

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



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

**Joe Hessler**

Manager, D365 Business Central

Baltimore, Maryland

443 761 4231

joe.hessler@rsmus.com

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

Ryan Lee-Norman | Manager

**Ryan Lee-Norman**

Manager, D365 Customer
Engagement

Minneapolis, MN

612 376 9383

ryan.lee-norman@rsmus.com

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

Uriah Hakala | Director



Uriah Hakala

Director, PSA Practice Lead

Chicago, Illinois

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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

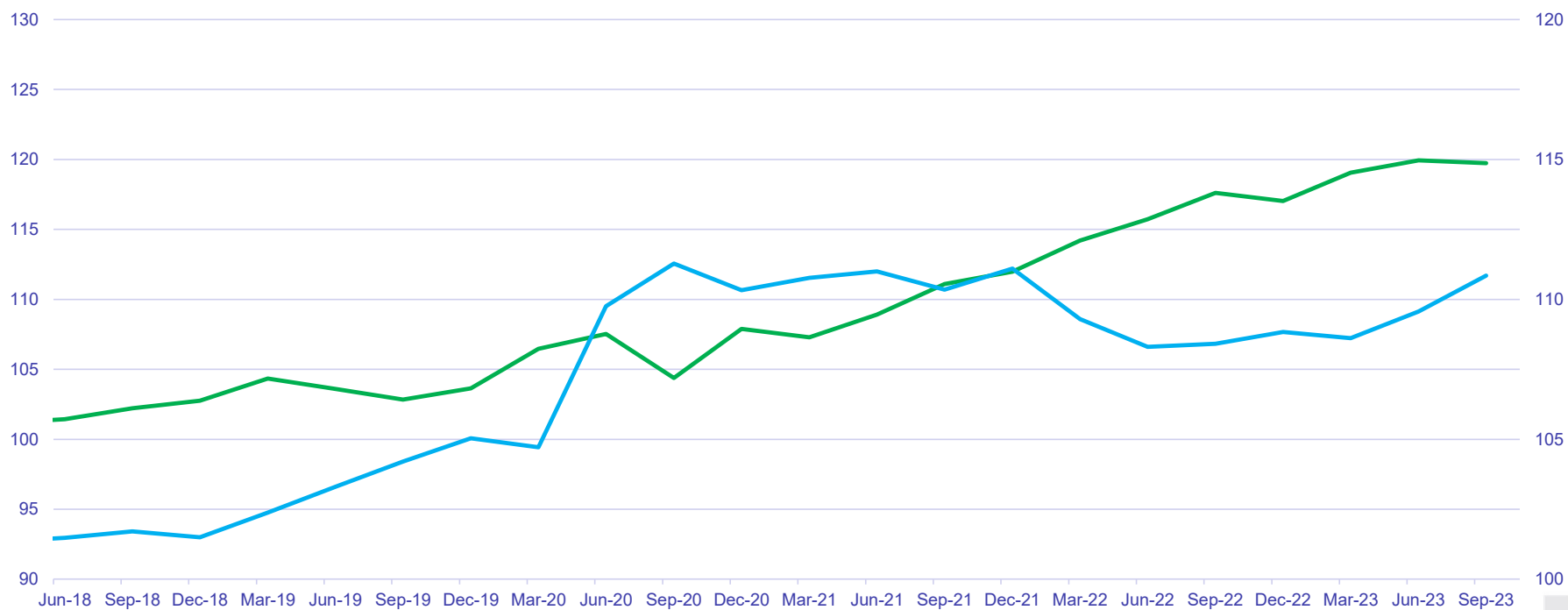
Pressure on margins



- 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



Source: Bloomberg

Labor Cost Index Labor Productivity Index

Prices received for services (realized rates)



Transparency in pricing and offerings

Shift towards Outcomes-based or Fixed-Price offerings



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”

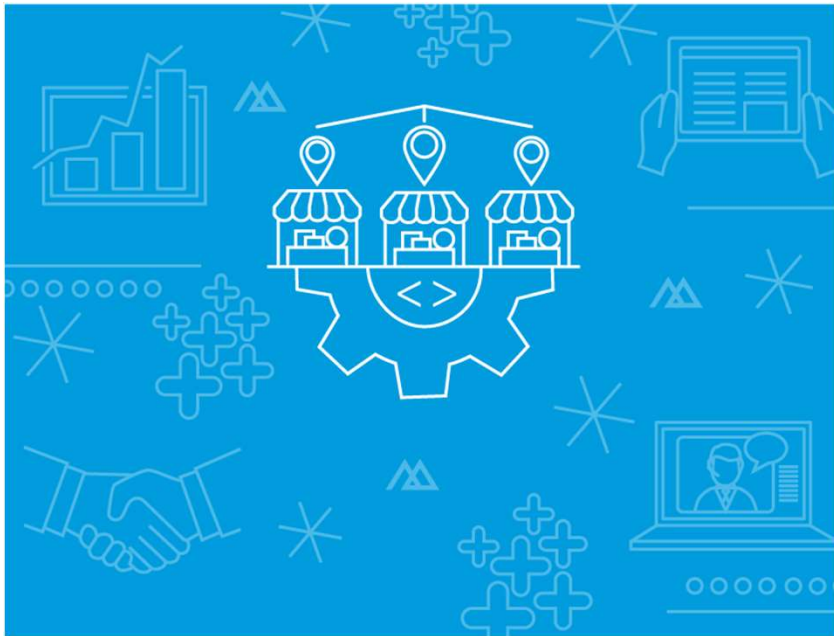
Remote / distributed workforce

- 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?

