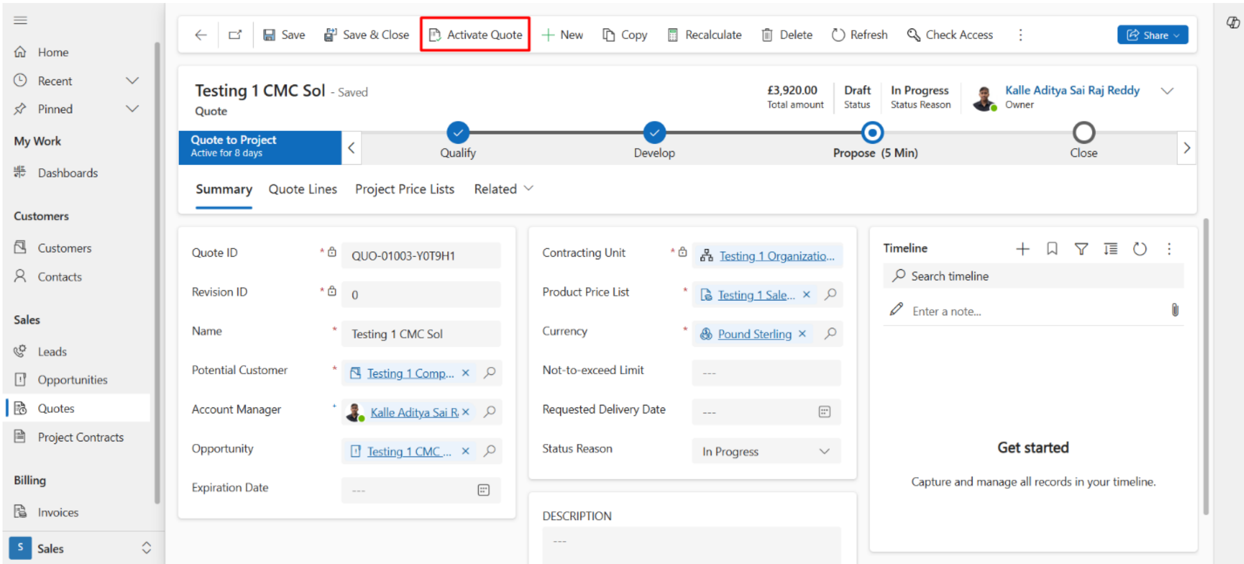
- Check if Quote Lines Details are updated or not.
- Click on Save and Close.



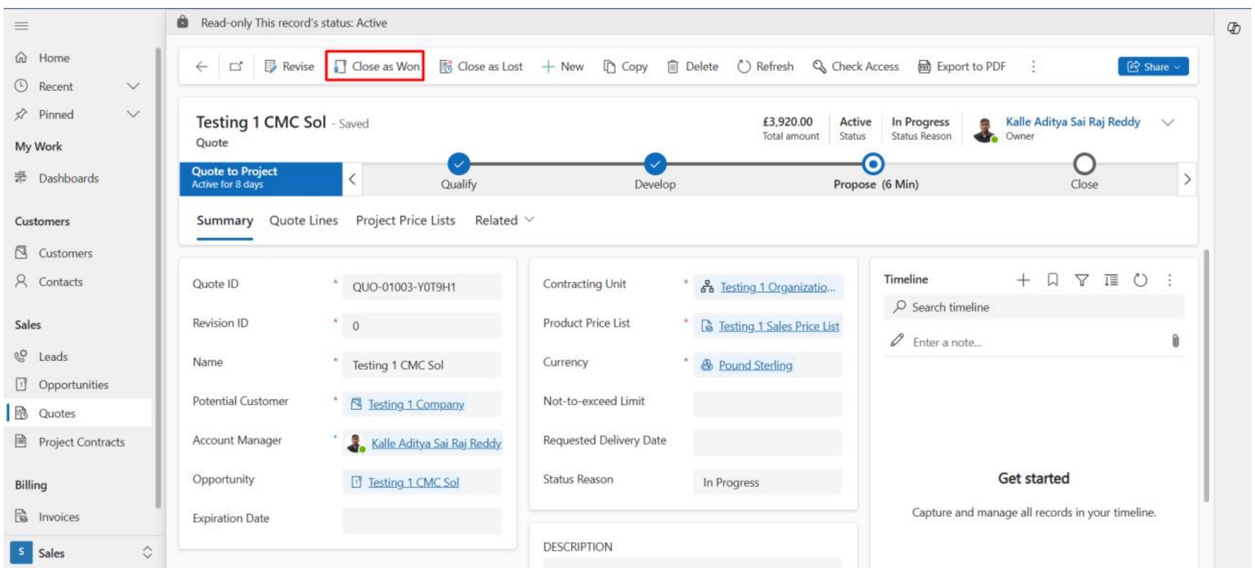
- Export the Quote Details by clicking on Ellipse and clicking on Export PDF.



- Activate the Quote.

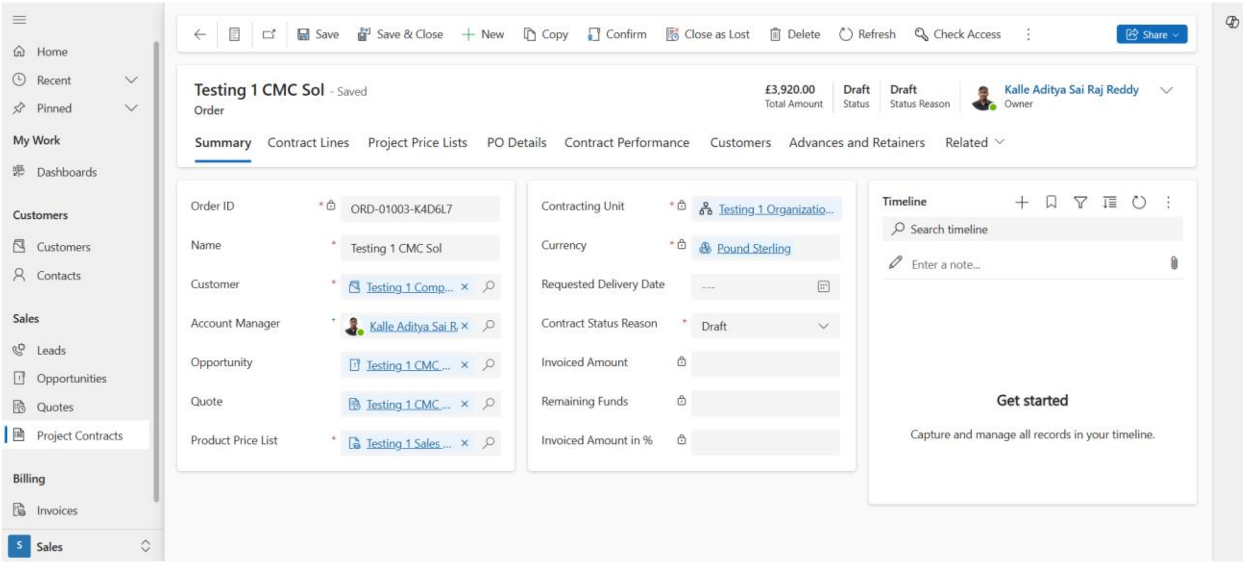


- Select Close as Won.

