



Dynamics 365 PSA to Project Operations Upgrade Playbook

Ensure optimal transition from D365 PSA to Dynamics 365 for Project Operations (Lite)

FastTrack for Dynamics 365 Apps



Purpose and Scope

THE SITUATION



- The goal is migrating all PSA 3.x Customers to Project Operations Lite by September 2024.

PURPOSE

The purpose of this playbook is to provide a framework for customers to effectively:

1. Understand why upgrade is important and necessary
2. Understand the prerequisites needed to support upgrade.
3. Plan their resources needed to support the upgrade process.
4. Gain clarity on the expected changes in the application post upgrade.

Audiences:

-  Customer Solution Architects
-  Partner Solution Architects

In summary, this guide will help you with:

- ✓ Awareness of challenges for IT.
- ✓ Understanding of tools and techniques that would ensure an optimal upgrade.

PROJECT OPERATIONS LITE FOR DYNAMICS 365

With Project Operations Lite, you can...

- Manage schedules with the new Project for the Web Experience
- Book resources with the new schedule board
- Adopt new billing and pricing features
- Support project with subcontracted resources

INSIDE THIS PLAYBOOK:

Chapter 1: Introduction	Chapter 2: Features	Chapter 3: Adoption	Appendix
What is PO Lite? Feature comparison PSA v. PO?	Assess existing PSA implementation Plan for an upgrade	Upcoming version... stay tuned!	Available Resources

PSA* Project Service Automation
PO* Project Operations Lite

Chapter 1 Introduction

- Why upgrade to Project Operations Lite?
- Project Service Automation (PSA) to Project Operations
- Currently Released Features
- Major Functionality Changes
- Supported Upgrade Scenarios
- Phases & Timeline
- Upgrade Prerequisites
- Upgrade Process overview
- Licensing Model

Resources

Chapter 2 Features

- What is Project Operations Lite?
- Project Features with Project for the Web
- material usage on projects and project tasks
- Subcontract management
- Advances and retainer-based contracts
- Contract not-to-exceed status and validations
- Task based billing

Resources

Chapter 3 Adoption

Coming soon...

Resources

Chapter 1: Introduction



Our Vision

Upgrading customers from Project Service Automation (PSA) to Project Operations Lite will enable Microsoft to more deeply invest in the best project management experiences for service-based organizations. Our customers will benefit from upcoming enhancements in the billing and pricing capabilities of the application along with refinement for service and material-based scenarios. Investments will be made to focus on supporting larger organizations who require more robust scale in size of projects and transactional throughput.

Project Service Automation (PSA) to Project Operations

Transition to Project Operations Lite to leverage exciting new features.

This feature enables existing PSA customers to upgrade to the latest Project Operations Lite deployment where they can enjoy new features such as:

- [New Project Scheduling](#) and [Scheduling Modes](#)
- [Recording material usage on projects and project tasks](#)
- [Subcontract management](#)
- [Advances and retainer-based contracts](#)
- [Contract not-to-exceed status and validations](#)
- [Task-based billing](#)
- [Split Billing](#)

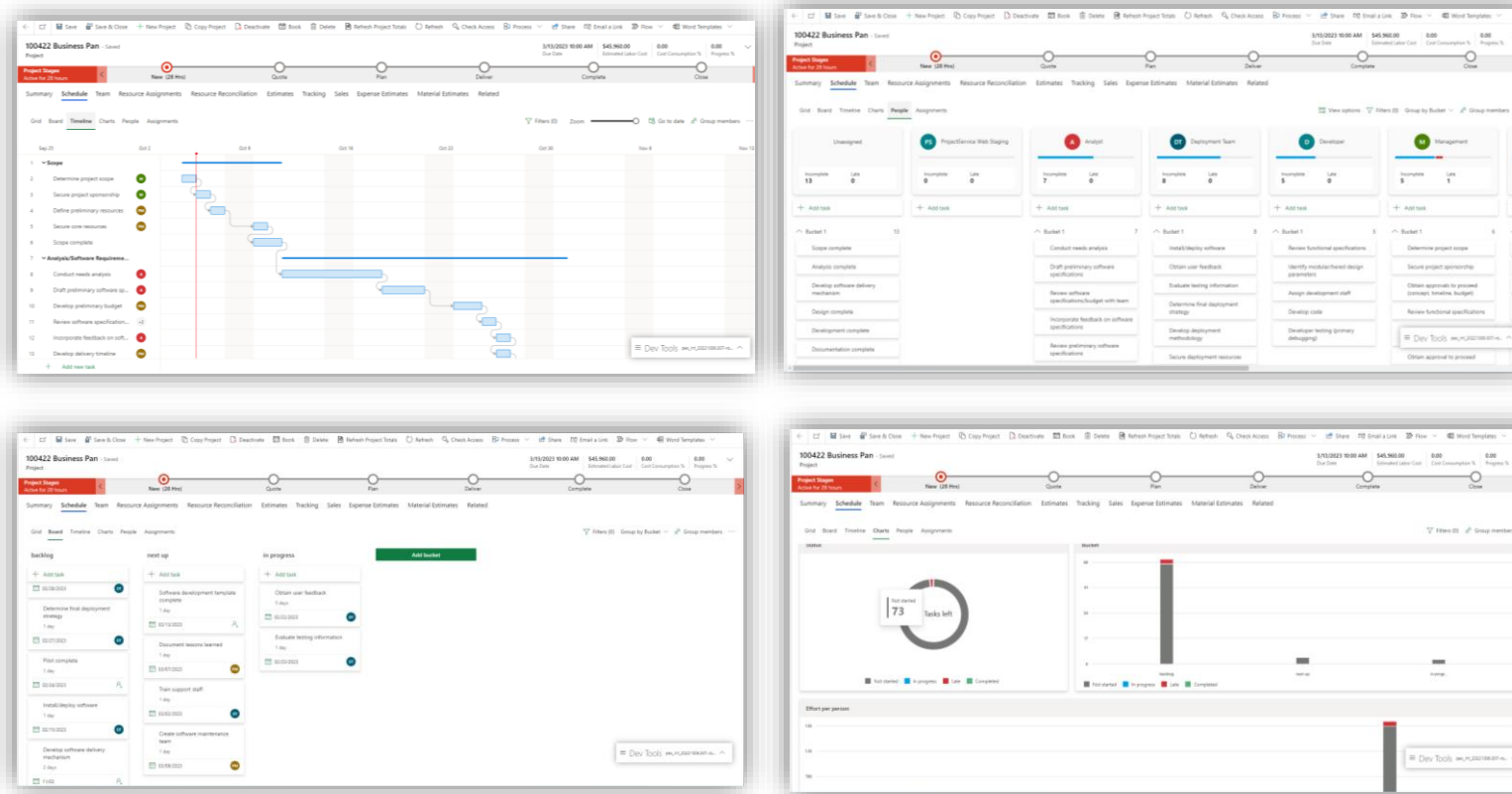
The process maintains your data and allows partners and customers to focus on updating security roles and customizations.

Currently Released Features

Transition to Project Operations Lite to leverage exciting new features.

*"Do more than just moving
Project Management"*

Short description of the extended value
for Project Operations Lite



- New interactive Gantt
- People and Task summary views
- Board view for agile execution
- Desktop controls including cut & paste, undo/redo
- Co-authoring

Major Functionality Changes

Project Features: [Project for the Web](#) replaces legacy project Features capabilities.

Project Templates: OOB Support for project templates have been removed, however, customers can leverage the [Project Copy API](#) to achieve similar functionality.

Project Desktop Add-in: Phase 1 and Phase 2 of upgrade do not support the desktop client add-in.

