

August 29, 2024

**TEXAS REGIONAL**



August 28, 2024

# **Implementing Microsoft Dynamics 365 Project Operations**





# Meet the Presenter



**Amir Hemani**  
Consulting Manager (Velosio)

**Amir Hemani:** Seasoned ERP Expert with 14+ Years in Implementation and Business Development.

- **Industry Experience:** professional services, distribution, trading, aviation, oil & gas, and fashion.
- **Core Competencies:** project management, implementation methodologies, requirement mapping, solution design.



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# Agenda

- Introduction to Microsoft Dynamics 365 Project Operations
- Deployment types
- Business process flow
- Additional considerations
- Success stories





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# INTRODUCTION TO PROJECT OPERATIONS

# What is Dynamics 365 Project Operations?

Empower services organizations with the visibility, collaboration and insight needed to drive success across operations – from prospect to cash. **Microsoft Dynamics 365 Project Operations** connects sales, resourcing, project management, and finance teams within a single application to win more deals, accelerate project delivery, and maximize profitability.



Project  
Sales



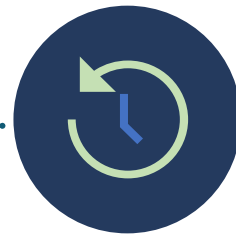
Project  
Planning



Resource  
Utilization



Team  
Collaboration



Time And  
Expenses



Project  
Accounting



Business  
Intelligence

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

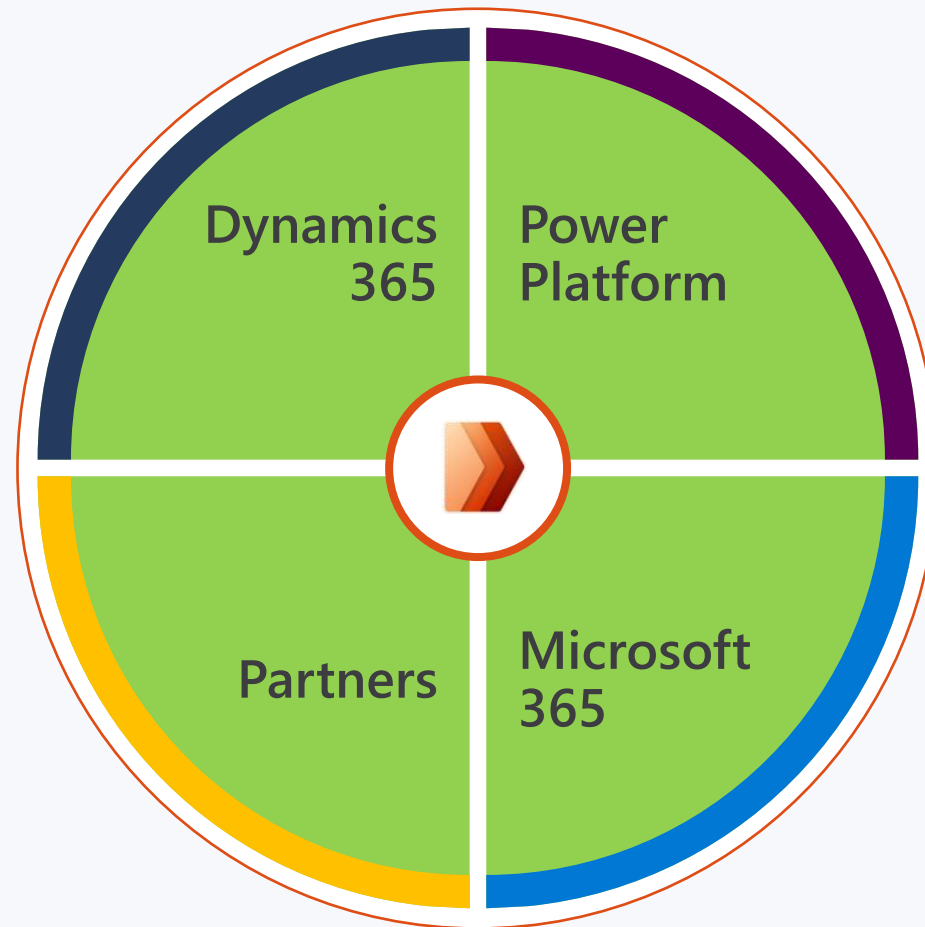


# Microsoft Dynamics 365 Project Operations

Deal management	Project planning	Resource management	T&E entry and approval	Project costing, pricing, actuals	Invoicing	Project financials
Multiple contract types	Project scheduling	Skills management	Intuitive web, mobile experiences for entry	Mark-ups and overrides for cost and bill rates	Periodic invoices	Revenue recognition
Lead to project contracts	Interactive Gantt, Kanban boards	Resource request and proposals	Approval time edits	Catalog pricing for products and services	Invoice corrections	Committed costs
CPQ for services	Accurate estimates	Reconciliations for bookings, assignments	Deep expense management	Transaction corrections	Configurable summarization	Project accounting
Advanced contracting limits	Dependencies and constraints	Configurable filters, search	Automated receipt capture (OCR)	Integration to financial system	Word-based invoice templates	Retainage and pay-when-paid

