

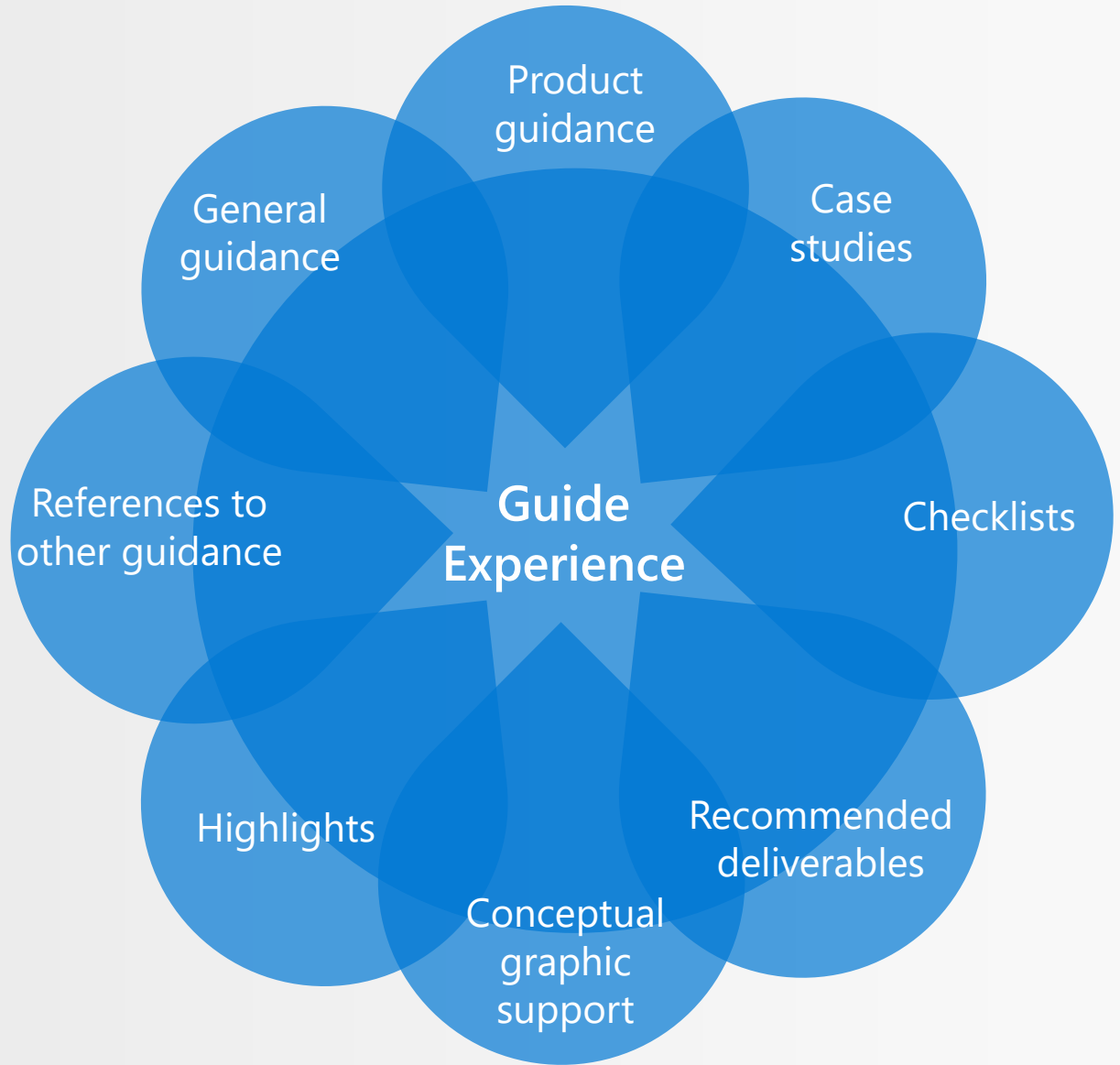
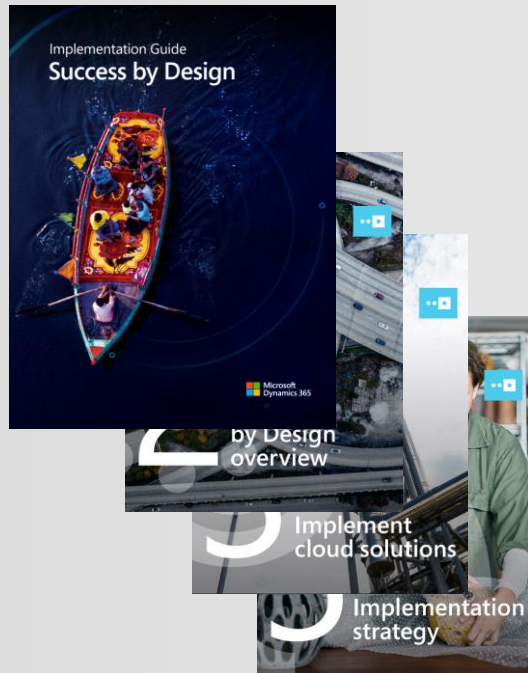
# Project Operations Demonstration

Martin Walker  
Satish Panwar



# Dynamics 365 Implementation Guide

Collective experience gained through  
thousands of Dynamics 365 implementations



Available at: <https://aka.ms/d365implementationguide>

# Objectives of this TechTalk

## Resource/non-stocked deployment type

- High-level end-to-end business process flow
- Demonstration in Dynamics 365 Project Operations