Writing to WBS Entities: Project schedules managed by Project for the Web, must use the [project scheduling APIs](#) create WBS records outside of the UI.

Supported Upgrade Scenarios

Source	Target	Status
Project Service Automation (PSA 3.x)	<u>Lite Deployment</u>	<u>Supported</u>
Project Service Automaton (PSA 3.x)	Resource/non-stocked Deployment	Not currently supported
Project Service Automaton (PSA 3.x)	Stocked/production-based Deployment	Not currently supported
D365 Finance Project Management and Accounting	Lite Deployment	Not currently supported
D365 Finance Project Management and Accounting	Resource/non-stocked Deployment	Not currently supported
Project for the Web (dedicated environment)	Lite Deployment	Not currently supported

Phasing

Phase 1 – No WBS
[November 2021]

Project Limits

Field	Limit
Maximum total tasks for a project	500
Maximum total duration for a project	3650 days (10 years)
Maximum total resources for a project	300
Maximum total links (successor only) for a project	600
Maximum total custom fields for a project	10
Maximum checklist items per task	20

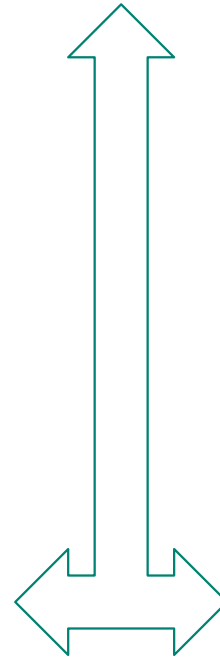
Phase 2 –within WBS limits
[November 2022]

Phase 3 – above supported
WBS limits

[April Wave 2023]

Task Limits

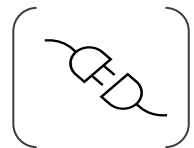
Field	Limit
Maximum hierarchy level	10 levels
Maximum links (successor + predecessor)	20
Maximum duration of leaf task	1250 days
Maximum duration of a summary task	3650 days (10 years)
Maximum resources assigned to a task	20 resources
Supported date range for a task	1/1/2000 - 12/31/2149



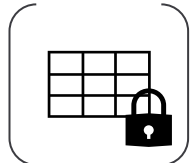
Features required to fulfill functional requirements for Upgrade



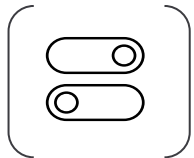
Pre-validation Rules – Surface errors to the administrator when specific pre-validation rules fail as the first step in upgrade providing a means for administrators to better diagnose failed upgrades.



Disable Project for the Web – Allow native CUD on WBS related entities, disable on CDS to PSS calls and remove access to the Modern Project Grid for all legacy projects brought forward during upgrade.



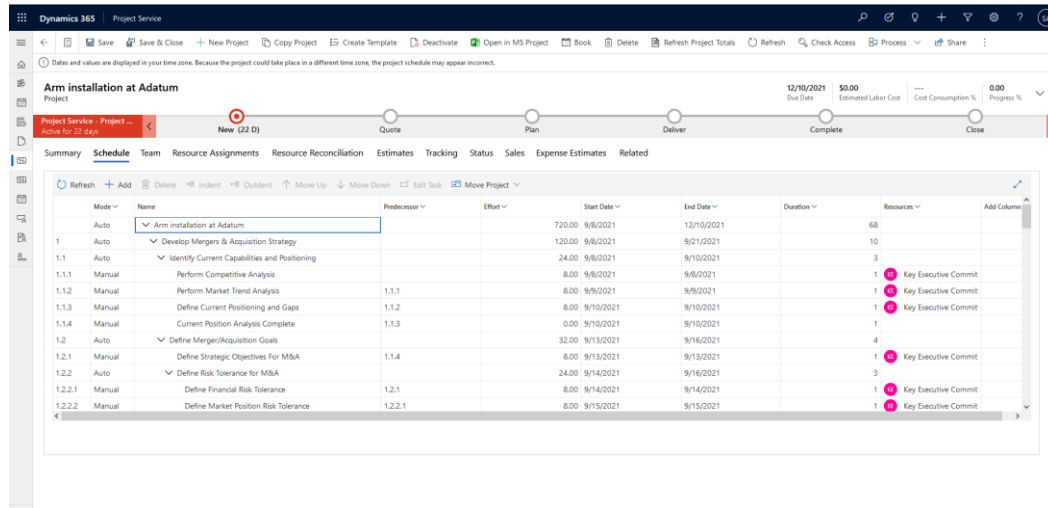
Read only WBS – Allow customers to view legacy projects, regardless of WBS limit, in the native CDS app.



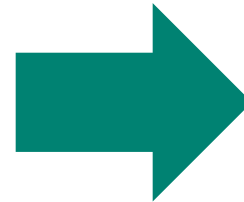
On demand conversion – provide the ability for the PM to convert a legacy project to a modern project from the Project Main form for projects that conform to the current WBS limits of Project for the Web.

1

- New Pre-validation checks
- New error logging for admins
- Upgrade meta data to handle new data model and new 4.x features

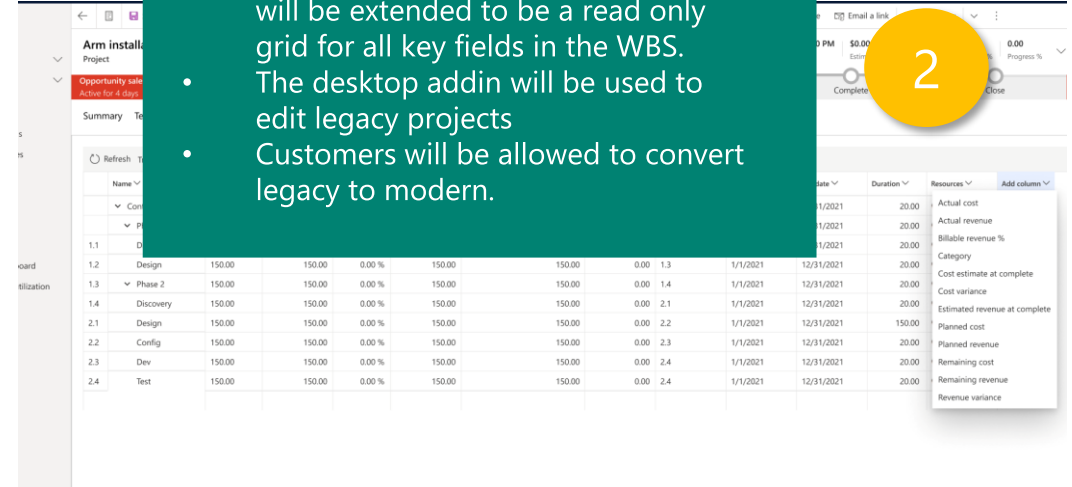


The screenshot shows the Dynamics 365 Project Service interface. The top navigation bar includes options like Save, Save & Close, New Project, Copy Project, Create Template, Deactivate, Open in MS Project, Book, Delete, Refresh Project Totals, Refresh, Check Access, Process, and Share. The main header displays project details for 'Arm installation at Adatum', including a progress bar and key metrics like '12/10/2021 Due Date', '\$0.00 Estimated Labor Cost', and '0.00 Cost Consumption %'. Below the header, there are tabs for Summary, Schedule, Team, Resource Assignments, Resource Reconciliation, Estimates, Tracking, Status, Sales, Expense Estimates, and Related. The 'Schedule' tab is active, showing a grid with columns for Name, Predecessor, Effort, Start Date, End Date, Duration, and Resources. The grid lists various tasks such as 'Arm installation at Adatum', 'Develop Mergers & Acquisition Strategy', and 'Identify Current Capabilities and Positioning'.