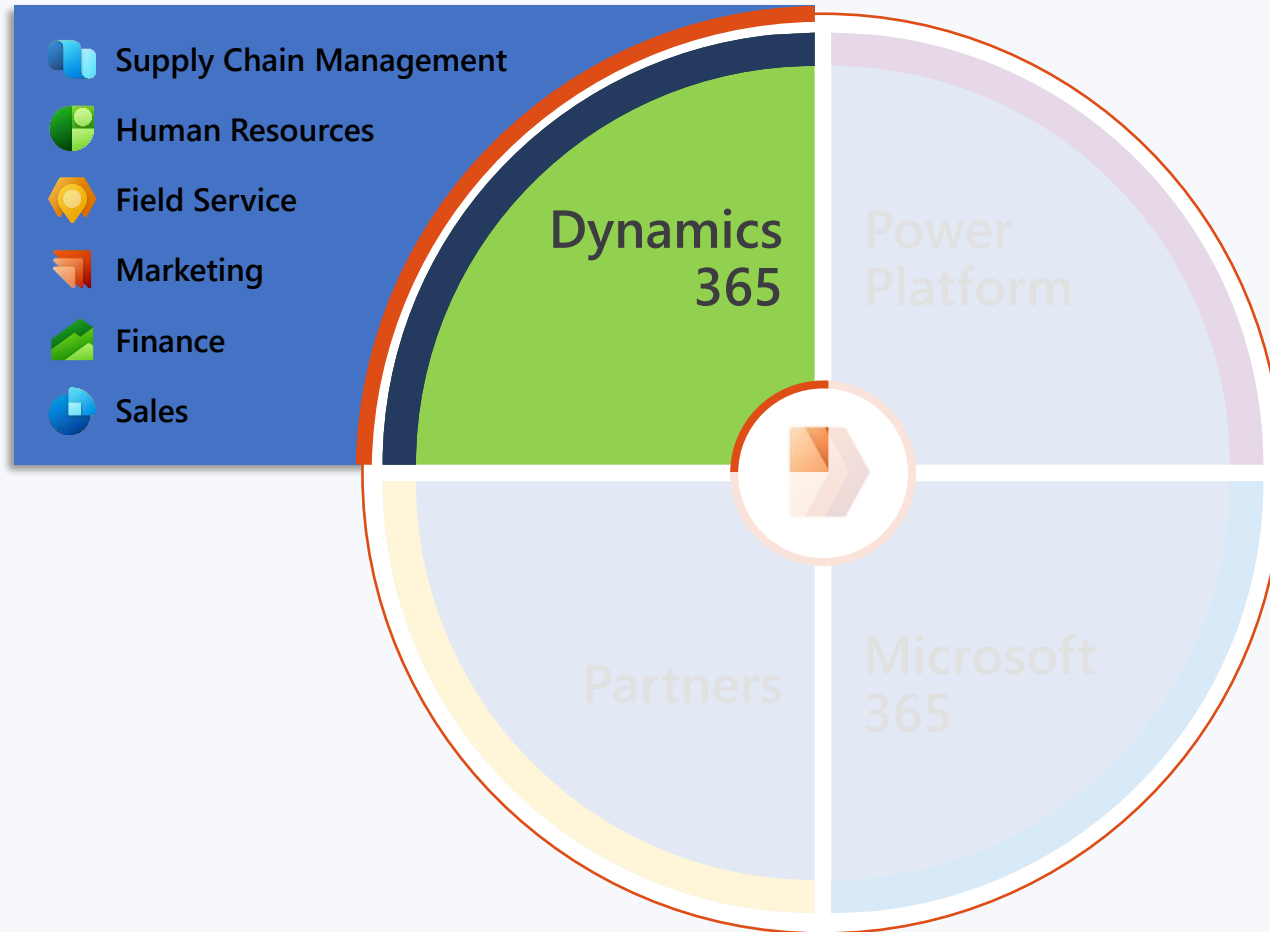


# Project Operations, part of the Microsoft Cloud platform



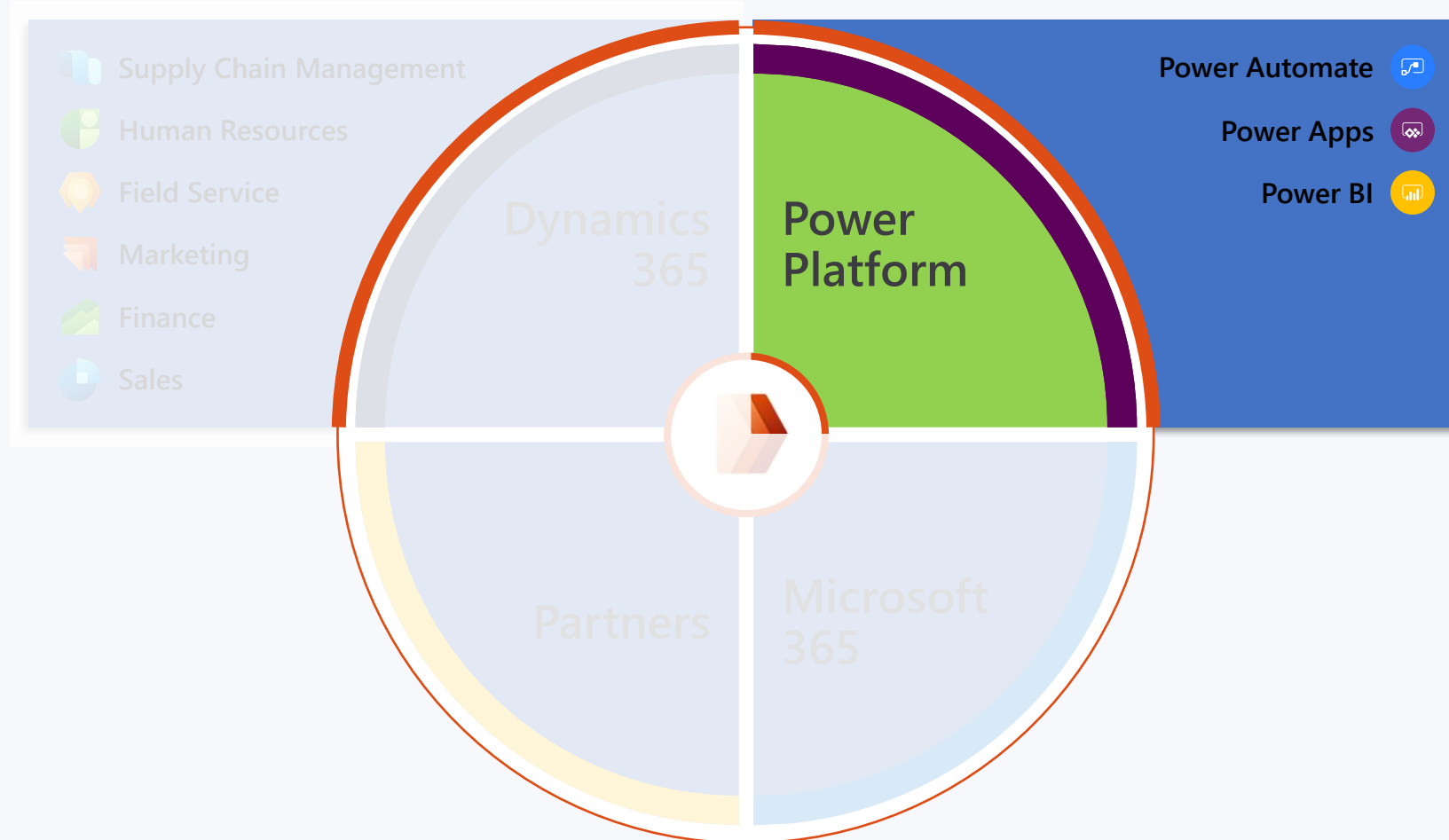