## What it doesn't cover

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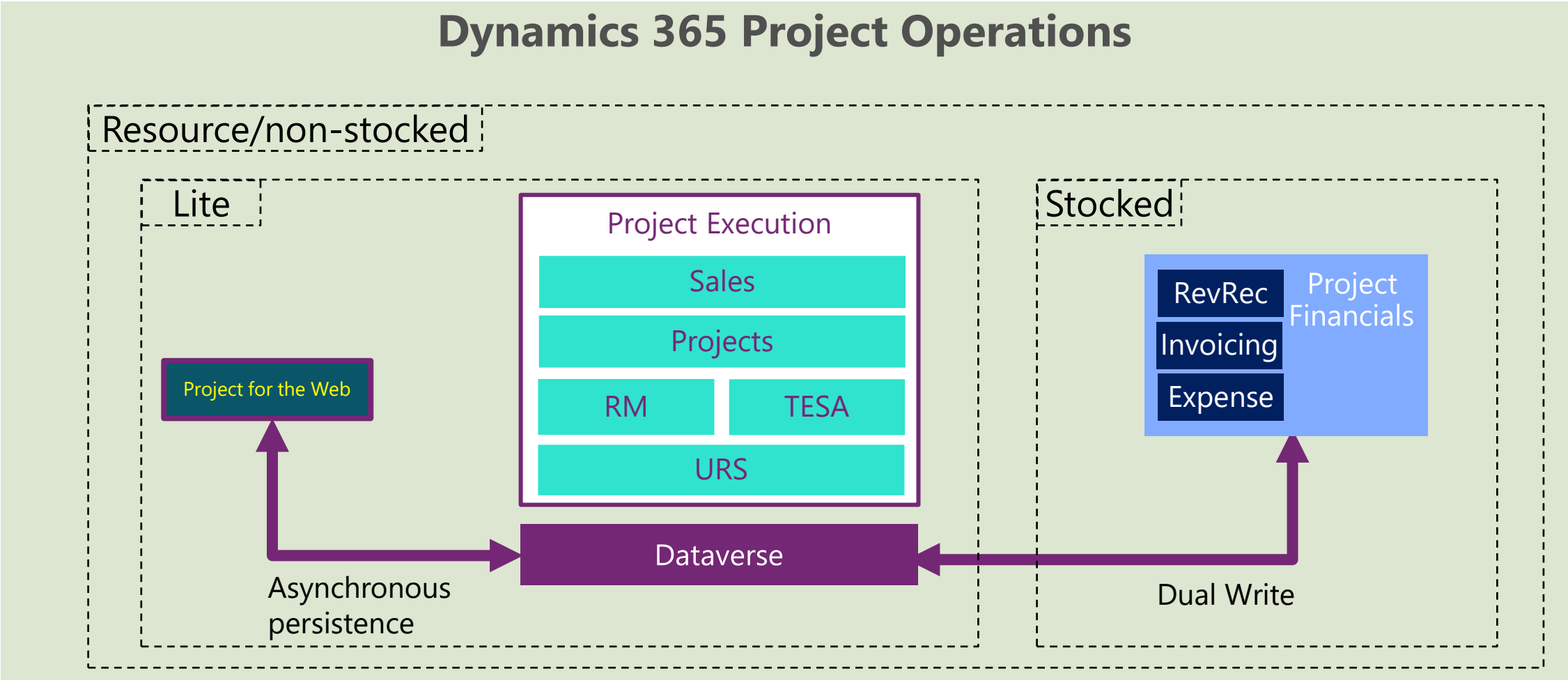
1. Configuring Project Operations
2. More complex process variations
3. Review of General Ledger accounting entries
4. Operational and Analytical reporting
5. Stocked / production-based deployment type (PMA)
6. Technical details

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# Agenda

- 
1. High level architecture
  2. End-to-end Process Flow
  3. Demos
    - Lead->Opportunity->Quote
    - Project & contract setup
    - Scheduling resources
    - Project execution
    - Proforma invoicing
    - Integration journals, project subledger and invoicing
    - Fixed price revenue recognition
  4. Resources

