



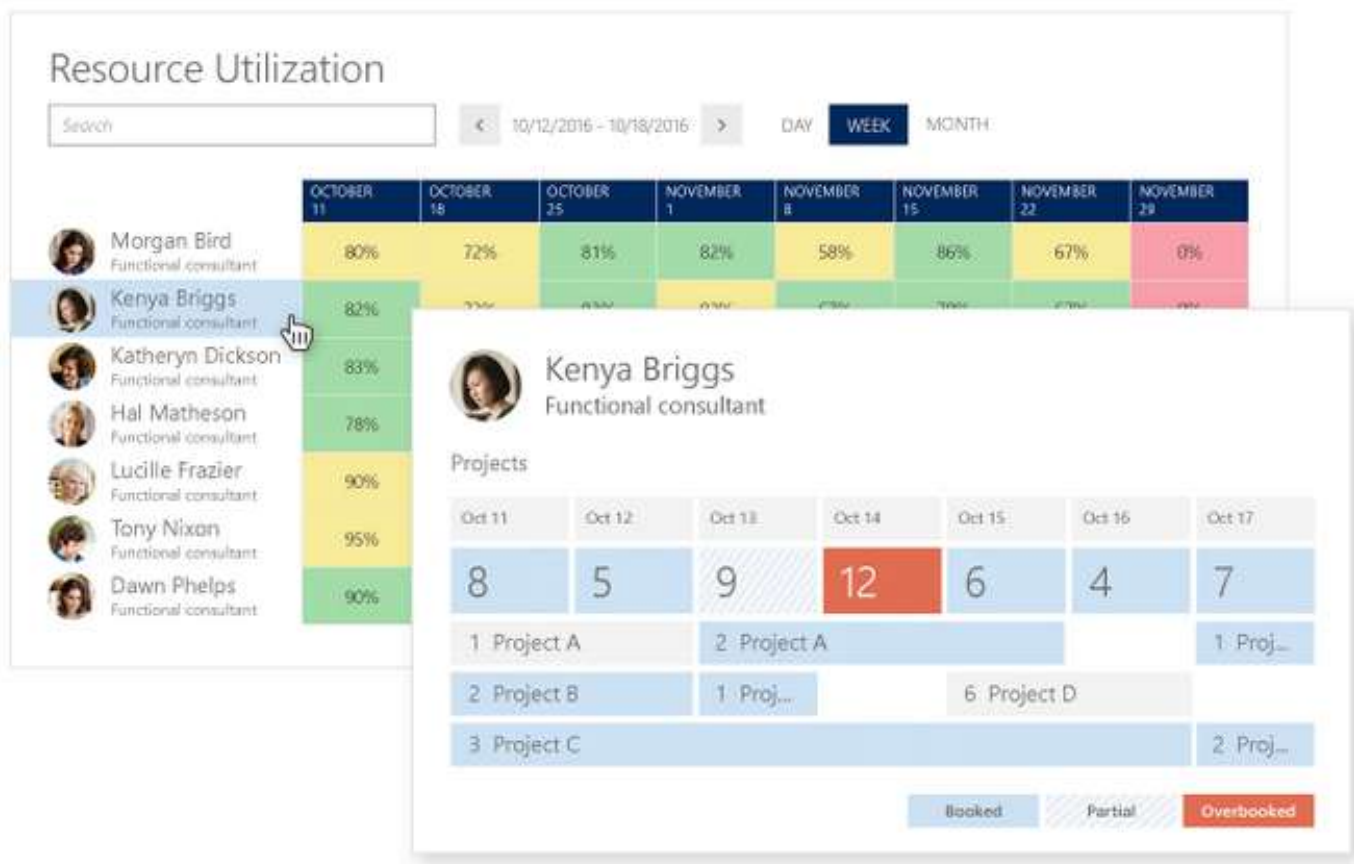
Project Service Automation

Microsoft Dynamics 365

Project Service Automation (PSA)

In recent years, more and more companies from various industries have recognized the benefits of project-oriented business and have adapted their organizations to this strategic condition. In the past, project planning tools were mostly restricted to project planning and resource management and the creation of projects was rather separate from sales and invoicing. If necessary, at the least interfaces were created for accounting.

A project-oriented approach already starts with sales with respect to the organization of internal processes. Microsoft has recognized the requirements of the market and responded to them. That is why the Project Automation Service module for Dynamics 365 was introduced, which supports all project processes. The Project Automation Service module (PSA) offers a fully integrated project management, from lead generation to final settlement.



