

## Internal User / D365 Admin

ProjectSync 365



Created by: Blackwater Tech

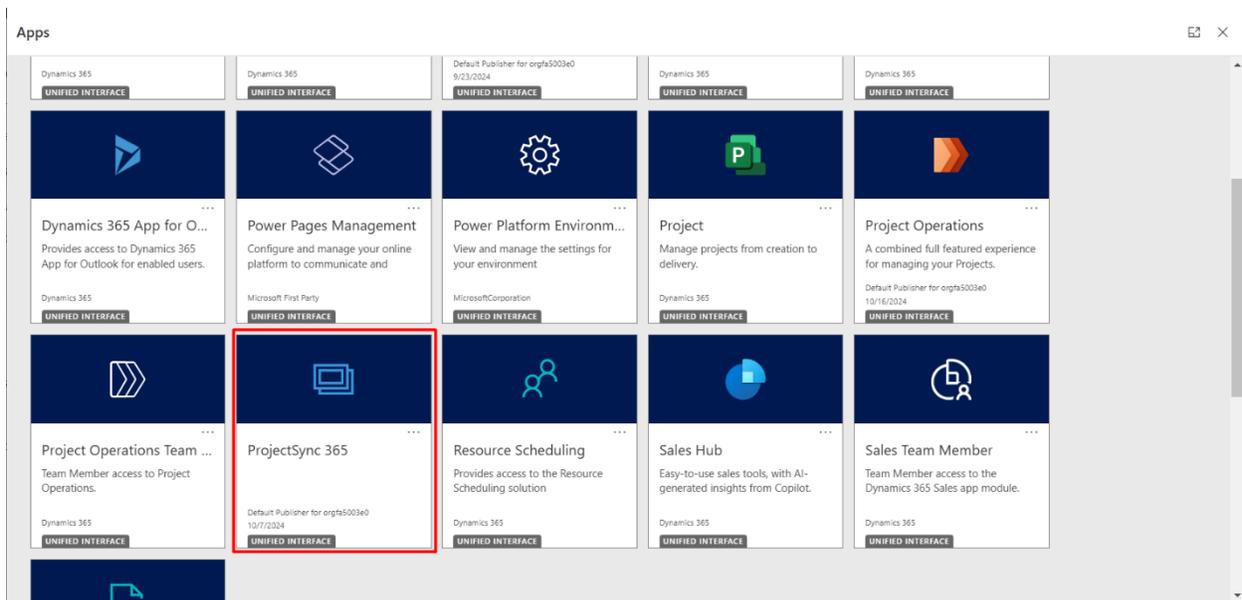
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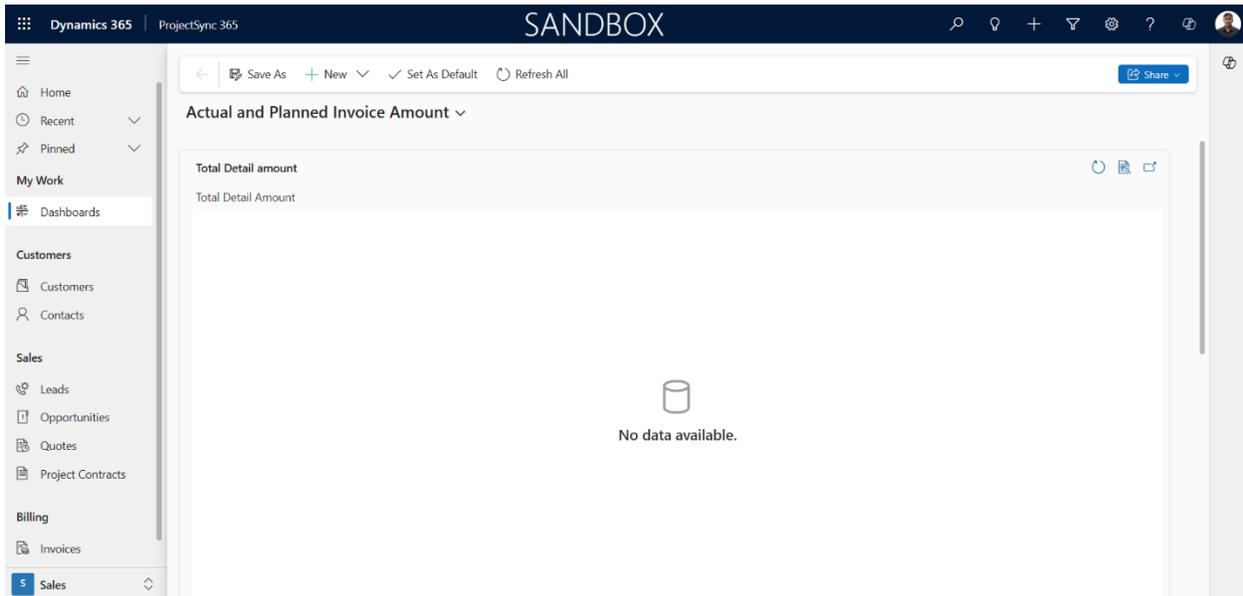
Following is the series of steps that outline the path a user takes to complete a specific business process. It provides a structured and guided experience for users to navigate through various stages of a process, ensuring consistency and efficiency in performing tasks.

## 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.

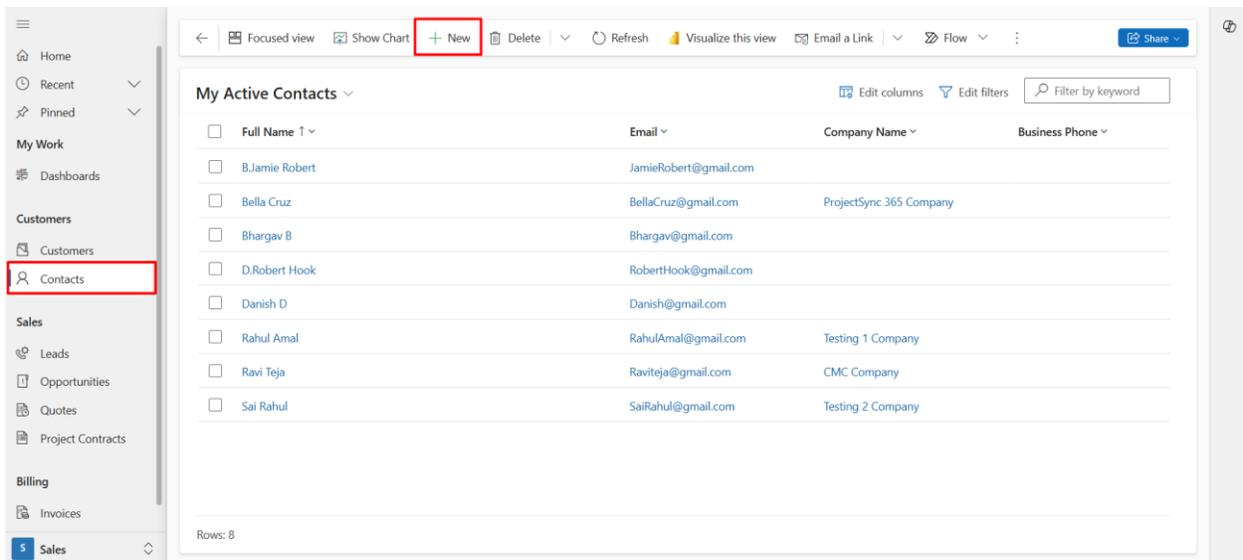


- You will be redirected to dynamics.



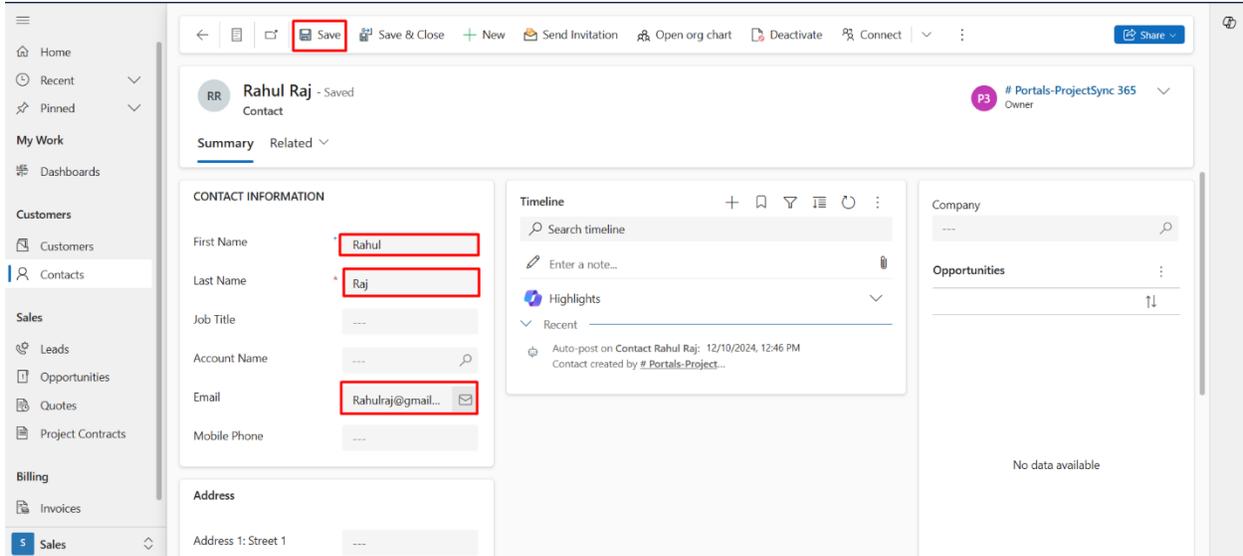
### Creating Contact: -

- 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

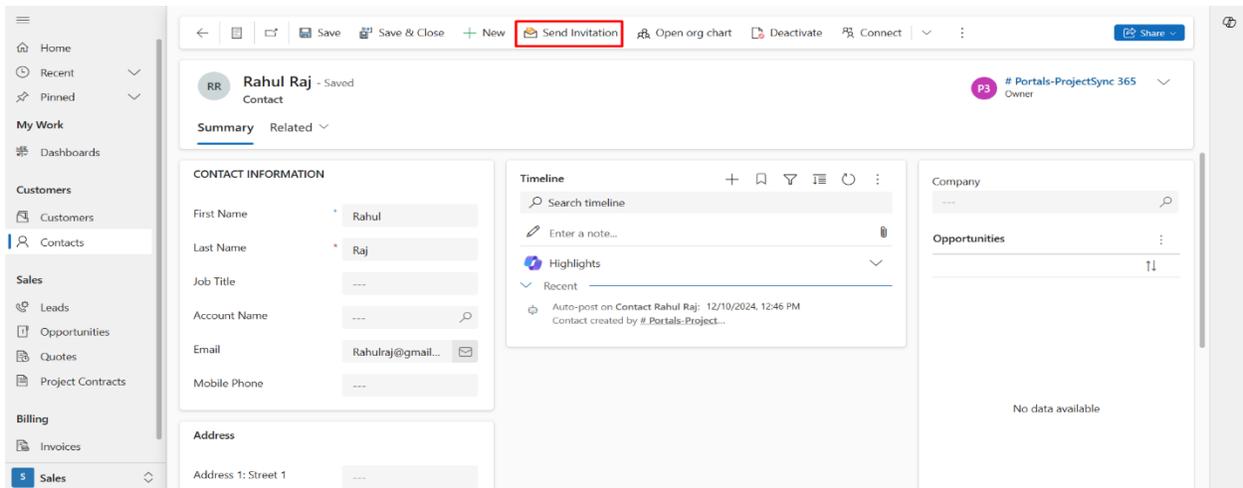
- o Address
- Click on Save.