# Project Operations, part of the Microsoft Cloud platform



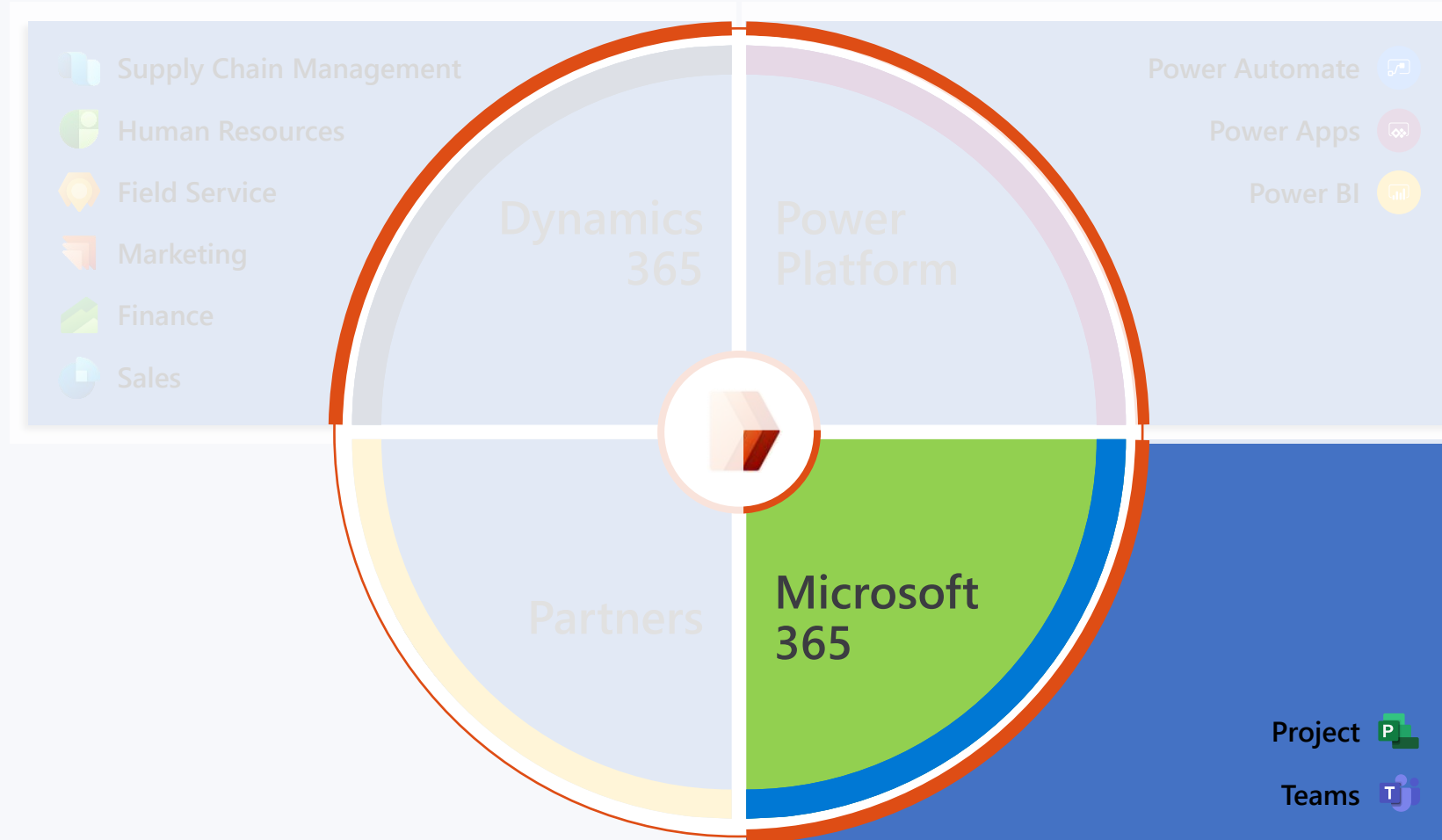


# Project Operations, part of the Microsoft Cloud platform