- For legacy projects, the tracking grid will be extended to be a read only grid for all key fields in the WBS.
- The desktop addin will be used to edit legacy projects
- Customers will be allowed to convert legacy to modern.

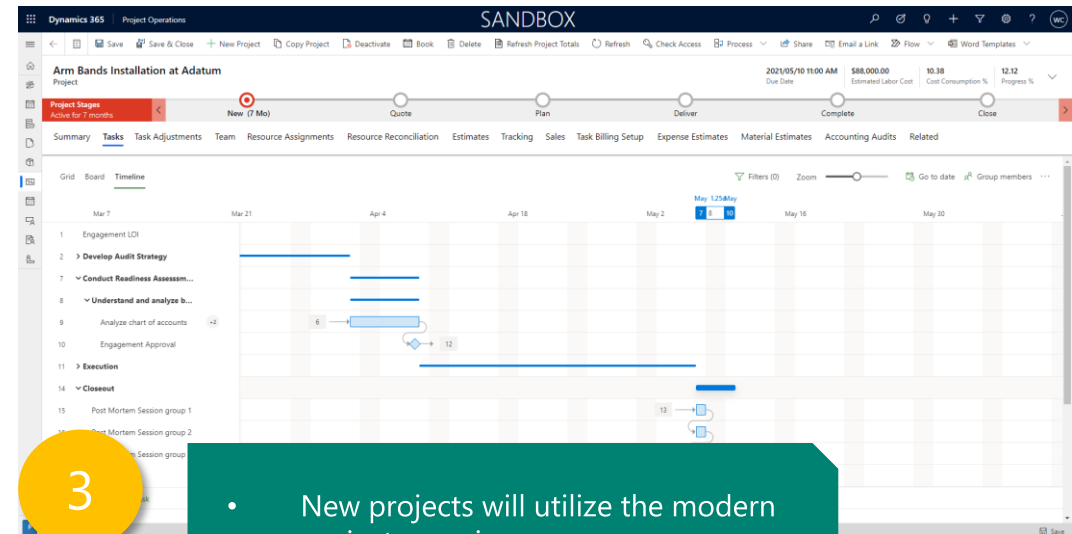
2



The screenshot shows the Dynamics 365 Project Service interface with a tracking grid. The top navigation bar includes options like Save, Save & Close, New Project, Copy Project, Deactivate, Open in MS Project, Book, Delete, Refresh Project Totals, Refresh, Check Access, Process, and Share. The main header displays project details for 'Arm installation at Adatum', including a progress bar and key metrics like '12/10/2021 Due Date', '\$0.00 Estimated Labor Cost', and '0.00 Cost Consumption %'. Below the header, there are tabs for Summary, Schedule, Team, Resource Assignments, Resource Reconciliation, Estimates, Tracking, Status, Sales, Expense Estimates, and Related. The 'Tracking' tab is active, showing a grid with columns for Name, Predecessor, Effort, Start Date, End Date, Duration, and Resources. The grid lists various tasks such as 'Arm installation at Adatum', 'Develop Mergers & Acquisition Strategy', and 'Identify Current Capabilities and Positioning'.

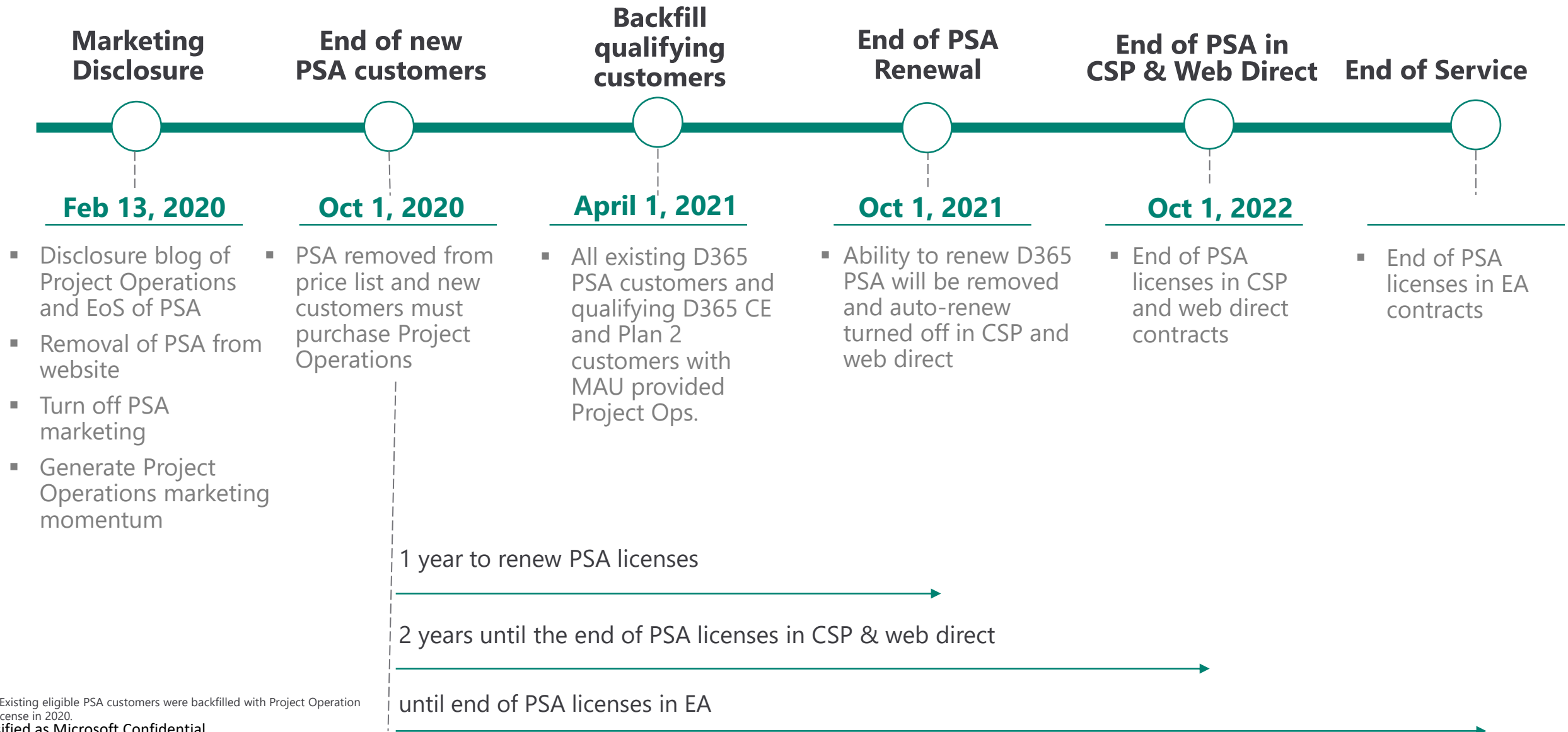
3

- New projects will utilize the modern project experience



The screenshot shows the Dynamics 365 Project Service interface with a modern project experience. The top navigation bar includes options like Save, Save & Close, New Project, Copy Project, Deactivate, Open in MS Project, Book, Delete, Refresh Project Totals, Refresh, Check Access, Process, and Share. The main header displays project details for 'Arm Bands Installation at Adatum', including a progress bar and key metrics like '2021/05/10 11:00 AM Due Date', '\$88,000.00 Estimated Labor Cost', and '10.38 Cost Consumption %'. Below the header, there are tabs for Summary, Task Adjustments, Team, Resource Assignments, Resource Reconciliation, Estimates, Tracking, Sales, Task Billing Setup, Expense Estimates, Material Estimates, Accounting Audits, and Related. The 'Task Adjustments' tab is active, showing a grid with columns for Name, Predecessor, Effort, Start Date, End Date, Duration, and Resources. The grid lists various tasks such as 'Arm Bands Installation at Adatum', 'Develop Mergers & Acquisition Strategy', and 'Identify Current Capabilities and Positioning'.