What is Dynamics 365 Project Service Automation (PSA)?

PSA is a module of the Dynamics 365 family. It is fully integrated into the menu structure and the program interface and with its functions and features it covers all requirements that a modern integrated project management system should fulfill.

1) Sales opportunities

PSA already covers this area and supports sales in that resources and costs can already be planned during the tender phase. This increases security in the tendering process.

2) Project planning

Thanks to the modern tools of this module, project managers can quickly and effectively plan incoming work packages and search and provide for the resources required for this purpose.

3) Resource planning

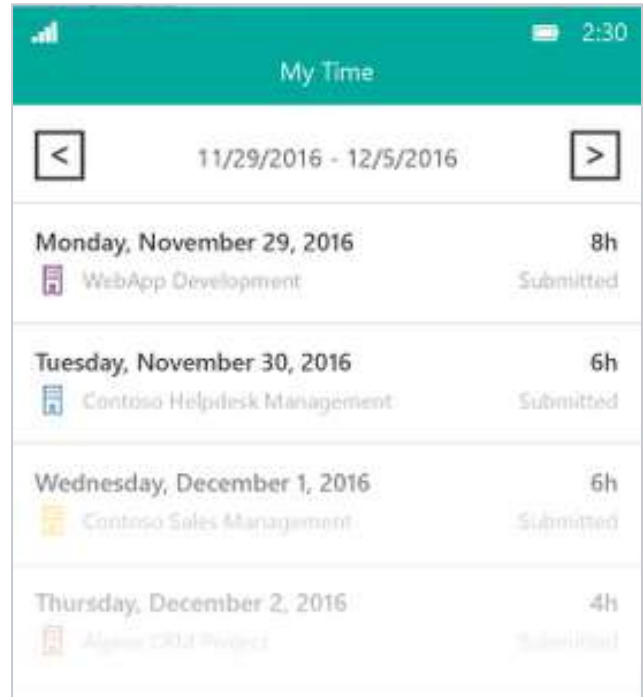
The comprehensive resource management offers a quick overview of availability, costs, utilization and level of training / know-how of your resources.

4) Cooperation in the project team

PSA provides a comprehensive overview of the project to all project participants at all times. The module provides functions so that information and tasks can be quickly and effectively communicated.

5) Time and expense recording

Employees can quickly and easily record their working hours in a project. In addition to the working hours, this of course also includes any charges and other expenses of the employee.



My Time	
11/29/2016 - 12/5/2016	
Monday, November 29, 2016	8h
WebApp Development	Submitted
Tuesday, November 30, 2016	6h
Contoso Helpdesk Management	Submitted
Wednesday, December 1, 2016	6h
Contoso Sales Management	Submitted
Thursday, December 2, 2016	4h
Alpine CRM Project	Submitted

6) Billing

PSA supports you in the billing of your projects, no matter whether you settle incurred expenses on a monthly basis or make fixed installments on agreed dates. Of course, you can just as easily integrate additional services or goods into the invoice.

7) Analyses

The full integration of PSA into Dynamics 365 of course also allows for comprehensive evaluations of your projects and provides you with information about costs, sales and other critical indicators at a glance.

What processes does PSA support directly?

The functions of the PSA module support you and your company in the following processes:

Creation of cost estimates and time schedules.

With the help of project templates, PSA offers your sales department a fast and practical solution for making quick statements about various issues, such as costs and sales. This is particularly useful in order to determine the earliest possible completion date in an efficient manner. All of this allows for a faster and more accurate bid estimate.

Selection of the best-possible resources.