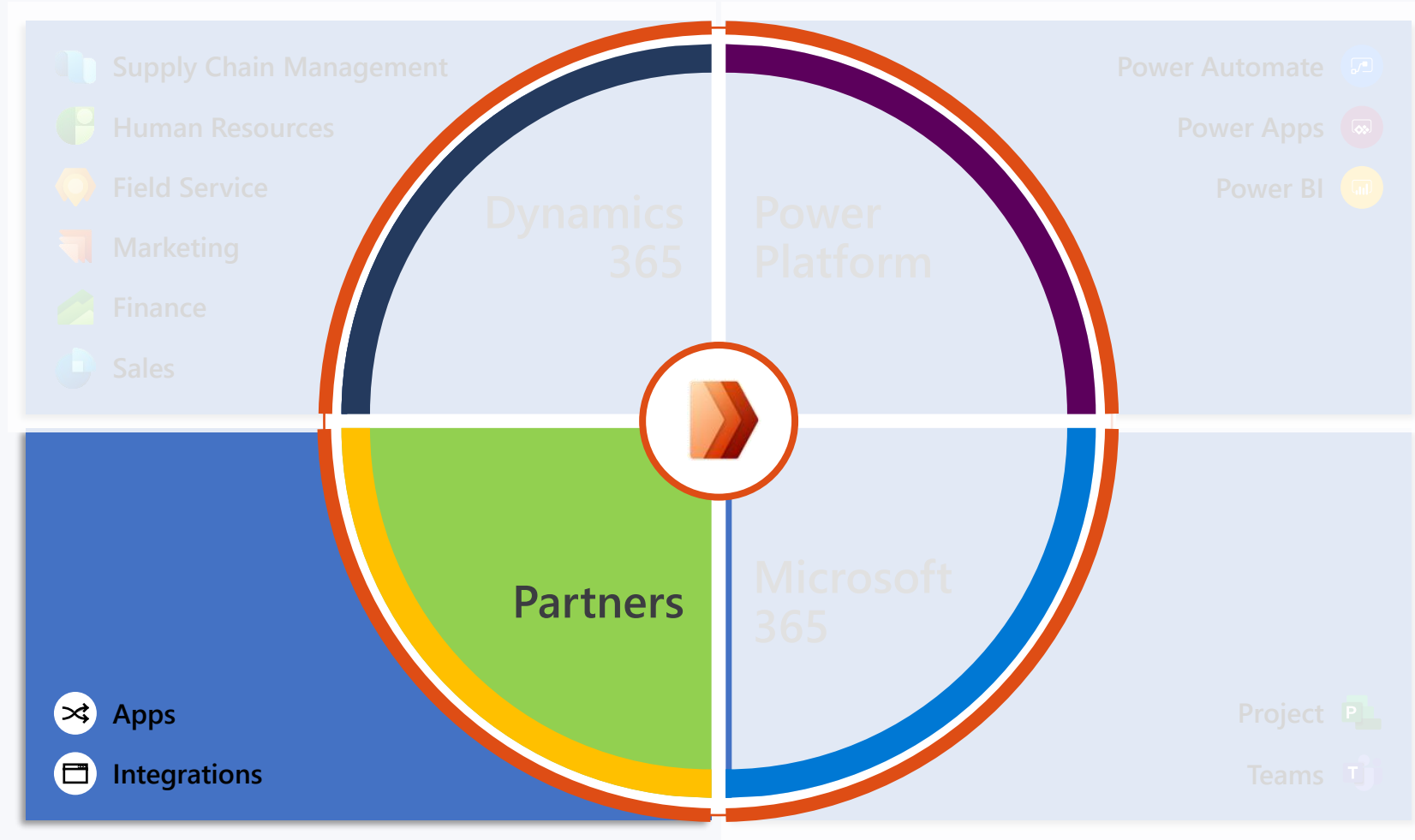




# Project Operations, part of the Microsoft Cloud platform



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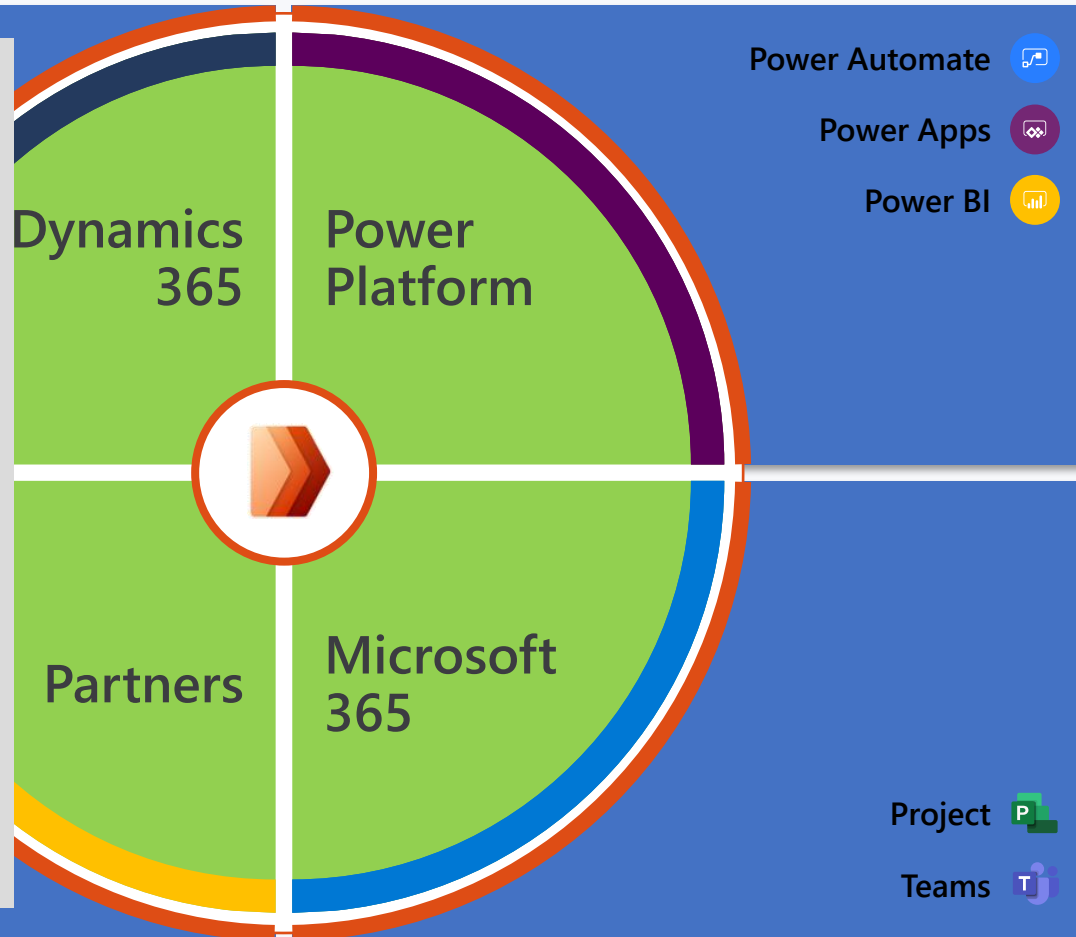




# Project Operations, part of the Microsoft Cloud platform

Microsoft Partner Ecosystem brings industry expertise and solutions across industries:

- ✓ Professional Services and Consulting
- ✓ Manufacturing Services
- ✓ Architecture, Engineering, and Construction (AEC)
- ✓ Health Services
- ✓ Facilities, Utilities, Mining and others





# Deployment Options





# Project Operations Deployment Types

Deal to proforma invoicing Lite deployment existing third- party service centric ERPs



Resource/non-stocked scenarios



Stocked/production orders scenarios



<https://admin.powerplatform.microsoft.com/projectoperations>



# Project Operations Deployment Comparison

Capability*	Deployment Type		
	Lite deployment - deal to proforma invoicing (CE only)	Project Operations for resource/non-stocked based scenarios (Integrated)	Project Operations for stocked/production-based scenarios (F&O PMA)
Project for the Web capabilities	•	•	
Time entry	•	•	•
Simple expenses	•	•	
Full expense management - Policy management - Workflow - Credit card integration - Receipt OCR		•	•
Revenue recognition		•	•
Non-stocked material support - pending vendor invoice - non-stocked materials project purchase order		•	•
Classic PMA functionality - D365 Supply Chain integration (Production, stock and warehouse management) - Project Timesheets - Funding Management - Project Free Text Invoice - General Ledger Journal - Indirect Cost - Budget Planning & Forecasting			•

\*the list is not exhaustive of all features





# Project Operations Deployment Considerations

## Expense Entry

- Deployment type
  - Lite
    - Basic Expense Entry on CE app
    - Mobile – UCI (Unified Client Interface) apps
  - Integrated
    - Basic Expense on CE app or F&O for Full Expense management
    - Mobile – UCI (Unified Client Interface) apps
    - Mobile – F&O – Yes, mobile workspaces, but expected to be deprecated in favor of Power Apps
  - Stocked
    - F&O for Full Expense management
    - Mobile – F&O - Yes, mobile workspaces, but expected to be deprecated in favor of Power Apps
- Recommendation
  - Keep it simple, e.g. for a Resource/non-stocked deployment, it is probably best to enter expenses via CE or F&O, not both.





