



# WHAT'S NEW

EXTENSION PROJECT CONTROLLING / 2025 H2

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AXtension B.V.  
Noorderpoort 9D  
5916 PJ Venlo  
The Netherlands

Tel.	: +31 (0)77 3232622
Fax	: +31 (0)77 3232627
E-mail	: <a href="mailto:info@axtension.com">info@axtension.com</a>
Internet	: <a href="http://www.axtension.com">www.axtension.com</a>
Trade register number	: 12037027, Noord- en Midden Limburg Chamber of Commerce
Bank	: Rabobank Gelderse Vallei
Bank account number (IBAN)	: NL43RABO0102787077
VAT number	: NL806.969.349.B01

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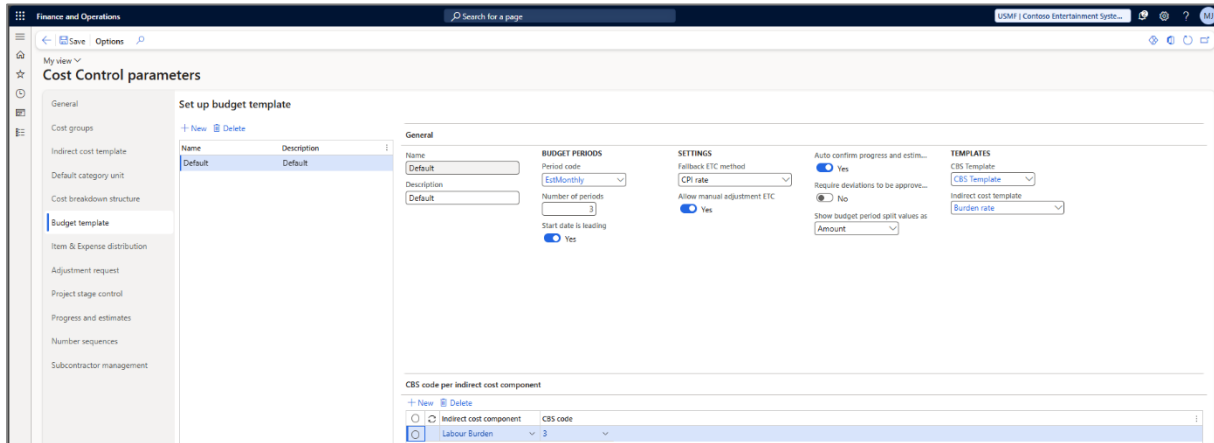
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# Axtension® Project Controlling

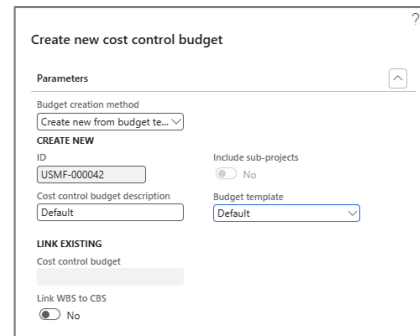
## Automate set up of Cost Control budget for projects

This release of Axtension® Project Controlling introduces the ability to standardize the setup of a Cost Control budget in the **Cost Control parameters > Budget template** form.

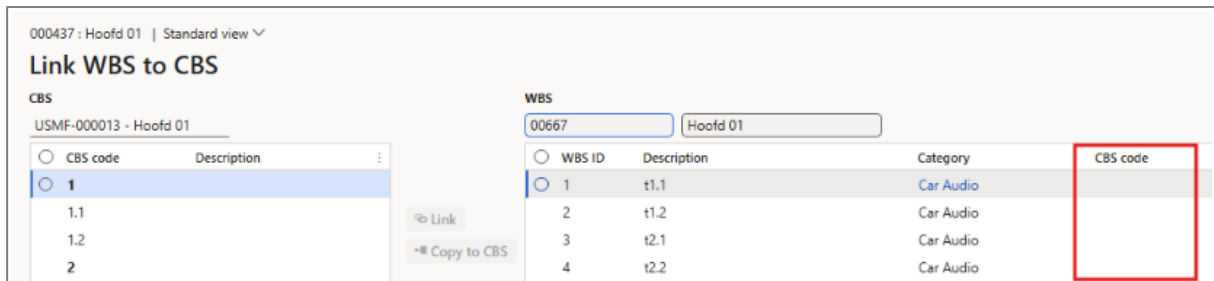


It is possible to predefine the common settings of a Cost Control budget like the default number of periods, the ETC method, link the budget template to a CBS template, automatically confirm progress and estimate datasets or define if the budget period split should be shown as amounts or percentages. In addition, it is possible to default which CBS code should be used per indirect cost component.