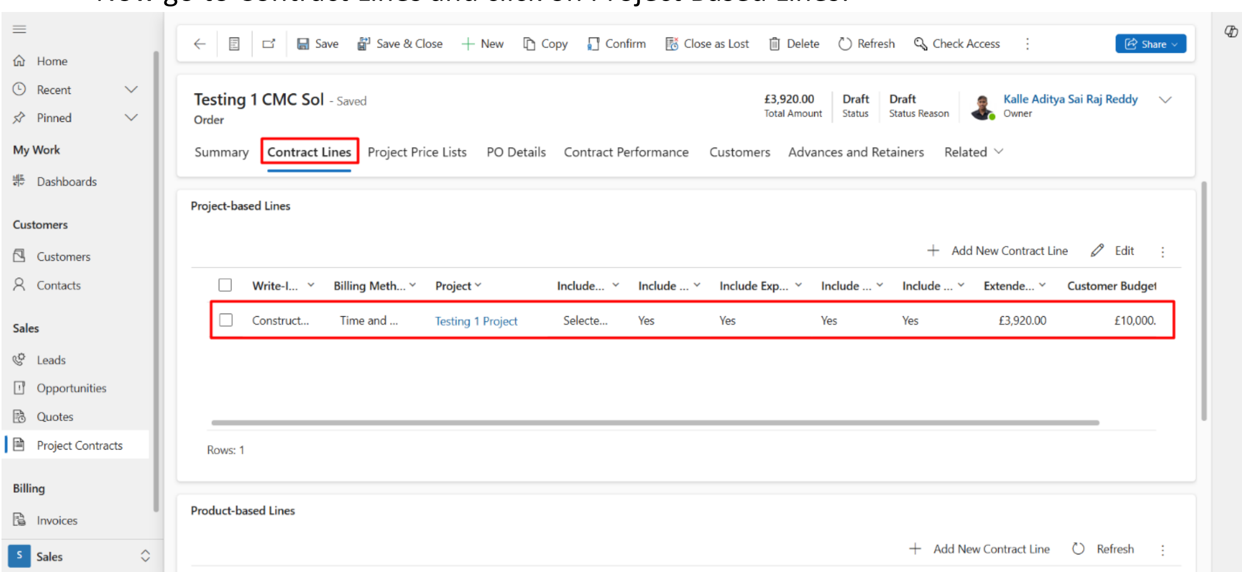


Creating Project Contract: -

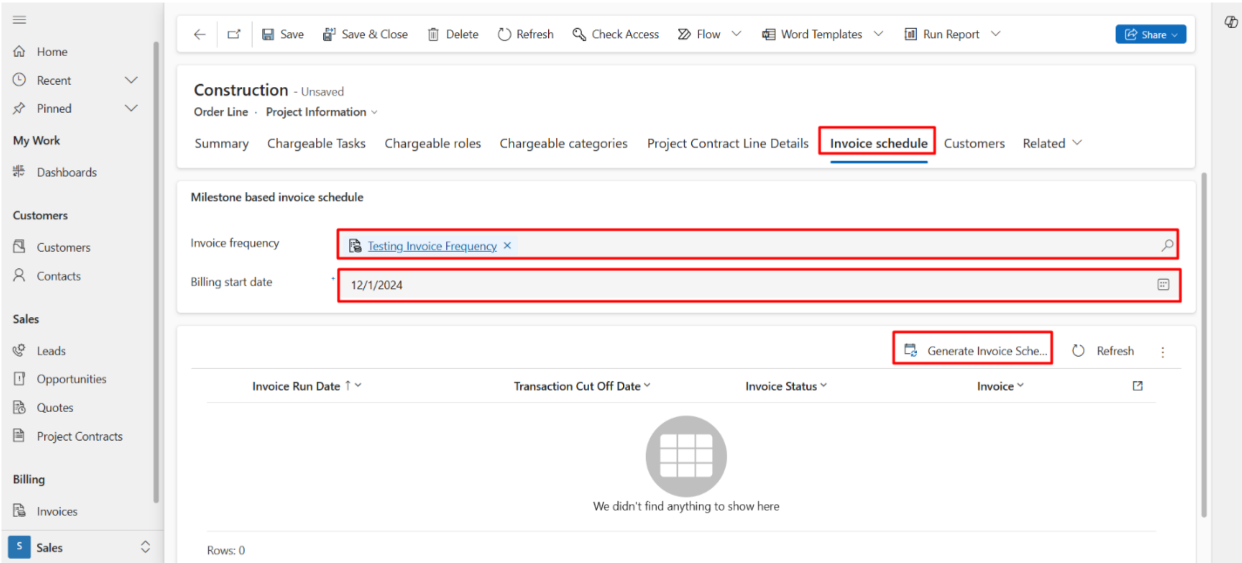
- Project Contract is created in Project Contracts.



- Now go to Contract Lines and click on Project Based Lines.

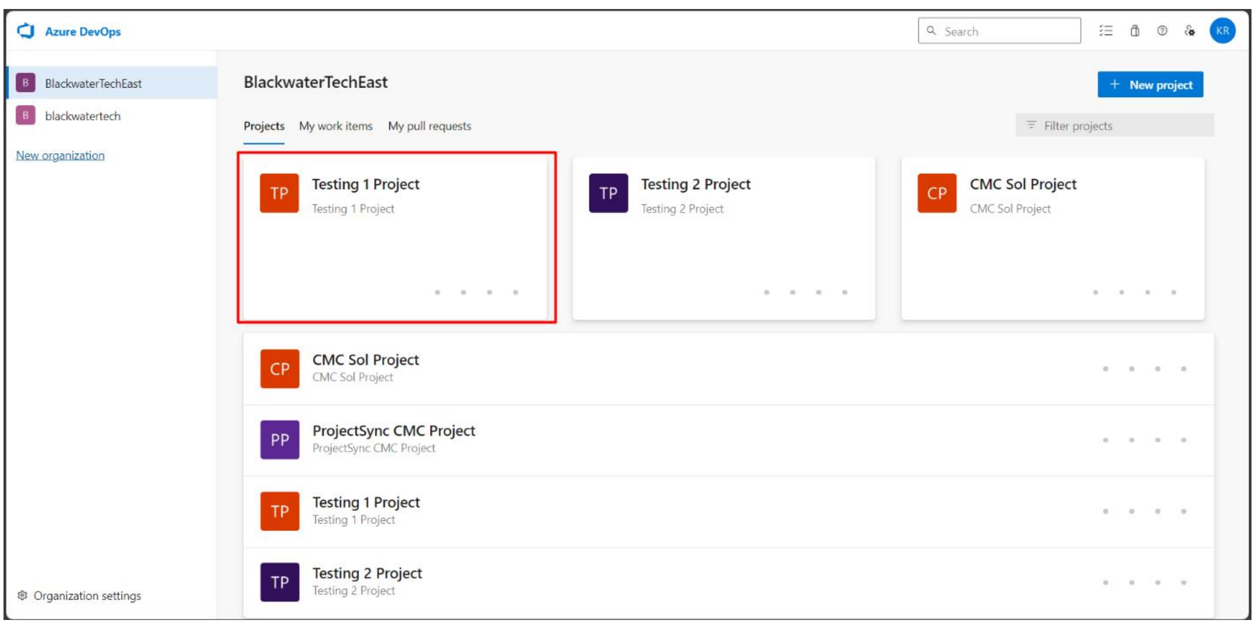


- Click on the Invoice Schedule Tab and add the Invoice Frequency and Billing start Date and Click on Generate Invoice Schedule.

