

Dynamics 365 Project Operations

A Modern Project Management Solution



Are we communicating not enough?



Unifying your project business



Agenda



Overview



Use Cases



Benefits



Live Demo



Summary and Q&A



Sebastian Sieber

Global Technology Director, proMX



Project Operations

Combines functionality of

- Microsoft Planner
- Dynamics 365 Project Service Automation
- Dynamics 365 Finance



Microsoft
Planner



Dynamics 365
Project Service
Automation



Dynamics 365
Finance



Dynamics 365 Project
Operations

Different Deployment Types

- Project Operations **Core** (CE)
- Project Operations **Integrated to ERP** (CE and F&O)
- Project Operations **for Manufacturing** (F&O)

In a nutshell

Planner

Lightweight task
planning



Project Server

Traditional Project
Management with financials



D365 Project Operations

End-to-end project business
management



- ✓ Opportunity Management
- ✓ Quotation + Contract Management
- ✓ ERP Integration
- ✓ Financial Management

Values



Before the project

- ERP Integration
- Sales Support
- Project Planning
- Resource Staffing
- Project Contracting



During the project

- Project controlling
- Time and expense tracking
- Productive collaboration
- Project management
- Resource management



After the project

- Reporting
- Billing
- Integration to ERP



Transformation of agentic Service Delivery Operations with Copilot

Use Cases



VP of Finance

Project Financials
Strategic Reporting
Project Profitability



Project Manager

Create and Manage Tasks
Review Budget consumption
Maintain Dependencies



Sales Manager

Account Insights
T&M based Quotation
Quote Profitability



Resource Manager

Overview Resource Requests
Track billable utilization
Manage Skills and Roles



PMO

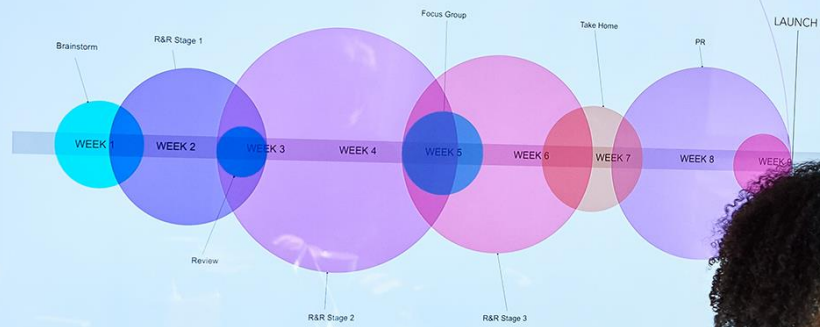
Monitor Project Contracts
Coordinate Invoice Schedules
Oversee Budget limits



Project Team Member

Expense and Time Tracking
Insights on Assignments
Transparent Allocation

ROADMAP TO PRODUCT LAUNCH



Demo

Summary

Simplify Projects – maximize Impact



Unites multiple
productivity suites

Project Cost
Management Tool



Entrance to the
Power Platform

Advanced Sales
Integration based on
detailed Cost planning

Resource Scheduling
with Scheduling
Board capabilities

Real-Time Insights
and Transparency

Links



[D365 Project
Operations
Documentation](#)

[D365 Project
Operations Learning
Path – Get Started](#)

[Extend D365 Project
Operations](#)

[Set up and use
features with lite
Deployment](#)



GET IN TOUCH

Reach out with more
questions or to chat!



linkedin.com/in/siebersebastian



sebastian.sieber@promx.net



sebastians365journey.com