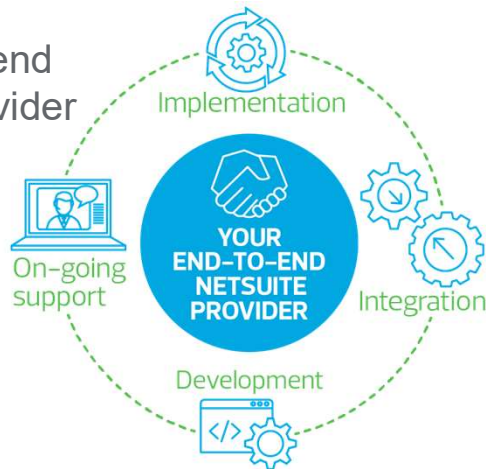
Change management is critical!

- 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

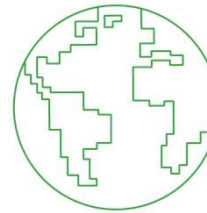
NetSuite overview

RSM NetSuite practice

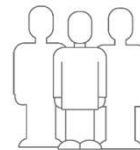
Your end-to-end
NetSuite provider



One of
the largest
**Global
NetSuite
Partners**

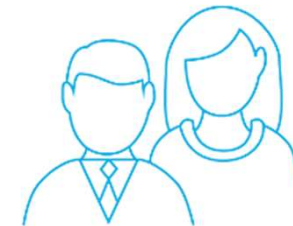


RSM offices
in 85 U.S. cities and
4 Canadian cities



**Location &
Industry
based
resources**

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



300+
NetSuite Consultants



#1 NetSuite
worldwide
consulting partner



1,500+
**NetSuite
customers**

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



2011
NetSuite
practice began

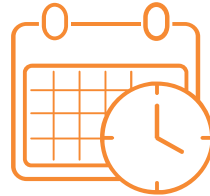
Benefits of NetSuite



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.