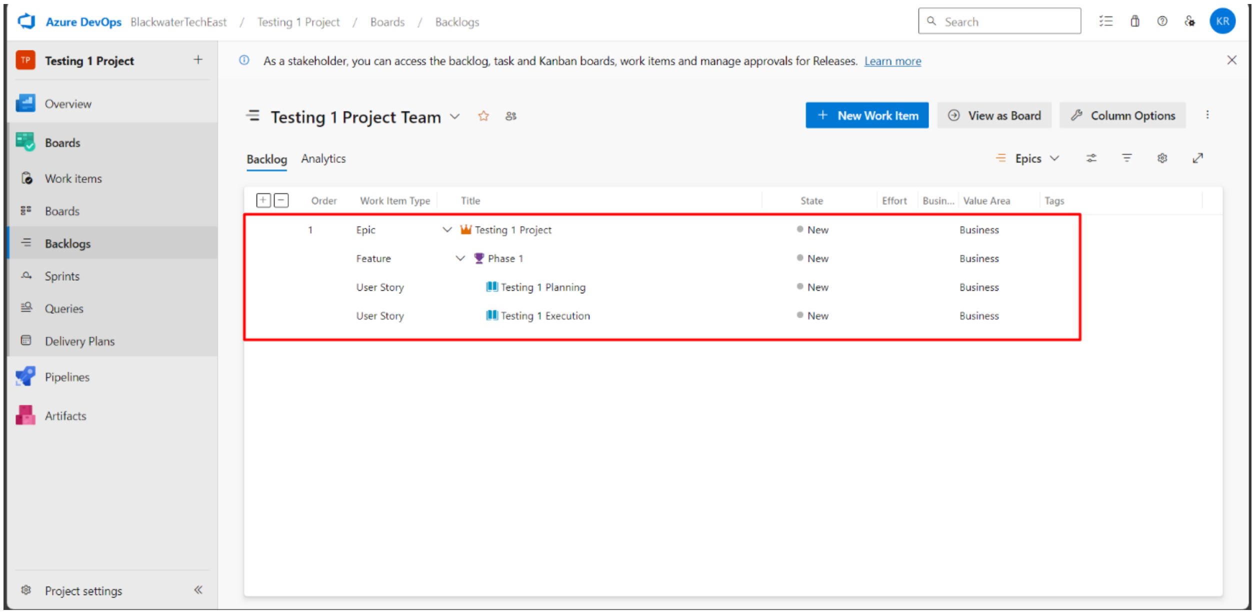


Azure DevOps: -

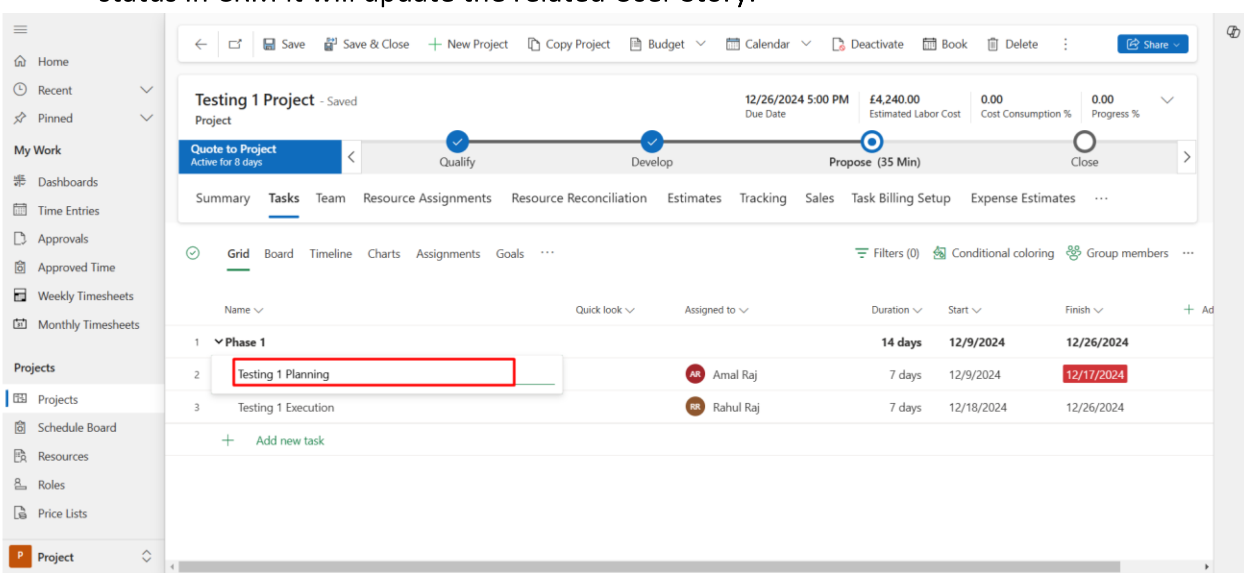
- Project is created in the Azure DevOps after Project Contract is created.



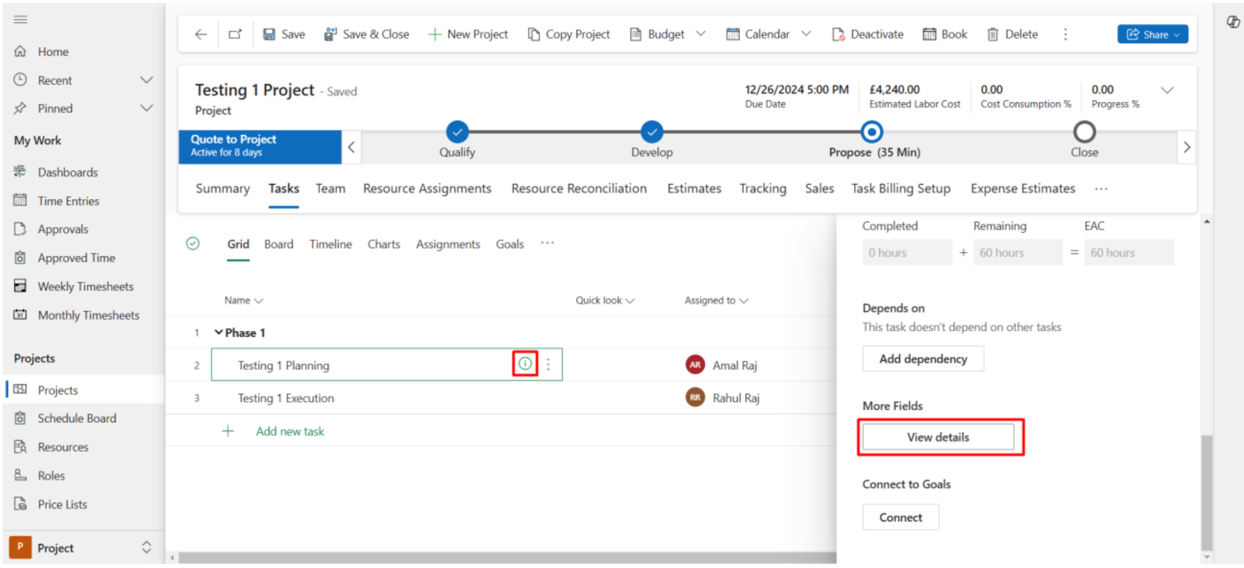
- The Project, Project Main Task and Project Sub Tasks are created in the backlog.



