



# Microsoft Dynamics 365 for Project Service Automation

Enables project-based organizations to deliver every customer engagement on-time and within-budget through an end-to-end solution for sales, planning, resourcing, delivery, and billing.

“Using Project Service Automation combined with Field Service and Portal will allow us to manage all our business processes in Dynamics 365. It will doubtlessly improve our processes.”

Simon Schwarz  
Interflex Business Applications Team Lead,



**ALLEGION**

*Allegion Interflex - Pioneering Security™*

## Key Benefits

### DEEPEN ENGAGEMENT

Cultivate trusted customer relationships using a predictable customer-responsive engagement model to deliver consistently value-add successful projects.

### EMPOWER TEAMS

Balance resource utilization and increase productivity across projects and programs while fostering team coordination, collaboration, and personal creativity.

### OPTIMIZE GROWTH

Prioritize innovations in service offerings based on actionable insights and industry trends by fostering a culture of making informed and timely investments.



Opportunity Management



Project Planning



Resource Management



Team Collaboration



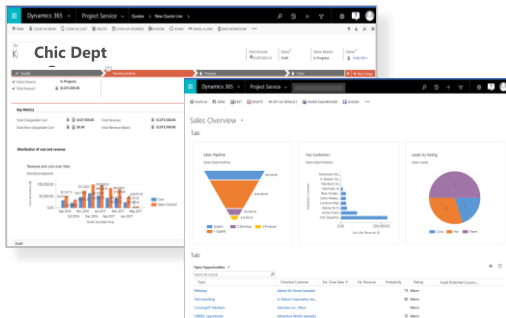
Time And Expenses



Customer Billing



Service Analytics



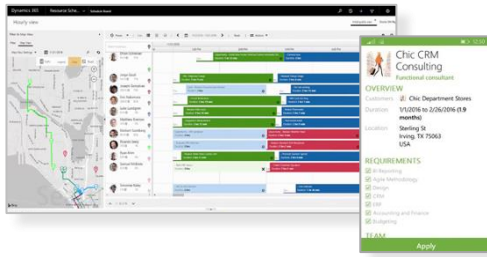
## Key Capabilities

### OPPORTUNITY MANAGEMENT

Provide integrated sales dashboard with project-based opportunities to help forecast profitability and feasibility. Streamline sales manager experience to quickly create project contracts, track labor rates and generate SOWs. Collaborate real-time with customers on the quotes, project scope and resource requirements through customer portals.

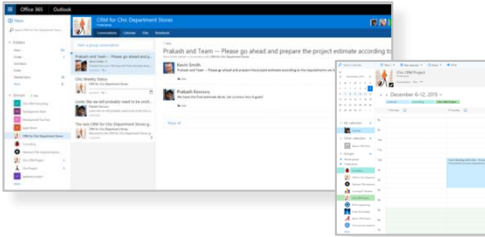
### PROJECT PLANNING

Make it easy for sales manager to visualize cost, effort, and sales value with project managers to estimate and define the work using standard project templates. Use robust project scheduling and management capabilities of Microsoft Project to complement the collaborative sales planning process.



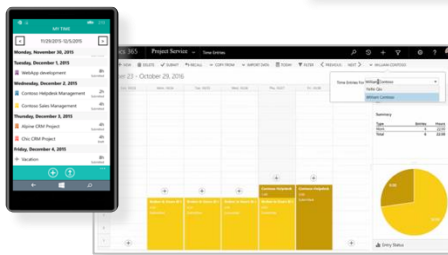
## RESOURCE MANAGEMENT

Optimize resource assignment through a consolidated scheduling engine across all modes of service to ensure right people on the right projects. Simplify engagement across project managers, resource managers and sub-contractors to forecast demand, talent management and resource allocation. Empower consultants to apply directly for relevant project roles, and update skills through mobile devices.



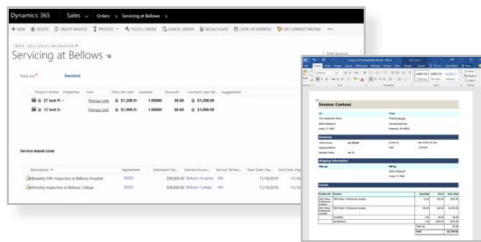
## TEAM COLLABORATION

Provide powerful, easy-to-use, mobile-ready O365 productivity tools for project teams, customers, and partners to communicate and collaborate on project deliverables and tasks. Empower project managers by providing real-time status and performance indicators to mitigate project risks.



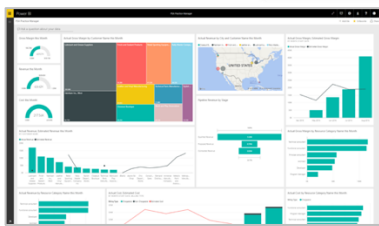
## TIME AND EXPENSE MANAGEMENT

Simplify management, tracking and submission of estimated and billed project time by integrating the tasks and deliverables within calendars. Track all project and non-project schedules on their device or app of choice through integration between exchange and project calendars.



## CUSTOMER BILLING

Provide project managers and customers a one-stop-shop dashboard to review, override, track overruns and approve all costs and time impacting their projects. Automate generation, approval, and distribution of accurate invoices in email and on the web. Enable integration with best-in-class back-office applications for financial accounting.



## SERVICE ANALYTICS

Anticipate business opportunities, optimize solution offerings, and improve business performance through robust analytics, interactive dashboards, role-based templates, and data visualization for 360 visibility to project and portfolio metrics like resource utilization and practice profitability.

## Dynamics 365

Microsoft Dynamics 365 is the next generation of intelligent business applications that enable your organization to grow, evolve and transform. These applications unify CRM and ERP capabilities with purpose-built applications that work seamlessly together to help manage specific business functions and allow your organization to transform to meet customer needs and capture new opportunities.

## Better Together

- **Sales:** Enable both product and project sellers to collaborate on pursuits and proposals using a client-centric approach.
- **Field Service:** Extend a reactive break-fix customer experience to value-add multi-day project engagements
- **Operations:** Support a centralized, consolidated and reconciled sales through financial management experience
- **Customer Service:** Capitalize on the new managed service economy to become integral part of your customers' journey
- **Customer Insights:** Capture and display big data insights in ways service delivery leaders can anticipate customer needs.

For more information, visit: <https://www.microsoft.com/en-us/dynamics365/project-service-automation>

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