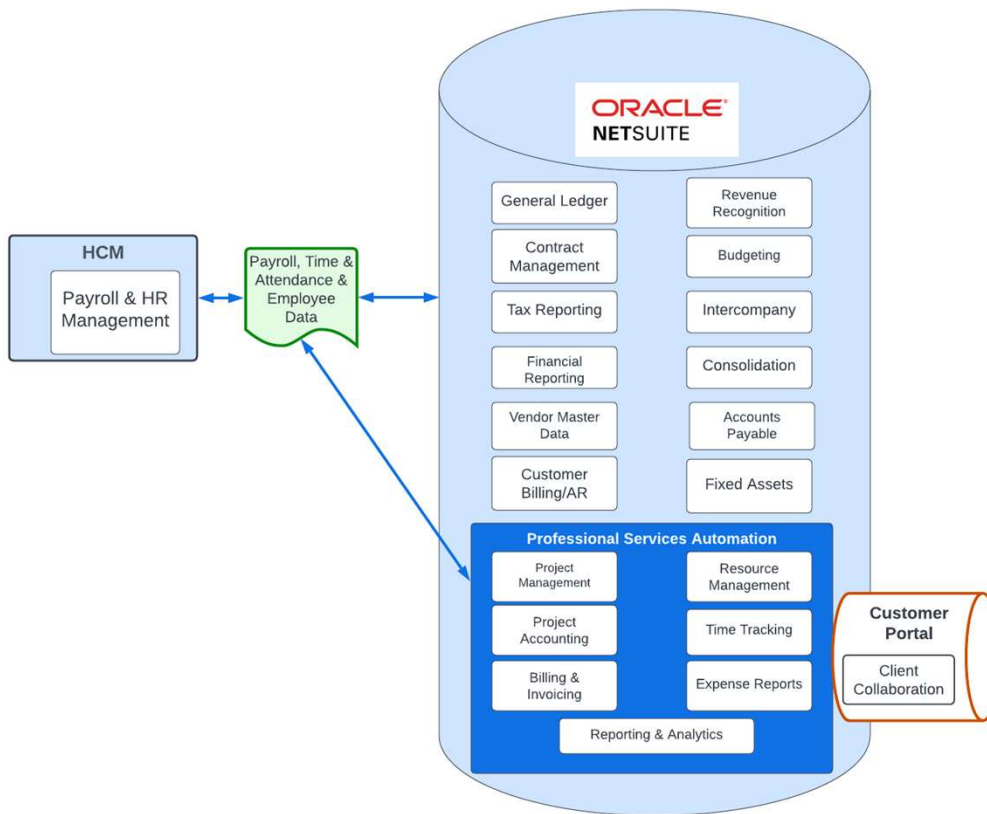


Anytime, Anywhere, Any Device Access



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

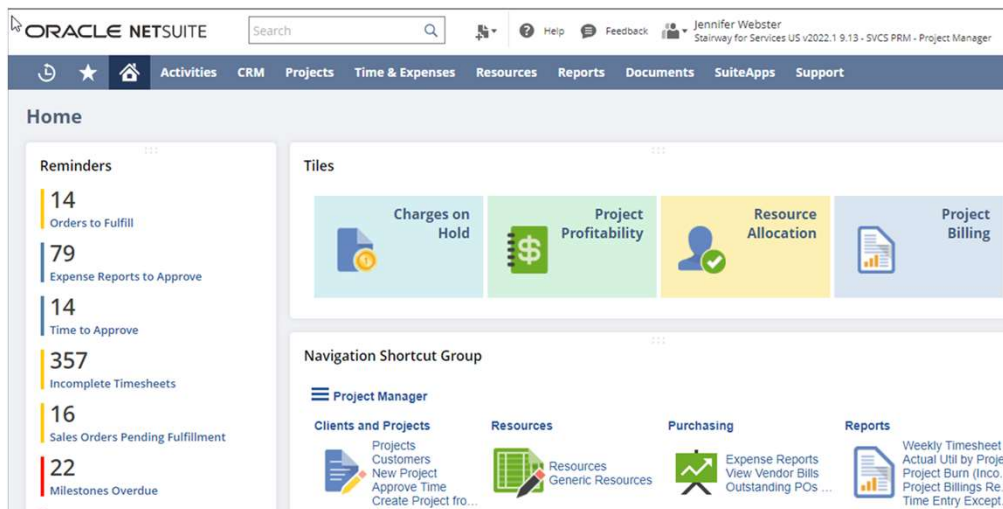


Client Acquisition and
Retention is a focus

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

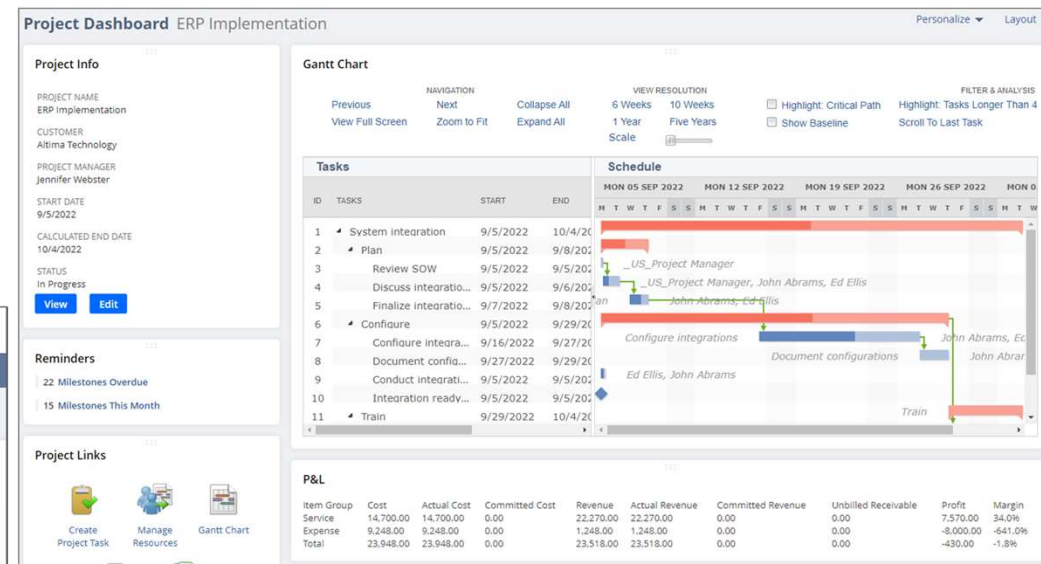
- 14 Orders to Fulfill
- 79 Expense Reports to Approve
- 14 Time to Approve
- 357 Incomplete Timesheets
- 16 Sales Orders Pending Fulfillment
- 22 Milestones Overdue

Tiles

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

Navigation Shortcut Group

- Project Manager**
 - Clients and Projects
 - Projects
 - Customers
 - New Project
 - Approve Time
 - Create Project from...
 - Resources
 - Resources
 - Generic Resources
 - Purchasing
 - Expense Reports
 - View Vendor Bills
 - Outstanding POS...
 - Reports
 - Weekly Timesheet
 - Actual Util by Proje
 - Project Burn (Inco..
 - Project Billings Re
 - Time Entry Except.