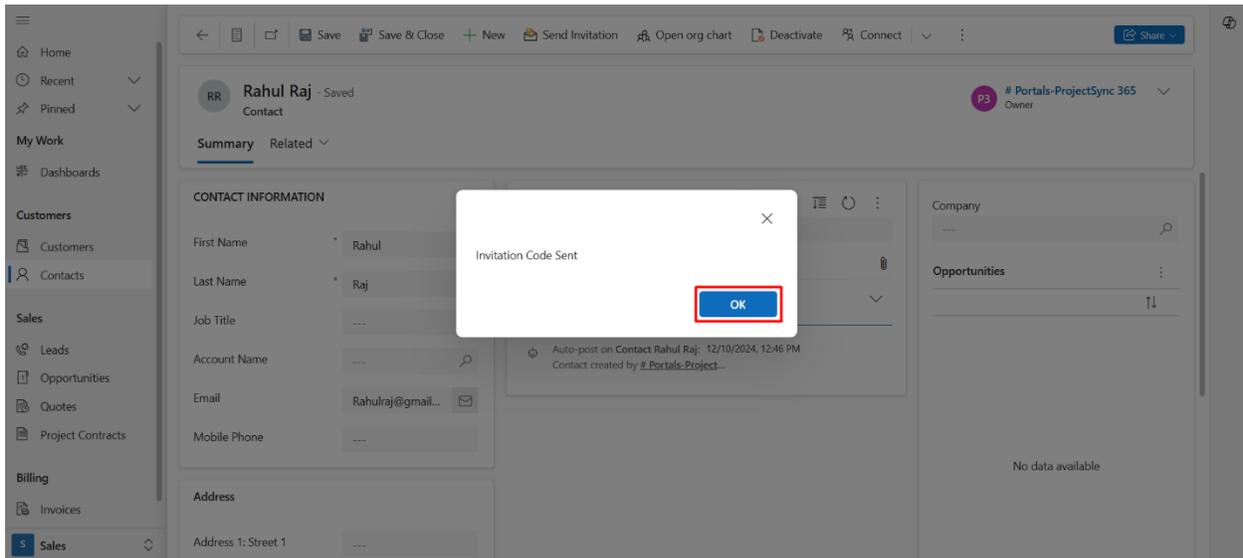
### Send Portal Login Invitation to Contact: -

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

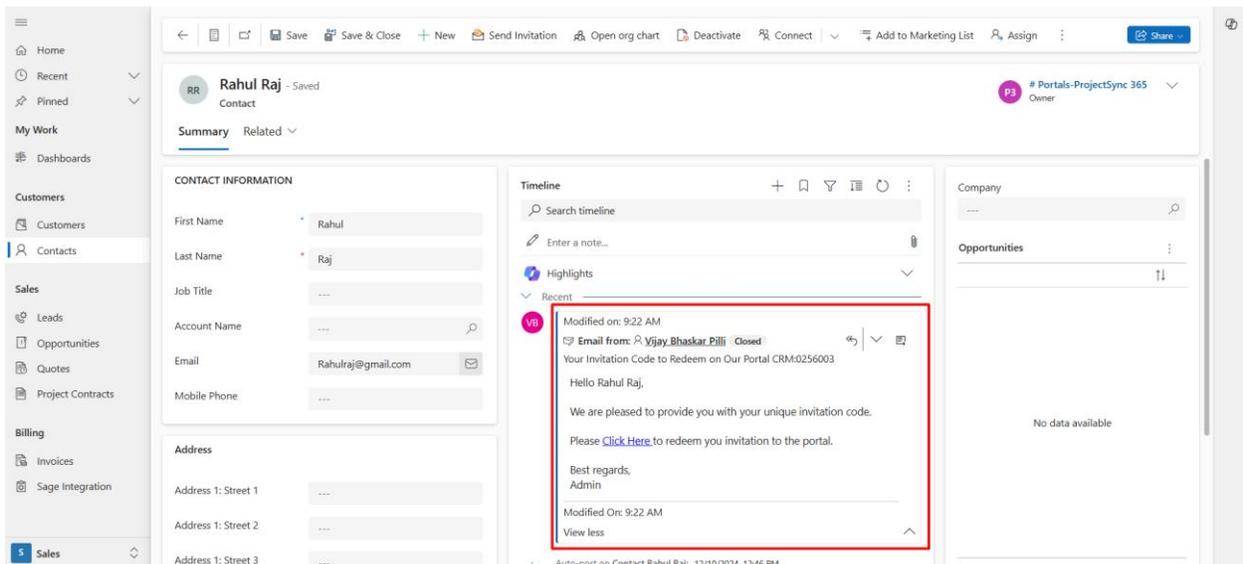
- In the contact details page, click on the Send Invitation button to send a portal invitation code to the contact so that the contact can redeem the code to login on the portal.



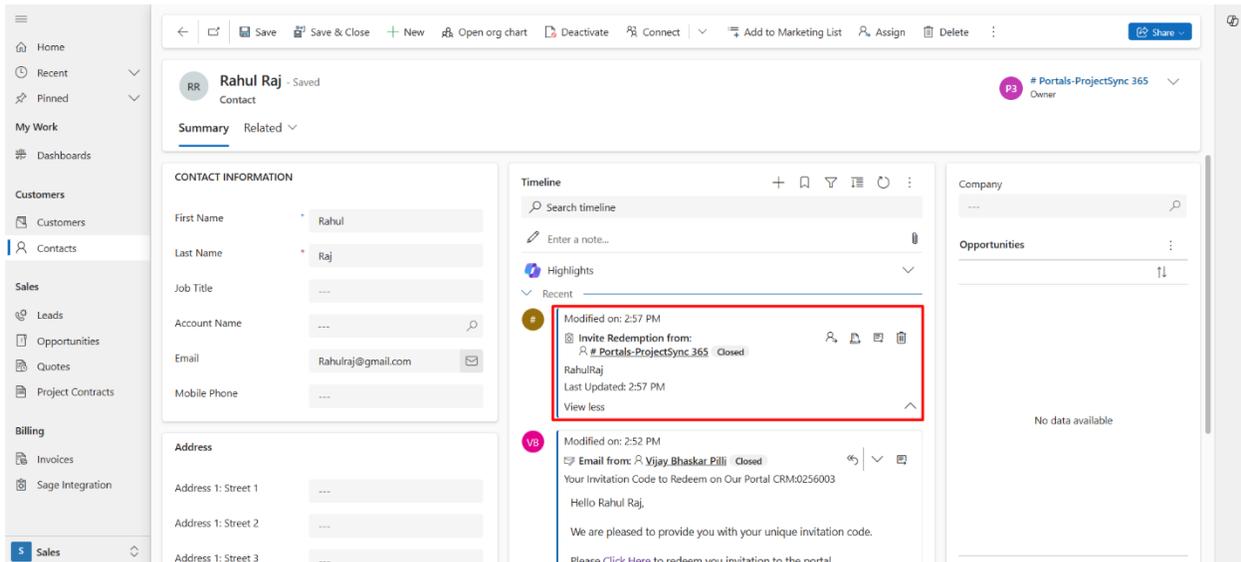
- A pop-up dialog box will be displayed saying that the invitation code has been sent. Click on Ok.



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

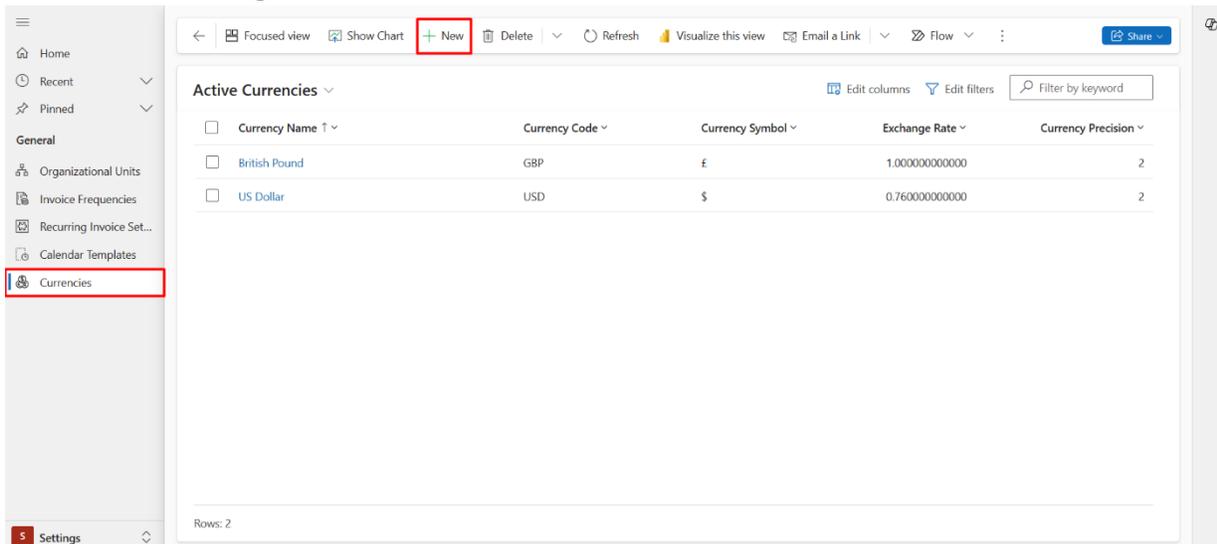


- On Successful redemption of the code by the contact, it will be updated in the timeline section.

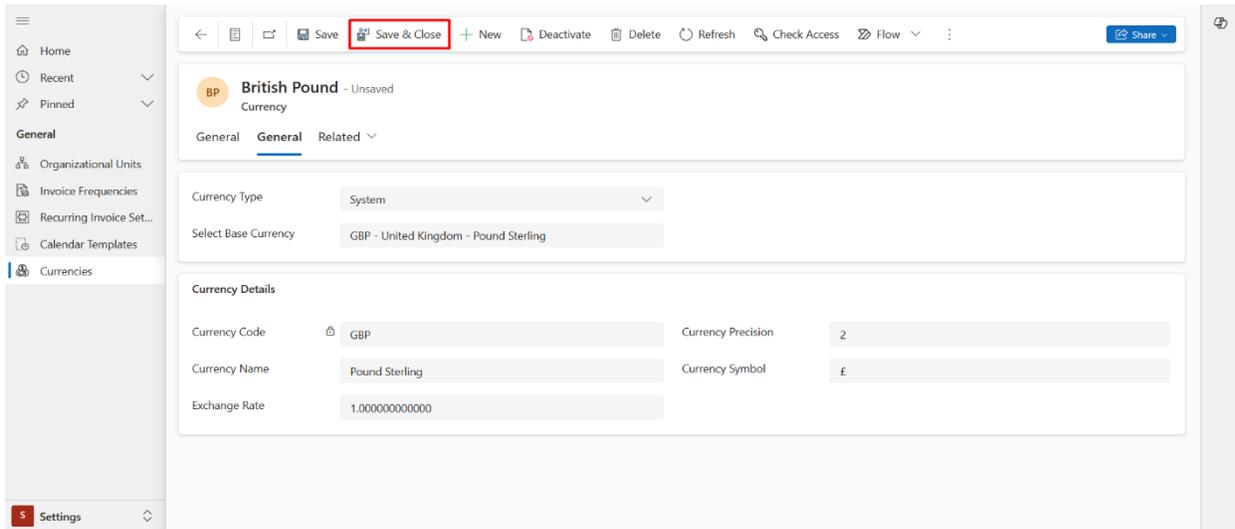


## Creating Currency: -

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

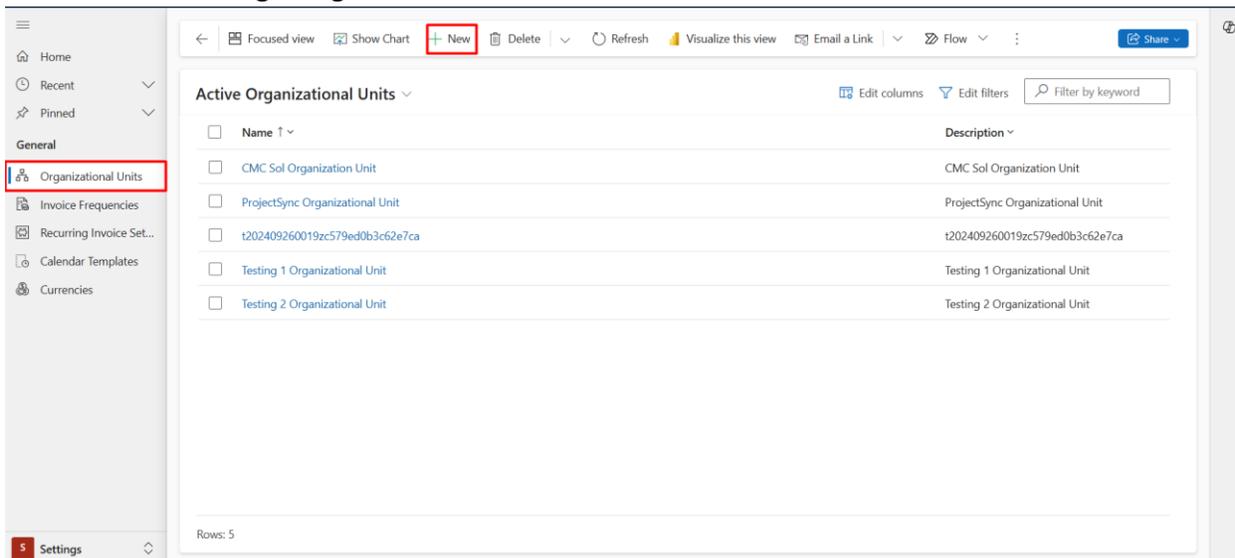


- Fill in the details such as Base Currency, Exchange Rate and click on Save and Close.

