



Std. Project vs. Professional Services (4-day training)

Prerequisites: knowledge of Dynamics AX Project I (& II)

Course agenda: (will include the training scenarios and is basically the full implementation training with the pre-sales part as well)

- **Introduction:**
 - Product positioning
 - Presales demo
 - General Professional Services for Microsoft Dynamics AX configuration

- **Process oriented training based on “day in the life” Professional Services scenarios:**
 - Software scenario
 - Engineering scenario
 - Construction scenario

- **Focus on Professional Services functionalities:**
 - Software scenario:
 - New project request & quotation (incl. workflow)
 - Resource scheduling
 - Enhanced WBS & ABS:
 - Links to additional dimensions
 - Added tasks and activities (incl. templates)
 - Budgeting (incl. workflow):
 - Budget revisions
 - Internal/External revisions
 - Timesheet entry (incl. clock-in/out)
 - Expense entry
 - PO/Request entry (incl. workflow)
 - Invoicing enhancements (incl. workflow):
 - Flexible invoicing methods
 - Pre-billing of estimates
 - Ad-hoc invoice presentation
 - Invoice processing
 - Split billing
 - Portal enablements
 - Extended project reports

 - Engineering scenario:
 - A/R – A/P Retainage
 - Timesheet entry:
 - Effective Labour Rate
 - Burden & Overhead

 - Construction scenario:
 - Invoicing enhancements:
 - Contract lines

 - Inter company processes
 - Revenue recognition wizards & adjustment enhancements