Project Dashboard ERP Implementation Personalize Layout

Project Info

PROJECT NAME
ERP Implementation

CUSTOMER
Altima Technology

PROJECT MANAGER
Jennifer Webster

START DATE
9/5/2022

CALCULATED END DATE
10/4/2022

STATUS
In Progress

[View](#) [Edit](#)

Reminders

- 22 Milestones Overdue
- 15 Milestones This Month

Project Links

- Create Project Task
- Manage Resources
- Gantt Chart

Gantt Chart

NAVIGATION: Previous Next Collapse All Expand All

VIEW RESOLUTION: 6 Weeks 10 Weeks 1 Year Five Years Scale

FILTER & ANALYSIS: Highlight Critical Path Highlight: Tasks Longer Than 4 Scroll To Last Task

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 integra...	9/16/2022	9/27/2022
8	Document confia...	9/27/2022	9/29/2022
9	Conduct integrati...	9/5/2022	9/5/2022
10	Integration ready...	9/5/2022	9/5/2022
11	Train	9/29/2022	10/4/2022

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	34.0%
Expense	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	23,518.00	23,518.00	0.00	0.00	-430.00	-1.8%

Project tasks

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

Project Tasks / Milestones									
VIEW									
<div> <div>Planning</div> <div>New Project Task</div> <div>New Milestone</div> <div>View Gantt Chart</div> <div>Customize View</div> </div>									
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 REV
	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		23,94
▼ 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

Opportunities

Transactions

Time Tracking

Expense Report Policies

VIEW

BILLING STATUS

TYPE

Default

Either

- All -

New Sales Order

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	
Edit	9/21/2022	Invoice	269		18,894.00	\$18,894.00	US Dollar	Open	21
Edit	9/10/2022	Invoice	356		4,000.00	\$4,000.00	US Dollar	Paid In Full	

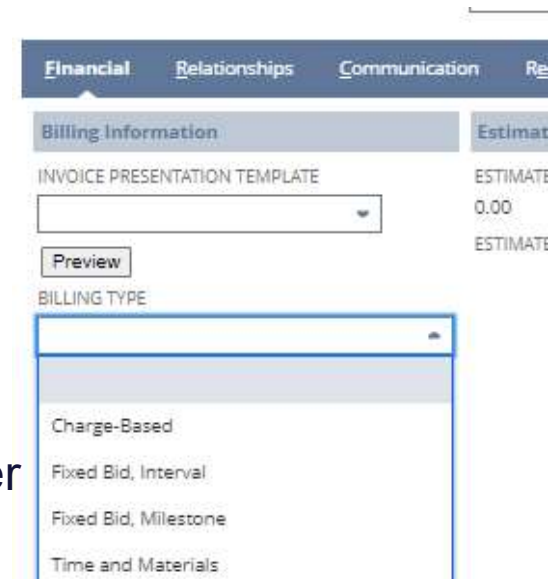
- Item group Cost/Revenue summary

Schedule	Resources	Financial	Relationships	Communication	Related Records	Preferences	System Information	Work Breakdown Structure	Budget	P&L
* Data you see might not be up to date. Go to Actions > Recalculate Financial Data to refresh them.										
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 interval
 - Fixed bid milestone
 - Time and materials
- Charge-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



The screenshot shows a software interface with a top navigation bar containing 'Financial', 'Relationships', 'Communication', and 'Re'. The 'Financial' tab is active, showing a 'Billing Information' section. This section includes a dropdown menu for 'INVOICE PRESENTATION TEMPLATE' with a downward arrow, a 'Preview' button, and a 'BILLING TYPE' dropdown menu. The 'BILLING TYPE' menu is open, displaying four options: 'Charge-Based', 'Fixed Bid, Interval', 'Fixed Bid, Milestone', and 'Time and Materials'. To the right of the 'Billing Information' section, there is a table with two rows, both labeled 'ESTIMATE' in the first column and '0.00' in the second column.

Complex billing rules

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

Percentage Complete Override					
Charges					
Charge Run History					
Fixed Fee Rules					
Time-Based Rules					
Expense-Based Rules					
Purchase Rules					
Project Revenue Rules					
VIEW					
All Time-Based Rules					
Customize View					
New Time-Based Rule					
EDIT	NAME	RULE ORDER	RATE BASIS	RATE MULTIPLIER	INITIAL CHARGE STAGE
	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

Percent Complete Override	Charges	Charge Run History	Fixed Fee Rules	Time-Based Rules	Expense-Based Rules
VIEW					
Charge Run	Customize View	Generate Charges	Generate Forecast		
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			
30310	9/2/2022 12:00 am	9/2/2022 12:00 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

ORACLE NETSUITE

Search

Activities SuiteTalk UI Transactions Lists Reports Analytics Documents Setup Customization Commerce Subscriptions SuiteApps Support

Revenue Arrangement 8 4 Test Customer 1

Edit Back Update Revenue Plans Revenue Summary Actions

Primary Information

REVENUE ARRANGEMENT # 8

CUSTOMER 4 Test Customer 1

DATE 5/26/2017

CREATED FROM MERGED ARRANGEMENTS

MERGED INTO NEW ARRANGEMENTS

REVENUE PLAN STATUS Not Started

COMPLIANT

TRANSACTION IS ALLOCATION BUNDLE

TRANSACTION TOTAL \$0.00

TOTAL CARVE-OUT 0.00

TOTAL REVENUE AMOUNT \$0.00

MEMO

Classification

SUBSIDIARY Parent Company

CLASS

Revenue Elements Communication Related Records System Information

Revenue Element Allocation Detail Revenue Arrangement Version Revenue Arrangement Message