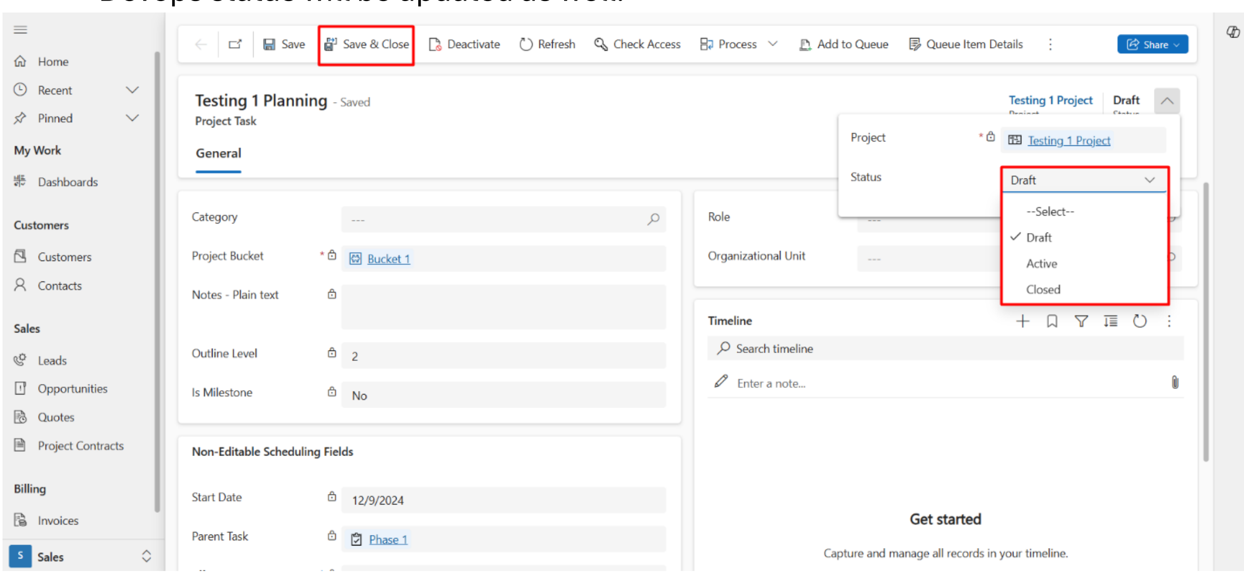
- The CRM is synchronized with Azure DevOps. If we update the Subtasks name and status in CRM it will update the related User Story.



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

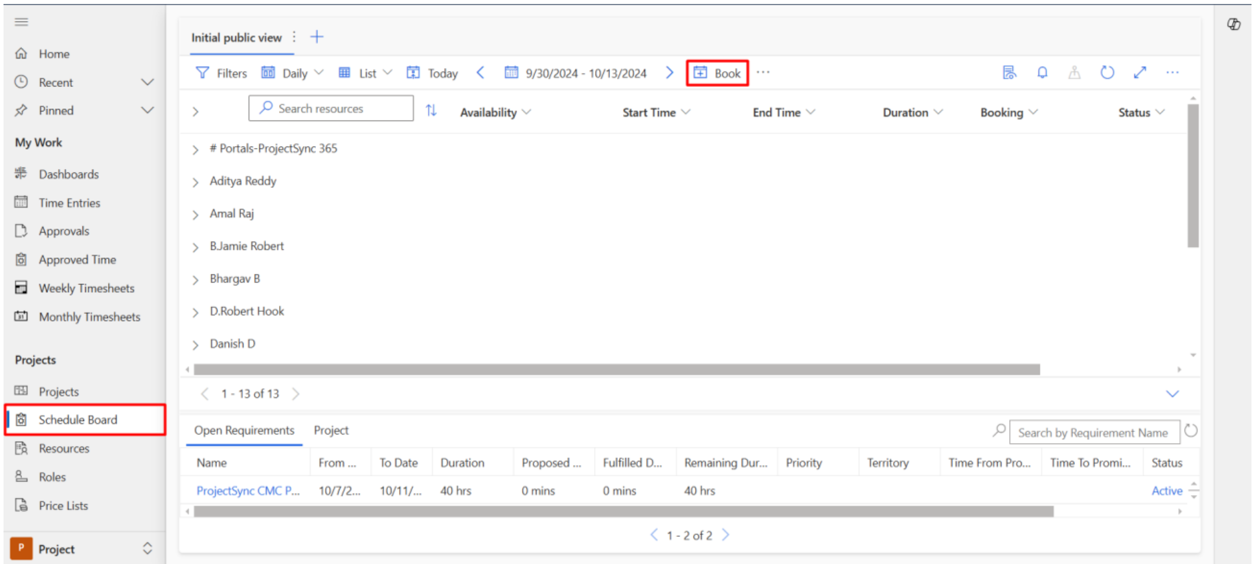


- Click on the dropdown and update the status and click on Save and close the Azure Devops status will be updated as well.