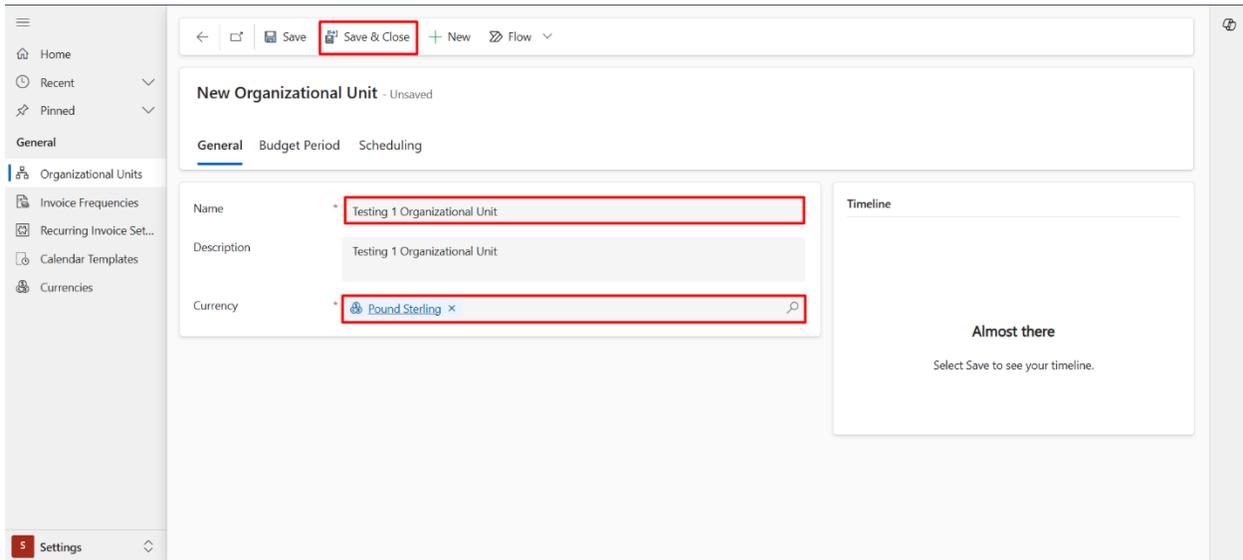


## Creating Organizational Units: -

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

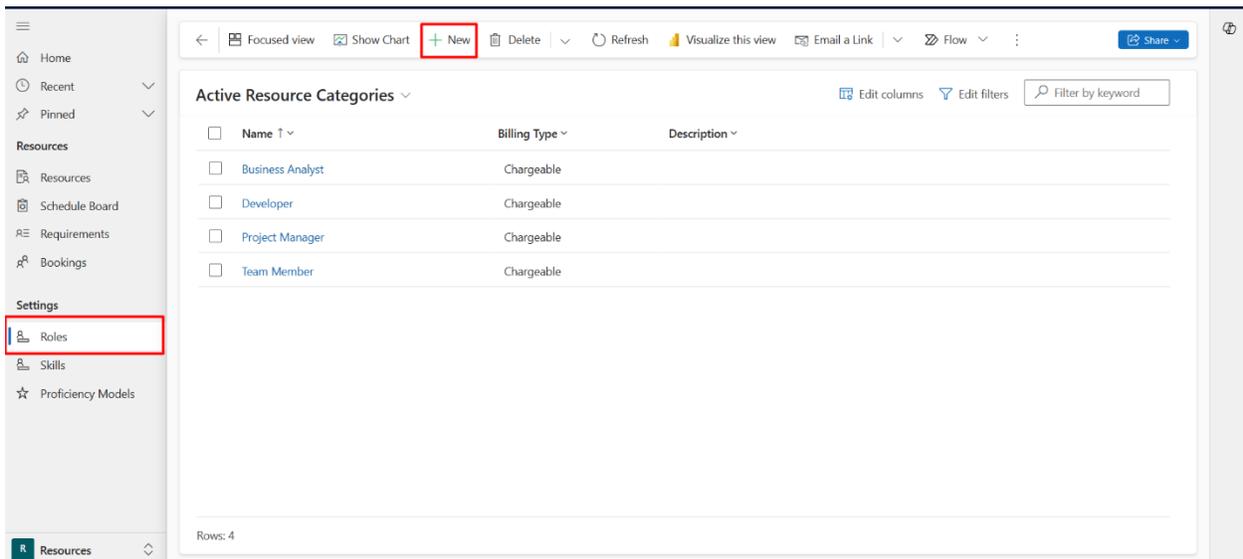


- Fill in details such as Name, Currency and click on Save and Close.



## 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.

**New Bookable Resource Category** - Unsaved

**General**

Name: Developer

Owner: Kalle Aditya Sai Raj Reddy (Available)

Description: ---

Target Utilization: 100

Billing Type: Chargeable

Skills:

No records can be displayed since this entity is not enabled for Notes, Activities or Posts.

## Creating Bookable Resources for contact: -

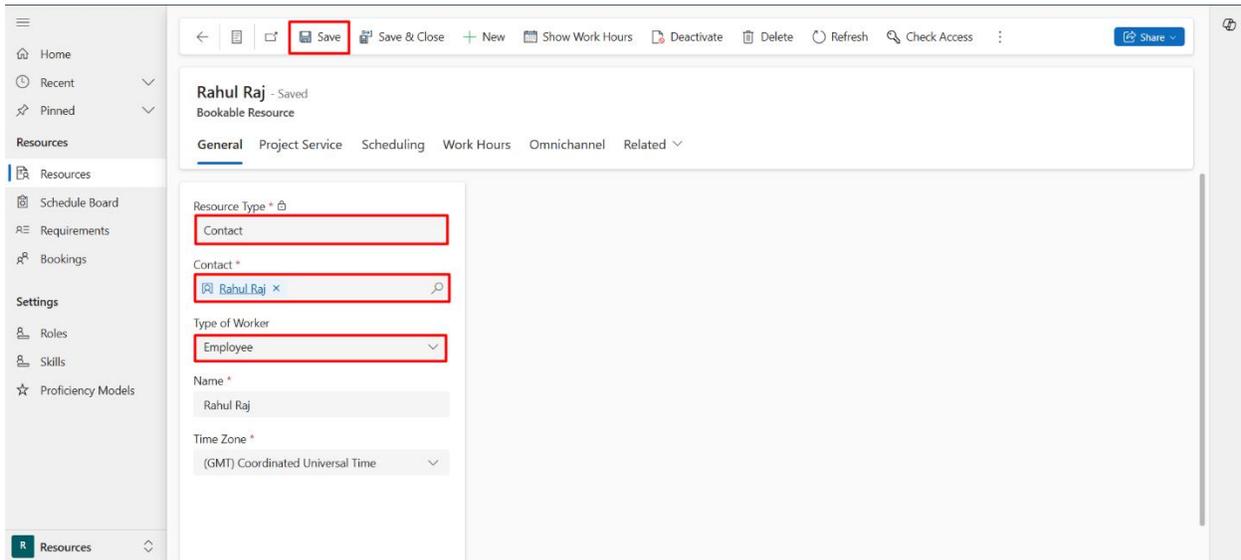
- Go to Resources>Resources and click on New.

**Active Bookable Resources**

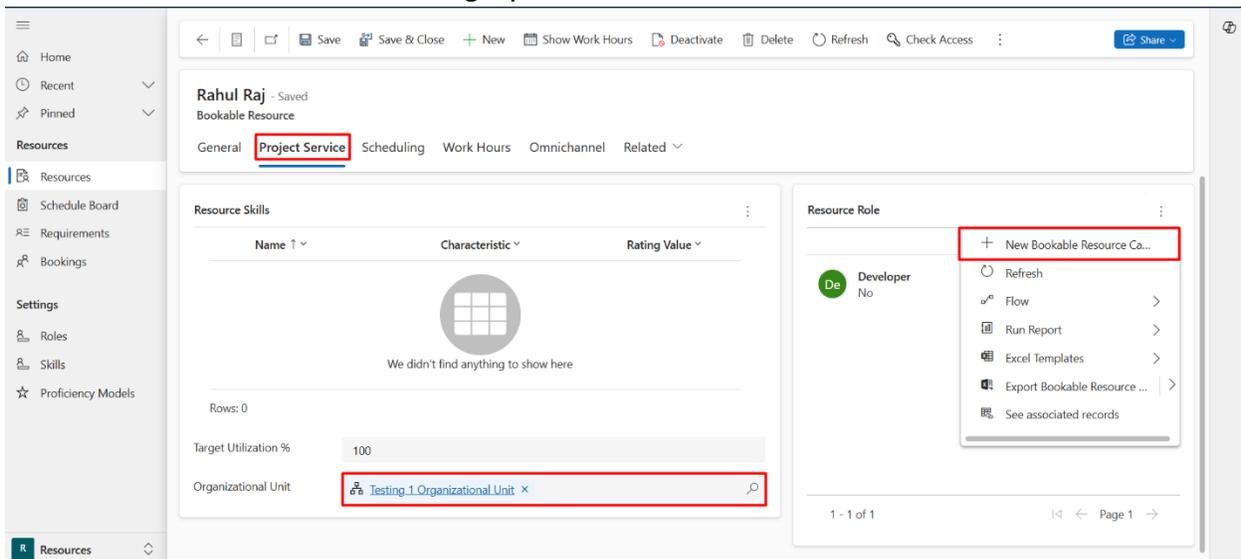
Name	Resource Type
# Portals-ProjectSync 365	User
Aditya Reddy	Contact
Amal Raj	Contact
B.Jamie Robert	Contact
Bhargav B	Contact
D.Robert Hook	Contact
Danish D	Contact
Generic Resource	Generic
Kalle Aditya Sai Raj Reddy	User
Rahul Raj	Contact
Sai Raj	Contact

Rows: 13

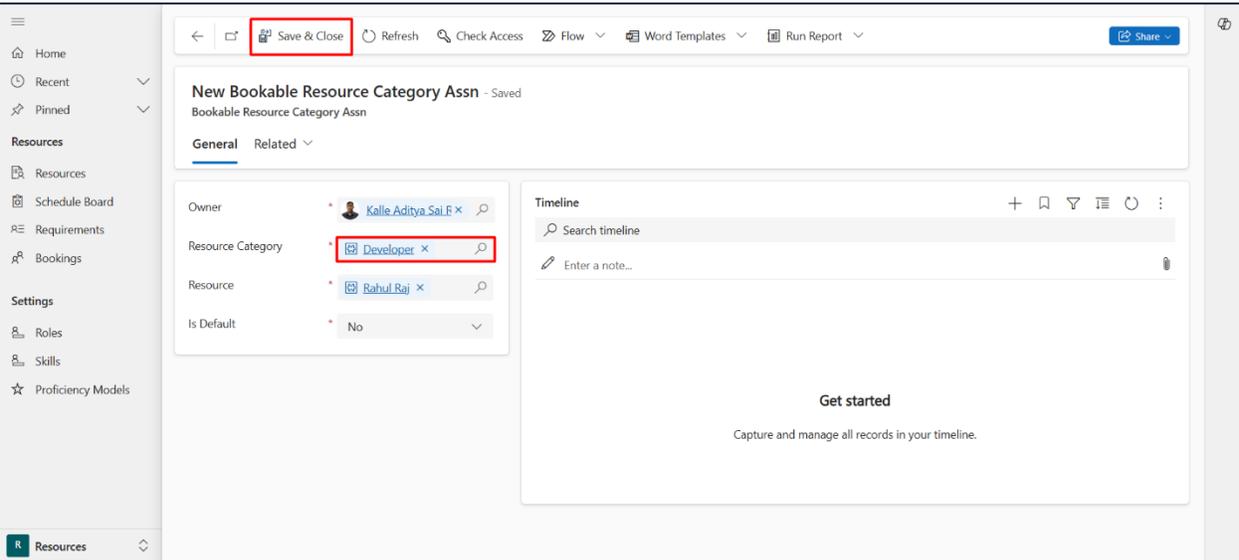
- Fill in the details such as Resource Type, Contact, etc. And click on Save.



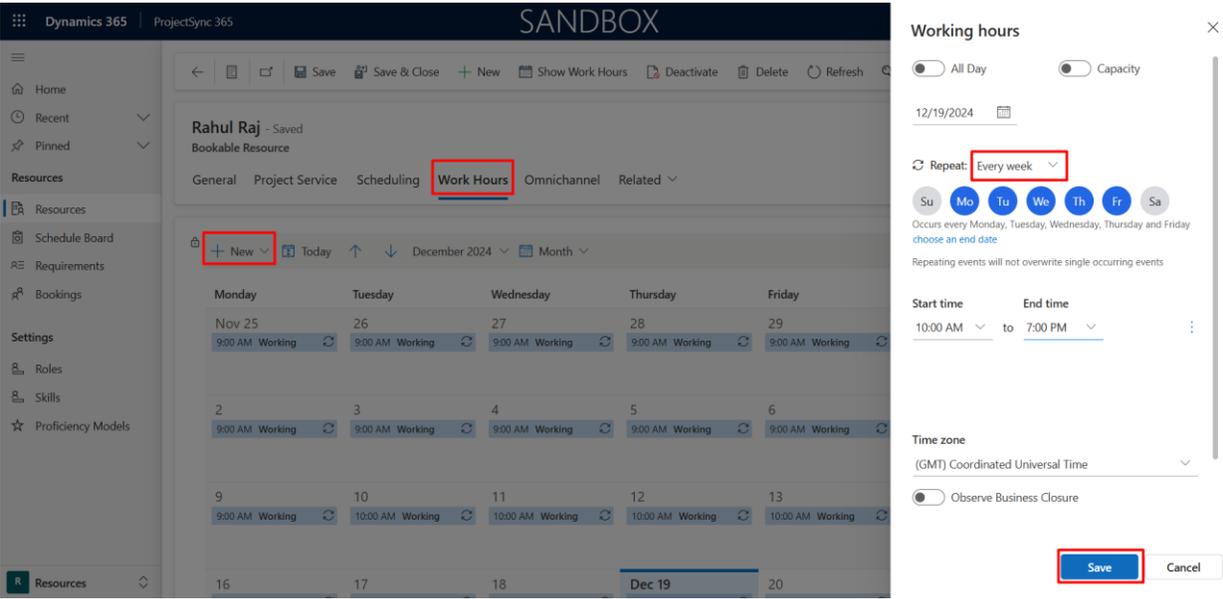
- Now, go to Project Service and Click on Ellipse in Resource Role Sub grid and click on new bookable resource category.



- 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.

The screenshot shows the 'Work Hours' configuration page for a resource named 'Rahul Raj'. The interface includes a top toolbar with buttons for 'Save', 'Save & Close' (highlighted in red), 'New', 'Show Work Hours', 'Deactivate', 'Delete', 'Refresh', 'Check Access', and 'Share'. Below the toolbar, the resource name and 'Bookable Resource' status are displayed. The main content area features a calendar grid for December 2024, showing work hours for each day from Monday, Nov 25 to Sunday, Dec 1. The work hours are listed as '9:00 AM Working' for most days, with some variations on Dec 9 and Dec 12.