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 TYPE	PARENT KIT ELEMENT	CALCULATED FAIR VALUE AMOUNT	ALLOCATION TYPE
21	Invoice #8	5/26/2017			Magazine	1	1		\$0.00	\$0.00	\$0.00		\$0.00						\$0.00	Normal

Edit Back Update Revenue Plans Revenue Summary Actions

Microsoft D365 Overview

Our Microsoft Practice



RSM offices in 98 U.S. cities and 6 Canadian cities



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



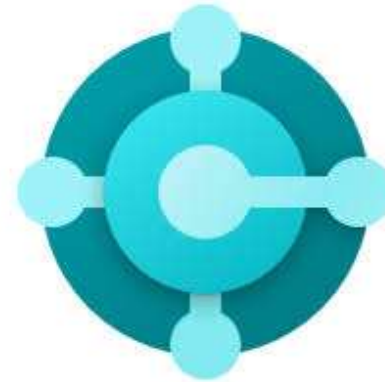
D365 Business Central for professional services

- 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

Views

All
Open
Planned and Quoted
Completed
Unassigned
Allen Interactions
Filter list by...
Filter totals by...

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...

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	Totalling	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	8,151.20

Project Task Breakdown

Job Planning lines for invoicing and project budgets

JOB00010 Reception area remodel 1010 Consulting

✓ Saved

Job Planning Lines Search Analyze + New Edit List Delete Home Report Actions Related Reports Automate Fewer options

Job Task No. ↑	Line Type	Planning Date	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	3
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

...

Name

Linda Martin

Type

Person

▼

Base Unit of Measure

HOUR

▼

Search Name

LINDA MARTIN

Resource Group No.

