



Navigating consulting challenges with technology-driven solutions

April 2024

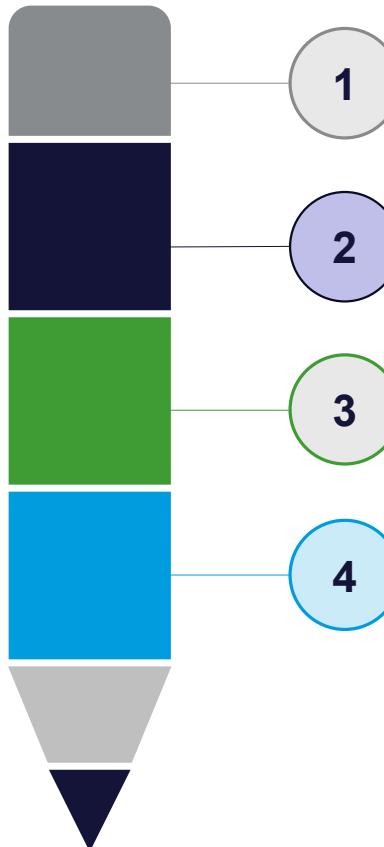


Learning objectives

By the end of this course, you will be able to:

- Describe the current state of the consulting subsector
- Explain the technology landscape for the consulting industry
- Articulate how NetSuite and Business Central can solve challenges for an organization
- Detail RSM's capabilities and methodology in implementing transformative tech solutions

Goals and objective



- 1 Gain valuable insight into the current state of the consulting sector
- 2 Understand the technology landscape of the consulting industry
- 3 Learn how NetSuite and Business Central can solve challenges for your organization
- 4 Grasp RSM's capabilities and methodology in implementing transformative tech solutions



Agenda

Introductions

Industry overview

NetSuite showcase

Microsoft showcase

Q & A

Ian Murray | Supervisor



Ian Murray
Supervisor, NetSuite Consulting

Baltimore, Maryland

240 529 6008

ian.murray@rsmus.com

Summary of experience

Ian Murray is a Supervisor in RSM's NetSuite Consulting practice, with over five years of experience providing technology services to middle-market organizations. Ian dedicates his time to working with health care and professional service organizations and is recognized across the firm as an industry expert/subject matter expert frequently brought on to work on projects for these types of organizations.

Coming from an accounting background, Ian can deliver best practice advice to clients from a range of topics critical to accounting departments such as configuring internal controls, period close activities, international accounting and revenue recognition within NetSuite.

Ian is frequently engaged in complex financial NetSuite implementations, where international accounting, revenue recognition and intercompany accounting configuration are critical to the project

Education

- BS, Accounting, Salisbury University
- BS, Information Systems, Salisbury University

Professional affiliations and credentials

- Oracle NetSuite Certified ERP Consultant

Joe Hessler | Manager



Summary of experience

Joe Hessler is a Manager in RSM's D365 Business Central delivery practice, with over 5 years of experience implementing ERP solutions for companies in multiple industries including Business & Professional Services, Not for Profit, and Industrials.

Joe specializes in working with companies that have Federal Government Contracts and has a deep understanding of the financial and operational requirements for Professional Services companies servicing both the Federal market and commercial market.

Education

- BS, Accounting, Salisbury University
- BS, Information Systems, Salisbury University

Professional affiliations and credentials

- Certified Public Accountant

Joe Hessler

Manager, D365 Business Central

Baltimore, Maryland

443 761 4231

joe.hessler@rsmus.com

Ryan Lee-Norman | Manager



Summary of experience

Ryan Lee-Norman is a Manager in Microsoft Dynamics 365 Customer Engagement Delivery. He specializes in delivering the Project Operations and Field Service modules for Business and Professional Services and Government Contractors. He is passionate about assisting companies in their digital transformation journeys and optimizing their operations with technology.

Education

- BA – Communication Arts, North Park University

Professional affiliations and credentials

- Microsoft Dynamics 365 Customer Engagement and Power Platform

Ryan Lee-Norman

Manager, D365 Customer Engagement

Minneapolis, MN

612 376 9383

ryan.lee-norman@rsmus.com



Uriah Hakala | Director



Uriah Hakala

Director, PSA Practice Lead

Chicago, Illinois

+1 312 498 1816

uriyah.hakala@rsmus.com

Summary of experience

Uriah has over 25 years of experience in consulting and technology roles spanning services, customer success, and operations. He has worked with thousands of clients and led organizational digital transformation engagements driving positive business outcomes.

Uriah has experience across a variety of technology solutions including project and portfolio management (PPM), analytics and business intelligence, Robotic Process Automation (RPA), process mining and intelligence, financial crime, and Professional Services Automation (PSA). He is a thought leader in the PSA space and is a frequent contributor to speaking and writing engagements related to professional services, customer success, outcomes engineering, and digital transformation, including:

"Building a High-Performing Business in Changing Market Conditions"

"How to Crush your KPIs and Deliver Consistent Results"

"Grow Up Fast! Accelerate Your Organizational Maturity"

His current focus is to be a first-choice advisor to our clients in the middle market, globally drive positive business outcomes and create value with the application of technology.

