

# Project to Profit Business Process Overview

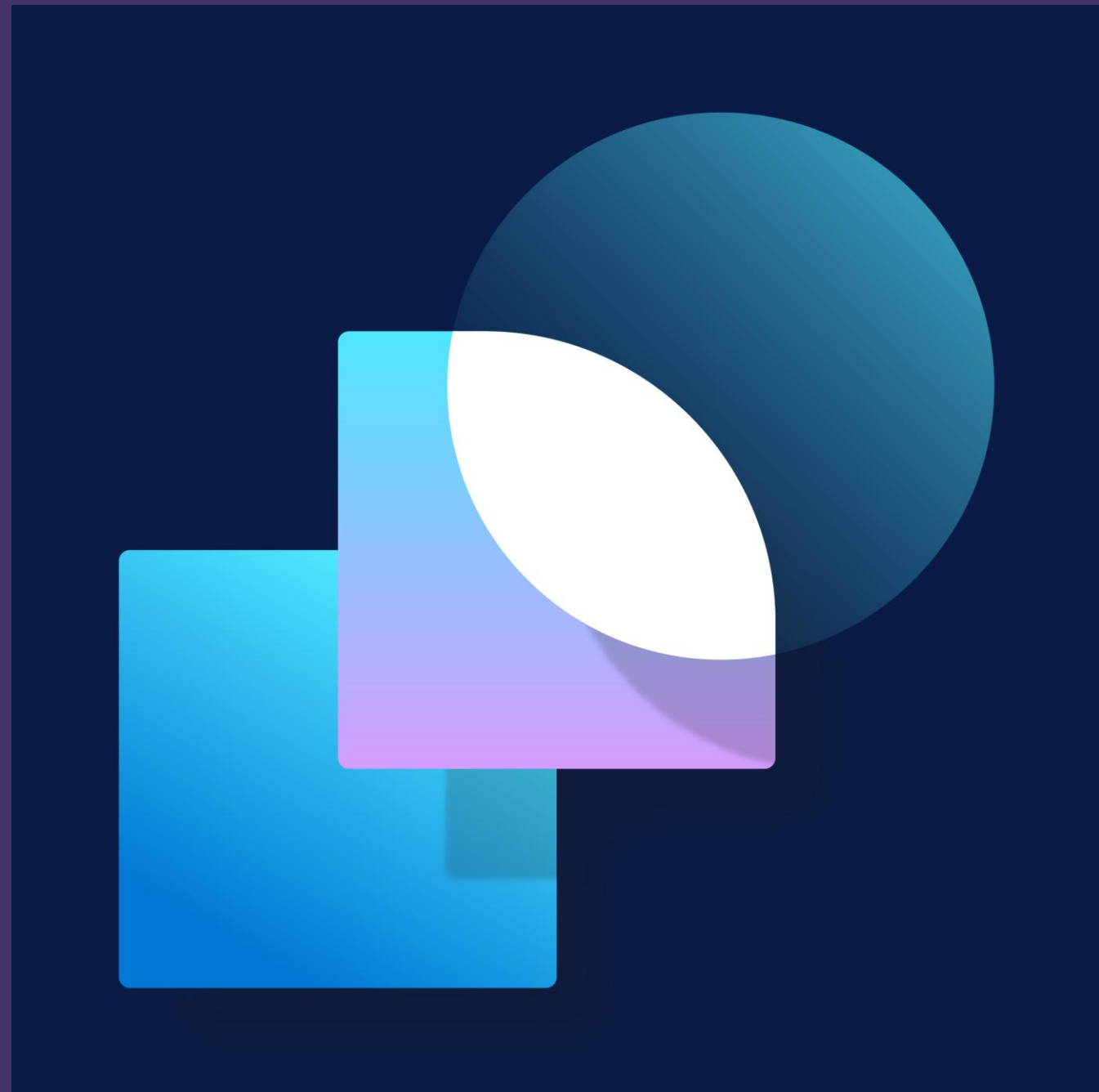
## Presenters:

Lalitha Chintamaneni  
Senior FastTrack Solution Architect

Mathieu Binaisse  
Senior FastTrack Solution Architect

## Moderator:

Henrik Jaeger  
Senior FastTrack Solution Architect



# Agenda

- Project to Profit Overview
- Business Process Areas
- Use Cases and Demo
- Resources
- Q&A



# Dynamics 365 Business Process Catalog

## *Project to profit*

L1

Project to profit

L2

Plan projects...