▼

Blocked

Privacy Blocked

Last Date Modified

Use Time Sheet

Time Sheet Owner User ID

Time Sheet Approver User ID

Invoicing

Direct Unit Cost

77.00

Indirect Cost %

10.00

Unit Cost

84.70

Price/Profit Calculation

Profit=Price-Cost

▼

Profit %

45

Unit Price

154.00

Tax Group Code

Gen. Prod. Posting Group

VAT Prod. Posting Group

Default Deferral Template

Automatic Ext. Text

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

Starting Date 4/10/2023

Ending Date 4/16/2023

Resource No. KATHERINE

Description Week 15

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

10 Monday

8.00/0.00

11 Tuesday

9.00/0.00

12 Wednesday

9.00/0.00

13 Thursday

9.00/0.00

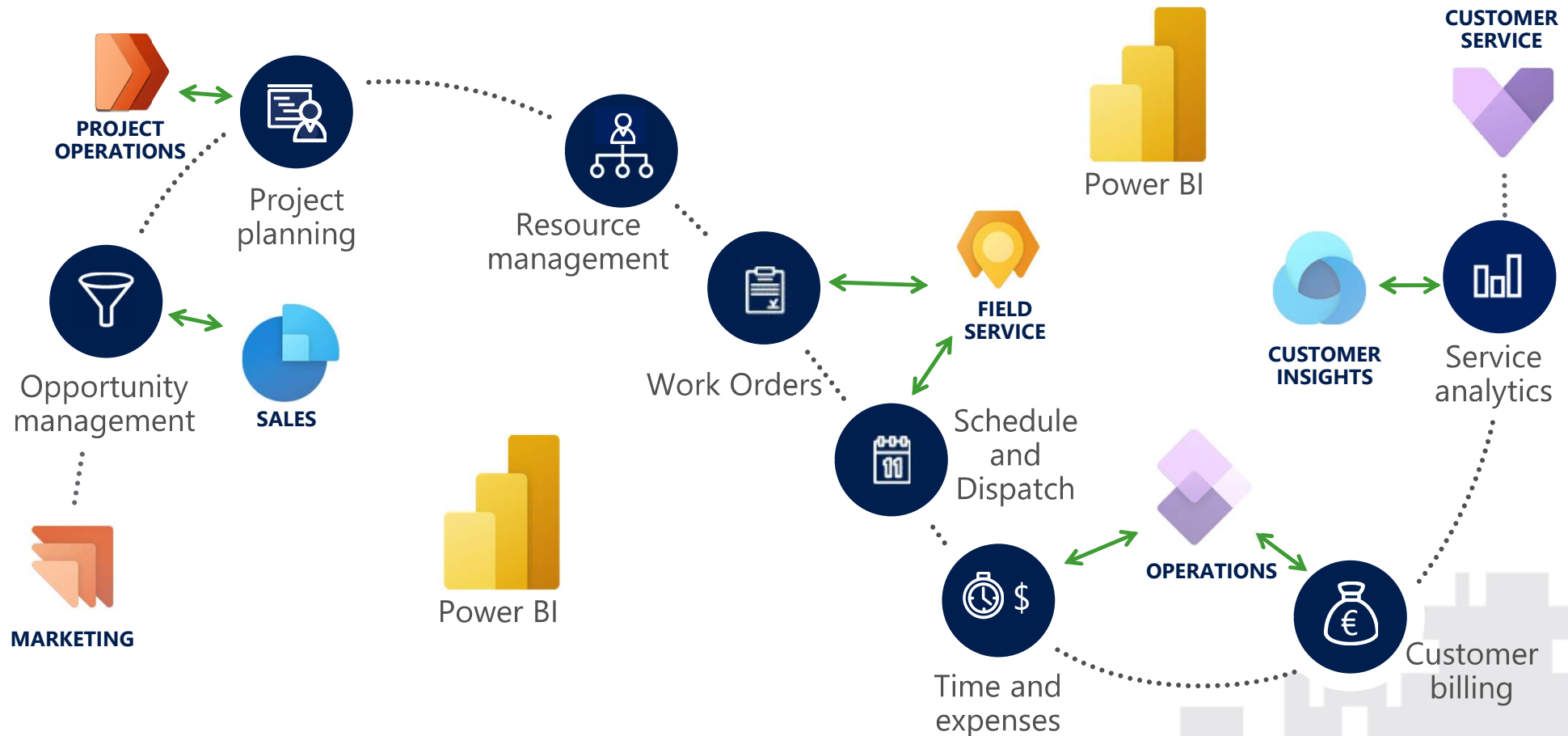
14 Friday

8.00/0.00

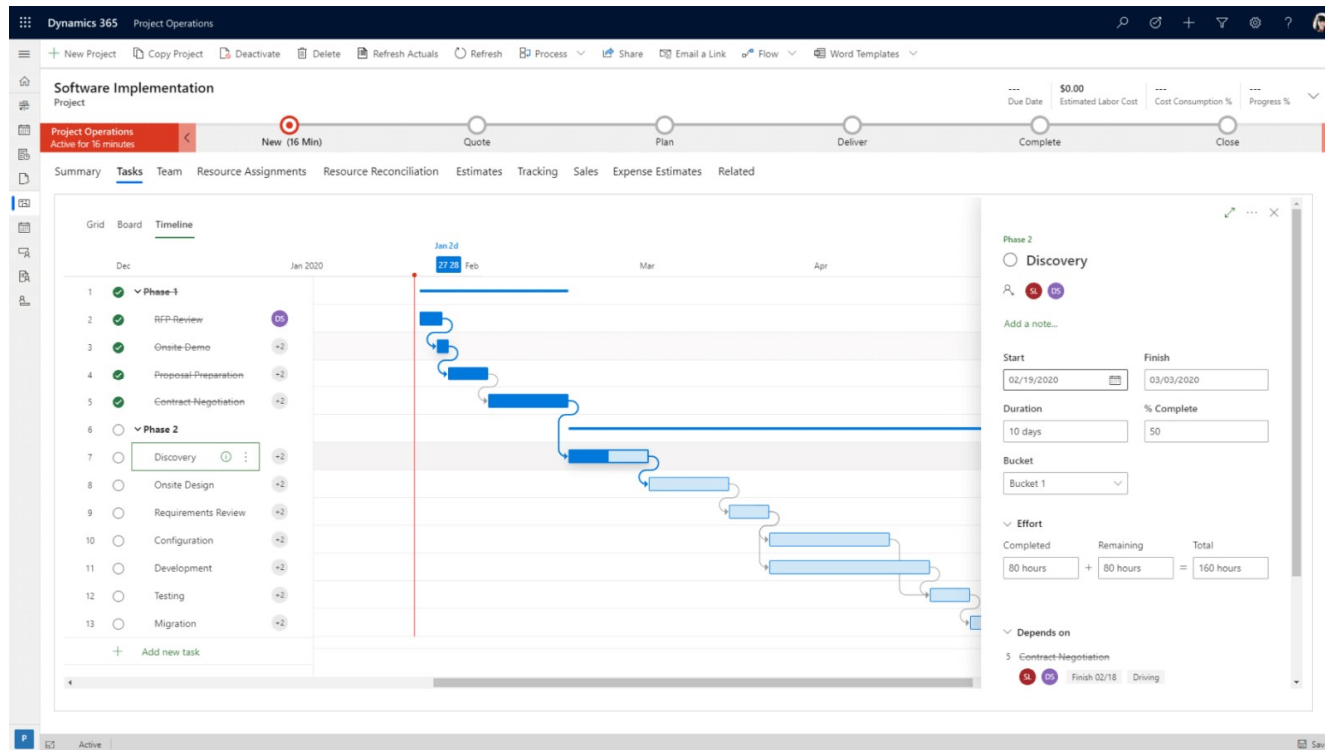
15 Saturday

0.00/0.00

The Power of Three – what it could be!