Education

- BBA, Information Systems Analysis and Design, Wisconsin School of Business

Industry trends



Industry trends for consulting



Pressure on Margins



Talent is Key



Client Acquisition and Retention is a focus

Pressure on margins

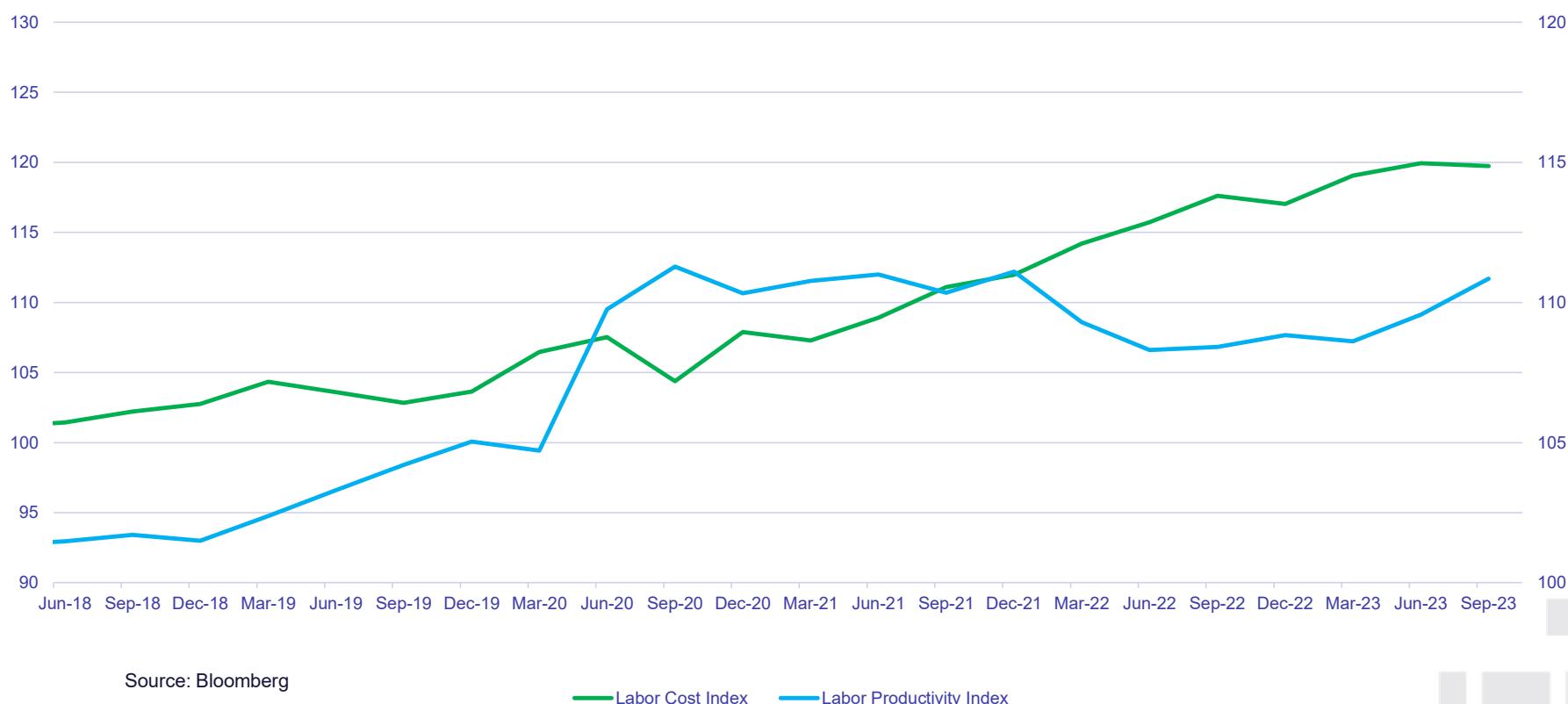


- Labor Costs and productivity are out of alignment
- Realized rates are down
- Clients are demanding greater transparency in pricing and offerings

Labor costs & productivity



Labor Costs and Productivity



Prices received for services (realized rates)



Transparency in pricing and offerings

Shift towards Outcomes-based or Fixed-Price offerings

What are the **Business Outcomes** the customer is looking to achieve?

What are the **Financial Results** that they will be looking for?

What are the **Operating KPIs** that will be tracked to measure success?

What **Business Capabilities** will our solution enable that impact these KPIs?

What **Technical Capabilities** are required to optimize the Business Capabilities?

Which of our **Products and Services** will deliver these capabilities?

Source: Martin Dove, Technology Services Industry Association (TSIA) - 2021

Greater scrutiny on estimates

- Bottom-up, “task-based” estimates vs. top-down, “resource-based”
- Expectations of leveraging offshore/nearshore/lower cost resources
- Blended rates vs. rate cards
- Pressure on project governance/management allocations

Talent is key



- Firms can afford to be more selective with their hiring, but growth and career opportunities matter
- Remote/distributed workforce can be leveraged to scale
- Doubling down on core competencies – skills management

Hiring + career growth

- 46% of Professional Services firms have challenges in recruiting and retaining talent
- Hiring is peaking (except in certain industries – e.g. Cybersecurity, AI)
- Employees are hesitant to move but still want to develop their career path for the future
- Technology allowing people to work on projects “outside their comfort zone”

*Source: S&P Global Market Intelligence Survey August 2023
“The Macro Technology Shift Impacting the Professional Services Industry”

Remote / distributed workforce

- Further work being pushed out to third parties/subcontractors
- “Virtual bench” / staffing on-demand
- Technology to provide insight into the full resource supply pool across companies – loose networks

Skills management

- There is more to staffing a project than just “who is available”
- Typically these taxonomies are very simplistic, almost an afterthought
- Employees looking to build their own brand/abilities for the future
- Taking on “stretch” projects to build out skills and capabilities

Client acquisition and retention



- Automation and AI can boost productivity
- Technology as an enabler, but only with true change management

Automation and AI

- Everyone's talking about AI these days, of course.. How does that fit in here?
 - Some of the 'redundant' tasks – writing the framework for proposal letters, SOW content, client outreach, etc.
 - Full automation isn't the goal, but getting a head start is a great time saver
- Automation of overall end to end business process – the goal of PSA
 - Where can you get the biggest bang for your buck?

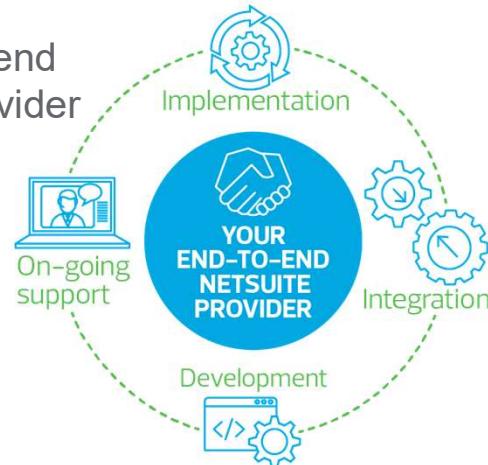
Change management is critical!

- Technology is built based on “best practices”.. But who’s best practices, exactly? One-size fits all doesn’t work – so how do you adapt?
- What, why, how does it impact me and my team?
- Focus on the business processes and outcomes
- Iterate and adapt – change takes time to be done right

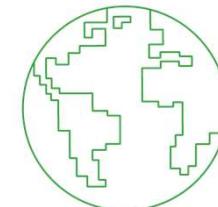
NetSuite overview

RSM NetSuite practice

Your end-to-end
NetSuite provider



One of
the largest
**Global
NetSuite
Partners**



RSM offices
in 85 U.S. cities and
4 Canadian cities



#1 NetSuite
worldwide
consulting partner



1,500+
NetSuite
customers

**10-Time NetSuite Solution
Partner of the Year**



**Location &
Industry
based
resources**

- Certified Public Accountants
- NetSuite ERP Consultants
- SuiteCloud Developers
- Project Managers
- eCommerce

300+
NetSuite Consultants



2011
NetSuite
practice began

Benefits of NetSuite



Integrated, End-to-End Solution – Includes CRM, PSA, Financials



Cloud Based – No Upgrade Hassles, Secure, Customizable, Adapts To New Business Models



Real-Time Visibility Across Business - Forecasts, Resources, Projects KPIs.