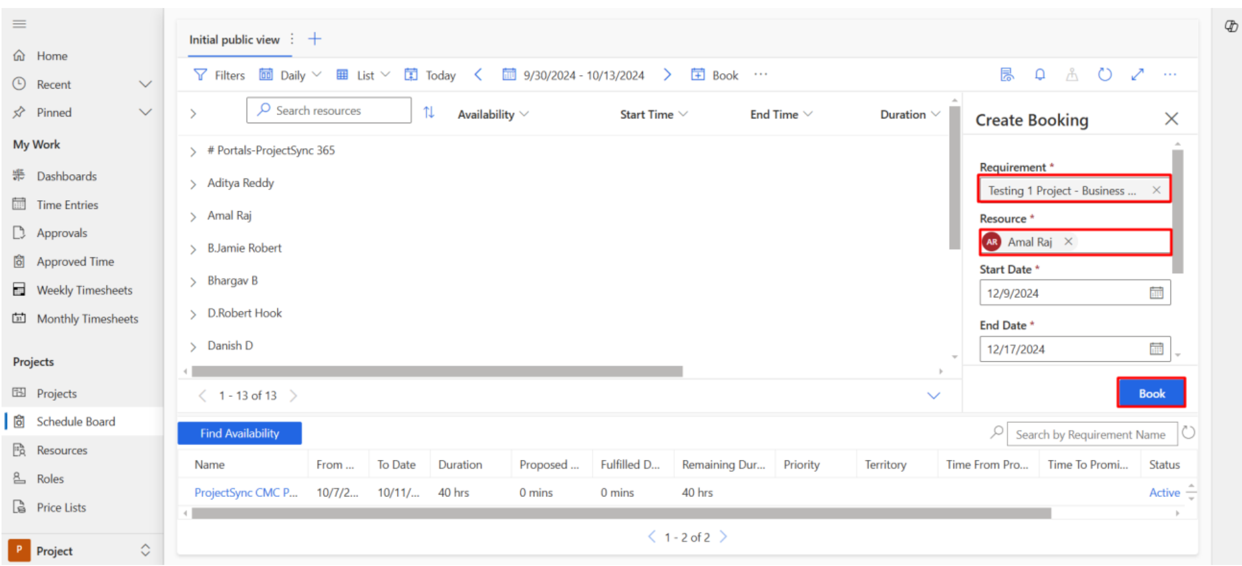


Booking Resources: -

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



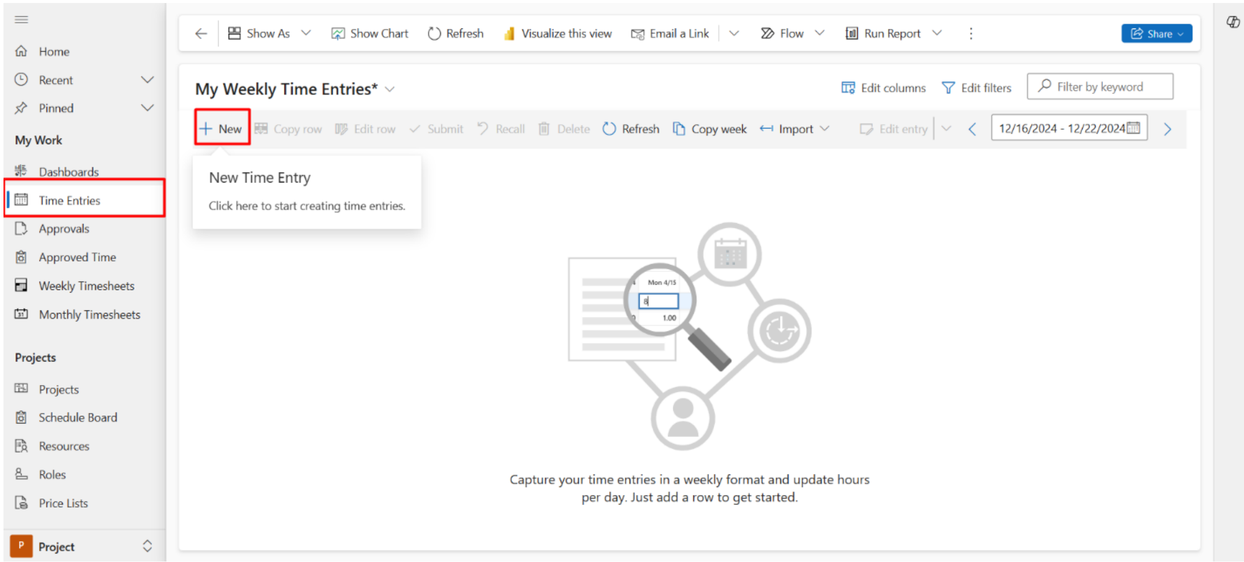
- Select the Resources, Click on Book, and Fill in details such as Requirement, Start and End Date, Booking type, Status.
- Click on Book.



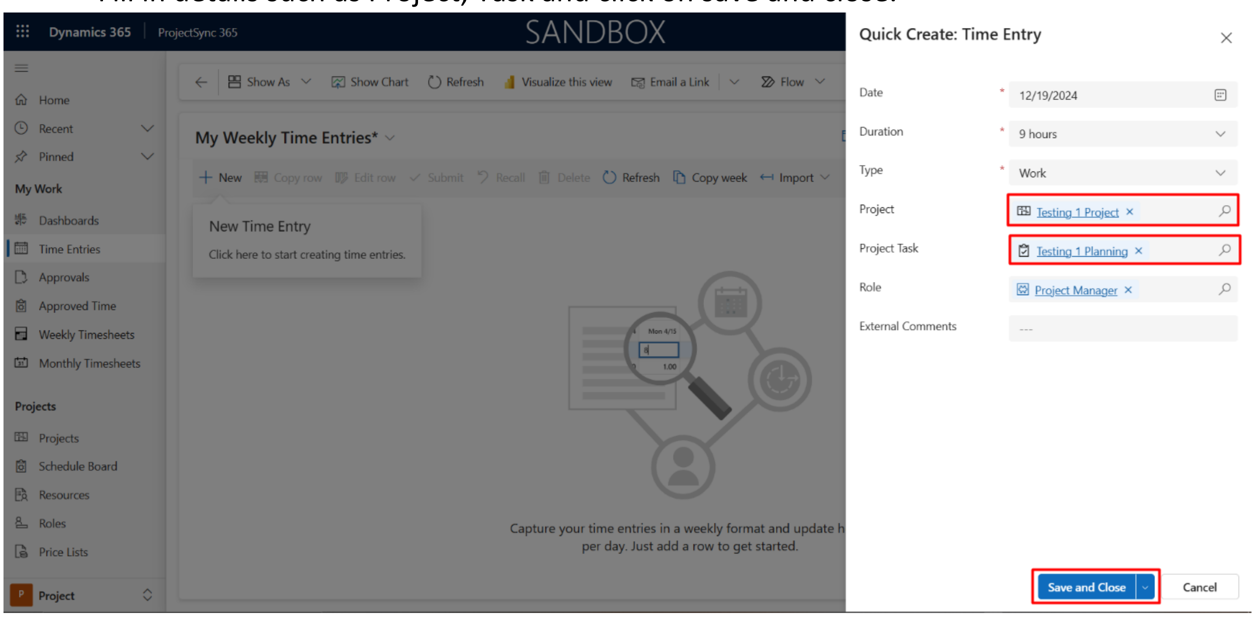
- Similarly, Book the other Resources as well.

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

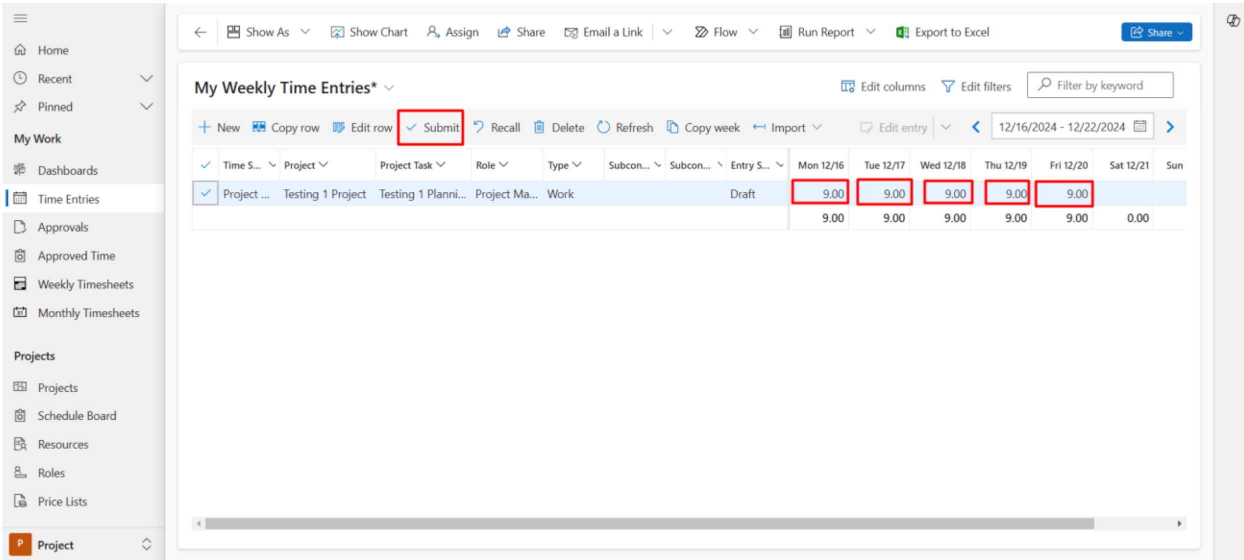
- Open Time Entries and click on new.