A budget template can be used when creating a Cost Control budget. By using the **Create new from budget template** method and selecting the required **Budget template** the settings from the budget template will be applied to the cost control budget. This way it is faster and easier to create a cost control budget by using all the default configuration options from a budget template.



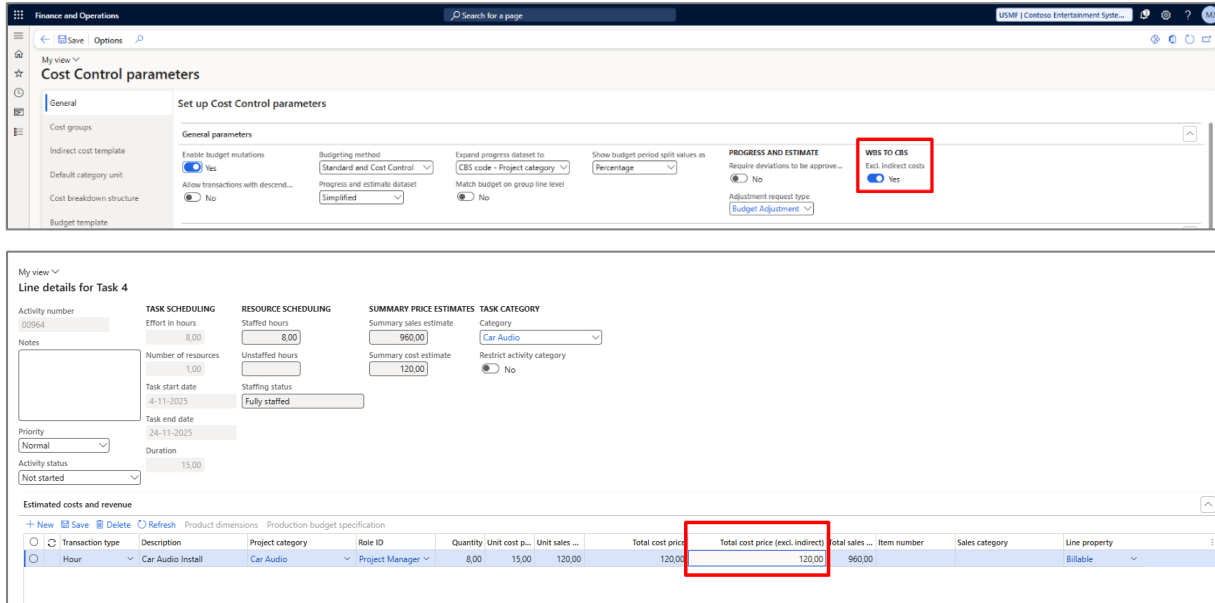
When creating a budget, the **Link WBS to CBS** form appears wherein it is possible to link project activities from the WBS to CBS codes. This form is only needed when the WBS ID's are not linked to CBS codes in the WBS.



## New total cost amount field on WBS – excluding indirect costs

For organizations wanting to distinguish between direct and indirect costs from the WBS, a new toggle is introduced to see the difference between **Total cost price** and **Total cost price (excl indirect)**.

This toggle can be enabled in the Cost Control parameters and will add the **Total cost price (excl indirect)** column on the details of an activity in the standard WBS or in the Axtension® Project Management task planning.



The screenshot displays two parts of the Axtension software interface. The top part shows the 'Cost Control parameters' settings, and the bottom part shows the 'Line details for Task 4'.

**Cost Control parameters:**

- General parameters:**
  - Enable budget mutations: ☒ Yes
  - Budgeting method: Standard and Cost Control
  - Expand progress dataset to: CBS code - Project category
  - Show budget period split values as: Percentage
  - PROGRESS AND ESTIMATE: Require deviations to be approved... ☒ No
  - Adjustment request type: Budget Adjustment
  - WBS TO CBS:** Excl indirect costs: ☒ Yes (highlighted with a red box)