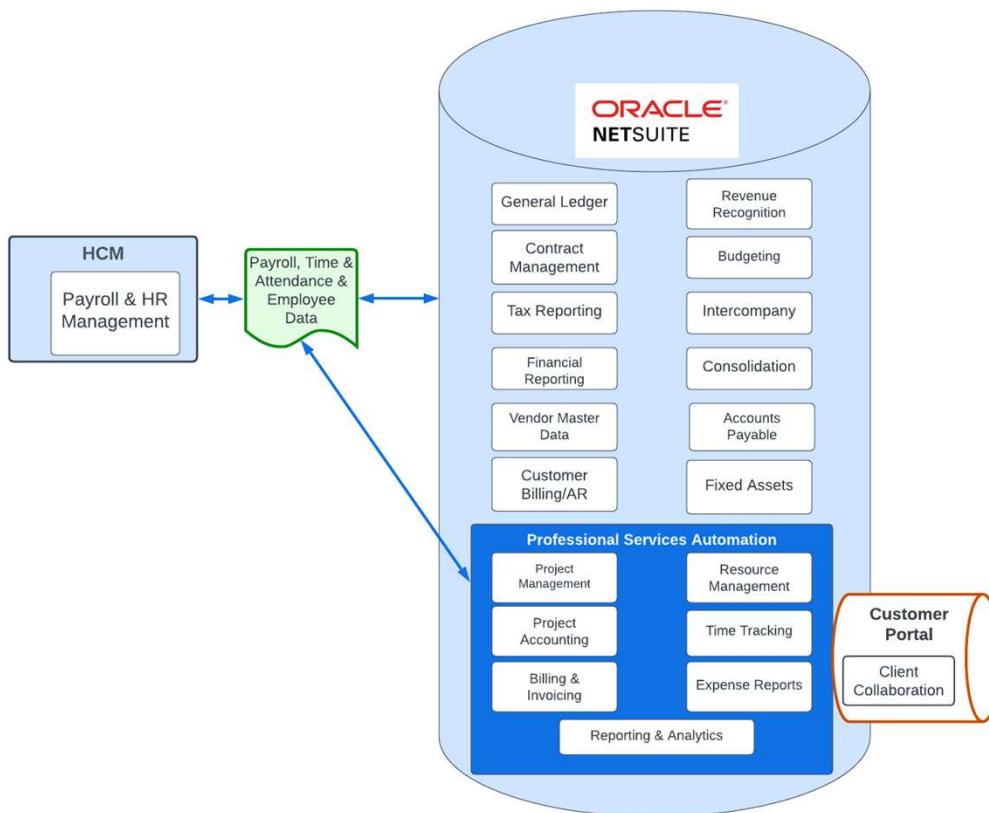
Anytime, Anywhere, Any Device Access



Gain Repeat Business



One centralized system



NetSuite brings your external project management and accounting system into your G/L system.

- Automated processes
- Live reporting
- Real time billings and revenue

Industry trends for consulting



Pressure on Margins



Talent is Key



Client Acquisition and Retention is a focus



Project management

Project management – home dashboard



- Reminders
- Alerts
- Navigation links

ORACLE NETSUITE

Search Help Feedback Jennifer Webster
Stairway for Services US v2022.1 9.13 - SVCS PRM - Project Manager

Activities CRM Projects Time & Expenses Resources Reports Documents SuiteApps Support

Home

Reminders

- 14 Orders to Fulfill
- 79 Expense Reports to Approve
- 14 Time to Approve
- 357 Incomplete Timesheets
- 16 Sales Orders Pending Fulfillment
- 22 Milestones Overdue

Tiles

- Charges on Hold
- Project Profitability
- Resource Allocation
- Project Billing

Navigation Shortcut Group

- Project Manager**
- Clients and Projects
- Resources
- Purchasing
- Reports

Projects
Customers
New Project
Approve Time
Create Project fro...

Resources
Generic Resources

Expense Reports
View Vendor Bills
Outstanding POs ...

Weekly Timesheet
Actual Util by Proj
Project Burn (Inco...
Project Billings Re...
Time Entry Except...

Project Dashboard ERP Implementation

Project Info

PROJECT NAME: ERP Implementation
CUSTOMER: Altria Technology
PROJECT MANAGER: Jennifer Webster
START DATE: 9/5/2022
CALCULATED END DATE: 10/4/2022
STATUS: In Progress

Reminders

- 22 Milestones Overdue
- 15 Milestones This Month

Gantt Chart

Tasks

ID	TASKS	START	END
1	System integration	9/5/2022	10/4/2022
2	Plan	9/5/2022	9/8/2022
3	Review SOW	9/5/2022	9/5/2022
4	Discuss integration...	9/5/2022	9/6/2022
5	Finalize integration...	9/7/2022	9/8/2022
6	Configure	9/5/2022	9/29/2022
7	Configure integratio...	9/16/2022	9/27/2022
8	Document configura...	9/27/2022	9/29/2022
9	Conduct integratio...	9/5/2022	9/5/2022
10	Integration ready...	9/5/2022	9/5/2022
11	Train	9/29/2022	10/4/2022

Schedule

MON 05 SEP 2022	MON 12 SEP 2022	MON 19 SEP 2022	MON 26 SEP 2022
System integration	Plan	Review SOW	Discuss integration...
Finalize integration...	Configure	Configure integratio...	Document configura...
Train			Document configurations

Project Links

- Create Project Task
- Manage Resources
- Gantt Chart

P&L

Item Group	Cost	Actual Cost	Committed Cost	Revenue	Actual Revenue	Committed Revenue	Unbilled Receivable	Profit	Margin
Services	14,700.00	14,700.00	0.00	22,270.00	22,270.00	0.00	0.00	7,570.00	34.0%
Expenses	9,248.00	9,248.00	0.00	1,248.00	1,248.00	0.00	0.00	-8,000.00	-641.0%
Total	23,948.00	23,948.00	0.00	23,516.00	23,516.00	0.00	0.00	-420.00	-1.8%

Project tasks

- Task name, predecessors
- Start date/end date
- Planned/estimated work
- Estimated cost

Project Tasks / Milestones

VIEW

EDIT	ID	MILESTONE	NAME	PREDECESSORS	START DATE	END DATE	PLANNED WORK	CALCULATED WORK	ESTIMATED COST
Edit	1	No	System integration		9/5/2022	10/4/2022	200	212	24,400.00
Edit	2	No	Plan		9/5/2022	9/8/2022	64	64	8,840.00
Edit	3	No	Review SOW		9/5/2022	9/5/2022	4	4	500.00
Edit	4	No	Discuss integration points	3	9/5/2022	9/6/2022	28	28	3,860.00
Edit	5	No	Finalize integration plan	4	9/7/2022	9/8/2022	32	32	4,480.00

Work breakdown structure (WBS)

- EAC cost/revenue
- EAC profit/margin
- ETC cost/revenue

View WBS		Edit WBS								
ID	NAME	TASK	ACTIVITY CODE	EAC COST	EAC REVENUE	EAC PROFIT	EAC MARGIN	ETC COST	ETC REVENUE	
		Unmatched		23,948.00	23,518.00	0.00		0.00		
▼ 1	Labor			15,300.00	35,480.00	20,180.00	56.9%	15,300.00	35,480.00	
1.1	Consulting	Labor : Consulting		6,500.00	16,800.00	10,300.00	61.3%	6,500.00	16,800.00	
1.2	Tech Services	Labor : Technical Services		8,800.00	18,680.00	9,880.00	52.9%	8,800.00	18,680.00	