## Creating Pricelists: -

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

The screenshot shows the 'Active Price Lists' page. The top toolbar includes buttons for 'Focused view', 'Show Chart', 'New' (highlighted in red), 'Delete', 'Refresh', 'Visualize this view', 'Email a Link', 'Flow', and 'Share'. Below the toolbar, the page title 'Active Price Lists' is shown along with 'Edit columns', 'Edit filters', and a search box. The main content area contains a table with the following data:

<input type="checkbox"/>	Name 1	Currency	Start Date	End Date
<input type="checkbox"/>	CMC Sol Cost Price List	US Dollar		
<input type="checkbox"/>	CMC Sol Sales Price List	US Dollar		
<input type="checkbox"/>	ProjectSync 365 Cost Price List	US Dollar		
<input type="checkbox"/>	ProjectSync 365 Sales Price List	US Dollar		
<input type="checkbox"/>	Testing 1 Cost Price List	Pound Sterling		
<input type="checkbox"/>	Testing 1 Sales Price List	Pound Sterling		
<input type="checkbox"/>	Testing 2 Cost Price List	Pound Sterling		
<input type="checkbox"/>	Testing 2 Sales Price List	Pound Sterling		

At the bottom of the table, it indicates 'Rows: 8'.

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

**Testing 1 Cost Price List** - Saved Active Status

Price List

General Role prices Role price markups Category prices Material prices Territory Relationships Related

Name: Testing 1 Cost Price List

Context: Cost

Effective Start Date (Time Zone Independent): ---

Effective End Date (Time Zone Independent): ---

Currency: Pound Sterling

OOH1 Percentage: 25.00

OOH2 Percentage: 50.00

Time Unit: Hour

Description: Testing 1 Cost Price List

- Go to Role Prices click on New Role Price.

**Testing 1 Cost Price List** - Saved Active Status

Price List

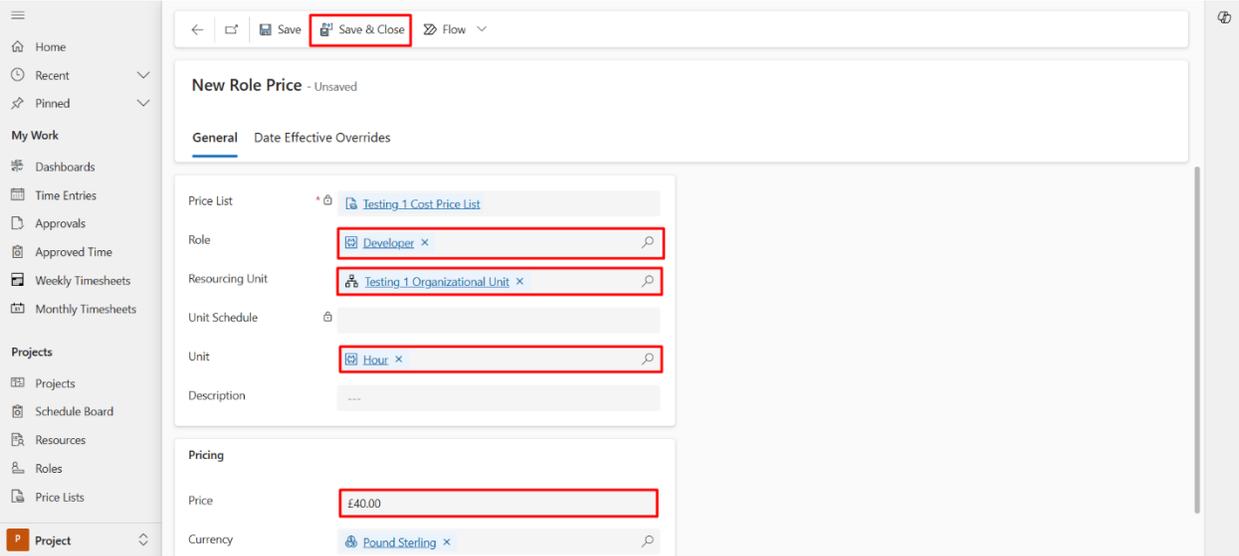
General Role prices Role price markups Category prices Material prices Territory Relationships Related

+ New Role Price Update Prices

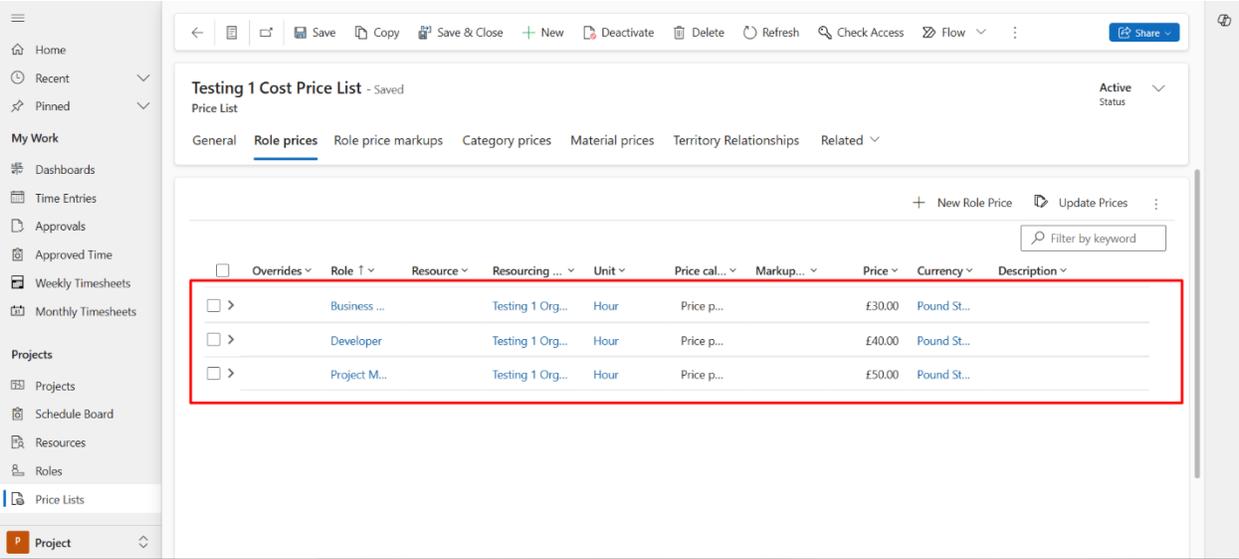
Filter by keyword

Overrides	Role	Resource	Resourcing	Unit	Price cal...	Markup...	Price	Currency	Description
<input type="checkbox"/>	> Business ...		Testing 1 Org...	Hour	Price p...		£30.00	Pound St...	
<input type="checkbox"/>	> Developer		Testing 1 Org...	Hour	Price p...		£40.00	Pound St...	
<input type="checkbox"/>	> Project M...		Testing 1 Org...	Hour	Price p...		£50.00	Pound St...	

- 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.

The screenshot shows a web application interface for creating a 'Sales Price List'. The top navigation bar includes a 'Save' button highlighted with a red box. The main content area is titled 'Testing 1 Sales Price List - Saved' and contains a form with the following fields:

- Name: Testing 1 Sales Price List (highlighted with a red box)
- Context: Sales (highlighted with a red box)
- Effective Start Date (Time Zone Independent): ---
- Effective End Date (Time Zone Independent): ---
- Currency: Pound Sterling
- OOH1 Percentage: 25.00
- OOH2 Percentage: 50.00
- Time Unit: Hour

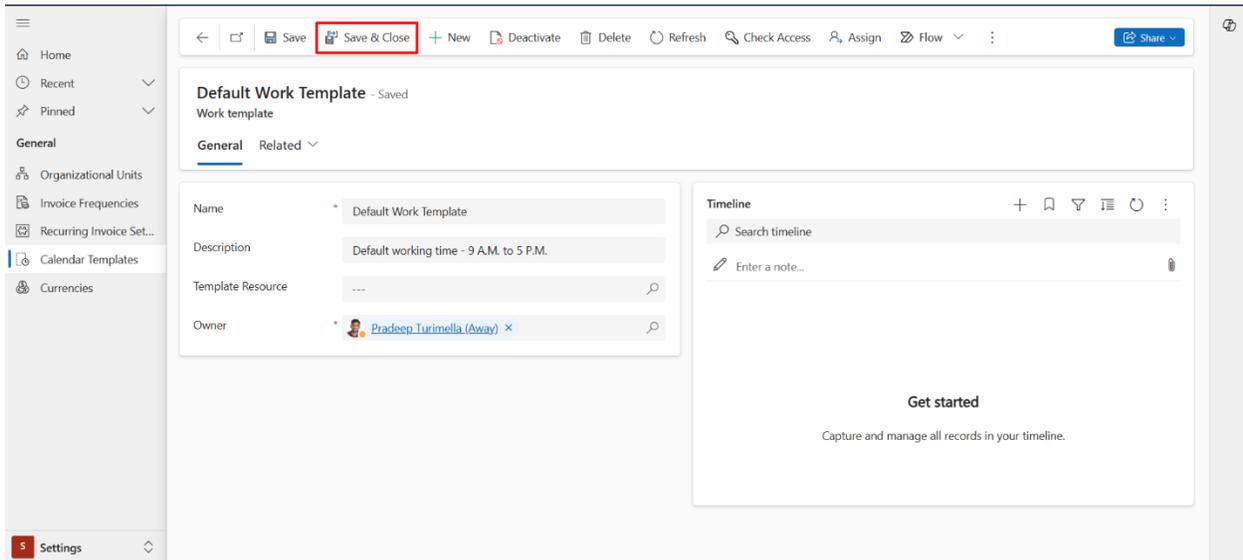
## Creating Calendar Template: -

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

The screenshot shows the 'Active Work Hours Templates' page. The top navigation bar includes a '+ New' button highlighted with a red box. The left sidebar has 'Calendar Templates' highlighted with a red box. The main content area displays a table with the following data:

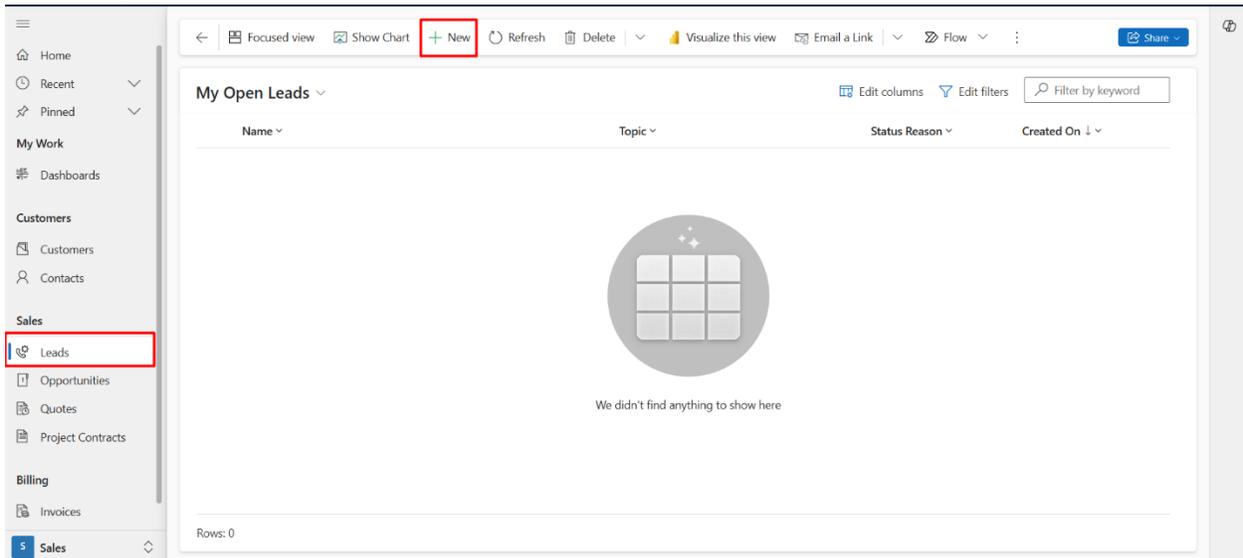
Name	Created On
Default Work Template	9/26/2024 1:25 AM