# Architecture

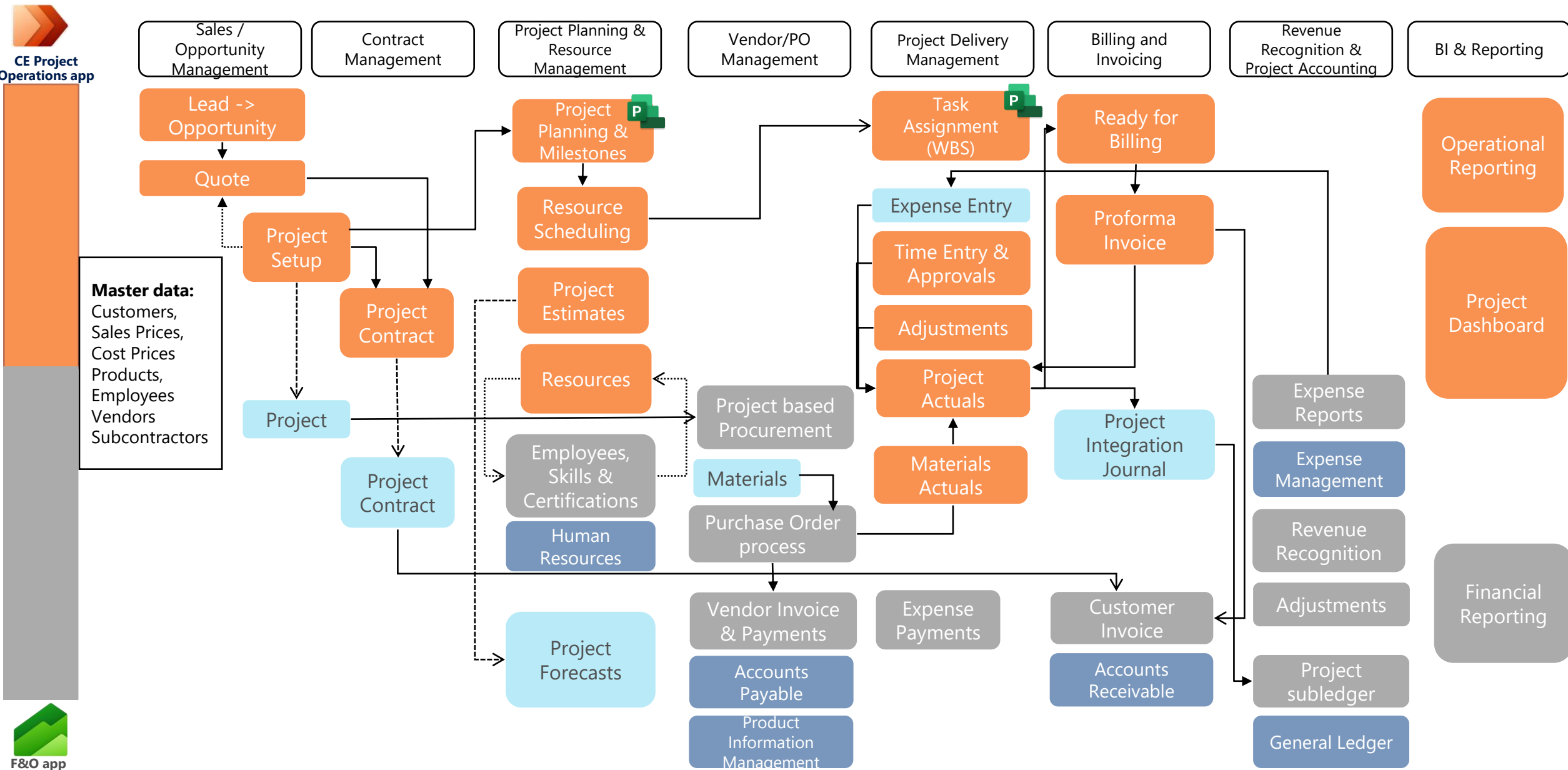


## Key

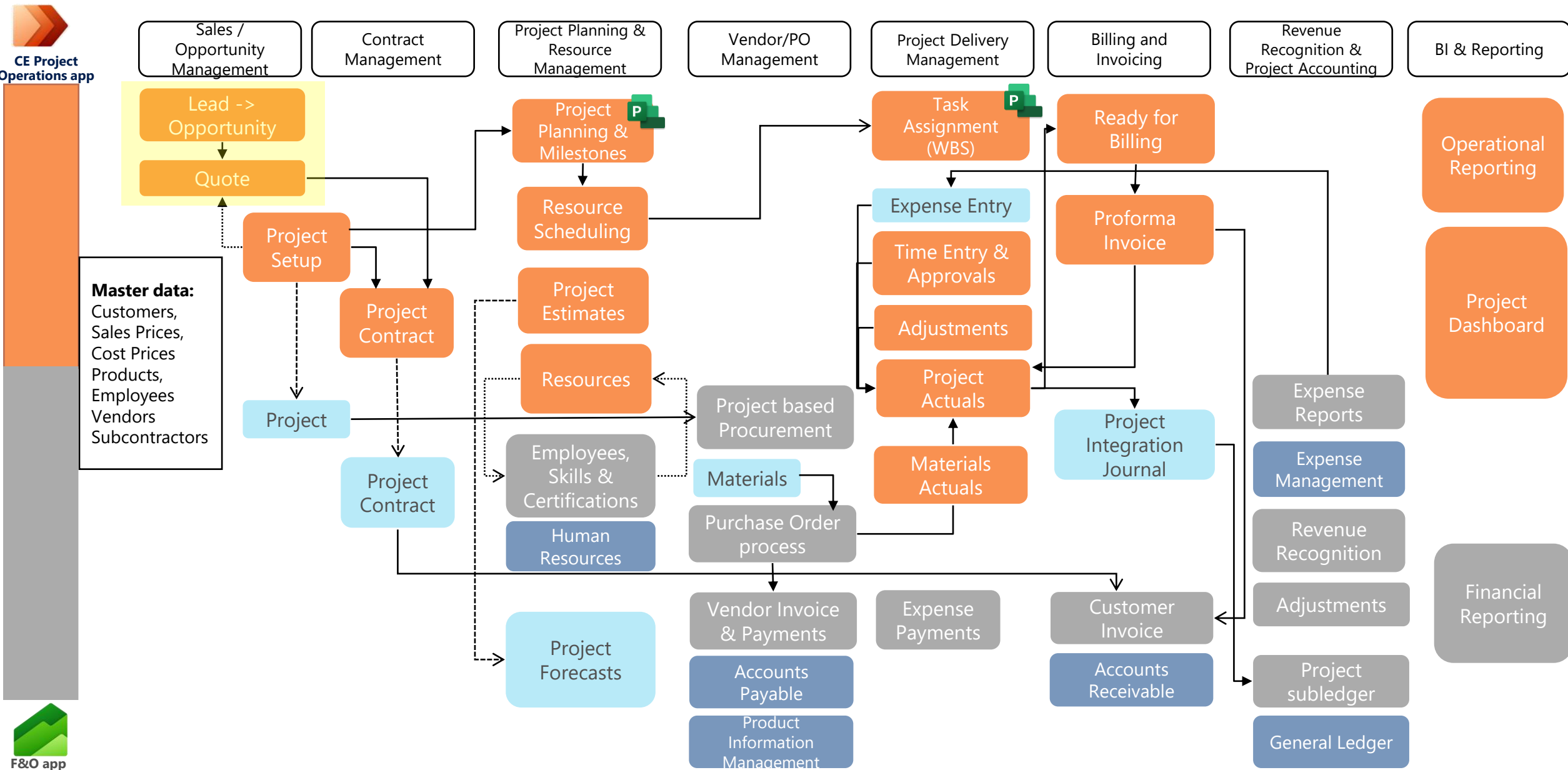
|               |              |
|---------------|--------------|
| M365 Services | D365 CE App  |
| Dataverse     | D365 F&O App |