D365 Project Operations – Project for the web



D365 Project Operations – project budgeting

Dynamics 365 | Project Operations

Arm installation at Adatum - Saved

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

Project stages: Active for 4 days | New | Quote | **Plan (4 D)** | Deliver | Complete | Close

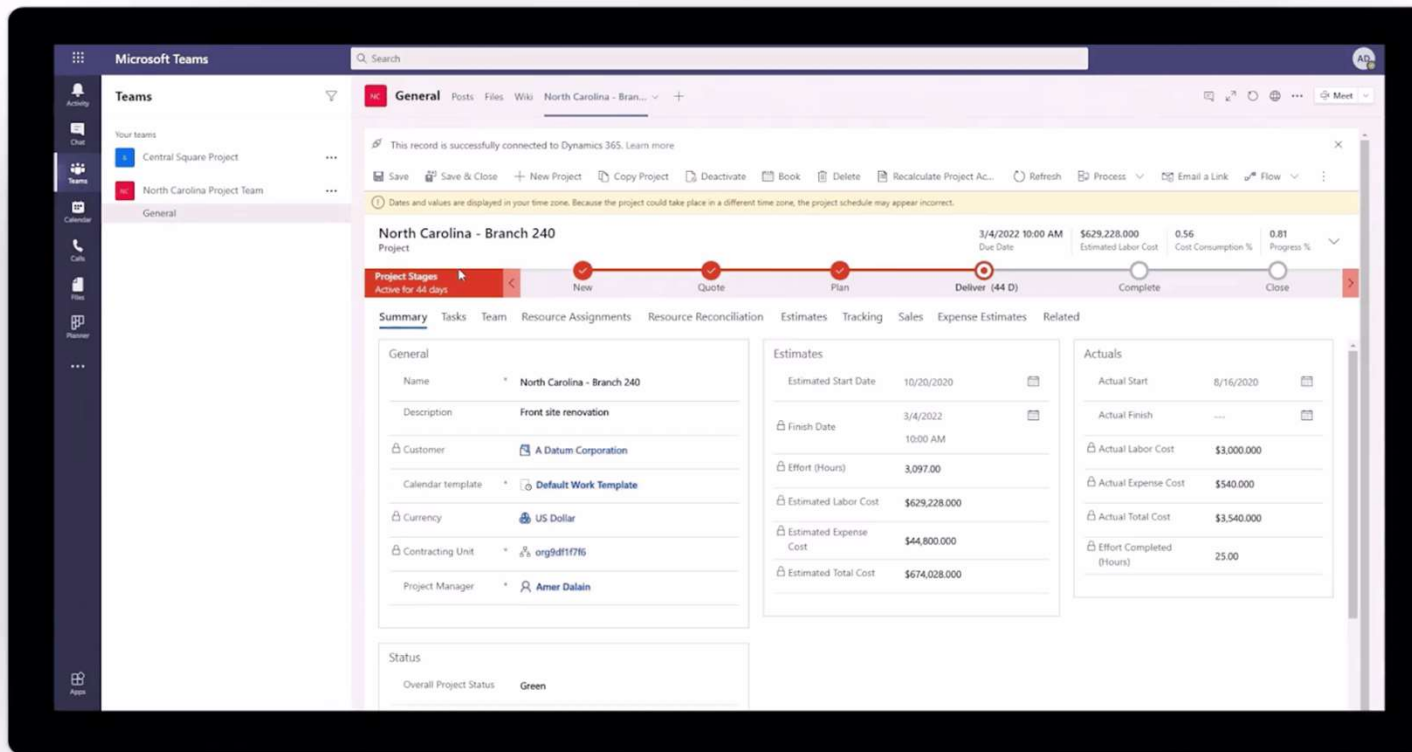
Summary | Tasks | Team | Resource assignments | Resource reconciliation | Estimates | **Budget** | Sales | Tracking | Task billing setup | Expense estimates | Material estimates | Related

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 I	Internal	Darlene Robe	Hour	\$100.00	\$100.00	\$12,000.00	\$5,000.00	\$13,000.00	-\$1,000.00	41.60%	38.46%																												
<table border="1"> <thead> <tr> <th>Month</th> <th>Budget unit cost</th> <th>Budget</th> <th>Actual unit cost (average)</th> <th>Actual</th> <th>Forecast</th> <th>Variance</th> </tr> </thead> <tbody> <tr> <td>January</td> <td>\$100.00</td> <td>\$4,000.00</td> <td>\$100.00</td> <td>\$5,000.00</td> <td>\$5,000.00</td> <td>-\$1,000.00</td> </tr> <tr> <td>February</td> <td>\$100.00</td> <td>\$4,000.00</td> <td>---</td> <td>---</td> <td>\$4,000.00</td> <td>\$0.00</td> </tr> <tr> <td>March</td> <td>\$100.00</td> <td>\$4,000.00</td> <td>---</td> <td>---</td> <td>\$4,000.00</td> <td>\$0.00</td> </tr> </tbody> </table>																Month	Budget unit cost	Budget	Actual unit cost (average)	Actual	Forecast	Variance	January	\$100.00	\$4,000.00	\$100.00	\$5,000.00	\$5,000.00	-\$1,000.00	February	\$100.00	\$4,000.00	---	---	\$4,000.00	\$0.00	March	\$100.00	\$4,000.00	---	---	\$4,000.00	\$0.00
Month	Budget unit cost	Budget	Actual unit cost (average)	Actual	Forecast	Variance																																					
January	\$100.00	\$4,000.00	\$100.00	\$5,000.00	\$5,000.00	-\$1,000.00																																					
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 I	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 I	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 Net 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%	--																												

9 rows (0 selected)

D365 Project Operations – embed in teams



The screenshot displays the Microsoft Teams interface with the D365 Project Operations app embedded in a team channel. The app shows a project named "North Carolina - Branch 240" with a status of "Active for 44 days". The project is currently in the "Deliver" stage, which is highlighted in red. The project timeline shows stages: New, Quote, Plan, Deliver (44 D), Complete, and Close. Key metrics displayed include: Due Date (3/4/2022 10:00 AM), Estimated Labor Cost (\$629,228.000), Cost Consumption % (0.56), and Progress % (0.81).