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

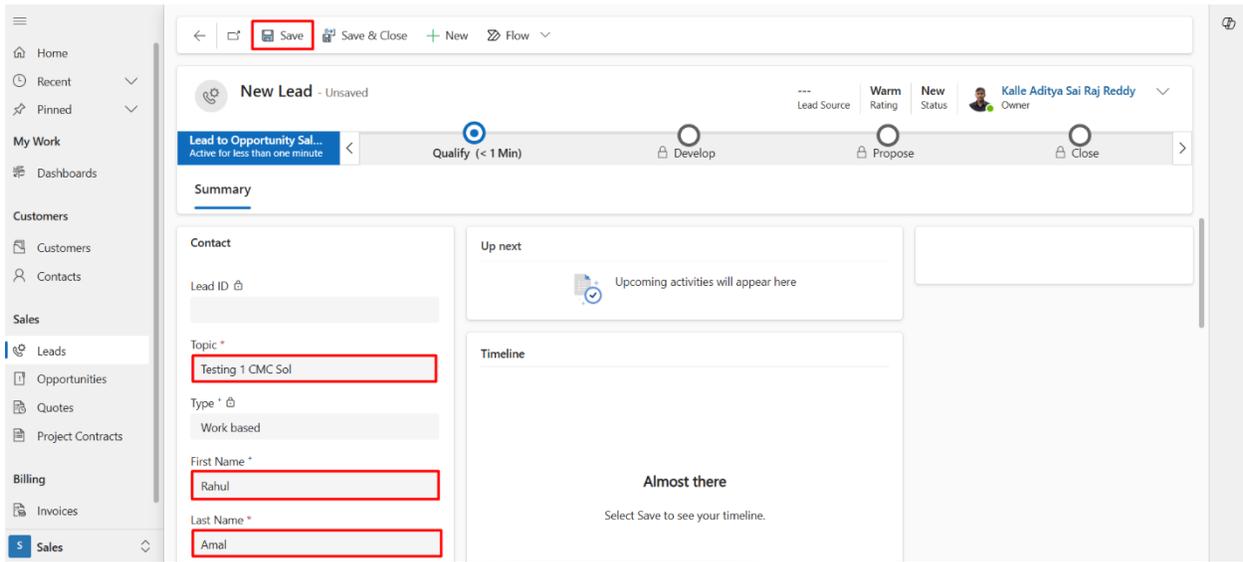


## Lead Generation and Qualification: -

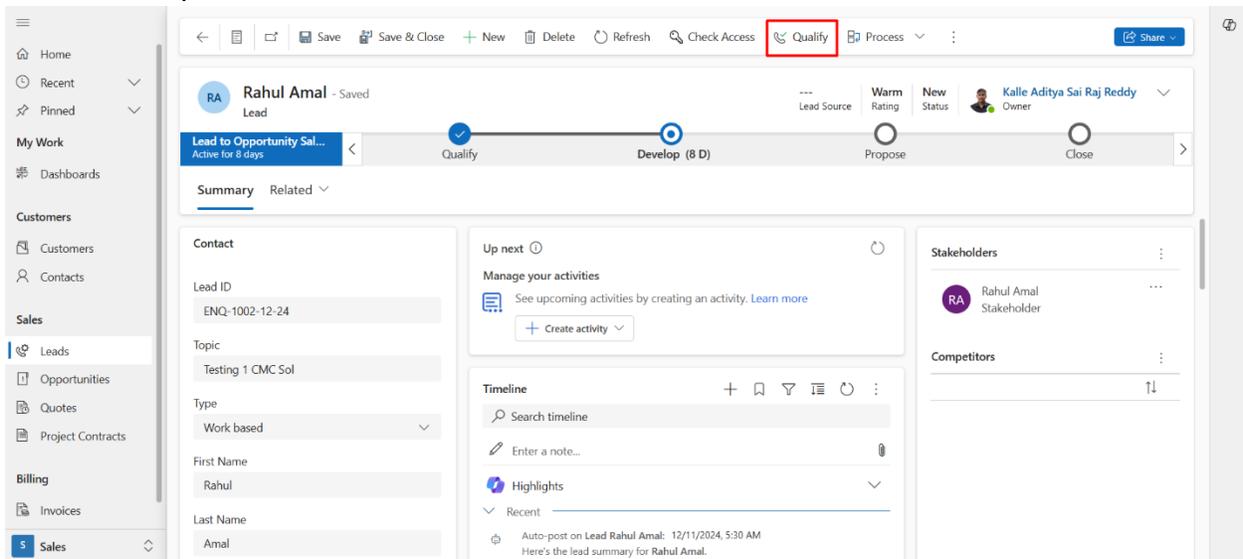
- Open Sales>Leads and click on New.



- Fill in the Summary Details and click on Save.



- Qualify the Lead.

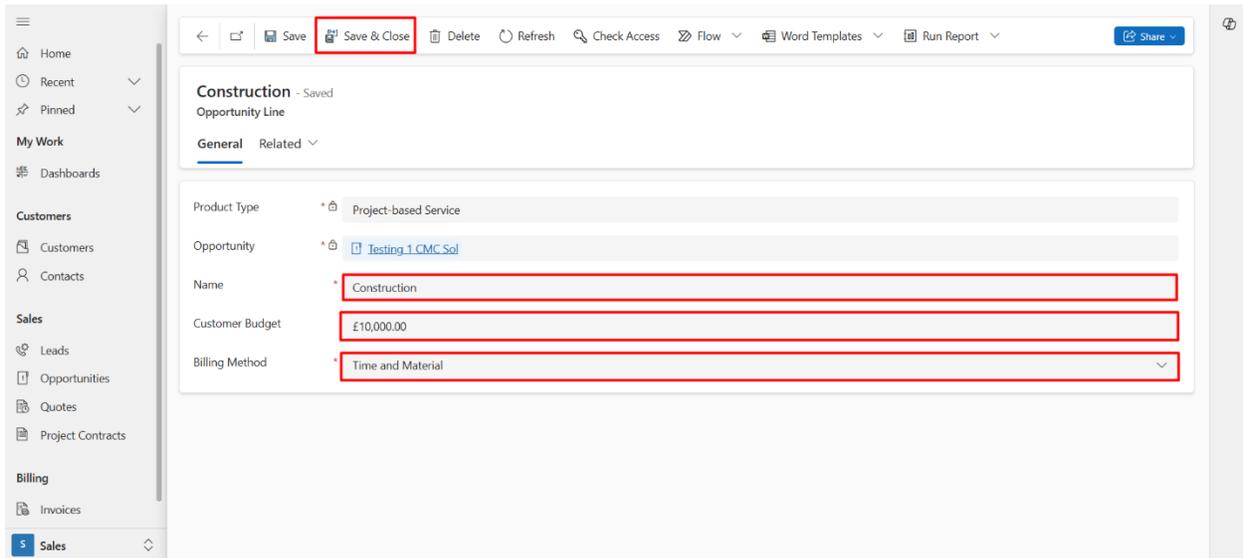


Opportunity is created: -

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

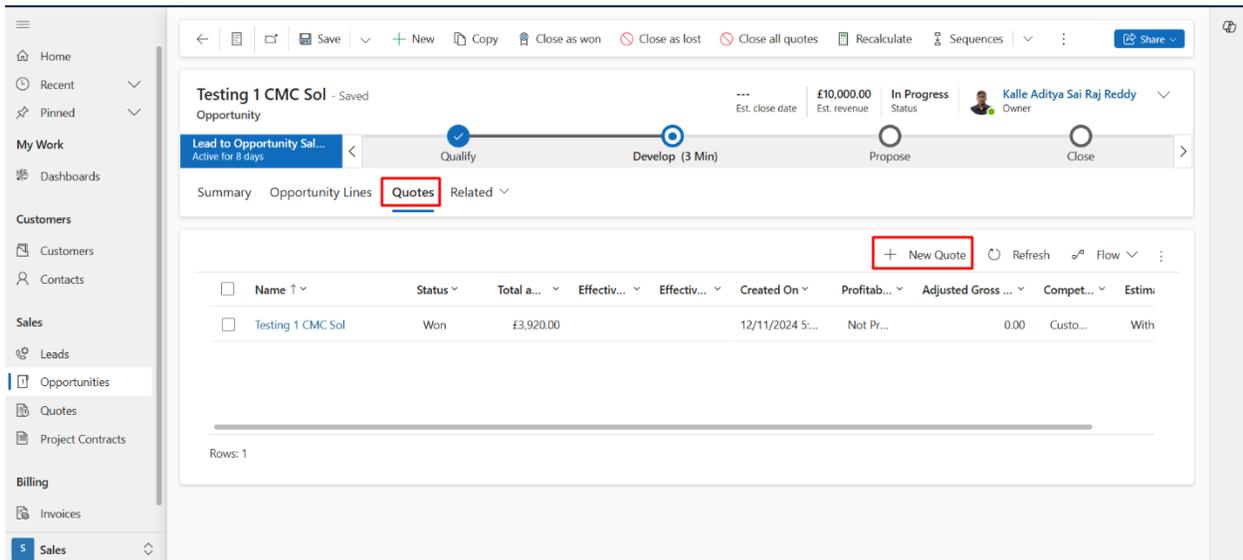
- Go to Opportunity Line and click on Add New Opportunity Line.

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

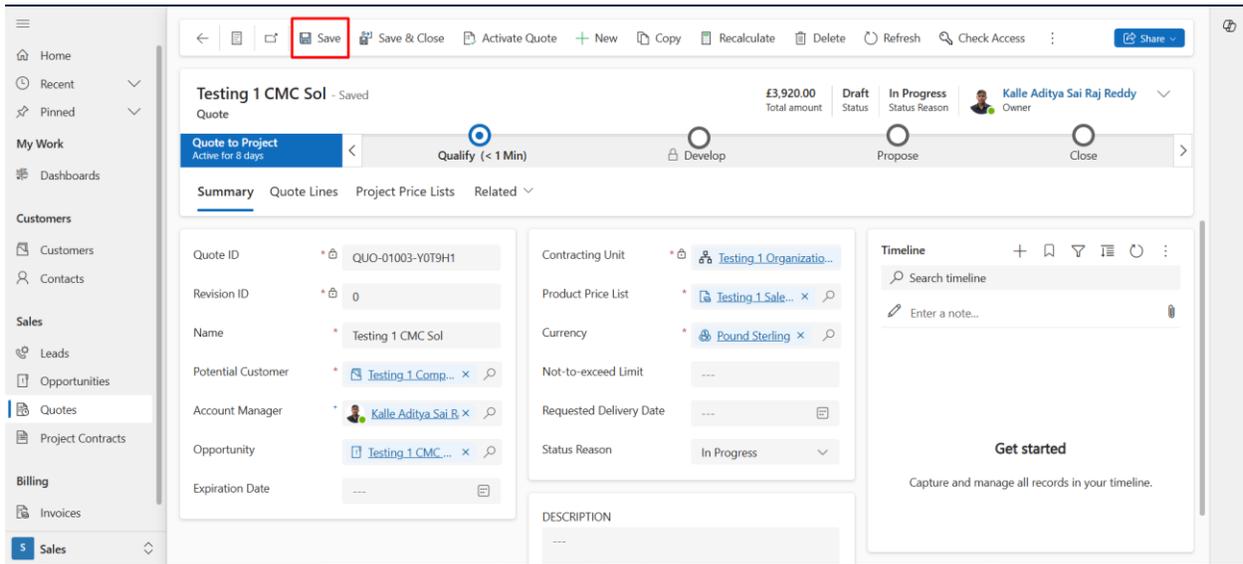


## Create a Quote: -

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

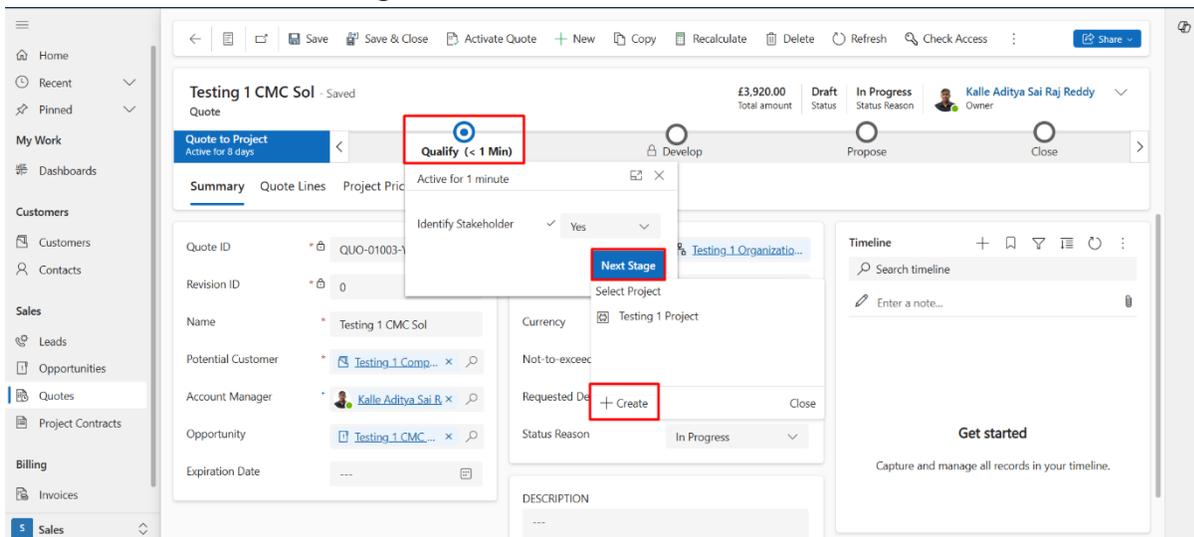


- A Quote is created and click on Save.