License Transition Timeline



* Existing eligible PSA customers were backfilled with Project Operation License in 2020.

Licensing Planning

- Licensed PSA customers have been backfilled with Project Operations
- Project Operations is a different product to PSA, being licensed for Project Operations does not give one access to PSA. When a customer's PSA license expires, they will no longer have access to PSA
- Customer needs more time on PSA? <http://aka.ms/ineedpsa>
- Project Operations does not include entitlement to Project Desktop Client

Project Operations License (full)

The screenshot shows the Microsoft 365 admin center interface. The left sidebar contains navigation links: Home, Users, Active users (selected), Contacts, Guest users, Deleted users, Groups, Billing, and Setup. The main content area is titled 'Active users' and displays a table of users. The table has columns for Display name, Username, and Licenses. The user 'Molly Clark' is highlighted. To the right of the table, the 'Licenses and apps' tab is selected for Molly Clark's profile. It shows a list of licenses with checkboxes. The 'Dynamics 365 Project Operations' license is highlighted with a red dashed box.

Active users

Display name ↑	Username	Licenses
Admin	admin@project-ops.com	Microsoft Dynam
Angad Kashyap	ankashya_microsoft.com#EXT#@eichimur.onmicrosoft.com	Unlicensed
Chinua	chinua@project-ops.com	Microsoft Power
Community Test	cmtuser1@eichimur.onmicrosoft.com	Office 365 E3, D
David So	davids@eichimur.onmicrosoft.com	Office 365 E3, D
eichimur test	eichimur@eichimur.onmicrosoft.com	Dynamics 365 C
IST Resource	istresource@eichimur.onmicrosoft.com	Office 365 E3, D
Jamie Reding	jamier@eichimur.onmicrosoft.com	Dynamics 365 C
Joe PSA	joe-psa@service-ops.com	Dynamics 365 C
<input checked="" type="checkbox"/> Molly Clark	mollyc@eichimur.onmicrosoft.com	Office 365 E3, D
Pick test 2	picktest2@service-ops.com	Unlicensed

Molly Clark

Reset password Block sign-in Delete user

Change photo

Account Devices **Licenses and apps** Mail OneDrive

Select location *
United States

Licenses (2)

- ☐ Dynamics 365 AI for Market Insights (Preview)
9996 of 10000 licenses available
- ☒ Dynamics 365 Customer Engagement Plan
0 of 14 licenses available
- ☐ Dynamics 365 Customer Voice Trial
Unlimited licenses available
- ☐ **Dynamics 365 Project Operations**
3498 of 3500 licenses available
- ☐ Microsoft Dynamics AX7 User Trial
9999 of 10000 licenses available

Project Operations Licenses and Apps

Name of app entitlement

Common Data Service for Dynamics 365 Project Operations
Dynamics 365 for Finance and Operations, Enterprise edition
- Regulatory Service

Dynamics 365 Project Operations

(or Dynamics 365 Project Operations Attach)

Dynamics 365 Project Operations CDS

(or Dynamics 365 Project Operations CDS Attach)

Exchange Foundation?

Power Apps for Dynamics 365

Power Automate for Dynamics 365

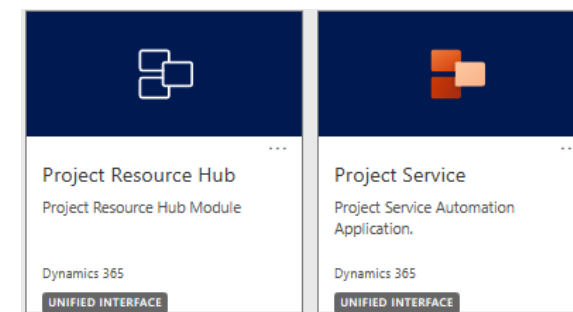
Power Pages Internal User

Project for Project Operations

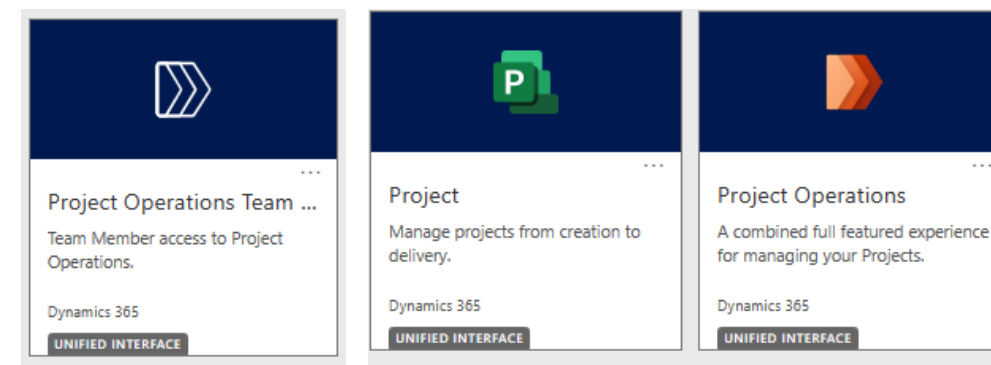
(or Project for Project Operations Attach)

SharePoint (Plan 1)