The app interface includes a "Summary" tab with the following details:

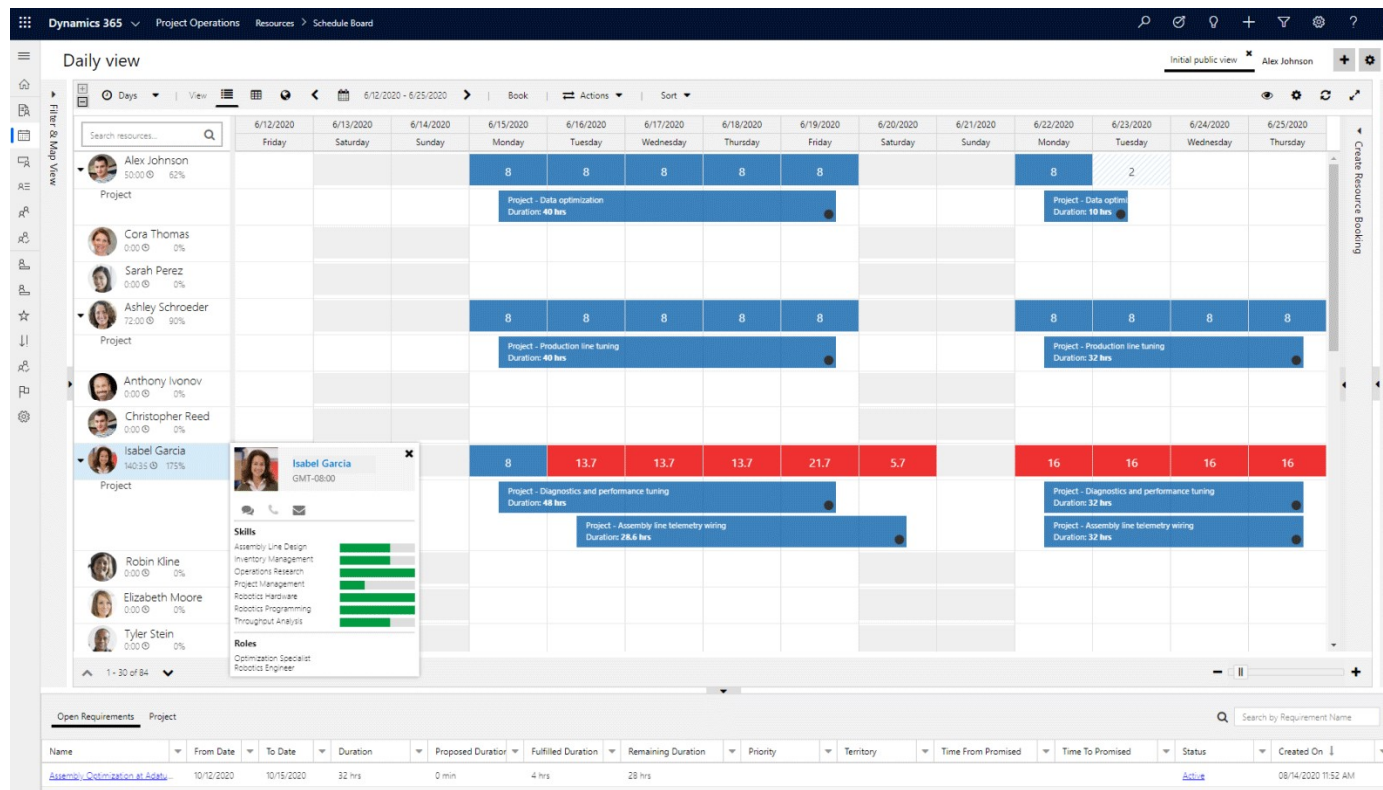
General	
Name	North Carolina - Branch 240
Description	Front site renovation
Customer	A Datum Corporation
Calendar template	Default Work Template
Currency	US Dollar
Contracting Unit	org9d1f17f6
Project Manager	Amer Dalain

Estimates	
Estimated Start Date	10/20/2020
Finish Date	3/4/2022 10:00 AM
Effort (Hours)	3,097.00
Estimated Labor Cost	\$629,228.000
Estimated Expense Cost	\$44,800.000
Estimated Total Cost	\$674,028.000

Actuals	
Actual Start	8/16/2020
Actual Finish	
Actual Labor Cost	\$3,000.000
Actual Expense Cost	\$540.000
Actual Total Cost	\$3,540.000
Effort Completed (Hours)	25.00

The "Status" section shows the Overall Project Status as "Green".

D365 Project Operations – Resource Management



Questions and Answers





THE POWER OF BEING UNDERSTOOD

ASSURANCE | TAX | CONSULTING

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