Project budgets

- Budgeted cost/revenue
- Budgeted profit/margin
- Budget history

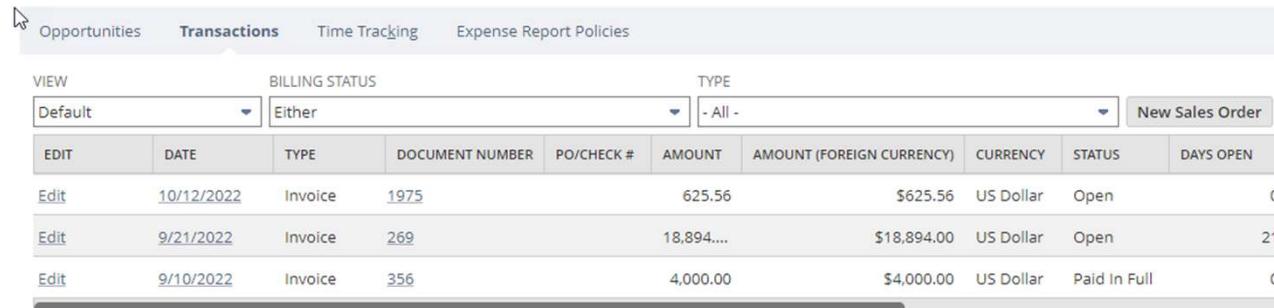
EAC Budget Baseline Budget Budget History

View Budget

ID	NAME	TASK	ACTIVITY CODE	BUDGETED COST	BUDGETED REVENUE	BUDGETED PROFIT	BUDGETED MARGIN	ACTUAL C
	Unmatched			0.00	0.00	0.00		23.9%
▼ 1	Labor			15,300.00	35,480.00	20,180.00	56.9%	
1.1	Consulting		Labor : Consulting	6,500.00	16,800.00	10,300.00	61.3%	
1.2	Tech Services		Labor : Technical Services	8,800.00	18,680.00	9,880.00	52.9%	

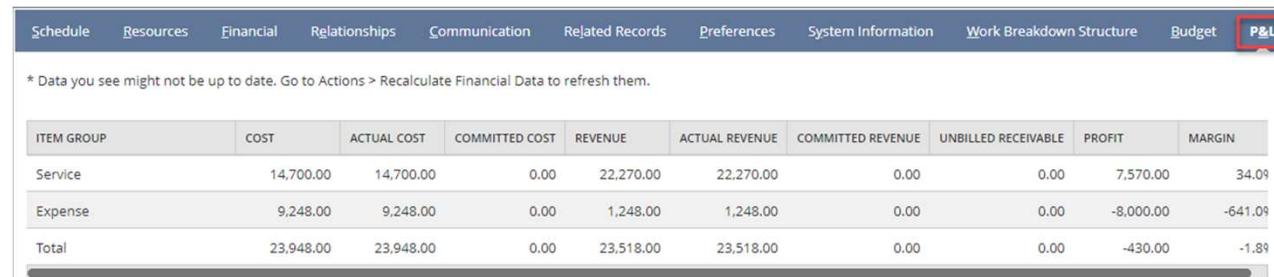
Transactions/profit and loss

- Transactions linked to project



Transactions									
VIEW		BILLING STATUS		TYPE					
Default		Either		- All -					
EDIT	DATE	TYPE	DOCUMENT NUMBER	PO/CHECK #	AMOUNT	AMOUNT (FOREIGN CURRENCY)	CURRENCY	STATUS	DAYS OPEN
Edit	10/12/2022	Invoice	1975		625.56	\$625.56	US Dollar	Open	0
Edit	9/21/2022	Invoice	269		18,894....	\$18,894.00	US Dollar	Open	21
Edit	9/10/2022	Invoice	356		4,000.00	\$4,000.00	US Dollar	Paid In Full	0

- Item group Cost/Revenue summary

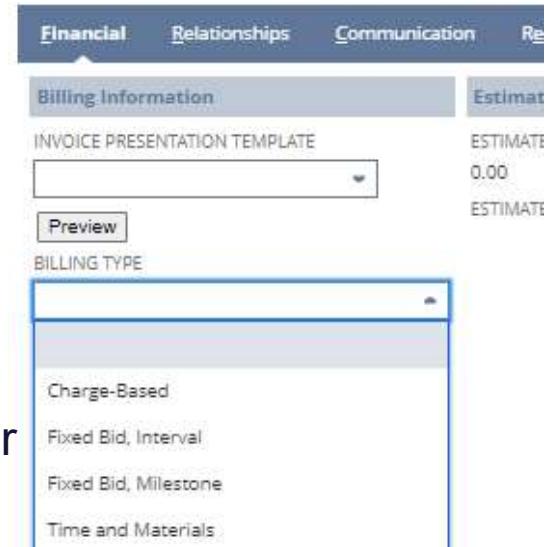


P&L									
ITEM GROUP	COST	ACTUAL COST	COMMITTED COST	REVENUE	ACTUAL REVENUE	COMMITTED REVENUE	UNBILLED RECEIVABLE	PROFIT	MARGIN
Service	14,700.00	14,700.00	0.00	22,270.00	22,270.00	0.00	0.00	7,570.00	34.09
Expense	9,248.00	9,248.00	0.00	1,248.00	1,248.00	0.00	0.00	-8,000.00	-641.09
Total	23,948.00	23,948.00	0.00	23,518.00	23,518.00	0.00	0.00	-430.00	-1.89

Project Billing and Revenue Recognition

Project billing – Charge-based billing

- Four main types of project billing that offer varying degrees of flexibility for calculating the billable value of a project
 - Charge-based billing
 - Fixed bid internal
 - Fixed bid milestone
 - Time and materials
- Charged-based billing allows you to create charges that are billed to the customer with either a customer specific billing rate card or a general rate card
- Charge-based billing is based on rules defined on the project record



Complex billing rules

- Projects can have multiple charge rules within a single type of charge rule and across the types of charge rules

Time-Based Rules					
VIEW		TIME-BASED RULES			
All Time-Based Rules		Customize View	New Time-Based Rule	TIME-BASED RULES	
EDIT	NAME		RULE ORDER	RATE BASIS	RATE MULTIPLIER
	Bill at standard rates		1	Service Items	Ready
Edit	Invoice Grouping		2	Service Items	Ready

- Complex billing rules need to be assigned a rule order to determine when the rule should be applied charges
- Capping rules allows charges to be limited based on the charge the rule is applied to

Generating and billing charges

- NetSuite will generate project related charged automatically every night at midnight