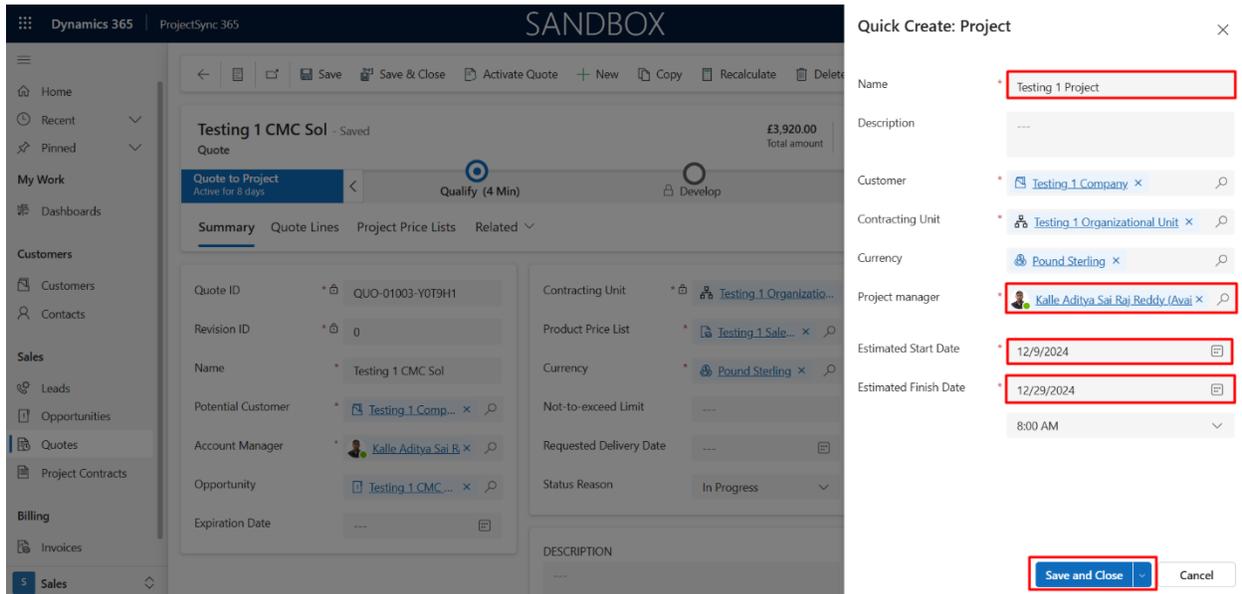


## Creating Project: -

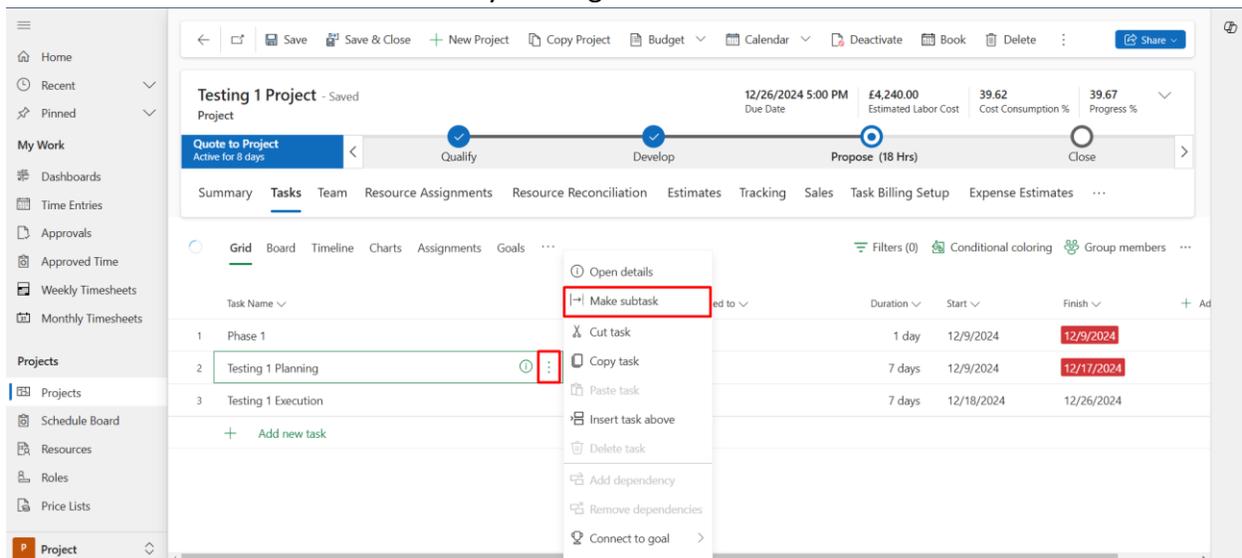
- Click on Qualify and Change the Identify Stakeholder field value to yes.
- Click on the next stage and click on the create button.



- 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.

The screenshot shows the 'Testing 1 Project' interface. The 'Tasks' tab is selected and highlighted with a red box. Below the navigation tabs, there is a table of tasks. The 'Add new task' button is highlighted with a red box. A dropdown menu is open, showing options to 'Add generic resource' and 'Rahul Raj'.

- 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.

The screenshot shows the 'New Project Team Member' form. The 'Save & Close' button is highlighted with a red box. The form fields for Position Name, Project, Bookable Resource, Role, Resourcing Unit, Start, Finish, and Working Hours Per Day are all highlighted with red boxes.

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

The screenshot shows the 'Testing 1 Project' interface. At the top, there are project details: 'Testing 1 Project - Saved', '12/26/2024 5:00 PM' (Due Date), '£4,240.00' (Estimated Labor Cost), '0.00' (Cost Consumption %), and '0.00' (Progress %). Below this is a progress bar with stages: 'Quote to Project' (Active for 8 days), 'Qualify', 'Develop (15 Min)', 'Propose', and 'Close'. The 'Team' tab is selected, showing a table of team members. A 'Generate Requirement' button is highlighted with a red box.

Worker Type	Subcontract...	Bookable Resource	Role	Resourcing Unit	Position Name	Start	Finish	Required Hours
> Employee	Valid	Kalle Aditya Sai Raj Reddy	Project Manager	t202409260019zc579ex	Project Manager 1	12/9/2024	12/29/2024	---
> Employee	Valid	Rahul Raj	Developer	Testing 1 Organization: Developer		12/18/2024	12/26/2024	---
> Employee	Valid	Amal Raj	Business Analyst	Testing 1 Organization: Business Analyst		12/9/2024	12/17/2024	---

### 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.

The screenshot shows the 'Testing 1 Project' interface with the 'Quote Lines' tab selected. A dropdown menu is open for the 'Develop (< 1 Min)' stage, showing options for 'Identify Tasks', 'Identify Roles', and 'Generate Requirement', all set to 'Yes'. A 'Next Stage' button is highlighted with a red box.

Field	Value
Project Number	X241005 GSK Testing 1 Project
Name	Testing 1 Project
Description	Testing 1 Project
Customer	Testing 1 Company
Currency	Pound Sterling
Contracting Unit	Testing 1 Organizational Unit
Project manager	Kalle Aditya Sai Raj Reddy (A)

Field	Value
Effort (Hours)	121.00
Estimated Labor Cost	£4,240.00
Estimated Expense Cost	£0.00
Estimated Material Cost	£0.00
Estimated Total Cost	£4,240.00

Field	Value
Actual Start	---
Actual Finish	---
Actual Labor Cost	£0.00
Actual Expense Cost	£0.00
Actual Material Cost	£0.00

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

Testing 1 CMC Sol - Saved

£3,920.00 Total amount

Draft Status

In Progress Status Reason

Kalle Aditya Sai Raj Reddy Owner

Quote to Project Active for 6 days

Qualify Develop Propose (< 1 Min) Close

Summary **Quote Lines** Project Price Lists Related

Project-based Lines

Write-In Pr...	Billing Meth...	Project	Include...	Include ...	Include Expense	Include ...	Include ...	Extended Amou...	Customer
<input type="checkbox"/>	Construction	Time and ...	Testing 1 ...	Selecte...	Yes	Yes	Yes	Yes	£3,920.00

Rows: 1

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

Construction - Saved

Quote Line

Summary Chargeable Tasks Chargeable roles Chargeable categories Quote Line Details Invoice schedule Customers Related

Quote \* [Testing 1 CMC Sol](#)

Name \* Construction

Billing Method \* Time and Material

Project \* **Testing 1 Project**

Project Main Task \* **Phase 1**

Description

Based on a 9 hour day - Business Analyst - £30 per Hour

Based on a 9 hour day - Developer - £40 per Hour

Based on a 9 hour day - Developer - £40 per Hour

Included tasks

Selected project tasks only

Include Time Yes

Include Expense Yes

Include material Yes

Include Fee Yes

Quoted amount £3,920.00

Estimated tax £0.00

Extended amount £3,920.00

Not-to-exceed limit ---

Customer Budget £10,000.00

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

The screenshot shows the 'Chargeable Tasks' table with the following data:

Task	Parent Task (Task)	Billing Type	Effort (Task)	Start (Task)	Finish (Task)	
Testing 1 Execution	Phase 1	Chargeable	61.00	12/18/2024	12/26/2024	[icon]
Testing 1 Planning	Phase 1	Chargeable	60.00	12/9/2024	12/17/2024	[icon]

Rows: 2

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

The screenshot shows the 'Quote Line Details' view with a dropdown menu open. The menu options are:

- Import from Project Estima...
- Refresh
- Flow
- Run Report
- Excel Templates
- Export Quote Line Detail
- See associated records
- Show As

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

Description	Billing Type	Transaction Class	Select Prod...	Product	Product Na...	Write In Pr...	Resourcing unit	Transaction...	Role
Phase 1	Chargeable	Time	Existing	---	---	---	Testing 1 Orga...	---	Business Analyst
Phase 1	Chargeable	Time	Existing	---	---	---	Testing 1 Orga...	---	Developer

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

Testing 1 CMC Sol - Saved

£3,920.00 Total amount

Draft Status

In Progress Status Reason

Quote to Project (Active for 8 days)

Qualify

Develop

Propose (5 Min)

Export to PDF

Look Up Address

Process

Assign

Flow

Word Templates

Run Report

Quote ID: QUO-01003-Y0T9H1

Revision ID: 0

Name: Testing 1 CMC Sol

Potential Customer: Testing 1 Comp...

Account Manager: Kalle Aditya Sai B.

Opportunity: Testing 1 CMC...

Expiration Date: ---

Contracting Unit: Testing 1 Organizatio...

Product Price List: Testing 1 Sale...

Currency: Pound Sterling

Not-to-exceed Limit: ---

Requested Delivery Date: ---

Status Reason: In Progress

- Activate the Quote.

Testing 1 CMC Sol - Saved

£3,920.00 Total amount

Draft Status

In Progress Status Reason

Kalle Aditya Sai Raj Reddy Owner

Quote to Project Active for 8 days

Qualify Develop Propose (5 Min) Close

Summary Quote Lines Project Price Lists Related

Quote ID: QUO-01003-Y0T9H1

Revision ID: 0

Name: Testing 1 CMC Sol

Potential Customer: Testing 1 Comp...

Account Manager: Kalle Aditya Sai R...

Opportunity: Testing 1 CMC...

Expiration Date: ---

Contracting Unit: Testing 1 Organizatio...

Product Price List: Testing 1 Sale...

Currency: Pound Sterling

Not-to-exceed Limit: ---

Requested Delivery Date: ---

Status Reason: In Progress

Timeline

Search timeline

Enter a note...

Get started

Capture and manage all records in your timeline.

- Select Close as Won.

Read-only This record's status: Active

Testing 1 CMC Sol - Saved

£3,920.00 Total amount

Active Status

In Progress Status Reason

Kalle Aditya Sai Raj Reddy Owner

Quote to Project Active for 8 days

Qualify Develop Propose (6 Min) Close

Summary Quote Lines Project Price Lists Related

Quote ID: QUO-01003-Y0T9H1

Revision ID: 0

Name: Testing 1 CMC Sol

Potential Customer: Testing 1 Company

Account Manager: Kalle Aditya Sai Raj Reddy

Opportunity: Testing 1 CMC Sol

Expiration Date: ---

Contracting Unit: Testing 1 Organizatio...

Product Price List: Testing 1 Sales Price List

Currency: Pound Sterling

Not-to-exceed Limit: ---

Requested Delivery Date: ---

Status Reason: In Progress

Timeline

Search timeline

Enter a note...

Get started

Capture and manage all records in your timeline.

## Creating Project Contract: -

- Project Contract is created in Project Contracts.

Testing 1 CMC Sol - Saved

Order

Summary Contract Lines Project Price Lists PO Details Contract Performance Customers Advances and Retainers Related

Order ID \* ORD-01003-K4D6L7

Name \* Testing 1 CMC Sol

Customer \* Testing 1 Comp... x

Account Manager \* Kalle Aditya Sai B x

Opportunity Testing 1 CMC... x

Quote Testing 1 CMC... x

Product Price List \* Testing 1 Sales... x

Contracting Unit \* Testing 1 Organizatio...

Currency \* Pound Sterling

Requested Delivery Date ---

Contract Status Reason \* Draft

Invoiced Amount

Remaining Funds

Invoiced Amount in %

Timeline

Search timeline

Enter a note...

Get started

Capture and manage all records in your timeline.

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

Testing 1 CMC Sol - Saved

Order

Summary **Contract Lines** Project Price Lists PO Details Contract Performance Customers Advances and Retainers Related

Project-based Lines

+ Add New Contract Line Edit

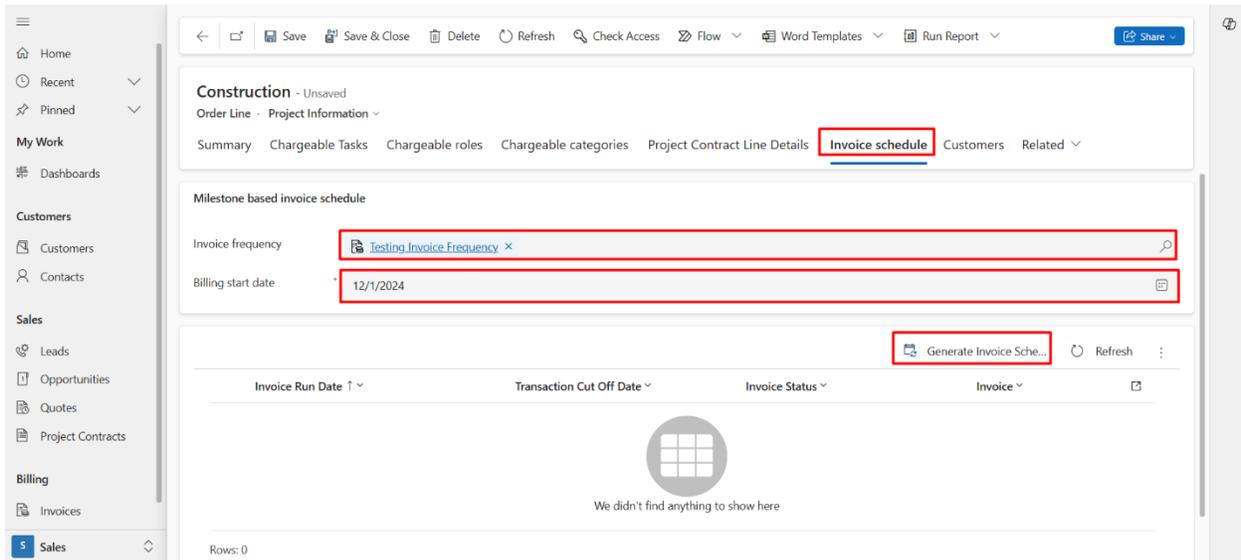
<input type="checkbox"/>	Write-off	Billing Meth...	Project	Include...	Include ...	Include Exp...	Include ...	Include ...	Extend...	Customer Budget
<input type="checkbox"/>	Construct...	Time and ...	Testing 1 Project	Selecte...	Yes	Yes	Yes	Yes	£3,920.00	£10,000.