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

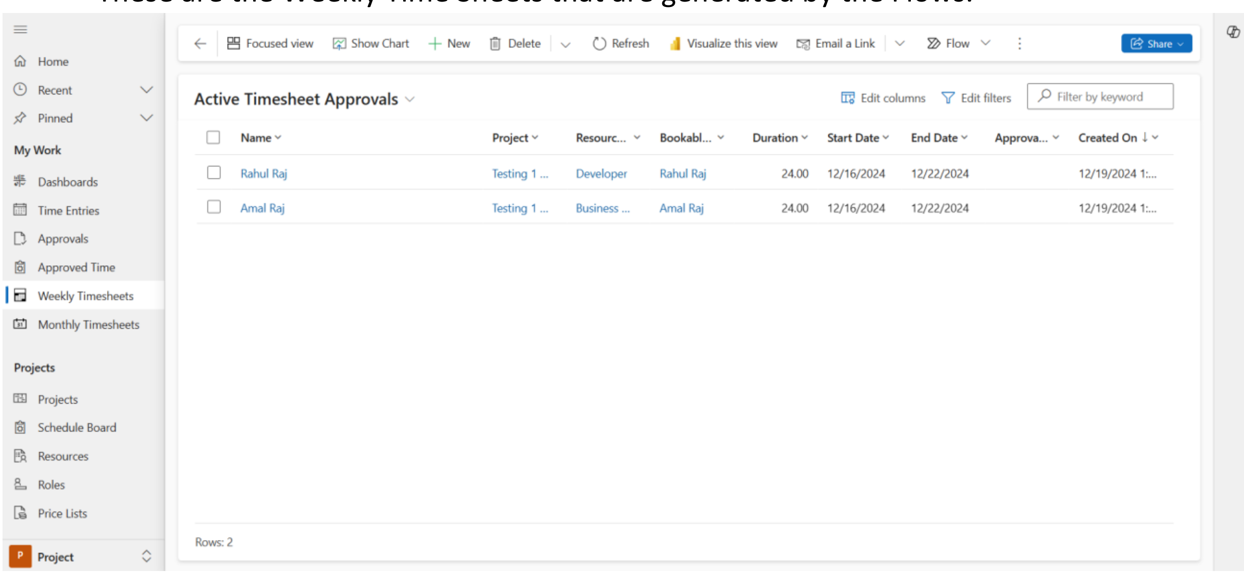


- Fill in Time Entries for Each day.
- Select the Time Entries and click on Submit.

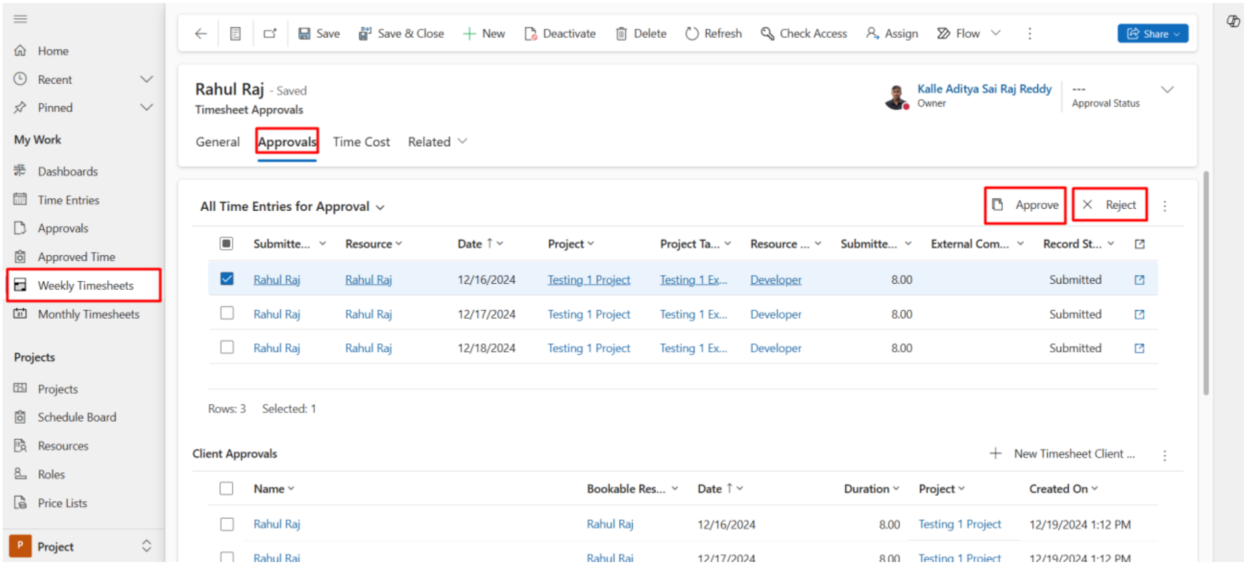


Weekly Time Sheets: -

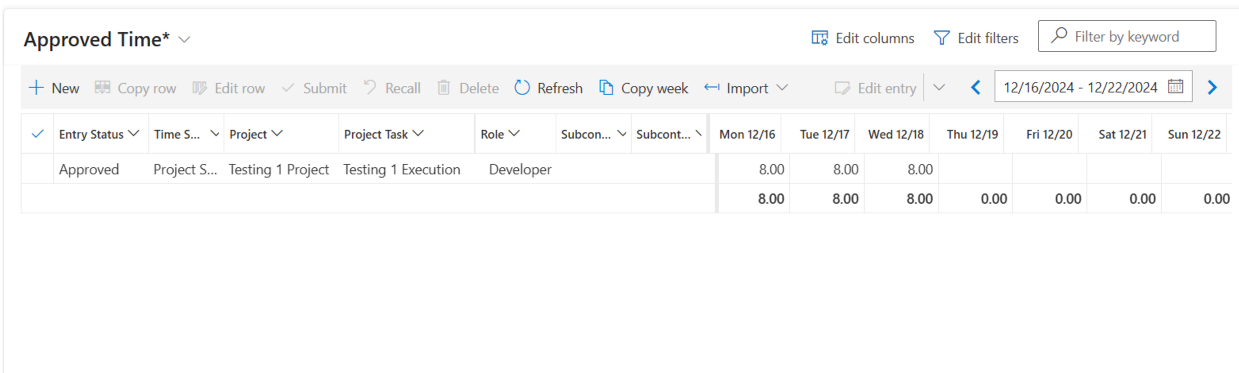
- The Weekly Time Sheets are generated every Monday.
- These are the Weekly Time Sheets that are generated by the Flows.



