



# Microsoft Dynamics 365 Project Service Automation

Capabilities

# Manage projects with confidence

## Earn customer trust

Ensure project deliverables reflect the terms of the contract, approved work, and expenses.

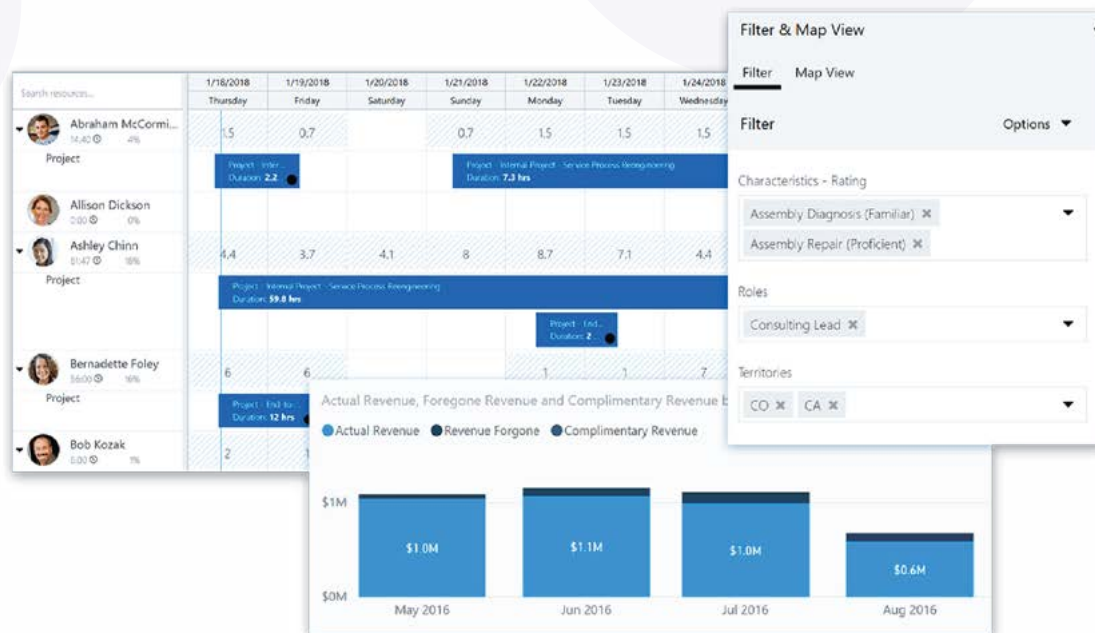
## Plan for success

Visualise accurate cost, effort, and revenue, and achieve predictable project delivery using robust project planning capabilities including native Microsoft Project integration.

## Manage with precision

Provide project managers with intuitive dashboards to review, monitor, and approve all costs and time impacting their projects.





# Optimise your resources

## Streamline scheduling

Enable intelligent and relevant skills-based assignments with real-time visibility to resources using a unified scheduling engine.

## Increase billable hours

Accurately measure utilisation and make intelligent decisions to get the most out of billable resources by using real-time dashboards.

## Empower service professionals

Allow consultants and sub-contractors to update their skills profile and apply directly for relevant projects.

# Forecast project profitability

## Gain visibility on project-based opportunities

Prioritise deals based on a unified sales management dashboard that brings together product and project-based opportunities.