**Line details for Task 4:**

- Activity number: 00964
- Notes: [Empty text area]
- Priority: Normal
- Activity status: Not started
- TASK SCHEDULING:** Effort in hours: 8,00
- RESOURCE SCHEDULING:** Staffed hours: 8,00
- SUMMARY PRICE ESTIMATES:**
  - Summary sales estimate: 960,00
  - Summary cost estimate: 120,00
- TASK CATEGORY:** Category: Car Audio
- Restrict activity category: ☒ No
- Task start date: 8-11-2025
- Task end date: 24-11-2025
- Duration: 15,00
- Staffing status: Fully staffed

**Estimated costs and revenue:**

Transaction type	Description	Project category	Role ID	Quantity	Unit cost p...	Unit sales ...	Total cost price	Total cost price (excl indirect)	Total sales ...	Item number	Sales category	Line property
Hour	Car Audio Install	Car Audio	Project Manager	8,00	15,00	120,00	120,00	120,00	960,00			Billable

The value of **Total cost price (excl indirect)** is calculated by multiplying the quantity with the unit cost price. The **Total cost price (excl indirect)** value is then transferred into the Cost Control budget.

## Display budget adjustment totals on fact pane

The **Budget status** fact pane shows the “Total budget status” which can be compared with the total value of a task within the budget, and the ability to compare individual transaction types with the budget.

If an adjustment request exists on a task, the value of that adjustment request is shown as well from the task but also per transaction type. It is also possible to create and open the adjustment request from the fact pane.

Budget status

Total budget status

Adjustment request requested

Planned	Budget
312,00	300,00

Adjustment

12,00

DETAILED

Status Transaction type

Hour

Planned	Budget
300,00	300,00

Adjustment

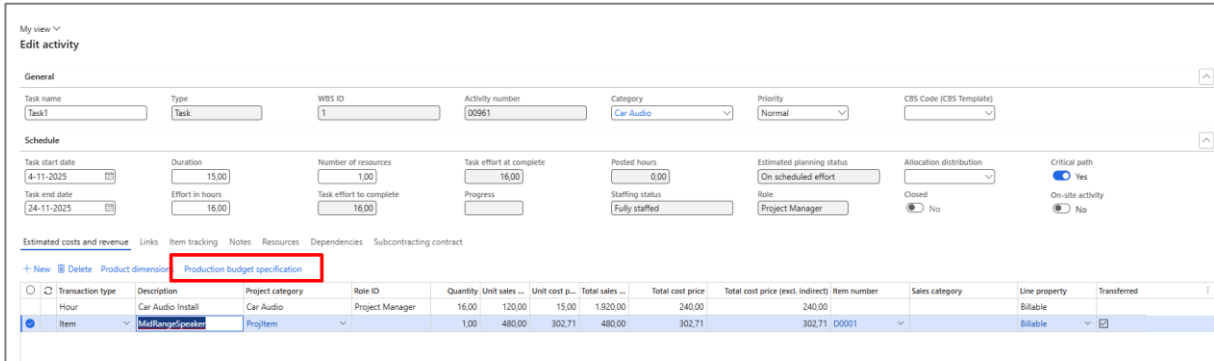
0,00

Create adjustment request  
Open adjustment requests

## Update production budget specification

It is now possible to change the production budget specification from the WBS after the creation of a Cost Control budget. This will allow organizations to update the production budget specification after engineering is done, this way it will reflect the actual production costs compared to the initial estimate before engineering.

Editing an existing production budget specification is done by using the standard D365 WBS or via the task planning on a draft WBS.



My view ▾  
 Edit activity

**General**

Task name: Task1, Type: Task, WBS ID: 1, Activity number: 00961, Category: Car Audio, Priority: Normal, CBS Code (CBS Template):

**Schedule**

Task start date: 4-11-2025, Duration: 15.00, Number of resources: 1.00, Task effort at complete: 16.00, Posted hours: 0.00, Estimated planning status: On scheduled effort, Allocation distribution: Closed, Critical path: Yes

Task end date: 24-11-2025, Effort in hours: 16.00, Task effort to complete: 16.00, Progress: Fully staffed, Role: Project Manager, On-site activity: No

**Estimated costs and revenue** Links: Item tracking, Notes, Resources, Dependencies, Subcontracting contract

+ New, Delete, Product dimension, **Production budget specification**

Transaction type	Description	Project category	Role ID	Quantity	Unit sales	Unit cost p...	Total sales	Total cost price	Total cost price (excl. indirects)	Item number	Sales category	Line property	Transferred
Hour	Car Audio Install	Car Audio	Project Manager	16.00	120.00	15.00	1,920.00	240.00	240.00			Billable	
Item	Car Audio Install	Project		1.00	480.00	302.71	480.00	302.71	302.71	00001		Billable	

Updating the production budget specification is done in the same matter as creating a new production budget specification.