Rows: 1

Product-based Lines

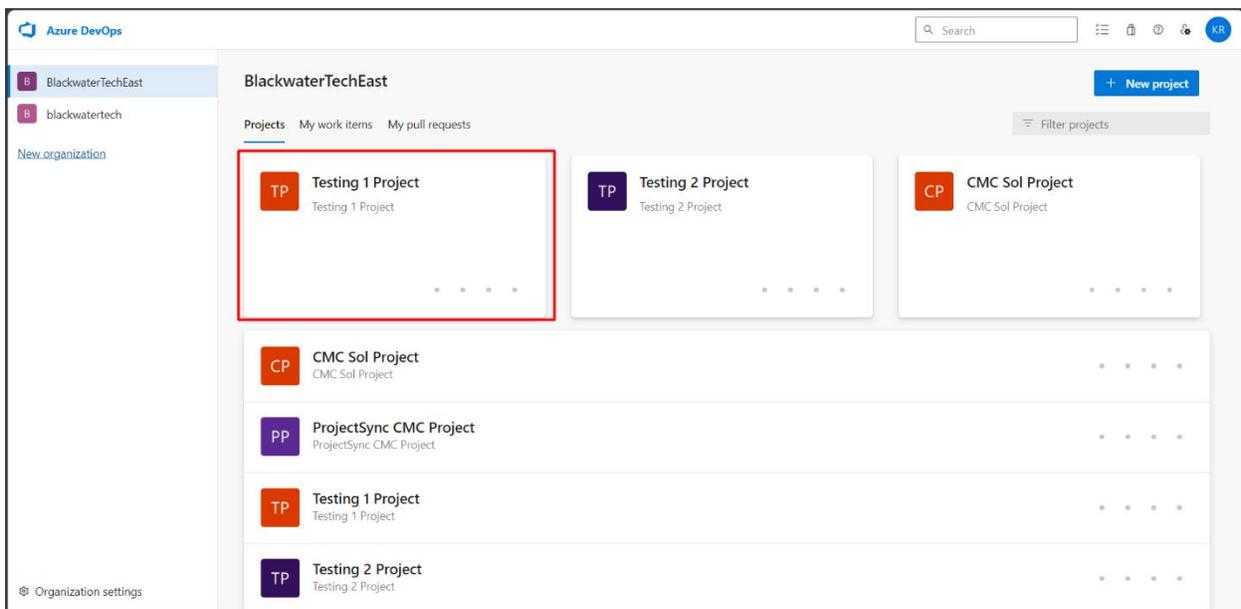
+ Add New Contract Line Refresh

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

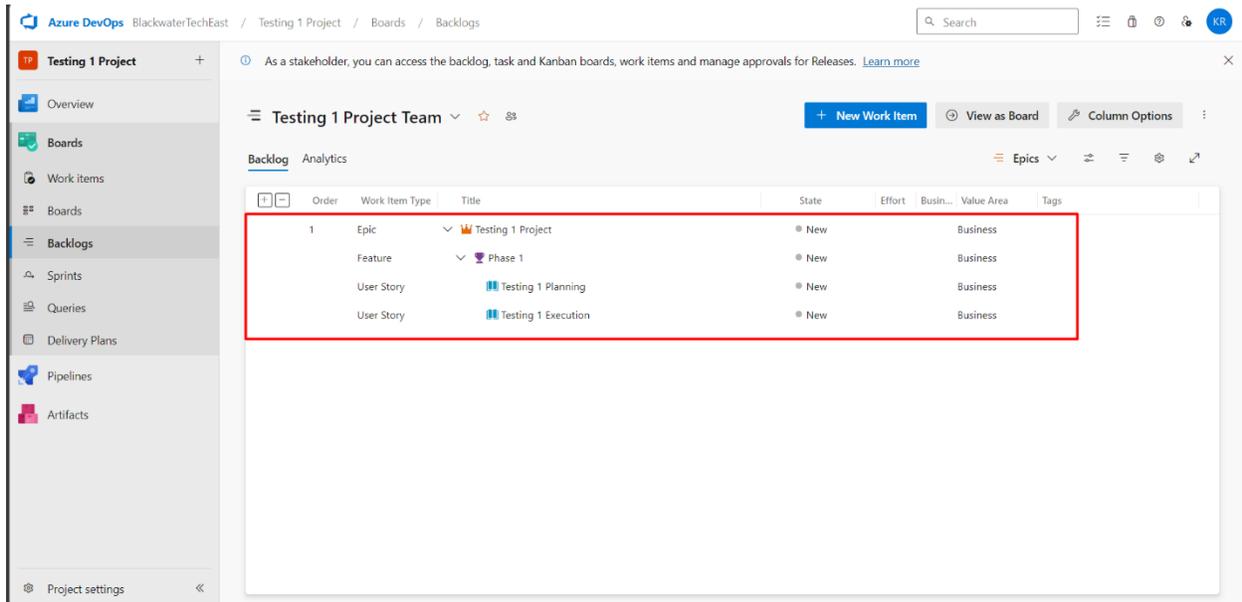


## Azure DevOps: -

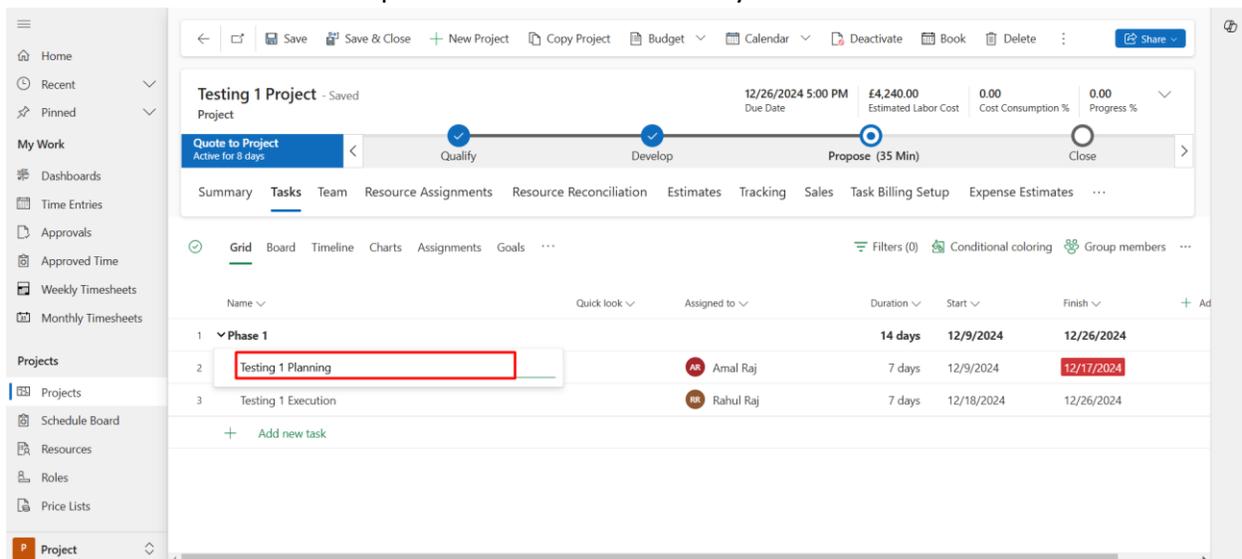
- Project is created in the Azure DevOps after Project Contract is created.



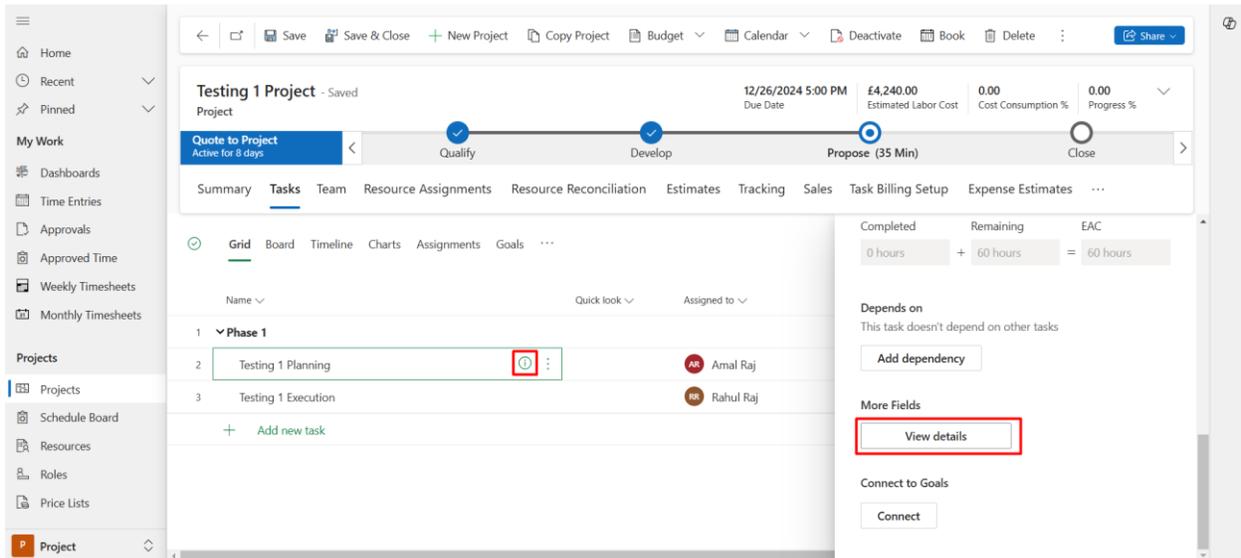
- The Project, Project Main Task and Project Sub Tasks are created in the backlog.



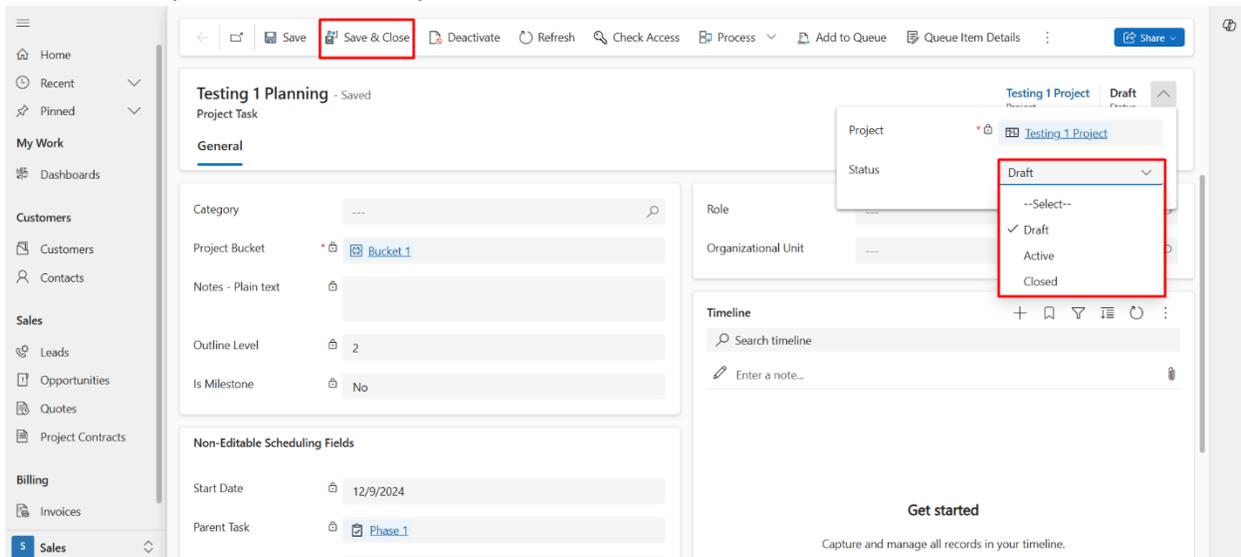
- The CRM is synchronized with Azure DevOps. If we update the Subtasks name and status in CRM it will update the related User Story.