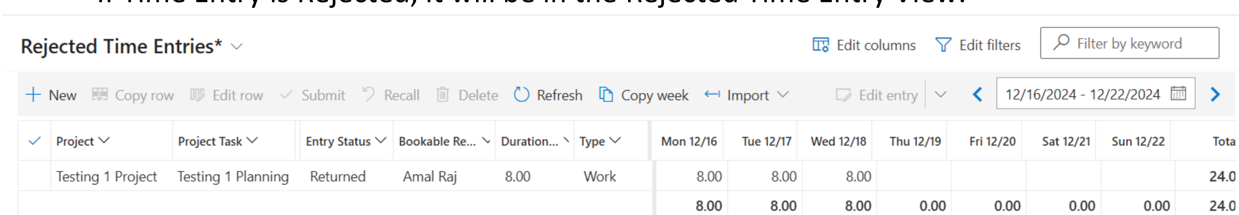
- The Project Manager Can Approve/Reject the Time Entry Submitted in the Weekly Time Sheet.



- If Time Entry is Approved, it will be in the Approved Time Entry View.

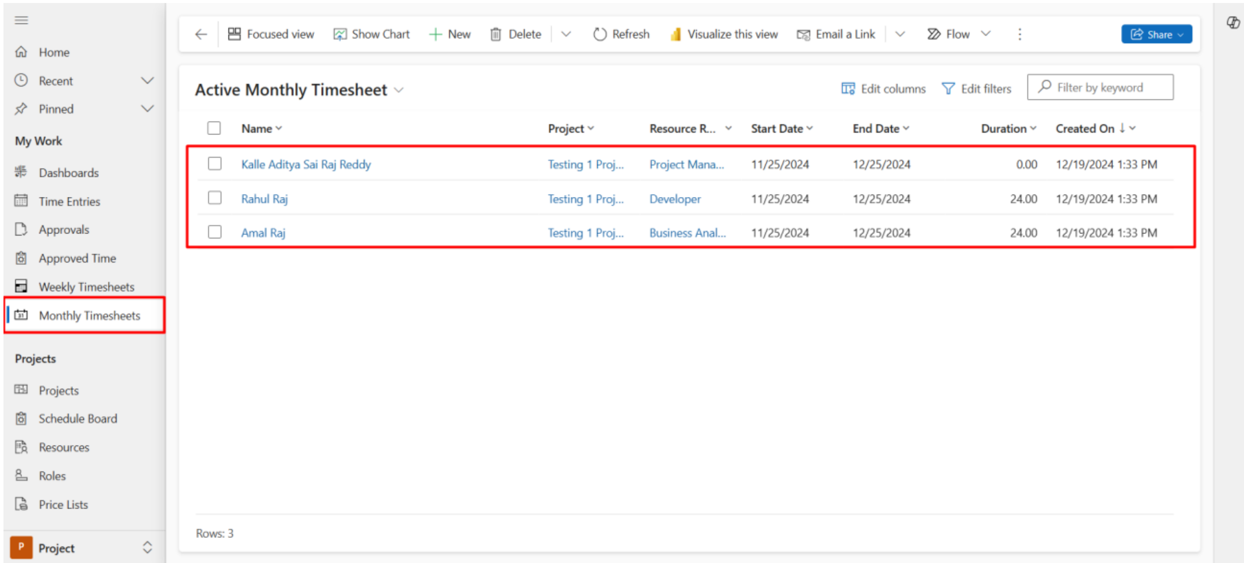


- If Time Entry is Rejected, it will be in the Rejected Time Entry View.