PSA



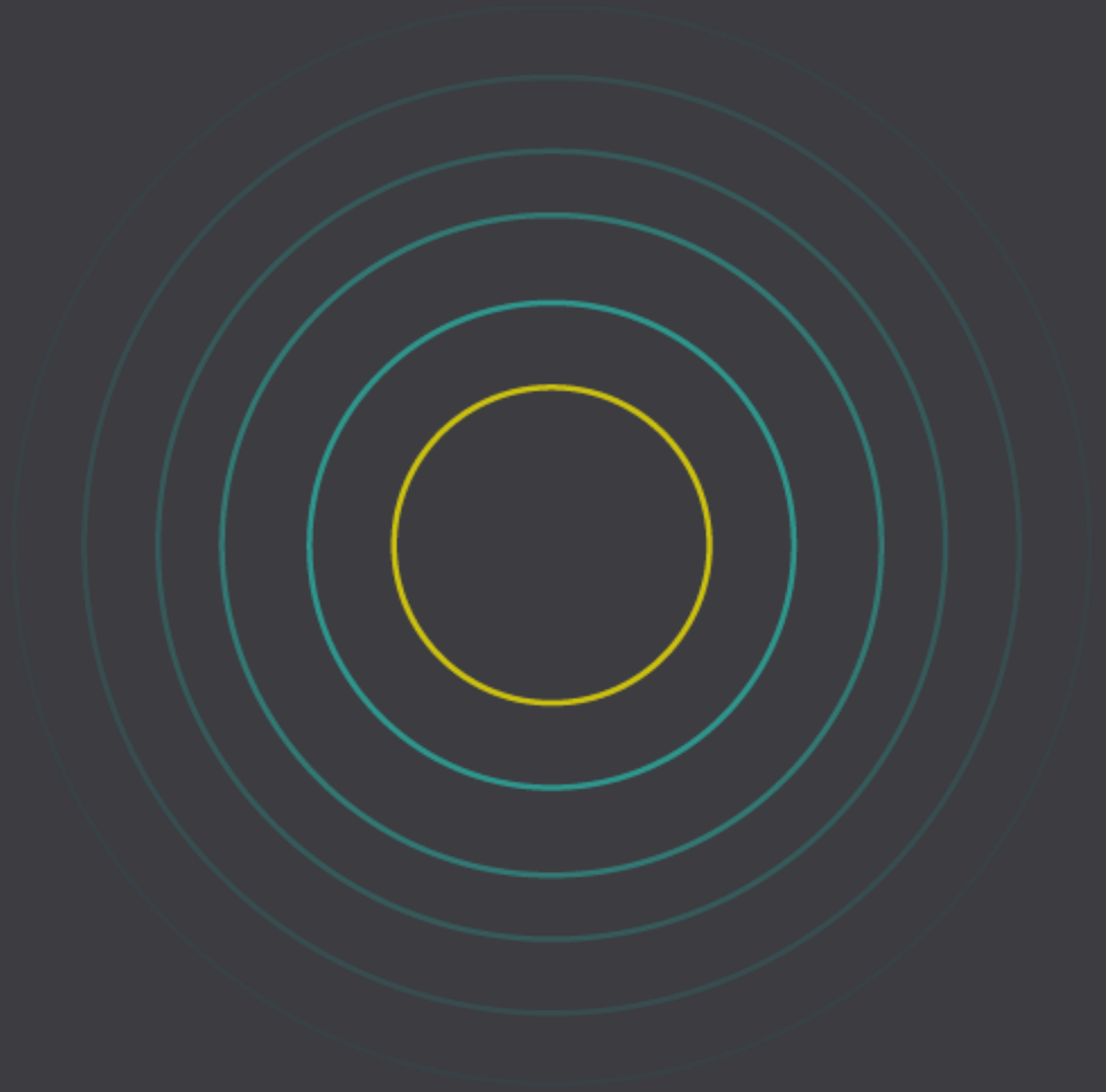
Project Operations



Make sure at least the highlighted apps are enabled (full license)

Team Members license does not include Project, but rights are across Dynamics 365 products. Access is via designated Team Member apps. See [Licensing Guide](#).

Chapter 2: Features



What is Project Operations Lite?

Project Operations empowers project-centric organizations with the right capabilities to drive success– from prospect to payment to profit.

Project Operations builds upon the strengths in Project Service Automation while providing rich new experiences in project Features along with exciting tools to provide more flexibility in quoting and contracting to support both service and non-stocked materials scenarios. New features include:

[Project Features with Project for the Web](#)

- Schedule with new robust tools for both agile and waterfall project delivery.

[Recording material usage on projects and project tasks](#)

- Estimate and track consumption of non-stocked materials.

[Subcontract management](#)

- Contract, invoice and staff project with external resources.

[Advances and retainer-based contracts](#)

- Create retainer-based billing schedules

[Contract not-to-exceed status and validations](#)

- Provides robust contract control at the customer, contract or contract line level.

[Task based & Split billing](#)

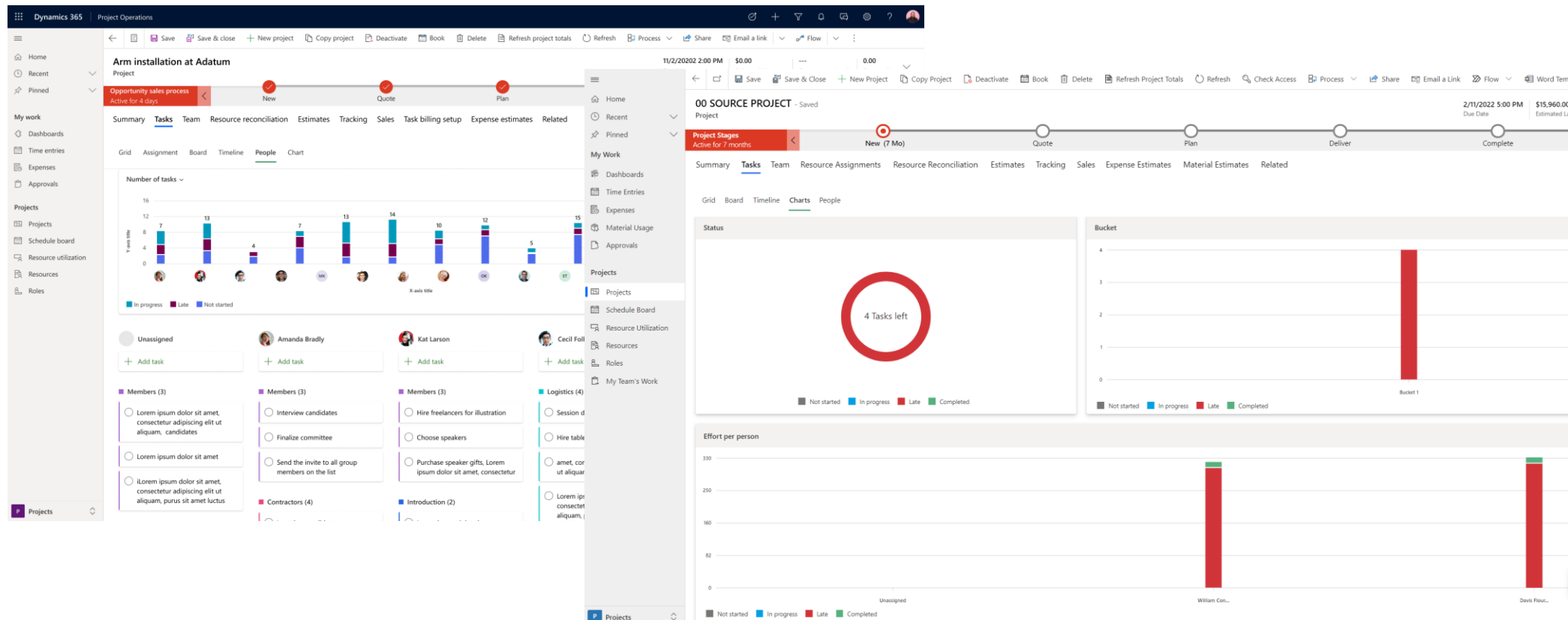
- Quote and contract lines can be mapped to specific tasks in the work breakdown structure.
- Add contract line to one or many paying customers

[Project Budget Management \(Preview\)](#)