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

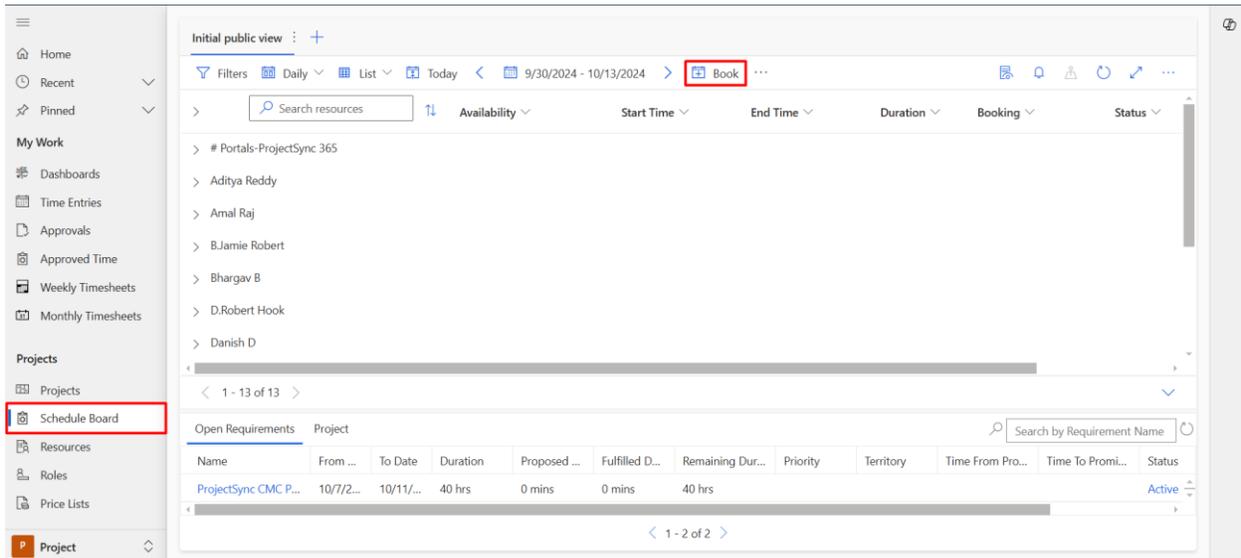


- Click on the dropdown and update the status and click on Save and close the Azure DevOps status will be updated as well.

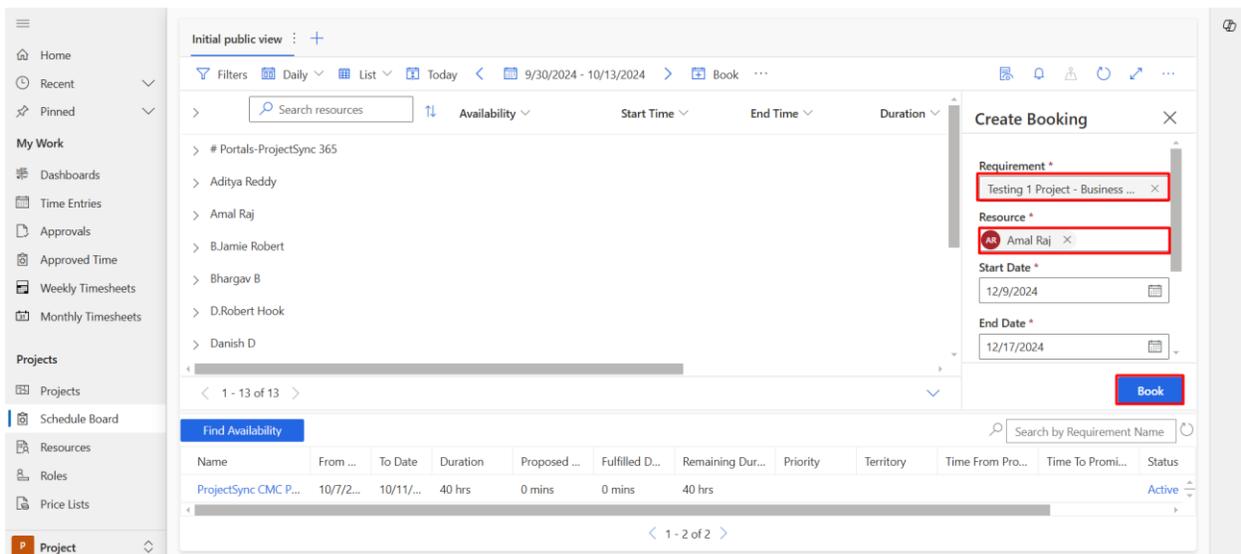


## Booking Resources: -

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



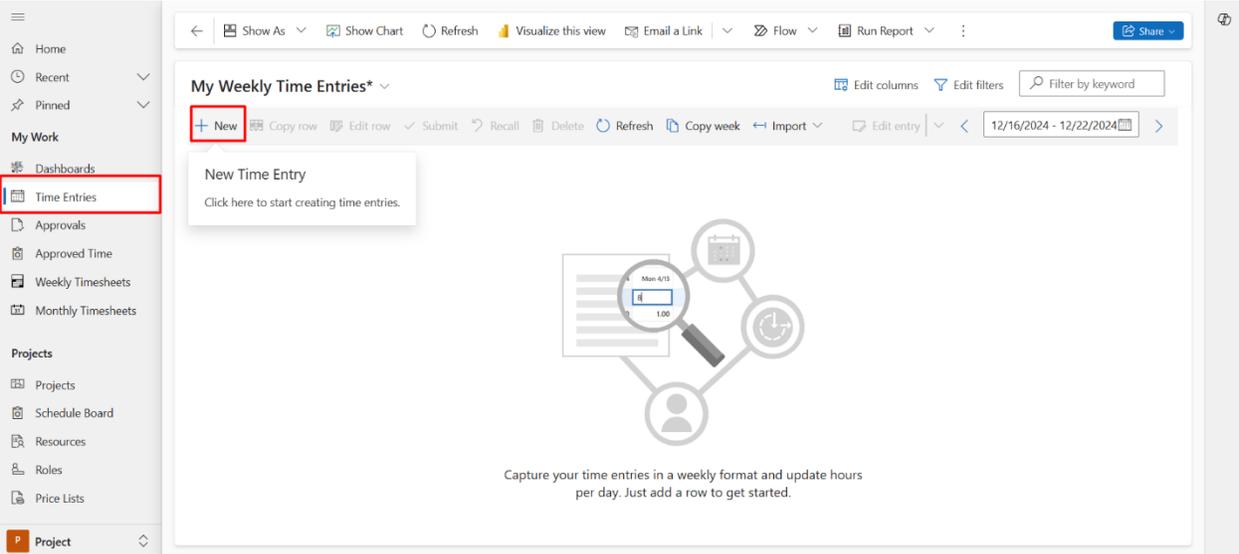
- Select the Resources, Click on Book, and Fill in details such as Requirement, Start and End Date, Booking type, Status.
- Click on Book.



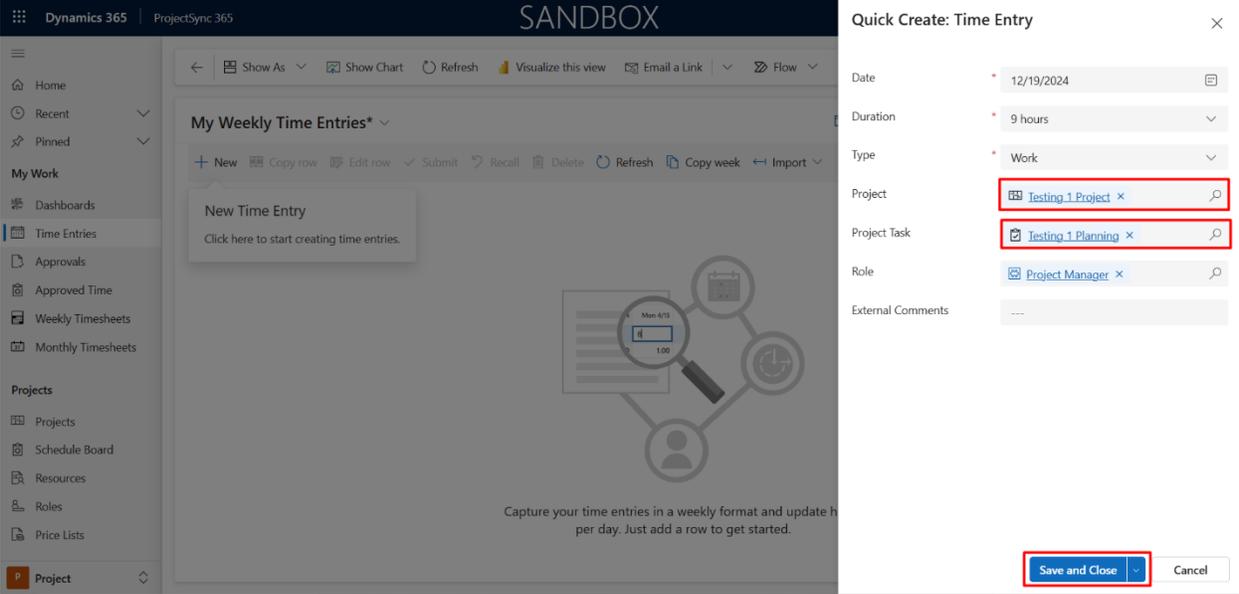
- Similarly, Book the other Resources as well.

## 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.

Time S...	Project	Project Task	Role	Type	Subcon...	Subcon...	Entry S...	Mon 12/16	Tue 12/17	Wed 12/18	Thu 12/19	Fri 12/20	Sat 12/21	Sun
<input checked="" type="checkbox"/>	Project ...	Testing 1 Project	Testing 1 Planni...	Project Ma...	Work		Draft	9.00	9.00	9.00	9.00	9.00	0.00	
								9.00	9.00	9.00	9.00	9.00	0.00	

## Weekly Time Sheets: -

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

<input type="checkbox"/>	Name	Project	Resourc...	Bookabl...	Duration	Start Date	End Date	Approva...	Created On
<input type="checkbox"/>	Rahul Raj	Testing 1 ...	Developer	Rahul Raj	24.00	12/16/2024	12/22/2024		12/19/2024 1:...
<input type="checkbox"/>	Amal Raj	Testing 1 ...	Business ...	Amal Raj	24.00	12/16/2024	12/22/2024		12/19/2024 1:...

Rows: 2

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

**Rahul Raj - Saved**  
Timesheet Approvals

General **Approvals** Time Cost Related

**All Time Entries for Approval**

Submitte...	Resource	Date	Project	Project Ta...	Resource ...	Submitte...	External Com...	Record St...
<input checked="" type="checkbox"/>	Rahul Raj	12/16/2024	Testing_1 Project	Testing_1 Ex...	Developer	8.00		Submitted
<input type="checkbox"/>	Rahul Raj	12/17/2024	Testing 1 Project	Testing 1 Ex...	Developer	8.00		Submitted
<input type="checkbox"/>	Rahul Raj	12/18/2024	Testing 1 Project	Testing 1 Ex...	Developer	8.00		Submitted

Rows: 3 Selected: 1

**Client Approvals**

Name	Bookable Res...	Date	Duration	Project	Created On
<input type="checkbox"/>	Rahul Raj	12/16/2024	8.00	Testing 1 Project	12/19/2024 1:12 PM
<input type="checkbox"/>	Rahul Rai	12/17/2024	8.00	Testing 1 Project	12/19/2024 1:12 PM

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

**Approved Time\***

Entry Status	Time S...	Project	Project Task	Role	Subcon...	Subcon...	Mon 12/16	Tue 12/17	Wed 12/18	Thu 12/19	Fri 12/20	Sat 12/21	Sun 12/22
Approved	Project S...	Testing 1 Project	Testing 1 Execution	Developer			8.00	8.00	8.00	0.00	0.00	0.00	0.00

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

**Rejected Time Entries\***

Project	Project Task	Entry Status	Bookable Re...	Duration...	Type	Mon 12/16	Tue 12/17	Wed 12/18	Thu 12/19	Fri 12/20	Sat 12/21	Sun 12/22	Tota
Testing 1 Project	Testing 1 Planning	Returned	Amal Raj	8.00	Work	8.00	8.00	8.00	0.00	0.00	0.00	0.00	24.0
						8.00	8.00	8.00	0.00	0.00	0.00	0.00	24.0

Monthly Time Sheets: -

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

Name	Project	Resource R...	Start Date	End Date	Duration	Created On
Kalle Aditya Sai Raj Reddy	Testing 1 Proj...	Project Mana...	11/25/2024	12/25/2024	0.00	12/19/2024 1:33 PM
Rahul Raj	Testing 1 Proj...	Developer	11/25/2024	12/25/2024	24.00	12/19/2024 1:33 PM
Amal Raj	Testing 1 Proj...	Business Anal...	11/25/2024	12/25/2024	24.00	12/19/2024 1:33 PM

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

Project Contract Cus...	Description	Invoice Date	Amount	Invoice Status	Available Amount	Used Amount
Testing 1 Company		12/19/2024	£1,680.00	Ready for invoicing	---	---

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.

The screenshot shows the 'Testing 1 CMC Sol' order page. At the top right, a dropdown menu is open, and the 'Create Invoice' option is highlighted with a red box. The order details show a total amount of £3,920.00 and a status of 'Draft'. Below this, there is a table of 'Advances and Retainers' with one row highlighted in blue, indicating it is 'Ready for invoice'.

Project Contract Cus...	Description	Invoice Date	Amount	Invoice Status	Available Amount	Used Am
✓ Testing 1 Com...	19/12/2024	12/19/2024	£1,680.00	Ready for invoici...	---	---

- Invoice is created.

The screenshot shows the 'Testing 1 CMC Sol' invoice page. At the top right, a dropdown menu is open, and the 'Confirm invoice' option is highlighted with a red box. The invoice details show a total amount of £1,680.00 and a status of 'Active'. Below this, there is a table of 'Project-based Lines' with one row highlighted in blue, indicating it is 'Ready for invoice'.

Write-In Product	Project	Billing ...	Contract Line A...	Amount Pre...	Ai
Construction	Testing 1 Project	Time a...	£3,920.00	£0.00	

- Confirm the Invoice.

Navigation: Save, Save & Close, Delete, Refresh, Check Access, Refresh Invoice Line Tr..., Recalculate, **Confirm invoice**, Share

### 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

Write-In Product	Project	Billing ...	Contract Line A...	Amount Pre...	Au
<input type="checkbox"/>	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
<input type="checkbox"/>	↑	☒