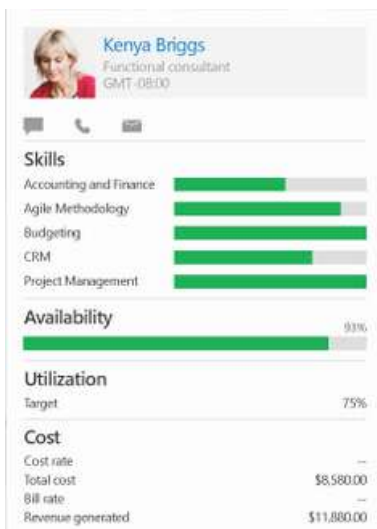
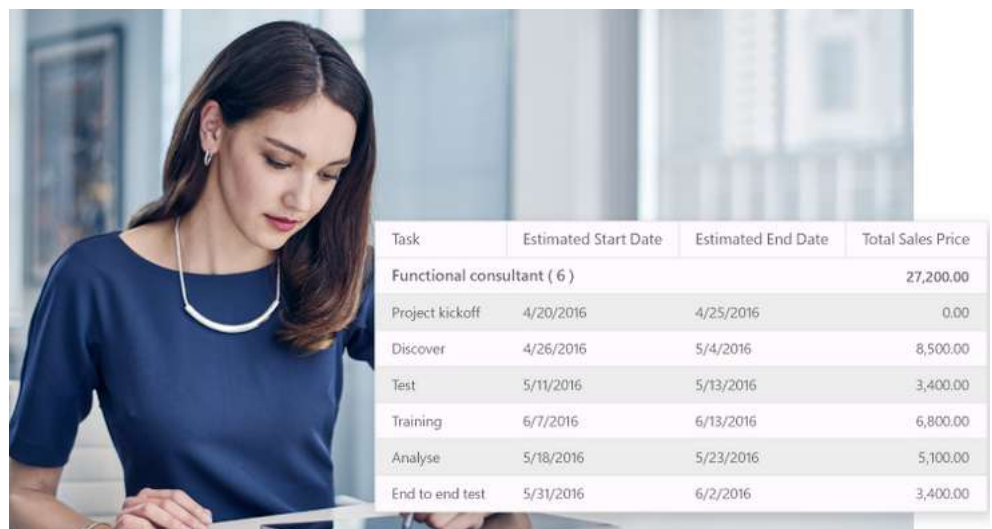
No matter whether your own employees or external resources, PSA offers the resource manager a variety of functions to ensure the best-possible combination of resources. In addition to availability and costs, you can also use the training level and certifications of your resources as planning modules.

Simplification of time recording and approval processes

You can record working hours in a project with PSA. All resources can record times provided they have access to Dynamics 365 or if an employee portal is connected. Working hours and charges/expenses can be recorded quickly and effectively. A project manager checks the inputs and approves them if necessary.

Flexible Accounting

Regardless of whether you settle expenses on a monthly basis or make fixed installments upon certain project milestones: PSA offers you the full flexibility that you need in the billing process.

Task	Estimated Start Date	Estimated End Date	Total Sales Price
Functional consultant (6)			27,200.00
Project kickoff	4/20/2016	4/25/2016	0.00
Discover	4/26/2016	5/4/2016	8,500.00
Test	5/11/2016	5/13/2016	3,400.00
Training	6/7/2016	6/13/2016	6,800.00
Analyse	5/18/2016	5/23/2016	5,100.00
End to end test	5/31/2016	6/2/2016	3,400.00



What additional functions and opportunities offer advantages for my project management?

Due to the full integration into Dynamics 365, PSA also has all of the core functions of this system. At the same time, Dynamics 365 allows for a comprehensive integration into MS Office as well as other Microsoft products. Both tools together offer a variety of possibilities and advantages that you can utilize:

1) Process automation via workflows

Upon placement of an order, send automatic thank-you letters to customers or automatically inform the project manager if a project task is overdue or a budget is exceeded. The powerful process automation of Dynamics 365 is fully available in the PSA module as well.

2) Support of business processes in forms

Structure your sales opportunities and projects with Dynamics 365 business processes. All business processes are also available to you in the PSA module as well, regardless of whether you want to record expenses or control the creation of a new project.

3) Integration of MS Project

Do you already work with MS Project? No problem! PSA can be fully integrated in MS Project. You can easily publish and use your project plan from MS Project in the PSA module.

4) Cross-module planning of resources

Do you already use the field work module or the customer service module? No problem! Thanks to the 100% integration into Dynamics 365, you can use resource planning across modules. In addition to the project business, you can also plan service and field service in Dynamics 365. This is of course also of interest if an employee works in several or all of these areas. Dynamics 365 thus provides a cross-departmental resource planning tool.

5) Exchange / Outlook Integration

In addition to the classic integration (i.e. tracking activities such as e-mail and telephone), a project task that was assigned to an employee is also shown in the Outlook calendar of this employee.

6) MS Portal

The MS Portal solutions for Dynamics 365 comprise different portals through which customers, employees and partners can access defined data. For example, you can therefore approve the read access for certain project data for the employees of a partner. However, it is possible to not only read information, but also to record time data and other data. You can determine which users can view and edit which contents and when.