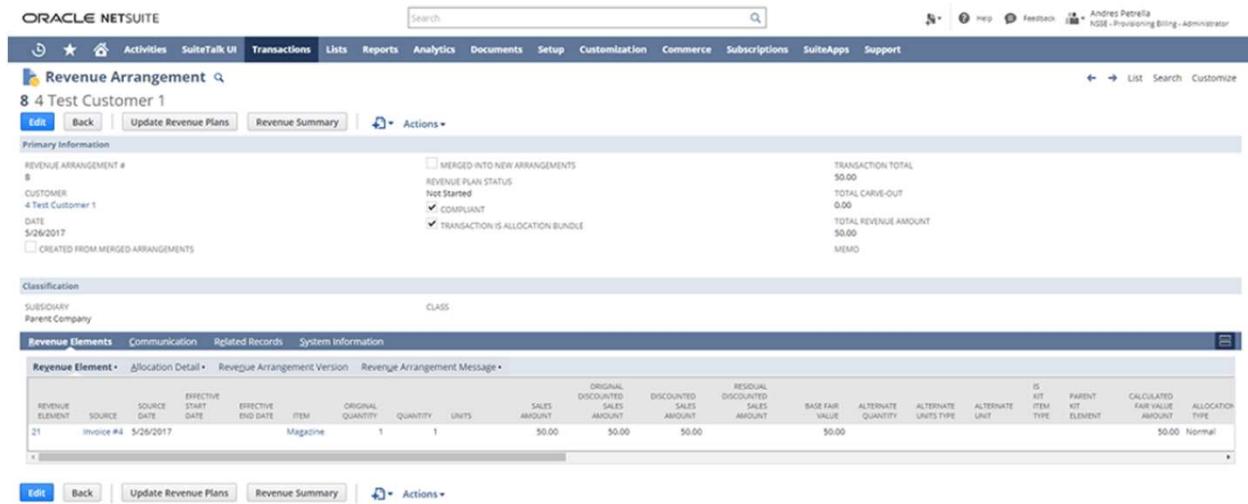
The screenshot shows the 'Charge Run History' tab in NetSuite. The page includes navigation tabs for 'Percent Complete Override', 'Charges', 'Charge Run History' (which is selected and highlighted in blue), 'Fixed Fee Rules', 'Time-Based Rules', and 'Expense-Based Rules'. Below these are buttons for 'VIEW', 'Customize View', 'Generate Charges', and 'Generate Forecast'. The main content area displays a table with columns for 'ID', 'STARTED', and 'ENDED'. The table contains five rows of data, each representing a charge run with a unique ID, a start date of 9/2/2022 12:00 am, and an end date of 9/2/2022 12:00 am.

ID	STARTED	ENDED
30311	9/2/2022 12:00 am	9/2/2022 12:00 am
28708	9/2/2022 12:00 am	9/2/2022 12:00 am
28709	9/2/2022 12:00 am	9/2/2022 12:00 am
28710	9/2/2022 12:01 am	9/2/2022 12:01 am

- The user can also trigger charges from the project record or via the transaction tab
- Once the charge is generated, the charge must be in ready status before it can be billed to the customer.

Revenue recognition

- Revenue recognition rules offer flexibility in predefining revenue recognition schedules
 - Straight-line, by even periods
 - Straight-line, using exact days
 - Percent complete
 - As charged
- Streamlines revenue recognition process at month end, by generating revenue recognition and reclassification of unbilled receivable entries
- Built into month end close task list



The screenshot shows the Oracle NetSuite interface for a 'Revenue Arrangement'. The primary information section includes fields for Revenue Arrangement # (8), Customer (4 Test Customer 1), Date (5/26/2017), and various status checkboxes. The classification section shows a subsidiary (Parent Company) and a class. The revenue elements section displays a table with one row:

Revenue Element	Source	Source Date	Effective Start Date	Effective End Date	Item	Original Quantity	Quantity	Units	Sales Amount	Original Discounted Sales Amount	Discounted Sales Amount	Residual Discounted Sales Amount	Base Fair Value	Alternate Quantity	Alternate Units Type	Alternate Unit	IS Kit Item	Kit Element	Parent Item	Calculated Fair Value Amount	Allocation Type
21	Invoice #4	5/26/2017			Magazine	1	1		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00							\$0.00	Normal



Microsoft D365 Overview

Our Microsoft Practice



RSM US is the **leading provider** of audit, tax, and consulting services focused on the middle market.



One of the **largest Microsoft Solutions Partners** in the U.S.



1300+
Microsoft Certified Consultants



Microsoft Recognition

Largest Microsoft Partner serving the SMC market



Partner of the Year

WINNER

2023 D365 Finance

2023 Defense & Intelligence

2022 Tech for Social Impact

2021 Connected Commerce

FINALIST

2023 D365 Business Central

2023 Government

2023 Community Response

2023 Health Care & Life Sciences

2023 Business Intelligence

2022 D365 Finance & SCM

2022 Government

2021 D365 Field Service

2021 D365 Finance & SCM

MORE

16 Microsoft Gold Competencies

Microsoft Inner Circle Partner



Business Applications

Data & AI (Azure)

Digital & App Innovation (Azure)

Infrastructure (Azure)

Modern Work

Security

Microsoft Cloud



Microsoft

Tier-1 Cloud Solutions Provider



MICROSOFT PRESENTS
FY21 Eagle Awards
Honoring business excellence in Microsoft Dynamics 365

INNERCIRCLE
for Microsoft Dynamics

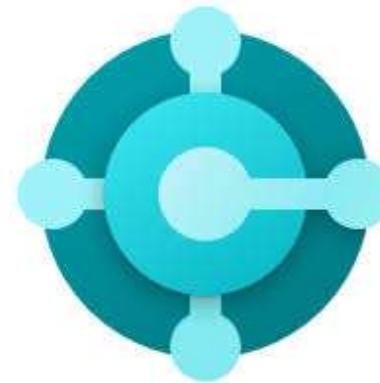
D365 Business Central for professional services

- Microsoft ERP for Small to Medium sized Businesses
- Functionality for Professional service companies includes:
 - Jobs – Project Accounting
 - Project Invoicing
 - Revenue Recognition
 - Utilization/Capacity Planning
 - Resource Management
 - Time tracking
 - GL/AR/AP
 - Fixed Assets Management
- Additional extensions can be leveraged to enhance functionality including Construction project management, Government Contracting services, and much more

D365 Business Central Solution Origin



Microsoft Dynamics NAV



Microsoft Dynamics 365
Business Central



D365 Business Central

CRONUS USA, Inc. | Sales & Purchases | Jobs | Resources | Journals | Posted Documents | All Reports | ≡

Jobs: All | Search | Analyze | New | Delete | Home | Job | Prices & Discounts | WIP | Report | More options | Print | Export | Import | Print | Export | Import

Views X

No.↑	Description	Bill-to Customer No.	Status	Search Description
JOB00010	Reception area remodel	30000	Open	RECEPTION AREA RE...
JOB00020	Decorate Conference Room	10000	Completed	DECORATE CONFERE...
JOB00030	New Office Furniture	20000	Open	NEW OFFICE FURNIT...

All

Open

Planned and Quoted

Completed

Unassigned

Allen Interactions

Filter list by...

Filter totals by...