# Project Operations Deployment Considerations

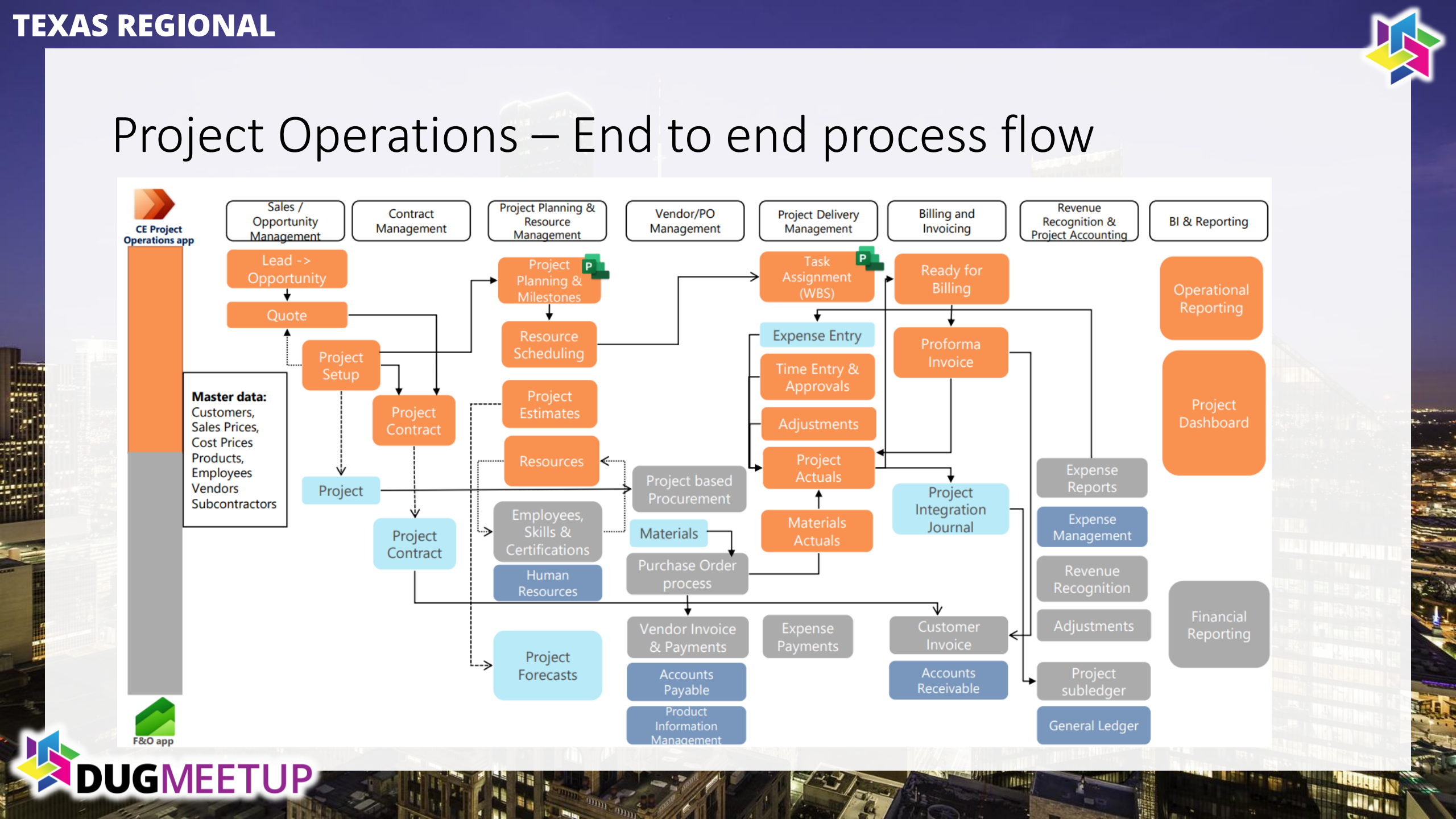
## Time Entry

- Deployment type
  - Lite
    - CE app for Time Entry
    - Mobile – UCI (Unified Client Interface) apps
  - Integrated
    - CE app for Time Entry
    - Mobile – UCI (Unified Client Interface) apps
  - Stocked
    - F&O app for Timesheets
    - Mobile – Yes, app for mobile workspaces, PowerApps
- Recommendation
  - Use the CE app, unless stocked deployment type