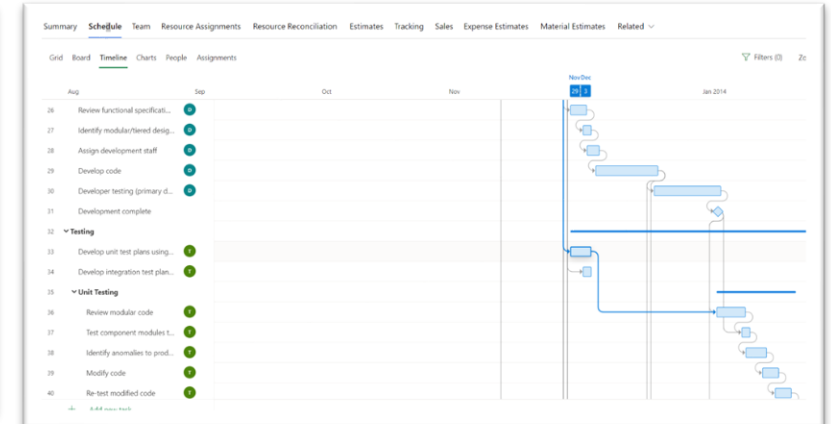
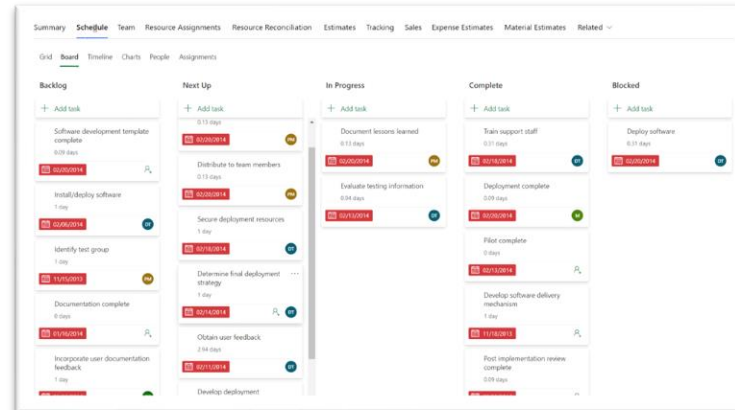
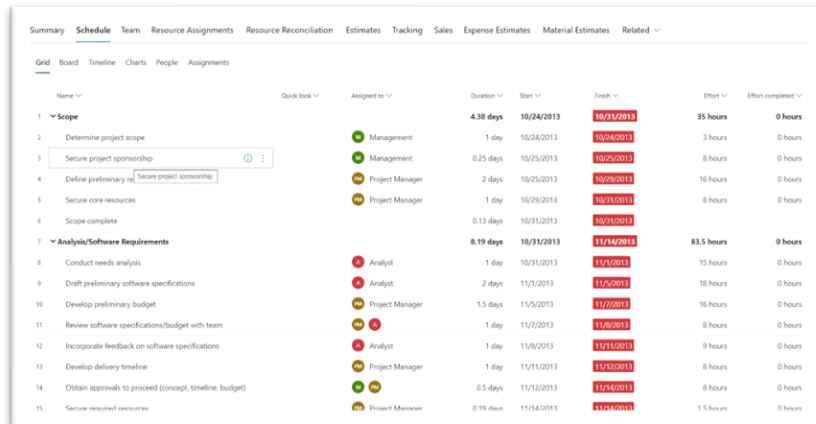
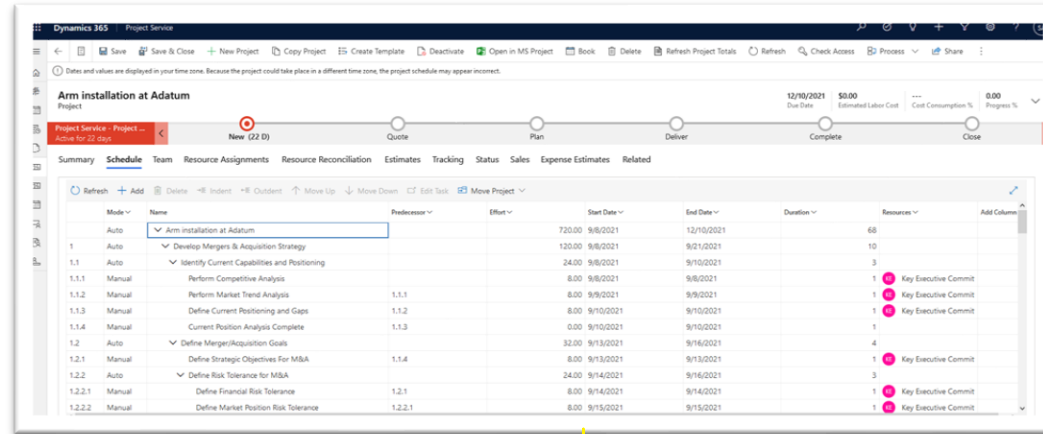
- A project budget represents a point-in-time snapshot of the estimated spend across the project phases and its associated tasks.

Project Features with Project for the Web

- People view and Charts view quantify the number of tasks assigned to a resource in a task and aggregate task status by task or resource.



Project Features with Project for the Web



1

advanced grid view with drag and drop, cut and paste, multi-select etc.

2

The board view can be used for agile project delivery

3

The timeline view allows customers to edit and view the tasks in a gantt

Recording material usage on projects and project tasks

Estimate

Summary Tasks Team Resource Assignments Resource Reconciliation Estimates Tracking Sales Expense Estimates Material Estimates Related ▾										
Refresh Add Material Estimate Delete Material Estimate Subcontracting Options										
Task ▾	Product ▾	Required Date ▾	Quantity ▾	Unit ▾	Unit Group ▾	Subcontract Line ▾	Unit Cost Price ▾	Unit Sales Price ▾	Total Cost Price ▾	Total Sales Price ▾
Install Network Card	Universal Network Card	2/10/2023	1.00	Primary Unit	Default Unit		12.00	0.00	12.00	0.00
Install Hard Drive	Universal Hard Drive	3/16/2023	1.00	Primary Unit	Default Unit		100.00	0.00	100.00	0.00
AssemblyMaestro Task 1	AssemblyMaestro Arm	3/17/2023	2.00	Primary Unit	Default Unit		1,000.00	0.00	2,000.00	0.00
AssemblyMaestro Task 1	AssemblyMaestro CPU + Controller	4/13/2023	2.00	Primary Unit	Default Unit		800.00	0.00	1,600.00	0.00
AssemblyMaestro Task 2	AssemblyMaestro Power Unit	5/11/2023	1.00	Primary Unit	Default Unit		700.00	0.00	700.00	0.00
AssemblyMaestro Task 3	AssemblyVirtuoso Trunk Servo Motor	6/2/2023	5.00	Primary Unit	Default Unit		780.00	0.00	3,900.00	0.00

Record

Quick Create: Material Usage Log

Transaction Date

2/3/2023

Select Product

Existing

Product

Software License

Material Usage Purpose

Tool to complete task 2

Project

MWTestProject6

Project Task

Task 2

Bookable Resource

Martin Walker

Subcontract

Subcontract Line

Quantity

1.00

Unit Group

Quantity

Unit

ea

Unit Cost

\$195.00

Save and Close

Cancel

Quick Create: Material Usage Log

Transaction Date

2/3/2023

Select Product

Write-In

Write-In Product

Material we use rarely

Material Usage Purpose

Non-catalog part to complete task 2

Project

MWTestProject6

Project Task

Task 2

Bookable Resource

Martin Walker

Subcontract

Subcontract Line

Quantity

1.00

Unit Group

Quantity

Unit

ea

Unit Cost

\$24.95

Save and Close

Cancel

Approve

Show Chart Approve Reject Edit Flow Export to Excel Show As ▾										
Material Usage for Approval ▾										
Group By: (no grouping)										
✓ Not Applicable	✓ Not applicable	Existing	Universal...	Universal...	---	---	2/10/20...	Material E...	---	Min Rao
✓ Not Applicable	Not applicable	Existing	Universal...	Universal...	---	---	3/16/2023	Material E...	---	Min Rao
Not Applicable	Not applicable	Existing	Assembly...	Assembly...	---	---	3/17/2023	Material E...	---	Min Rao

Show Chart Submit Edit Delete Assign Share Email a Link Flow Run Report Word Templates Export to Excel										
My Material Usage ▾										
Select Product Product Write-In Product Material Usage Project Project Task Bookable Resource Subcontract Subcontract Line Quantity Unit Cost Subtotal Sales Tax Amount Total Amount Material Usage ▾										
Existing	Universal log...	Material Est...	Min Rao	1.00	\$0.00	\$0.00			\$0.00	Draft
Existing	Universal Nat...	Material Est...	Min Rao	2.00	\$0.00	\$0.00			\$0.00	Draft
Existing	AssemblyMa...	Material Est...	Min Rao	2.00	\$0.00	\$0.00			\$0.00	Draft