Details Attachments (0)

Job Details - WIP/Recognition

Job No.	JOB00010
WIP Posting Date	
Total WIP Cost Amount	0.00
Total WIP Sales Amount	0.00
Recog. Costs Amount	0.00
Recog. Sales Amount	0.00
Recog. Profit Amount	0.00
Recog. Profit %	0.00

D365 Business Central



Job Card

JOB00010 · Reception area remodel



✓

[Home](#) [Print/Send](#) [Prices & Discounts](#) [WIP](#) [Job Report](#) [Related](#) [Reports](#) [Automate](#) [Fewer options](#)

[Copy Job Tasks from...](#) [Copy Job Tasks to...](#) [Create Inventory Pick](#) [Create Warehouse Pick](#)

Tasks [Manage](#) Line

[New Line](#) [Delete Line](#)

Job Task No.	Description	Totaling	Job Task Type	Start Date	End Date	Budget (Total Cost)	Actual (Total Cost)	EAC (Total Cost)	Invoiced (Total Cost)	Billable (Total Cost)	Billable (Total Price)
→ 1000	Phase 1 - Planning and Specs		Begin-Total	—	—	—	—	0.00	—	—	—
1010	Consulting		Posting	1/25/2023	1/25/2023	1,000.00	—	1,000.00	—	1,000.00	2,000.00
1020	Review and Sign-off		Posting	1/25/2023	1/25/2023	—	—	0.00	—	—	—
1099	Phase 1 Total	1000.9990	End-Total	—	—	7,720.00	—	7,720.00	—	7,720.00	15,031.20
1100	Phase 2 - Demo		Begin-Total	—	—	—	—	0.00	—	—	—
1110	Demolition		Posting	1/25/2023	1/25/2023	1,500.00	—	1,500.00	—	1,500.00	3,000.00
1120	Reclaim Bricks		Posting	1/25/2023	1/25/2023	100.00	—	100.00	—	100.00	200.00
1199	Phase 2 Total	1100.1199	End-Total	—	—	1,600.00	—	1,600.00	—	1,600.00	3,200.00
1200	Phase 3 - Install		Begin-Total	—	—	—	—	0.00	—	—	—
1210	Walls		Posting	1/25/2023	1/25/2023	3,000.00	—	3,000.00	—	3,000.00	6,000.00
1220	Ceiling		Posting	1/25/2023	1/25/2023	50.00	—	50.00	—	50.00	100.00
1230	Floors		Posting	1/25/2023	1/25/2023	450.00	—	450.00	—	450.00	900.00
1240	Decorations and Furnishings		Posting	1/25/2023	1/25/2023	780.00	—	780.00	—	780.00	1,151.20
1299	Phase 3 Total	1200.1299	End-Total	—	—	4,280.00	—	4,280.00	—	4,280.00	8,512.00

Project Task Breakdown

Job Planning lines for invoicing and project budgets

Job Task No. ↑	Line Type	Planned Delivery Date	Document No.	Type	No.	Description	Quantity	Unit Cost	Invoiced Cost Amount (\$)	Total Cost (\$)	Posted Total Cost	Remain
→ 1010	Both Budget and Billable	1/25/2023	1/25/2023	Resource	KATHERINE	KATHERINE HULL	20	50.00	0.00	1,000.00	0.00	1
1020	Both Budget and Billable	1/25/2023	1/25/2023	Text		Review Designs	0	0.00	0.00	0.00	0.00	
1110	Both Budget and Billable	1/25/2023	1/25/2023	Resource	TERRY	Terry Dodds	30	50.00	0.00	1,500.00	0.00	1
1120	Both Budget and Billable	1/25/2023	1/25/2023	Resource	TERRY	Terry Dodds	2	50.00	0.00	100.00	0.00	
1210	Both Budget and Billable	1/25/2023	1/25/2023	Resource	LINA	Lina Townsend	50	60.00	0.00	3,000.00	0.00	2
1220	Both Budget and Billable	1/25/2023	1/25/2023	Resource	KATHERINE	KATHERINE HULL	1	50.00	0.00	50.00	0.00	
1230	Both Budget and Billable	1/25/2023	1/25/2023	Resource	MARTY	Marty Horst	10	45.00	0.00	450.00	0.00	
1240	Both Budget and Billable	1/25/2023	1/25/2023	Item	1936-S	BERLIN Guest Chair, yellow	8	97.50	0.00	780.00	0.00	
1310	Both Budget and Billable	1/25/2023	1/25/2023	Resource	LINA	Lina Townsend	4	60.00	0.00	240.00	0.00	
1320	Both Budget and Billable	1/25/2023	1/25/2023	Resource	LINA	Lina Townsend	10	60.00	0.00	600.00	0.00	

D365 Business Central



Resource Card



LINDA · Linda Martin

Process Resource Report | Related ▾ Automate ▾ Fewer options

Statistics Dimensions Ledger Entries Attachments Comments Sales Prices Purchase Prices Picture Units of Measure Skills

General

No.	LINDA	...	Blocked	.....
Name	Linda Martin		Privacy Blocked	.....
Type	Person	▼	Last Date Modified	.....
Base Unit of Measure	HOUR	▼	Use Time Sheet	.....
Search Name	LINDA MARTIN		Time Sheet Owner User ID	.....
Resource Group No.		▼	Time Sheet Approver User ID	.....

Invoicing

Direct Unit Cost	77.00	Tax Group Code	.....
Indirect Cost %	10.00	Gen. Prod. Posting Group	.....
Unit Cost	84.70	VAT Prod. Posting Group	.....
Price/Profit Calculation	Profit=Price-Cost	Default Deferral Template	.....
Profit %	45	Automatic Ext. Text	.....
Unit Price	154.00	IC Partner Purch. G/L Acc. No.	.....

D365 Business Central time sheets



Time Sheet Line Job Detail - TS00001 · 10000

Job No. ····· JOB00010

Job Task No. ····· 1010

Description ····· Consulting

Work Type Code ·····

Chargeable ·····

Time Sheet ····· April 10, 2023 (Week 15)

Home Prepare Automate ····· Fewer options

Reopen Submit Comments

General

No. ····· TS00001 Resource No. ····· KATHERINE

Starting Date ····· 4/10/2023 Description ····· Week 15

Ending Date ····· 4/16/2023

Lines Manage Line

Submit Reopen Time Sheet Allocation Activity Details Dimensions Comments

Type	Status	Description	10 Mon	11 Tue	12 Wed	13 Thu	14 Fri	15 Sat	16 Sun	Total
→ Job	Open	Consulting	8	9	9	9	8			43