RM = Resource Management  
TESA = Time, Expense, Status, Approvals  
URS = Universal Resource Scheduling  
RevRec = Revenue Recognition

# End to End Process flow



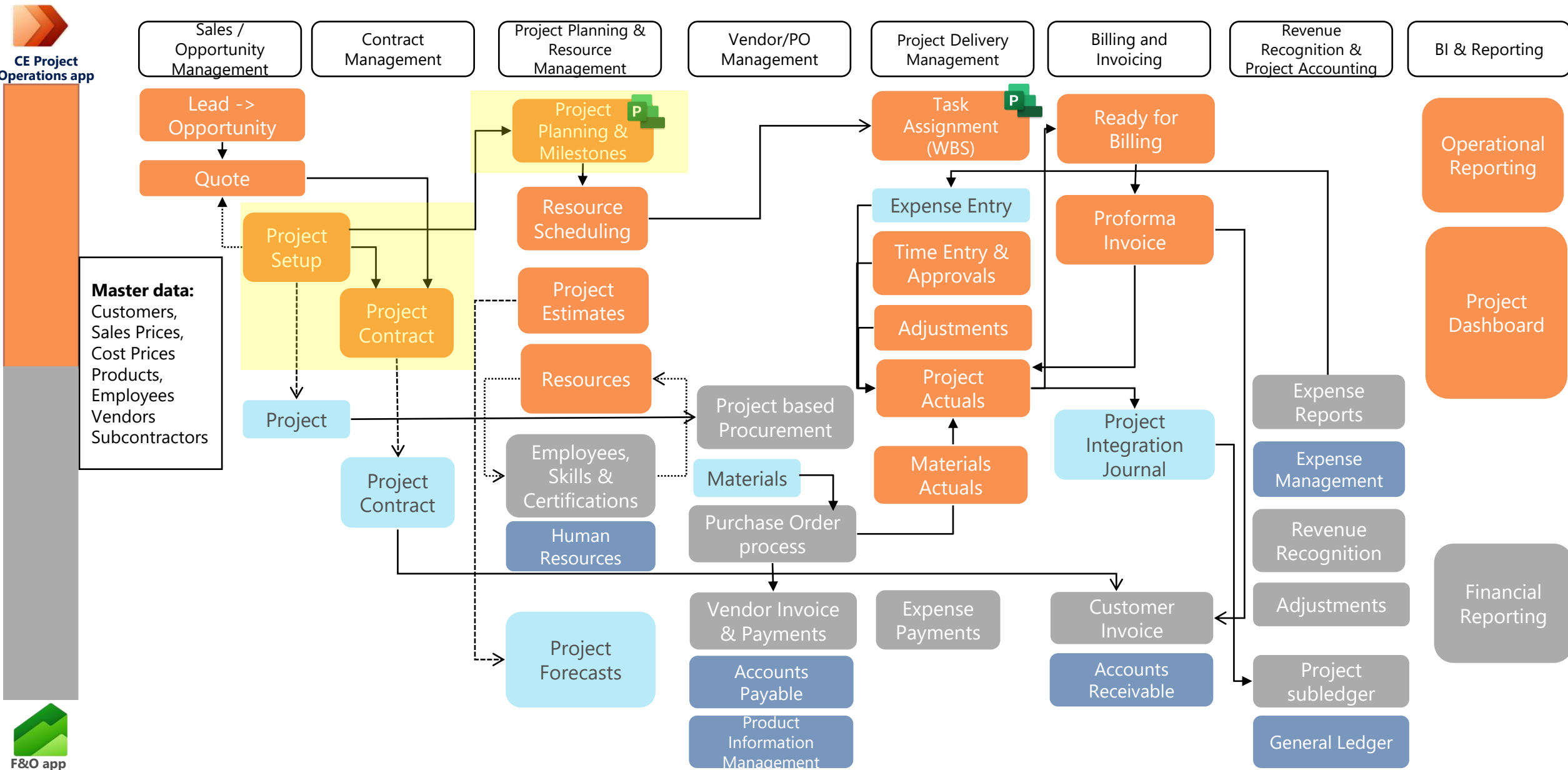
# End to End Process flow



# Demo

Lead -> Opportunity -> Quote

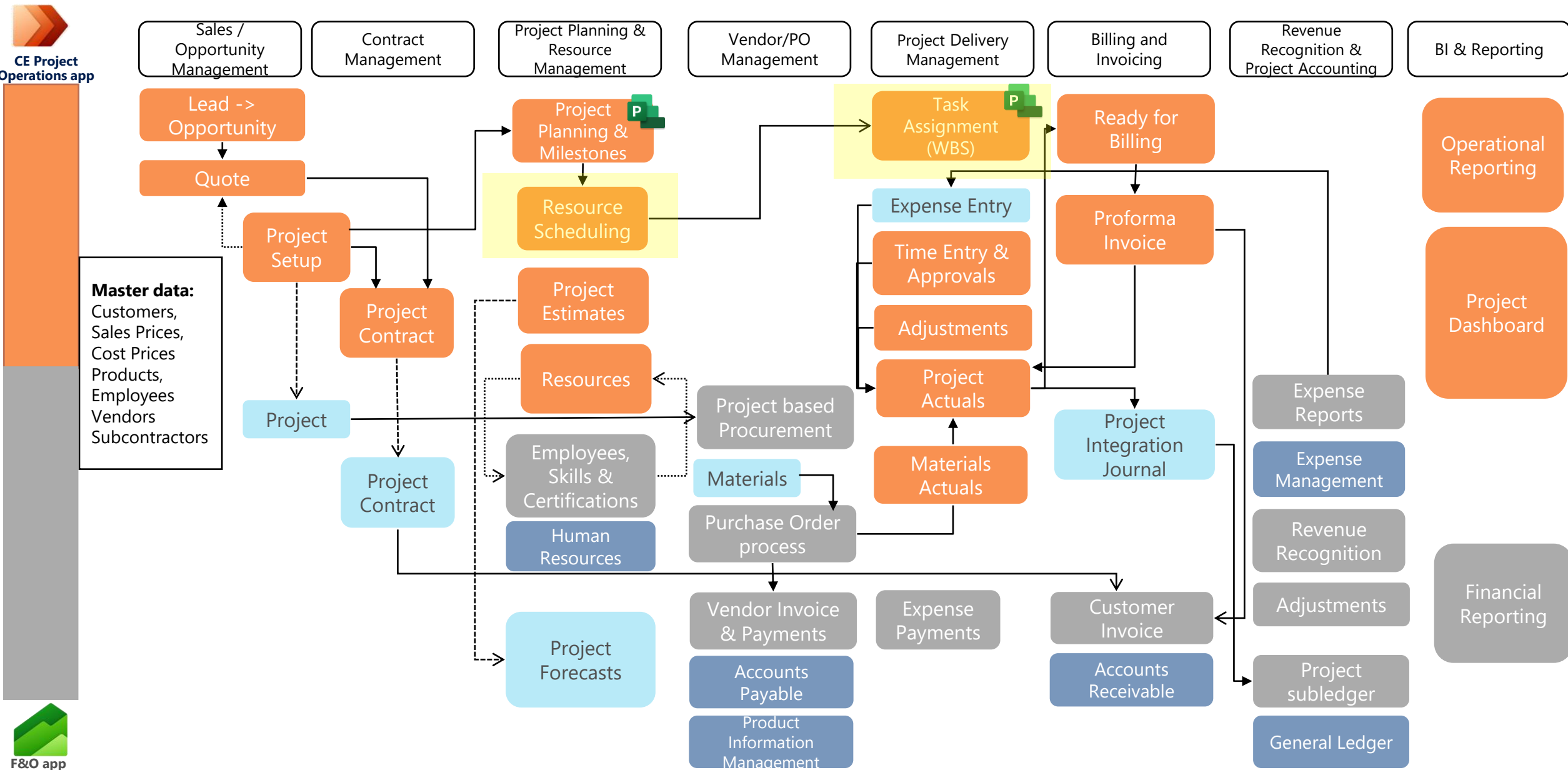
# End to End Process flow



# Demo

Project, project contract, WBS, generic resources

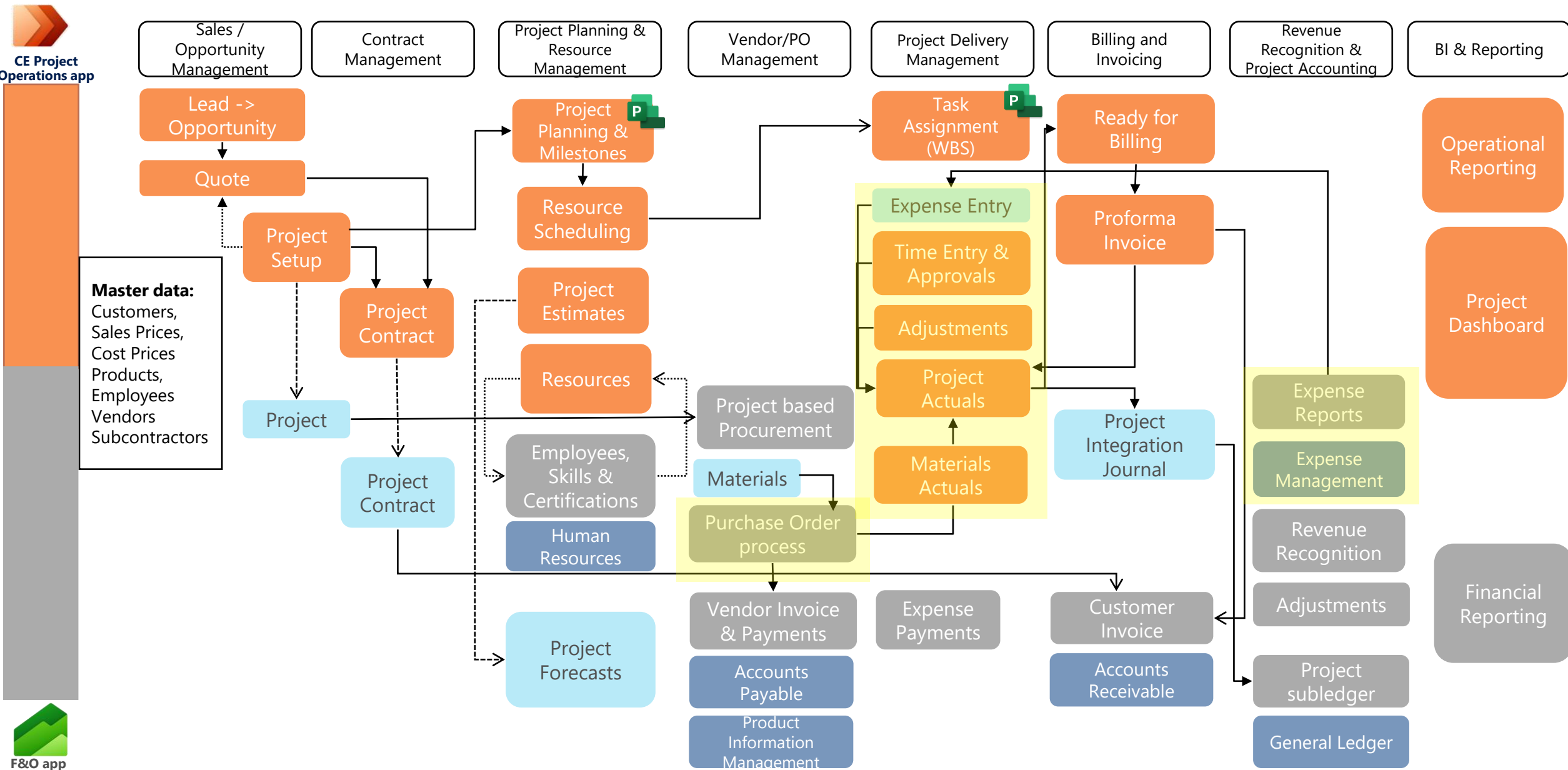