Project Stages Active for 57 days New (57 D) Quote Plan Deliver Complete										
Summary Tasks Team Resource Assignments Resource Reconciliation Estimates Tracking Sales Task Billing Setup Actuals ▾										
Show Chart Edit Ready to invoice Not ready to invoice Reset Not-To-Exceed S... Re-evaluate Not-To-Ex... Assign Actuals										
Actual Associated View ▾										
Filter by keyword										
Transaction Type ▾	Transact...	A...	Documen...	Project C...	Project C...	Project C...	Project ID ▾	Task ID ▾	Resou...	Tr...
Unbilled Sales	Material	2/3/2023	MWTC6	MWTC6T...	MW Test...	MWTestP...	Task 2	Projec...	Contoso...	USPM
Cost	Material	2/3/2023	MWTC6	MWTC6T...	MW Test...	MWTestP...	Task 2	Projec...	Contoso...	USPM

Subcontract management

- When a book experience is initiated from Project, the Schedule Board can be filtered to show Contract Workers from specific subcontracts
- Contract Workers recording time entries will be prompted with a subcontract and subcontract line when entering time so that the time is costed based on what was agreed on with the vendor contractually.

The screenshot displays the Microsoft Dynamics 365 Project Operations interface, specifically the 'Schedule Assistant' and 'My Weekly Time Entries' views.

Schedule Assistant - Arm Installation for Adatum - Consulting Lead

Filter View

Schedule Assistant Filter

Work Location: Location Agnostic | Available Duration: 4 hours

Radius: 0 | Search Start: 10/26/2020 5:00 PM | Search End: 11/2/2020 4:29 PM | Interval: 1 hour | Results Per Interval: | Characteristics - Rating: | Roles: Consulting Lead | Subcontract: SC #123 | Organizational Units: Fabrikam US | Resource Types: Contract, User, Equipment, Account, Crew, Facility, Pool

Arm Installation f...

Booked hrs: 0 / 40 | 33 hrs Unbooked | 7 hrs Unbooked

Asley Chinn | 28 hrs | 7 hrs | 40 hrs | 40 hrs | 40 hrs | 40 hrs

My Weekly Time Entries

+ New | Copy row | Edit row | Submit | Recall | Delete | Refresh | Copy week | Import

Time Source	Project	Project Task	Role	Type	Entry Status	Sun 11/22
Project Service	Sales values	Task 1	Project Manager	Work	Approved	0.00

Quick Create: Time Entry

Date: 11/28/2020 | Duration: 1 hour | Type: Work | Project: Production design at Adventure | Project Task: Design | Subcontract: SC #123 | Subcontract Line: Engineer hours from POQ | Role: Consulting Lead | Description: | External Comments: | Save and Close | Cancel

Advances and retainer-based contracts

MWTC6 - Saved
Order

\$48,800.00
Total Amount

Draft
Status

Draft
Status Reason

MW Martin Walker
Owner

SummaryContract LinesProject Price ListsContract PerformanceCustomersAdvances and RetainersRelated

Advances and Retainers

Ready to Invoice

Not Ready to Invoice

Project Contract C...	Description	Invoice Date	Amount	Invoice Status	Available Amount	Used Amount
✓ MW Test Cust...	Advance	2/1/2023	\$25,000.00	Not Ready for	---	---

Not Ready for invoicing

Ready for invoicing

Customer invoice created

Customer invoice posted

MWTC6TM1 - Saved
Invoice Line

General

Chargeable Transactions: \$ 644.95

Complimentary Transactions: \$ 0.00

Non Chargeable Transactions: \$ 0.00

Related

Chargeable transactions

RefreshFlowRun Report

Quantity	Unit	Price	Currency	Amount	Tax	Previous ...	PreviousT...	Invoice A...	InvoiceTax	Extended ...
1.0000	Hour	\$300.00	US Dollar	\$300.00	\$0.00			\$300.00	\$0.00	\$300.00
2.0000	Hour	\$160.00	US Dollar	\$320.00	\$0.00			\$320.00	\$0.00	\$320.00
1.0000	ea	\$24.95	US Dollar	\$24.95	\$0.00			\$24.95	\$0.00	\$24.95

1 - 3 of 3

Dynamics 365

Project Operations

SANDBOX

SaveSave & CloseDeleteRefreshCheck AccessCollaborateRefresh Invoice Line Tr...RecalculateShare

MWTC6 - Saved
Invoice · Project Invoice

\$0.00
Total Amount

Active
Status

Draft
Project Invoice Status

MW Martin Walker
Owner

Project Service - Invoice ...
Active for 6 minutes

Draft (6 Min)

In Review

Sent

SummaryDetailsRelated

Customers

Customers

Contacts

Price Lists

Sales

Leads

Opportunities

Quotes

Project Contracts

Transactions

Approved Time

Approved Expenses

Journals

Actuals

Billing

Fixed Price Milestones

Retainers and Advan...

Time and Material Bil...

Available Retainers a...

Invoices

Opportunity

Contract

MWTC6

Customer

MW Test Customer 2

Description

No Rows To Show

0 - 0 of 0

Applied Advances and Retainers

RefreshFlow

Description	Delivere...	Amount (Pr...	Used Amou...	Extended A...	Balance Ret...
Advance	2/1/2023	\$25,000.00	\$0.00	(\$644.95)	\$24,355.05

Detail Amount

\$0.00

Pre-Freight Amount

\$0.00

(+) Total Tax

\$0.00

Total Amount

\$0.00

Contract not-to-exceed status and validations

← Save Save & Close + New Look Up Address Flow

New Order - Unsaved

Summary Contract Lines Project Price Lists Contract Performance Customers Advances and Retainers

ID	---	Contracting Unit	truongdopsweb
Name	Software Project	Currency	US Dollar
Customer	Upgrade Inc.	Requested Delivery Date	1/31/2023
Account Manager	ProjectService Web Staging	Contract Status Reason	Draft
Opportunity	---	Not-to-exceed Limit	\$500,000.00
Quote	---	Committed Amount	---
Product Price List	PRICE LIST		

Services - Saved

Order Line

General Chargeable Roles Project Contract Line Details Invoice Schedule Customers Related

Project Contract	Software Project	Included Tasks	---	Contracted Amount	\$0.00
Name	Services	Include Time	Yes	Estimated Tax	---
Billing Method	Time and Material	Include Expense	No	Contracted Amount After Tax	\$0.00
Project	Software Development Plan 01	Include Material	No	Customer Budget	---
		Include Fee	Yes		

Not-to-exceed Limit	\$400,000.00		
Spent Amount	\$0.00	Committed Amount	\$0.00
Remaining Amount	\$400,000.00		
Last updated:	10/31/2022 10:40 PM	Last updated:	10/31/2022 10:40 PM

Task-based billing

- Provides ability to associate tasks in a project with different contract lines

MWTC4 - Saved

\$52,000.00

Draft

Draft

MW

Summary

Contract Lines

Project Price Lists

Contract Performance

Customers

Advances and Retainers

Related

Project-based Lines

+ Add New Contract Line

Line ID	Write-In	Billing Method	Project	Included Tasks	Include TL	Include Expense	Include
L-001022	MWTC4TM	Time and	MWTestProject4	Selected project tasks only	Yes	Yes	Yes
L-001021	MWTC4FP	Fixed Price	MWTestProject4	Selected project tasks only	Yes	No	Yes

1 - 2 of 2

MWTestProject4 - Saved

Project

12/30/2022 5:00 PM

\$36,640.00

4.34

3.75

Due Date

Estimated Labor Cost

Cost Consumption %

Progress %

Project Stages

Active for 58 days

New (58 D)

Quote

Plan

Deliver

Complete

Summary

Tasks

Team

Resource Assignments

Resource Reconciliation

Estimates

Tracking

Sales

Task Billing Setup

Expense Estimates

Task Associations

+ Associate a Contract li...