Unit of Measure ····· HOUR Total ····· 43

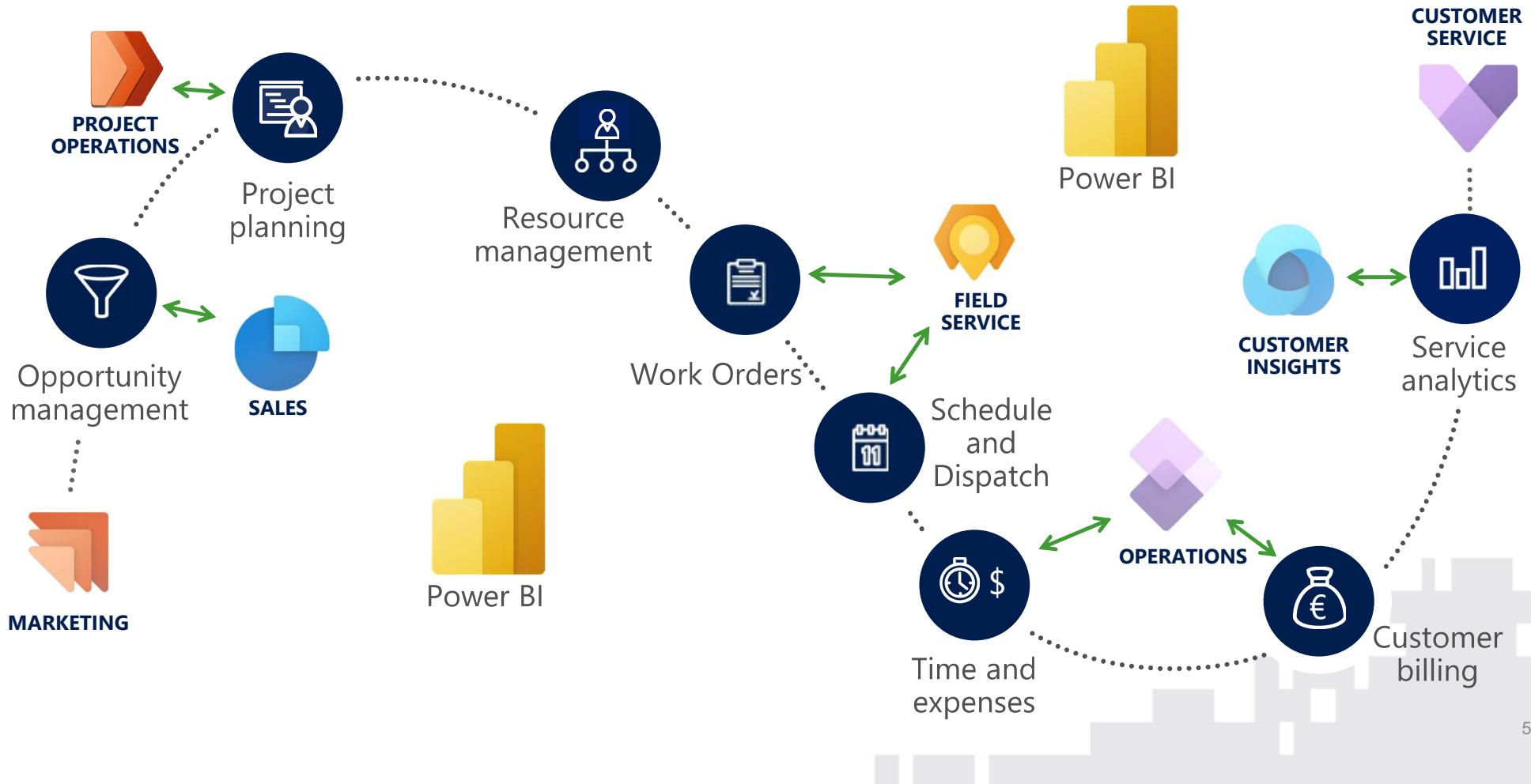
Time Sheet Status

Comment	No
Open	43.00
Submitted	0.00
Rejected	0.00
Approved	0.00
Total	43.00
Posted	0.00

Actual/Budgeted Summary

Day	Actual	Budgeted
10 Monday	8.00/0.00	
11 Tuesday	9.00/0.00	
12 Wednesday	9.00/0.00	
13 Thursday	9.00/0.00	
14 Friday	8.00/0.00	
15 Saturday	0.00/0.00	

The Power of Three – what it could be!



D365 Project Operations – Project for the web

Software Implementation

Project Operations Active for 16 minutes

Jan 2d

Phase 2

Discovery

Start: 02/19/2020, Finish: 03/03/2020, Duration: 10 days, % Complete: 50

Bucket: Bucket 1

Effort: Completed: 80 hours, Remaining: 80 hours, Total: 160 hours

Depends on: Contract-Negotiation

D365 Project Operations – project budgeting

Dynamics 365 Project Operations

Arm installation at Adatum - Saved Project

Project stages: Active for 4 days

Due date: 3/31/2022 | Budget cost: \$118,500.00 | Actual cost: \$40,500.00 | Cost consumption %: 34.23%

Project stages: New, Quote, Plan (4 D), Deliver, Complete, Close

Budget

Summary Tasks Team Resource assignments Resource reconciliation Estimates Budget Sales Tracking Task billing setup Expense estimates Material estimates Related