Summary

The Project Service Automation module supports your project management from the tender preparation to the billing. Projects are transparent from the start and your employees have a higher level of security and a better overview from the first to the last project phase. The PSA module offers all important information that users need in the respective situation at all times and everywhere.

Project Service Automation offers every employee the data important to him or her, thus reducing the effective project risks. Because everything happens in one system and thus all users always use the same database, you get a significantly higher level of planning security.

Project Automation Service with Dynamics 365 offers a higher level of planning security, effective workflows and an optimized resource utilization within a familiar interface.



AlfaPeople - Headquarters

Teglholm Allé 13
2450 **København** SV.
Denmark
Phone: +45 70 20 27 40
Email: info@alfapeople.com

AlfaPeople Germany

Elsbach Haus, Goebenstraße 3-7
32052 **Herford**
Phone: +49 5221 28440-0
Fax +49 5221 28440-44
Email: info.de@alfapeople.com

AlfaPeople Chile

Avda. Nueva de Lyon 072
Oficina 801, Piso 8
Providencia, **Santiago**
Phone: +56 (2) 2 751 90 00
Mobile: +56 9 75296062
Email: info.cl@alfapeople.com

AlfaPeople Costa Rica

Calle 36. Av 4 y 6.
Edificio Don Bosco. Tercer Piso
San Jose
Phone: +506 2233 7000
Fax +506 2233 3238
Email: info.cr@alfapeople.com

AlfaPeople China

Four Seasons Square, Building 2
No. 503 NingGuo Road,
Shanghai
200090
Phone: +966 2 6929450
Email: kle@alfapeople.com

AlfaPeople Saudi Arabia

King Road Tower (1106)
King Abdulaziz Road - **Jeddah**
PO Box 11787, Jeddah 21463
Phone: +966 2 6929450
Fax: +966 2 6068744
Email: info.me@alfapeople.com

AlfaPeople United Kingdom

Westbourne Studios,
242 Acklam Road, Portobello,
London, W10 5JJ.
Phone: +44 20 3289 7700
Email: info.uk@alfapeople.com

AlfaPeople Switzerland

Hohenbühlstrasse 2
8152 **Glattbrugg**
Phone: +41 43 355 30 60
Fax: +41 43 355 30 61
Email: info.ch@alfapeople.com

AlfaPeople Brazil - Barueri

Al Araguaia, 2044
Alphaville Industrial
06455-000 **Barueri**-SP
Phone: +55 (11) 4082 3232
Email: info.br@alfapeople.com

AlfaPeople Guatemala

5ta Avenida 4-55 Zona 14
Edificio Europlaza Torre 1, 2do
Nivel, Oficina 208/209
Phone: +502 2386 9981
Fax: +502 2386 8800
Email: info.gt@alfapeople.com

AlfaPeople India - Gurgaon

Landmark Tower, 4th Floor,
Plot No. 2, Ashok Marg,
C - Block, South City - I
Gurgaon - 122001
Phone: +919811089731
Email: info.in@alfapeople.com

AlfaPeople United Arab Emirates

Sidra Tower (1801)
Sheikh Zayed Road
PO Box 9588, **Dubai**
Phone: +971 4 5585066
Fax: +97144405988
Email: info.me@alfapeople.com

AlfaPeople US

Chrysler Building
405 Lexington Avenue,
26th Floor, **NY** 10174
Phone: +1 (917) 368-8088
Email: info.us@alfapeople.com

AlfaPeople Colombia

Ave Cra 9 # 123-86
Edificio Uraki - Ofi 401, **Bogotá**
Phone: +571 6054222
Fax: + 571 2082198
Email: info.co@alfapeople.com

AlfaPeople Brazil - Porto Alegre

Av. Maria Coelho Aguiar, 215
Jd. São Luiz - **São Paulo**/SP
CEP: 05805-000
Phone: +55 (11) 3741-5181
Email: info.br@alfapeople.com

AlfaPeople Mexico

Baja California # 245 Piso 8
Colonia Hipódromo.
Condesa C.P. 06170
México, D.F.
Phone: +55 5265 6030 Ext.878
Email: info.mx@alfapeople.com

AlfaPeople India - Bangalore

#26/1, 1st floor,
Regus gem business centre,
Ibis hotel, Bommanahalli,
Hosur road, **Bangalore** - 560068
Phone: +918040980841
Email: info.in@alfapeople.com