Task Billing Setup link

Project Task Name

Billing setup linked

Task 1

Billing setup linked

Task 2

Contract Li...

Billing Type

Billing Method (...)

Include Time (C...

Include Expense...

Include Fee (Co...

Include Material...

Name

MWTC4TM

Chargeable

Time and Mat...

Yes

Yes

Yes

Yes

Billing setup linked

Fixed price project management

Page 1

Split billing

Provides ability to define % of a contract line to be billed to each of multiple customers.

The screenshot displays the Dynamics 365 Project Operations interface. The main window shows the 'Order Line' tab for a 'services' contract. The 'Customers' sub-tab is active, displaying a table of customers and their billing split percentages. A red box highlights the 'Billing Split Percent' column header and the values for 'A Datum Corporation' (50.00) and 'Adventure Works' (50.00). To the right, a 'Quick Create: Project Contract Line Customer' dialog box is open, showing the configuration for a new customer. The dialog includes fields for 'Account' (Consolidated Messenger Assembly), 'Billing Split Percent' (0.00), 'Is Rounding' (Yes), and 'Not-to-exceed Limit' (---). The 'Save and Close' button is visible at the bottom right of the dialog.

Group By:	(no grouping)	Billing Split Percent	Is Rounding	Not-to-exceed Limit	Committed Amount	Spent Amount
Account	Account	50.00	No	---	\$0.00	
		50.00	Yes	---	\$0.00	

Quick Create: Project Contract Line Customer

Account * Consolidated Messenger Assembly

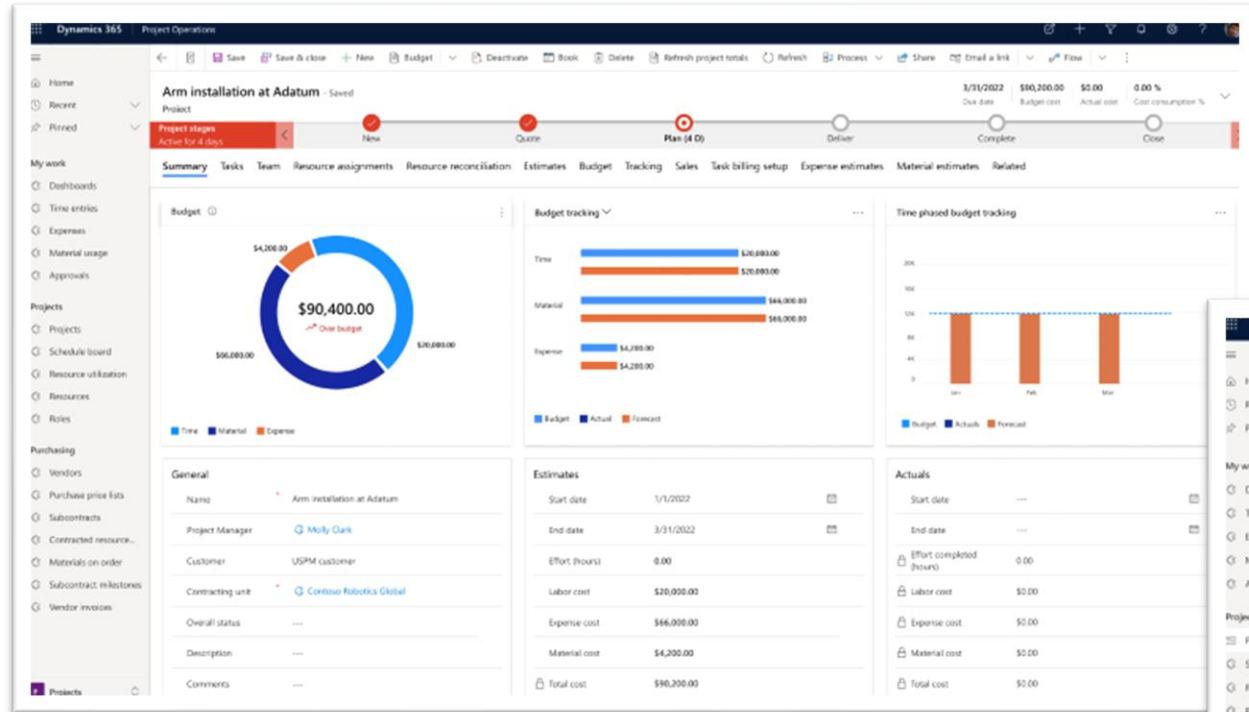
Billing Split Percent 0.00

Is Rounding Yes

Not-to-exceed Limit ---

Save and Close Cancel

Project budget management



The screenshot displays the Dynamics 365 Project Operations interface for a project named "Arm installation at Adatum". The top navigation bar includes options like Save, Save & close, New, Review budget, Deactivate, Book, Delete, Refresh project totals, Refresh, Process, Share, Email a link, and Flow. The project status is "Plan (4 days)".

The main section shows a "Budget" overview with a table of budget items. The table has columns for Transaction class, Transaction category, Product, Task, Role, Resource, Cost, Budget, Actual, Forecast, Variance, Consumption %, Budget progress, Contingency %, and Cost source.

Transaction class	Transaction category	Product	Task	Role	Resource	Cost	Budget	Actual	Forecast	Variance	Consumption %	Budget progress	Contingency %	Cost source
> Time	Default		Task 1	Robotics Tec	Darlene Rut	\$5,000.00	\$5,000.00	\$2,000.00	\$5,000.00	-\$300.00	33.33%	33.33%	0.00%	Internal
> Time	Default		Task 2	Robotics Env	Wade Worne	\$5,000.00	\$5,000.00	\$1,800.00	\$5,000.00	\$0.00	33.33%	33.33%	0.00%	Internal
> Time	Default		Task 3	Software En	Courtney Hs	\$5,000.00	\$5,000.00	\$1,800.00	\$5,000.00	\$0.00	33.33%	33.33%	0.00%	Internal
> Time	Default		Task 4	Consulting I	Jerome Bell	\$5,000.00	\$5,000.00	\$1,800.00	\$5,000.00	\$0.00	33.33%	33.33%	0.00%	Internal
> Material	Hardware	Armband 15				\$60,000.00	\$60,000.00	\$20,000.00	\$60,000.00	\$0.00	33.33%	---	0.00%	Internal
> Material	Hardware	Universal N6 Card				\$6,000.00	\$6,000.00	\$3,000.00	\$6,000.00	\$0.00	33.33%	---	0.00%	Internal
> Expense	Flight					\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	33.33%	---	0.00%	Internal
> Expense	Hotel					\$300.00	\$300.00	\$100.00	\$300.00	\$0.00	33.33%	---	0.00%	Internal
> Expense	Meals					\$900.00	\$900.00	\$300.00	\$900.00	\$0.00	33.33%	---	0.00%	Internal

The left sidebar contains navigation links for Home, Recent, Pinned, My work, Dashboards, Time entries, Expenses, Material usage, Approvals, Projects, Schedule board, Resource utilization, Resources, Roles, Purchasing, Vendors, Purchase price lists, Subcontracts, Contracted resource..., Materials on order, Subcontract milestones, and Vendor invoices.