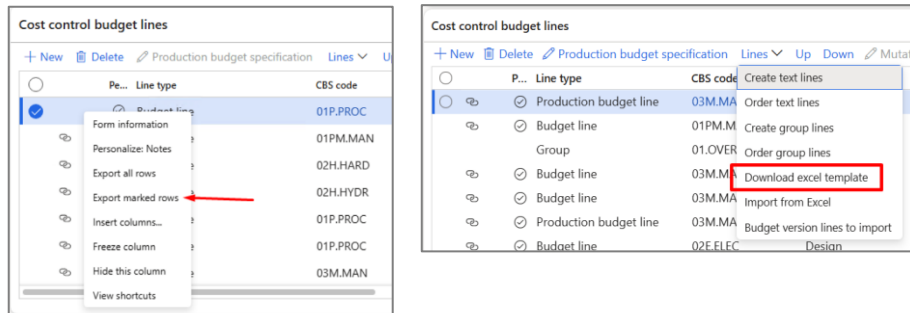
**Note** The quantity or unit cost price of an estimated cost line cannot be changed once a production budget specification is calculated on that estimated cost line.

## Import budget lines via Excel

For organizations which are not creating a Cost Control budget from the WBS, it is now possible to import budget lines from Excel. This can be done by downloading an Excel template from the Cost Control budget, then adding the required information and uploading it into the Cost Control budget.

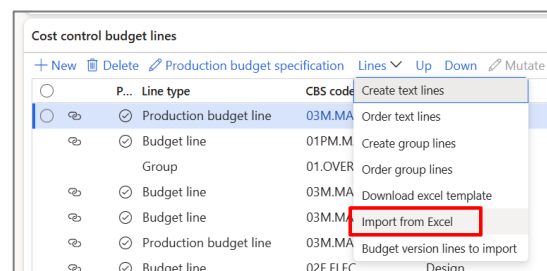
### Download Excel template

Creating the Excel template can be done by either using the standard D365 function to select rows and export them to an Excel file or by using the option to download an empty Excel template within the Cost Control budget.

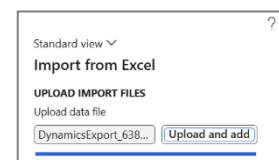


### Import from Excel

The import of budget lines from Excel can be done on an unlocked budget version by using the action **Import from Excel**.

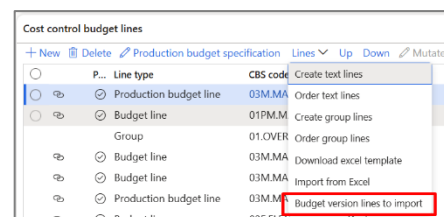


When selecting **Import from Excel** the following popup will appear where it is possible to select the Excel file which will be imported into the Cost Control budget. The import process will start after the Excel is uploaded and **Start import** is selected.

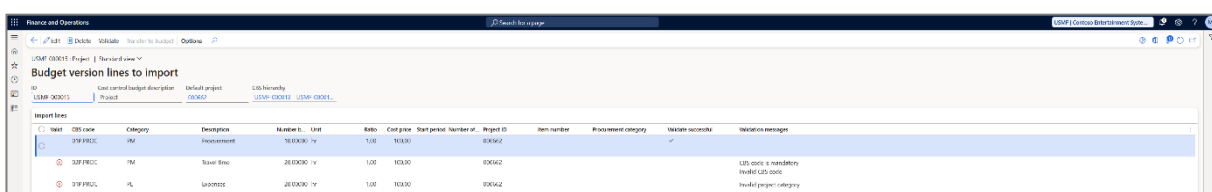


### Validate imported budget lines

Lines imported from Excel are not automatically added to the Cost Control budget but are first added in a stage form. This can be opened by selecting **Budget version lines to import**.



During the import process, the imported budget lines are automatically validated and checked e.g. on valid CBS code and/or category. The results of the validation check can be found in the **Budget version lines to import** form.





Incorrect lines can still be edited in the **Budget version lines to import** form and validated manually by using the **validate** action in the top-ribbon. The **Transfer to budget** action can be used to add the staged budget lines into the Cost Control budget.