

Dynamics 365 Project Operations

A Modern Project Management Solution



Are we communicating not enough?



Unifying your project business

Project Managers

Accelerate project delivery



Resource Managers

Optimize resource utilization



Account Manager

Win more contracts



Team Members

Collaboration and simplified time and expenses



Finance Manager

Deliver on-time and accurate project-based financials



CxO

Increase business agility and operational excellence



Agenda

 Overview

 Use Cases

 Benefits

 Live Demo

 Summary and Q&A



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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

Different Deployment Types

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



Dynamics 365 Project
Operations

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



Demo

Summary

Simplify Projects – maximize Impact



Unites multiple
productivity suites

Advanced Sales
Integration based on
detailed Cost planning

Project Cost
Management Tool

Resource Scheduling
with Scheduling
Board capabilities



Entrance to the
Power Platform

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!



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