# End to End Process flow



# Demo

Resource Scheduling

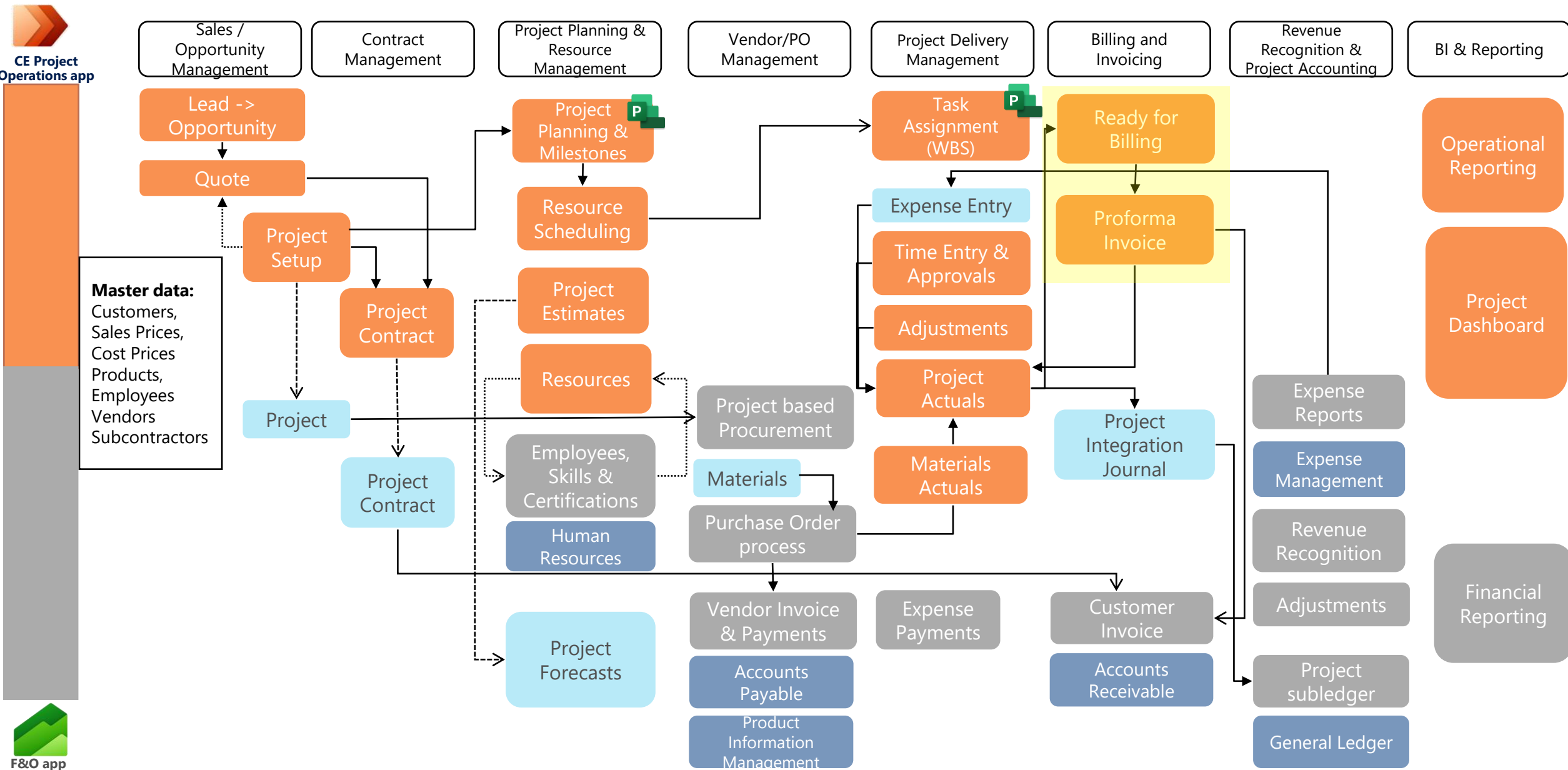
# End to End Process flow



# Demo

Project execution & actuals

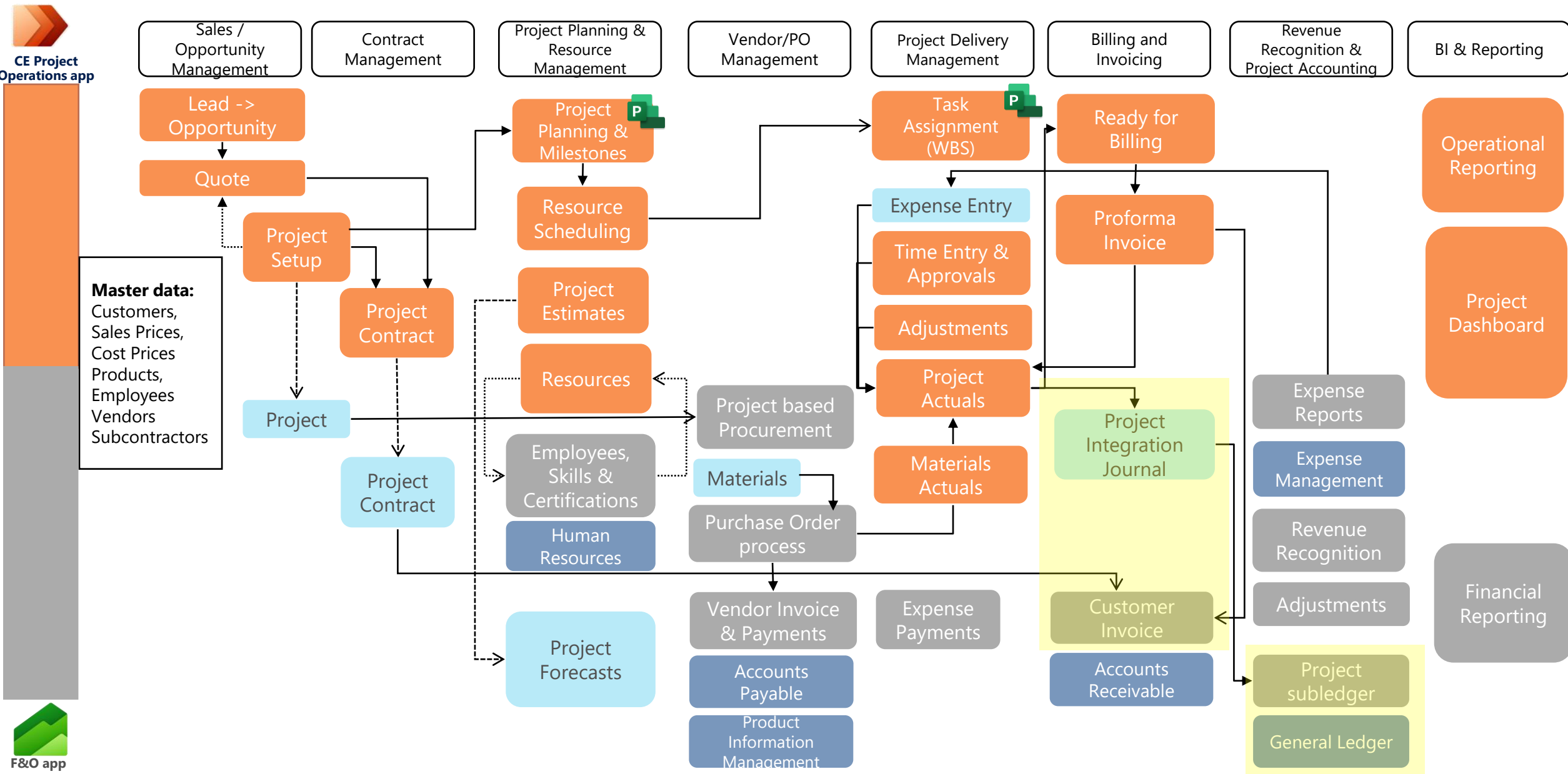
# End to End Process flow



# Demo

Proforma invoicing – unbilled sales & milestones

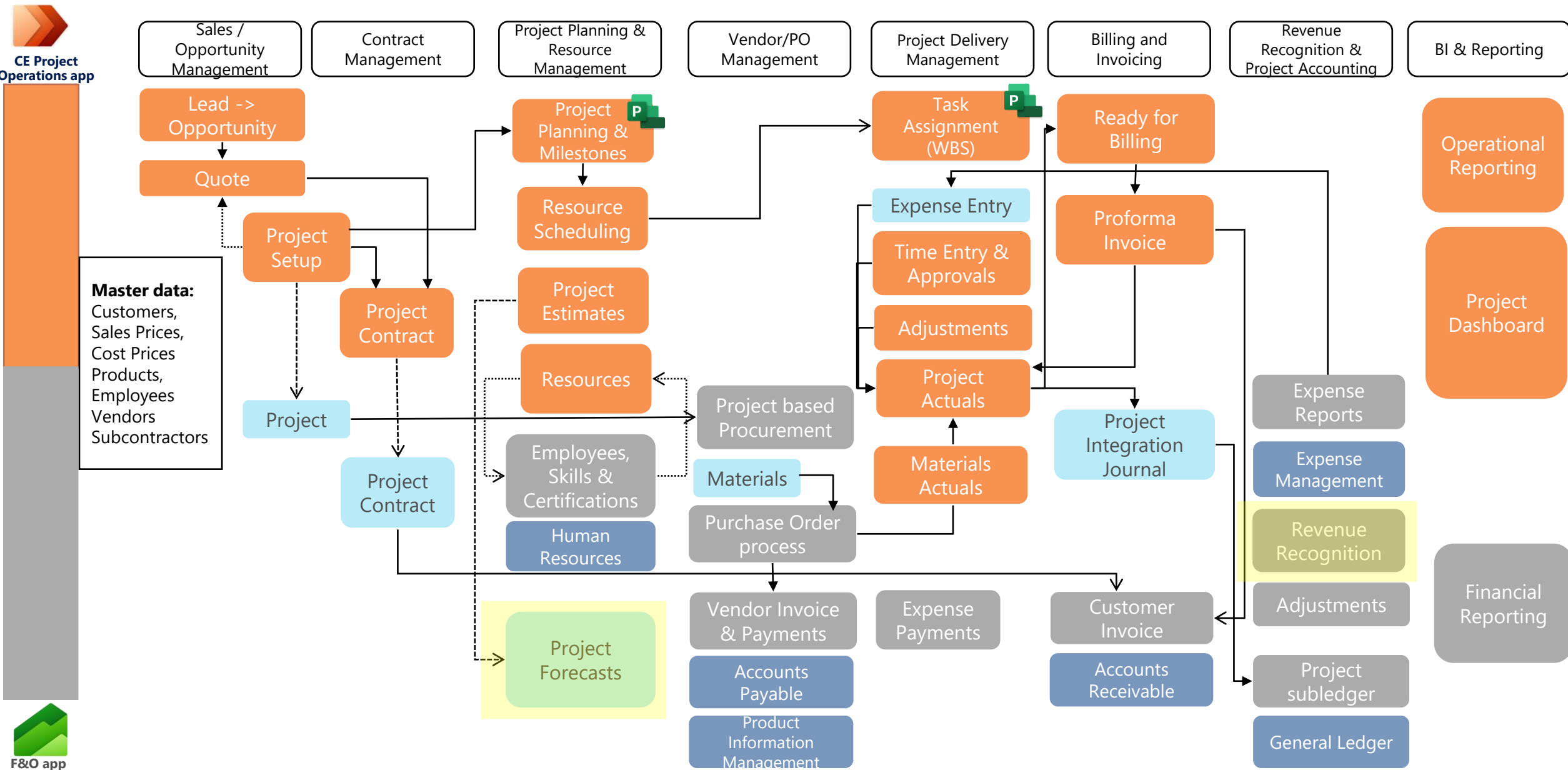
# End to End Process flow



# Demo

Integration journal & project subledger transactions  
Invoice proposal & posting