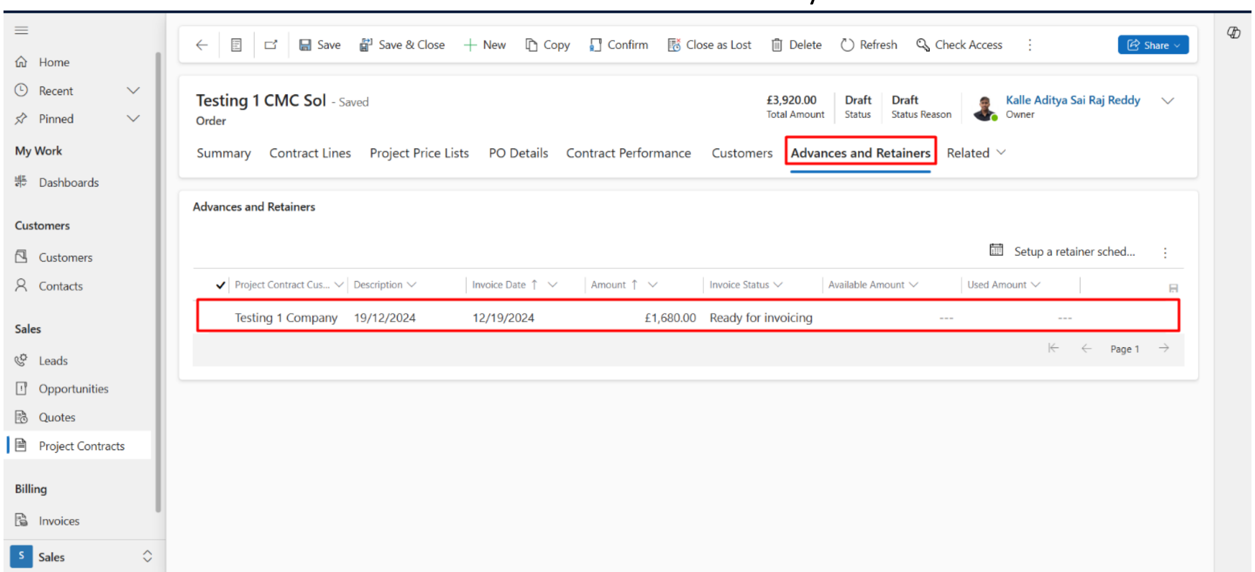


Monthly Time Sheets: -

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

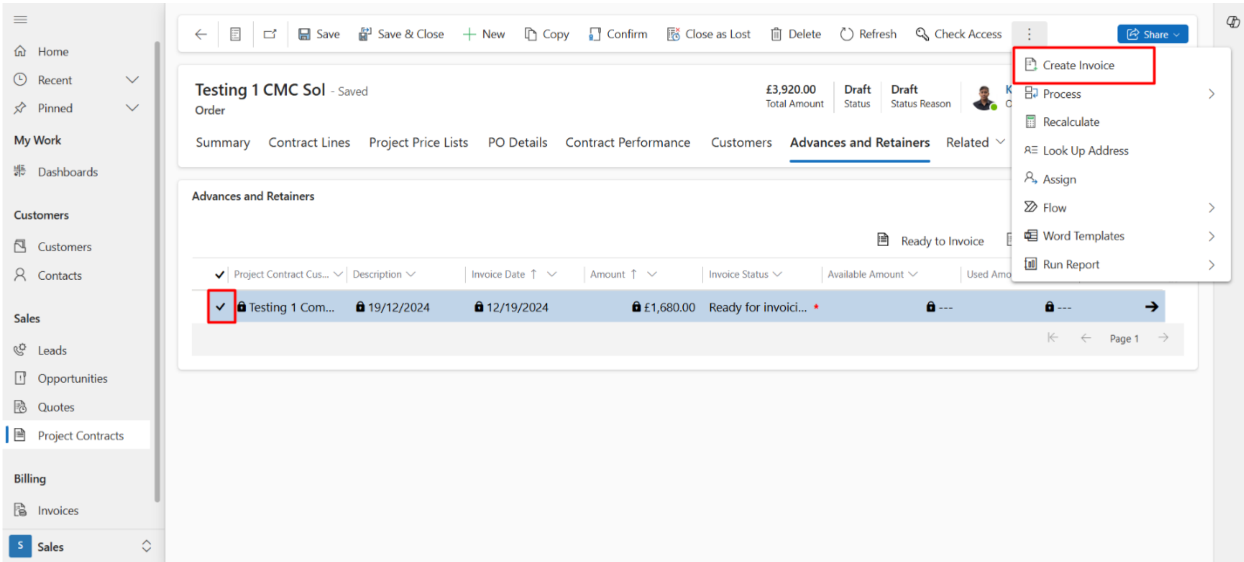


- The Advances and Retainers are also created by running the Monthly Timesheet (5) - Create Advances and Retainers for Order flow manually.

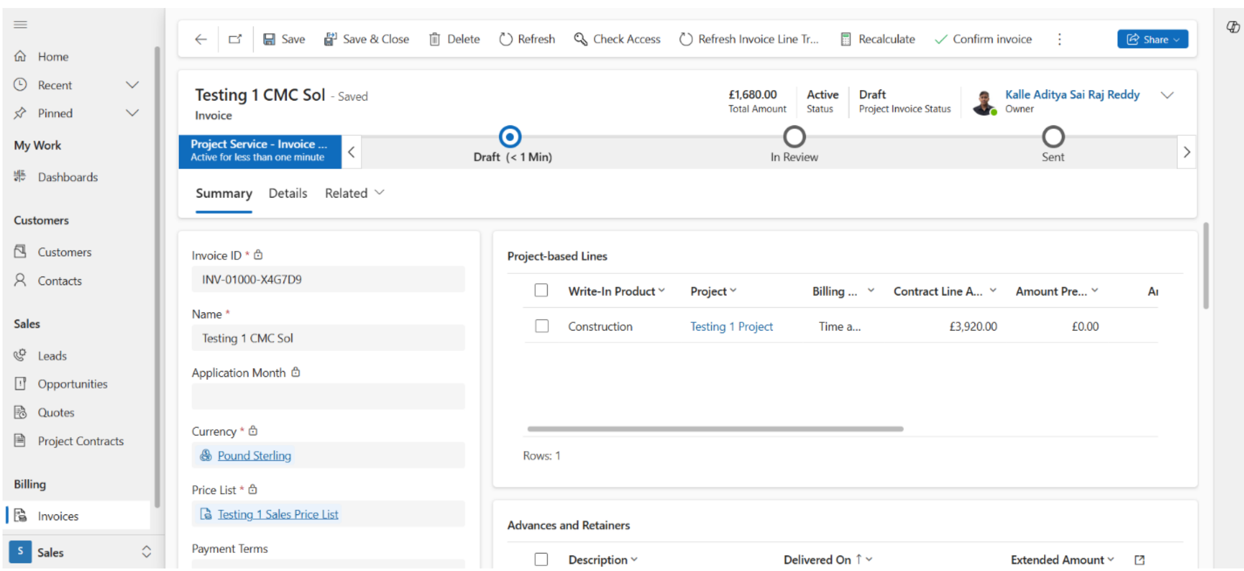


Creating Invoice: -

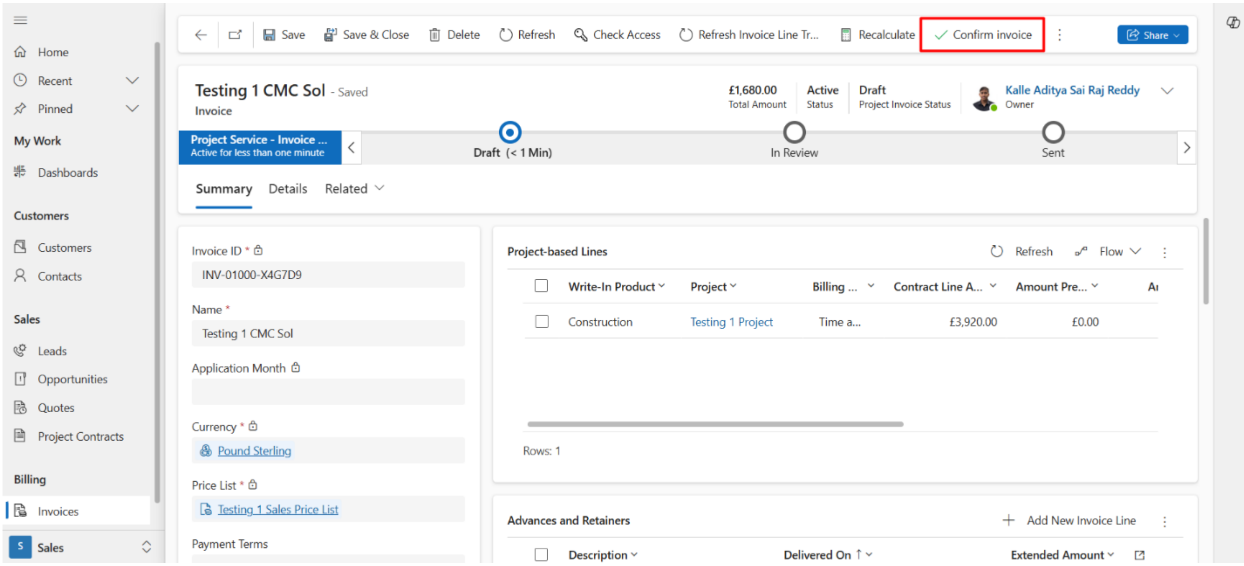
- Go to Project Contracts and open the order and click on advances and retainers.
- Select the Advances and Retainers and click on Create Invoice.



- Invoice is created.



- Confirm the Invoice.



Save
Save & Close
Delete
Refresh
Check Access
Refresh Invoice Line Tr...
Recalculate
Confirm invoice
Share
Home
Recent
Pinned
My Work
Dashboards
Customers
Customers
Contacts
Sales
Leads
Opportunities
Quotes
Project Contracts
Billing
Invoices
Sales
Testing 1 CMC Sol - Saved
Invoice
£1,680.00 Total Amount
Active Status
Draft Project Invoice Status
Kalle Aditya Sai Raj Reddy Owner
Project Service - Invoice ...
Active for less than one minute
Draft (< 1 Min)
In Review
Sent
Summary
Details
Related
Invoice ID
INV-01000-X4G7D9
Name
Testing 1 CMC Sol
Application Month
Currency
Pound Sterling
Price List
Testing 1 Sales Price List
Payment Terms
Project-based Lines
Refresh
Flow
Write-In Product
Project
Billing ...
Contract Line A...
Amount Pre...
Construction
Testing 1 Project
Time a...
£3,920.00
£0.00
Rows: 1
Advances and Retainers
Add New Invoice Line
Description
Delivered On
Extended Amount