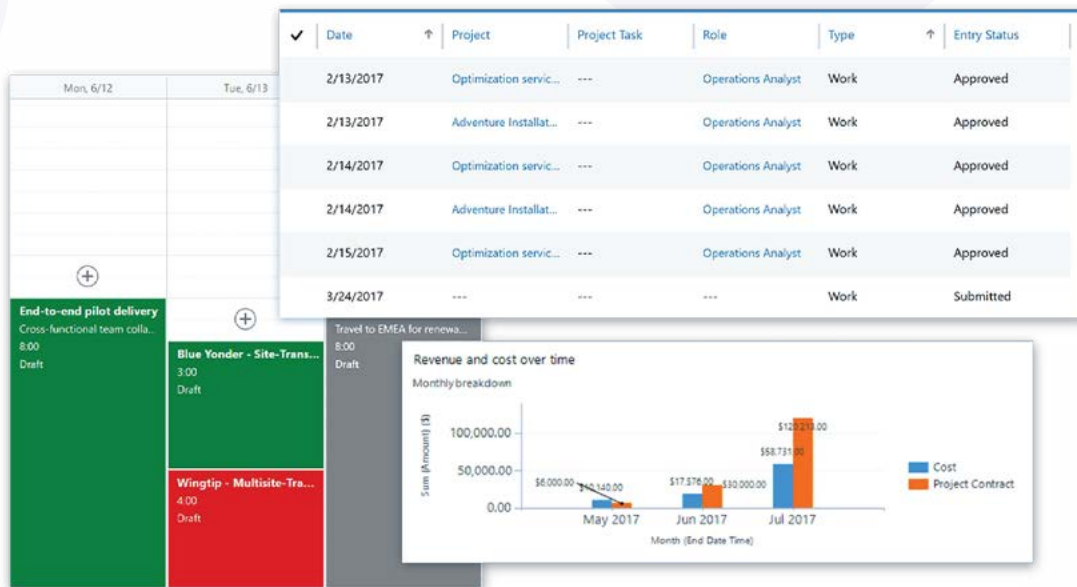
## Collaborate with customers

Engage directly with customers on quotes, project scope, and resource requirements through a secure portal.

## Simplify the contract process

Ensure seamless sales collaboration by creating project contracts, tracking labour rates, and generating statements of work directly within Dynamics 365 for Sales.

The screenshot displays the Dynamics 365 for Sales interface, featuring three main panels: 'All Activities', 'My Open Opportunities', and 'All Leads'. The 'All Activities' panel shows a list of email activities with columns for Subject, Regarding, and Activity Type. The 'My Open Opportunities' panel shows a list of opportunities with columns for Topic and Potential Cust... The 'All Leads' panel shows a list of leads with columns for Name, Topic, Owner, and St... Below these panels, a contract process flow is visible, showing stages: Qualify, Propose, Contract (Active for 1 day, 13 hours), and Close. A 'Sales Process (Active for 1 day, 13 hours)' is also shown with a 'Next Stage' button. A 'BILLING AND PRINT SETUP' dialog box is open, displaying fields for Bill To Address (1000 Ross Park Mall Dr, Pittsburgh, PA 15237, USA), Bill To Contact Name (Ross Park), Payment Terms (Net 30), and Currency (US Dollar). The contract status is 'Draft' with a total amount of '\$258,453.00'.



## Increase productivity

### Elevate collaboration

Foster collaboration across project teams using audio, video, and document management with integration to Office 365 applications.

### Manage with agility

Respond quickly to scope changes and project risks by managing critical key performance indicators to ensure profitable service delivery.

### Simplify time and expense management

Submit, approve, process, and reconcile time and expenses anytime, anywhere, for timely customer billing.

# Innovate with a modern and adaptable platform

## Adapt quickly

Accelerate time to market and adapt the application to your needs with no-code visual editors and tools that make it easy to build and deploy web and mobile apps.

## Unify your service environment

Automate processes across Dynamics 365 applications and third-party systems for better service engagement experiences.

## Invest with confidence

Rely on the Microsoft cloud platform to reduce the cost and complexity of operating a global infrastructure, and trust our state-of-the-art datacenters to safeguard your data.

## Drive innovation

Transform your customer interactions with deep insights provided by artificial intelligence that guide your teams to the right business outcomes.







Find out more about **Microsoft Dynamics 365**

Call: 0191 500 8150  
Email: [info@monpellier.co.uk](mailto:info@monpellier.co.uk)  
Visit: [www.monpellier.co.uk](http://www.monpellier.co.uk)