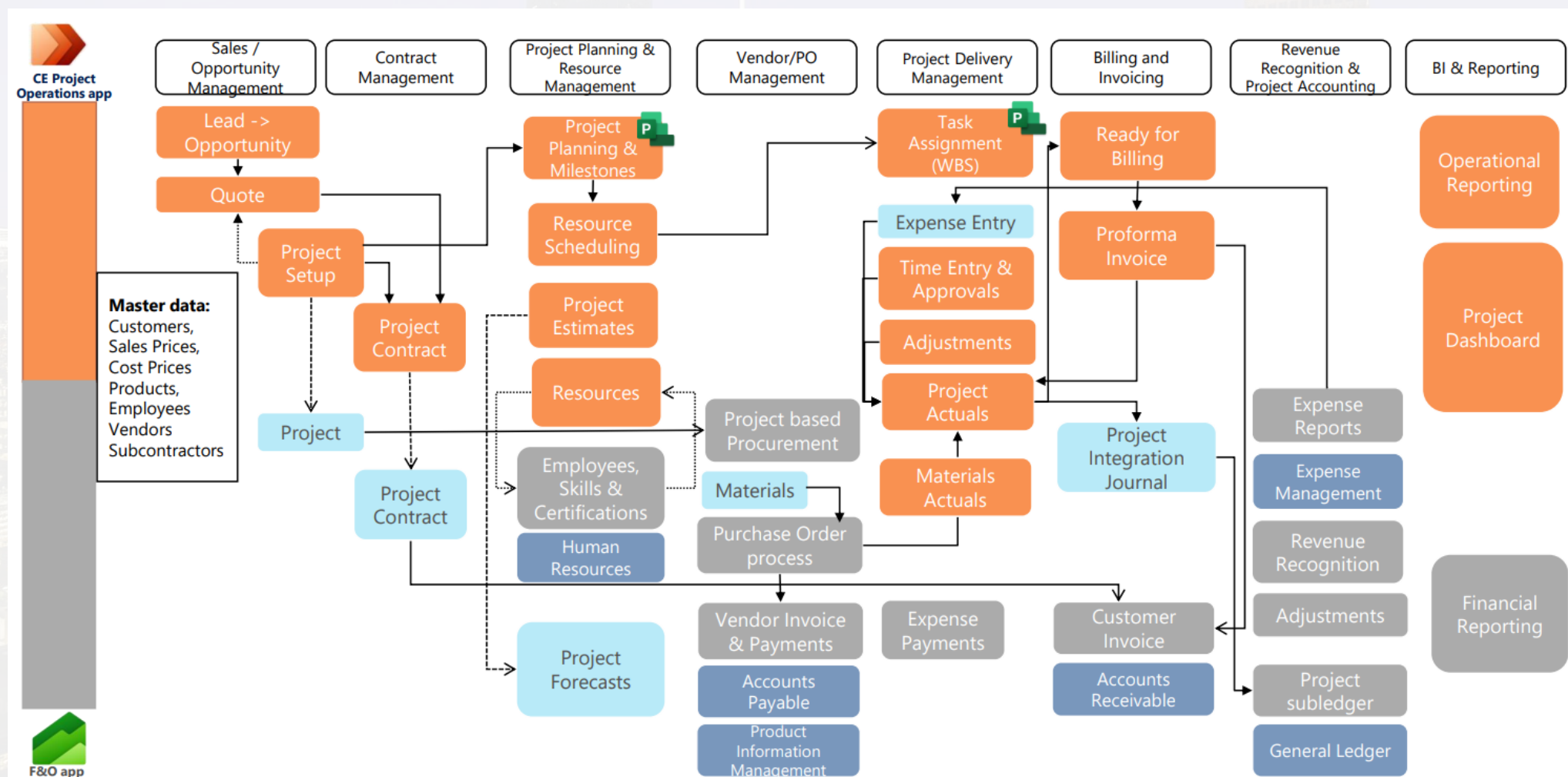




# BUSINESS PROCESS FLOW & COPILOT



# Project Operations – End to end process flow

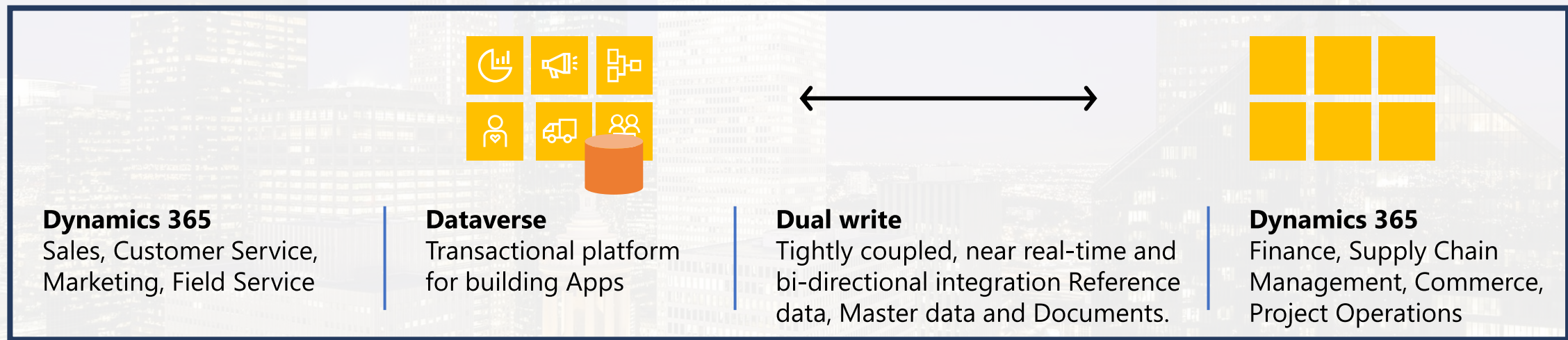






# Dynamics 365 Dual Write

Dual write provides bidirectional integration between the Dataverse (formerly Common Data Service) and the Finance, Supply Chain Management, Commerce, and Project Operations applications.



## Licensing policies for dual write:

A specific license is not required to enable dual write and when configuring dual write against unrestricted entities no additional licensing is required. However, when dual write is configured against a restricted entity, users making updates in the application that result in updates to those restricted entities must be appropriately licensed. More details, see [Dynamics 365 Licensing Guide](#).

For technical details, please visit [Dual Write home page](#)





# Additional Considerations

Data Migration  
(API to load data)

Gold build  
strategy for two  
environments

Environment  
Syncs

Dual Write  
enable

Storage Capacity

Licensing (ERP +  
Cross apps)

Enhancements

Microsoft  
Roadmap





## Customer challenges

The National Food Lab (NFL) faced multiple challenges in transitioning from a custom Salesforce system. They needed a system that could handle customer data, sales, project tasks, resource scheduling, and invoices while adjusting revenue calculations for different project types. This process was further complicated by the existence of two NFL divisions with unique processes, all requiring accommodation within a single solution.

## Implemented solution

Dynamics 365 Project Operations lite deployment, integrating sales, contract, project, and scheduling functions. They installed base customizations to align with parent company processes and guided NFL to use standardized workflows. Currently, they are leveraging the robust capabilities of Power BI for custom reports and dashboards.



## Customer challenges

Quiddity project leaders lacked credible data and a clear method to assess risks potential of projects. Unable to define and categorize labor hours, scheduling and budgeting were a challenge. It needed a transparent view of project progress and interdependencies showing financial risks and reliable costing and forecasting features.

## Implemented solution

Dynamics 365 Finance seamlessly connects Quiddity's financial data to business processes, streamlining and automating accounting and reporting systems, and one centralized data source enables faster access to more accurate opportunity and project information



<https://videos.microsoft.com/customer-stories/watch/Tt2DFXC2ofExHZZXt1u64n?autoplay=2&second=152.44>



## Customer challenges

American Engineering Testing (AET) was weighed down with fragmented data and manual processes. The resulting lack of visibility obstructed meaningful analysis and strategic planning.

## Implemented solution

Dynamics 365 Project Operations streamlines scheduling and field work improving project resourcing and automates recording of time, materials, and expenses. Newfound visibility enables collaboration between technicians, PMs, and accounting which speeds AET's billing cycle. Automations have saved about 400 work hours/week



**Thank You!**