# End to End Process flow



# Demo

Fixed price revenue recognition

# Resources - General

- [Overview - Dynamics 365 Project Operations | Microsoft Docs](#)
- [Overview - What is Dynamics 365 Project Service Automation? | Microsoft Docs](#)
- [Overview - Finance and Operations application documentation - Finance & Operations | Dynamics 365 | Microsoft Docs](#)
- [Community - Dynamics 365 General - Forums, Blogs, Support](#)
- [Roadmap - Product Updates | Microsoft Dynamics 365](#)
- [Ideas - Ideas \(dynamics.com\)](#)
- [FastTrack - Microsoft FastTrack, move to the cloud with confidence](#)
- [Insider Program - Sign in \(dynamics.com\)](#)

# Resources – Documentation and Learning

- [Documentation](#)
- [Developer home page](#)
- TechTalks\* [Upcoming](#) / [Recordings](#)
- YouTube [Dynamics 365](#)
- [Customer Source](#)
- [Microsoft Learn](#)

\* To receive info about the forthcoming TechTalks, Customers and Partners can subscribe and unsubscribe for themselves respectively, at <https://aka.ms/D365TechTalksSubscribe> and <https://aka.ms/D365TechTalksUnsubscribe>

# Useful links on SLA, Compliance, and Support

- [Licensing Guide](#)
- [Trust Center](#) – For information on privacy, compliance, and security procedures
- [Online Services Terms](#) – Terms and Conditions of Microsoft Services
- [Support Options](#)