Track costs View by month View unbudgeted entries

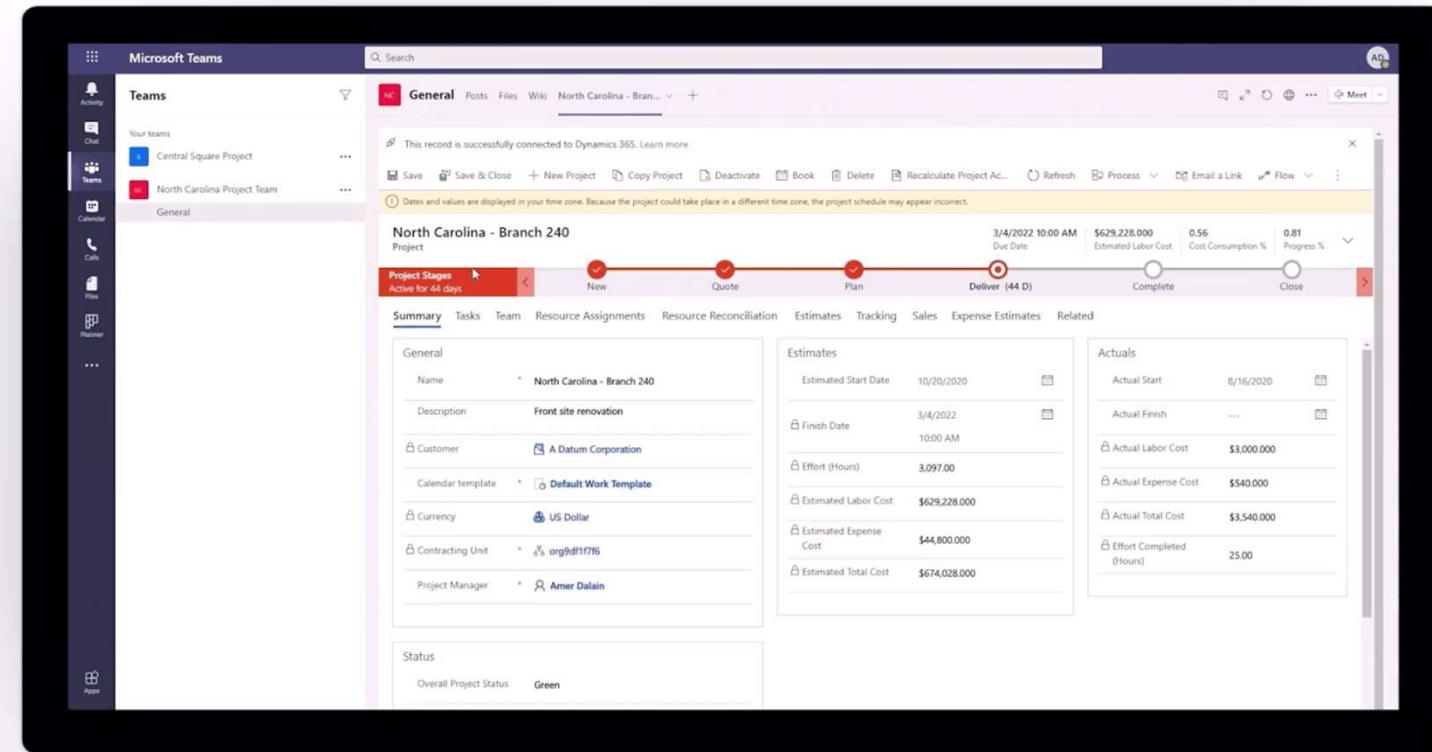
Transaction class	Transaction date	Product	Task	Role	Cost source	Resource	Unit	Budget unit cost	Actual unit cost	Budget	Actual	Forecast	Variance	Consumption %	Earned progress
Time	Default		Task 1	Robotics	Internal	Darlene Robe	Hour	\$100.00	\$100.00	\$12,000.00	\$5,000.00	\$13,000.00	-\$1,000.00	41.60%	38.46%
Month					Budget unit cost	Budget	Actual unit cost (average)								
January					\$100.00	\$4,000.00	\$100.00	\$5,000.00	\$5,000.00	\$12,000.00	\$0.00				
February					\$100.00	\$4,000.00	---	---	\$4,000.00	\$0.00					
March					\$100.00	\$4,000.00	---	---	\$4,000.00	\$0.00					

	Time	Default	Task 2	Robotics	Internal	Wade Warren	Hour	\$100.00	\$100.00	\$12,000.00	\$4,000.00	\$12,000.00	\$0.00	33.33%	33.33%
	Time	Default	Task 3	Software	Internal	Courtney Hen	Hour	\$100.00	\$100.00	\$12,000.00	\$4,000.00	\$12,000.00	\$0.00	33.33%	33.33%
	Time	Default	Task 4	Consulting	Internal	Jerome Bell	Hour	\$100.00	\$100.00	\$12,000.00	\$4,000.00	\$12,000.00	\$0.00	33.33%	33.33%
	Material	Hardware	Armbard 150		Internal		ea	\$1,000.00	\$1,000.00	\$60,000.00	\$20,000.00	\$60,000.00	\$0.00	33.33%	---
	Material	Hardware	Universal Neti Card		Internal		ea	\$100.00	\$100.00	\$6,000.00	\$2,000.00	\$6,000.00	\$0.00	33.33%	---
	Expense	Flight			Internal		ea	\$1,000.00	\$1,000.00	\$3,000.00	\$1,000.00	\$3,000.00	\$0.00	33.33%	---
	Expense	Hotel			Internal		ea	\$100.00	\$100.00	\$300.00	\$100.00	\$300.00	\$0.00	33.33%	---
	Expense	Meals			Internal		ea	\$300.00	\$300.00	\$900.00	\$300.00	\$900.00	\$0.00	33.33%	---

Projects

9 rows (0 selected)

D365 Project Operations – embed in teams



D365 Project Operations – Resource Management

Dynamics 365 Project Operations Resources > Schedule Board

Initial public view x Alex Johnson + ⚙

Daily view

Filter & Map View

Search resources...

6/12/2020 6/13/2020 6/14/2020 6/15/2020 6/16/2020 6/17/2020 6/18/2020 6/19/2020 6/20/2020 6/21/2020 6/22/2020 6/23/2020 6/24/2020 6/25/2020

Book Actions Sort

Details Create Resource Booking

Alex Johnson 5000 Ⓜ 62% Project

Project - Data optimization Duration: 40 hrs

Cora Thomas 0.00 Ⓜ 0% Sarah Perez 0.00 Ⓜ 0% Ashley Schroeder 72.00 Ⓜ 90% Project

Project - Production line tuning Duration: 40 hrs

Anthony Ivanov 0.00 Ⓜ 0% Christopher Reed 0.00 Ⓜ 0% Isabel Garcia 140.35 Ⓜ 175% Project

Project - Production line tuning Duration: 32 hrs

Isabel Garcia GMT-08:00

Skills: Assembly Line Design, Inventory Management, Operations Research, Project Management, Robotics Hardware, Robotics Programming, Throughput Analysis

Roles: Optimization Specialist, Robotics Engineer

Robin Kline 0.00 Ⓜ 0% Elizabeth Moore 0.00 Ⓜ 0% Tyler Stein 0.00 Ⓜ 0%

Project - Diagnostics and performance tuning Duration: 48 hrs

Project - Assembly line telemetry wiring Duration: 28.6 hrs

Project - Diagnostics and performance tuning Duration: 32 hrs

Project - Assembly line telemetry wiring Duration: 32 hrs

1 - 30 of 84

Open Requirements Project

Name From Date To Date Duration Proposed Duration Fulfilled Duration Remaining Duration Priority Territory Time From Promised Time To Promised Status Created On

Assembly Optimization at Adab... 10/12/2020 10/15/2020 32 hrs 0 min 4 hrs 28 hrs Active 08/14/2020 11:52 AM

Search by Requirement Name



Questions and Answers





THE POWER OF BEING UNDERSTOOD

ASSURANCE | TAX | CONSULTING

This document contains general information, may be based on authorities that are subject to change, and is not a substitute for professional advice or services. This document does not constitute assurance, tax, consulting, business, financial, investment, legal or other professional advice, and you should consult a qualified professional advisor before taking any action based on the information herein. RSM US LLP, its affiliates and related entities are not responsible for any loss resulting from or relating to reliance on this document by any person. Internal Revenue Service rules require us to inform you that this communication may be deemed a solicitation to provide tax services. This communication is being sent to individuals who have subscribed to receive it or who we believe would have an interest in the topics discussed.

RSM US LLP is a limited liability partnership and the U.S. member firm of RSM International, a global network of independent assurance, tax and consulting firms. The member firms of RSM International collaborate to provide services to global clients, but are separate and distinct legal entities that cannot obligate each other. Each member firm is responsible only for its own acts and omissions, and not those of any other party. Visit rsmus.com/aboutus for more information regarding RSM US LLP and RSM International.

RSM, the RSM logo and *the power of being understood* are registered trademarks of RSM International Association.

© 2023 RSM US LLP. All Rights Reserved.