... Manage project delivery

L3

Plan project tasks ...

... Assign project resources

Track project time ...

Purchase project materials...

L4

Import a project plan from Microsoft project into Dynamics project operations ...

.....Import a project plan from Excel into Dynamics project operations

Manually assign a resource to a project in Dynamics 365 project operations ...

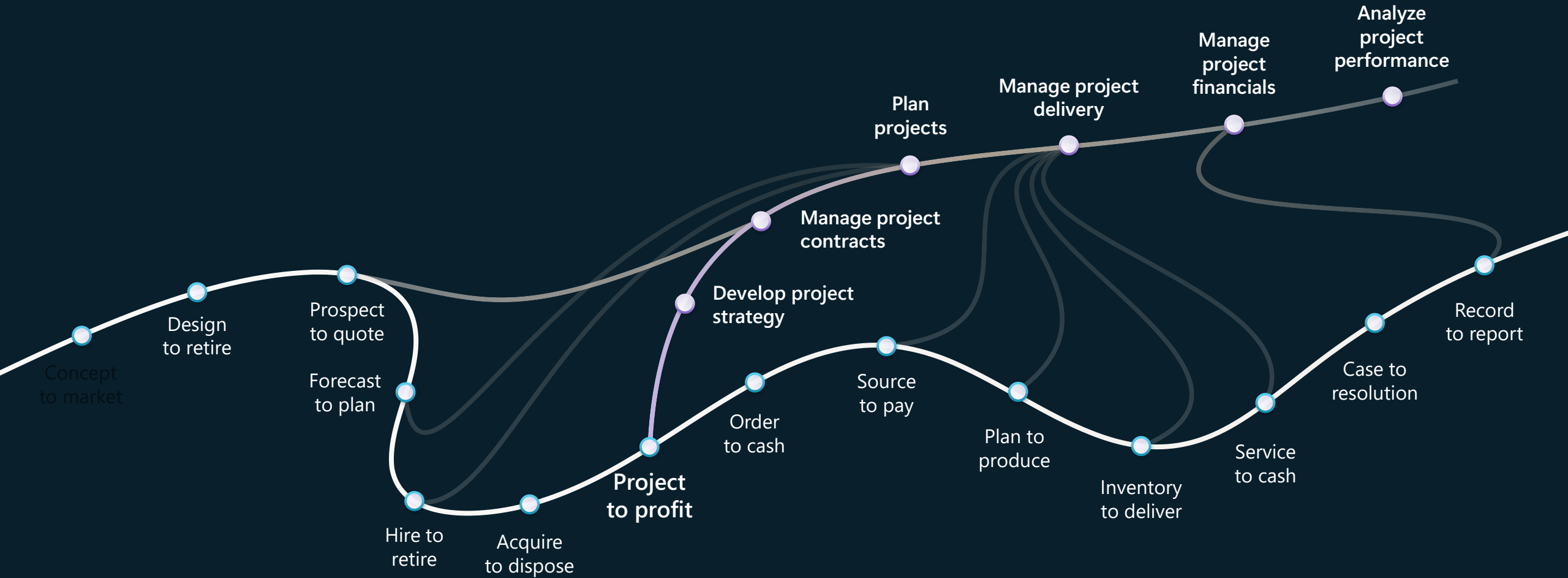
Enter project time using time entry in Dynamics project operations ...

... Enter time entry using journals in project operations

Create project purchase orders in Dynamics 365 Project Operations ...

# Project to profit – Overview

# An end-to-end journey



# Project to profit – Benefits



# Project to profit – Stakeholders

Executive  
Sponsor

Project  
Manager

IT  
Department

Business  
Process  
Owner

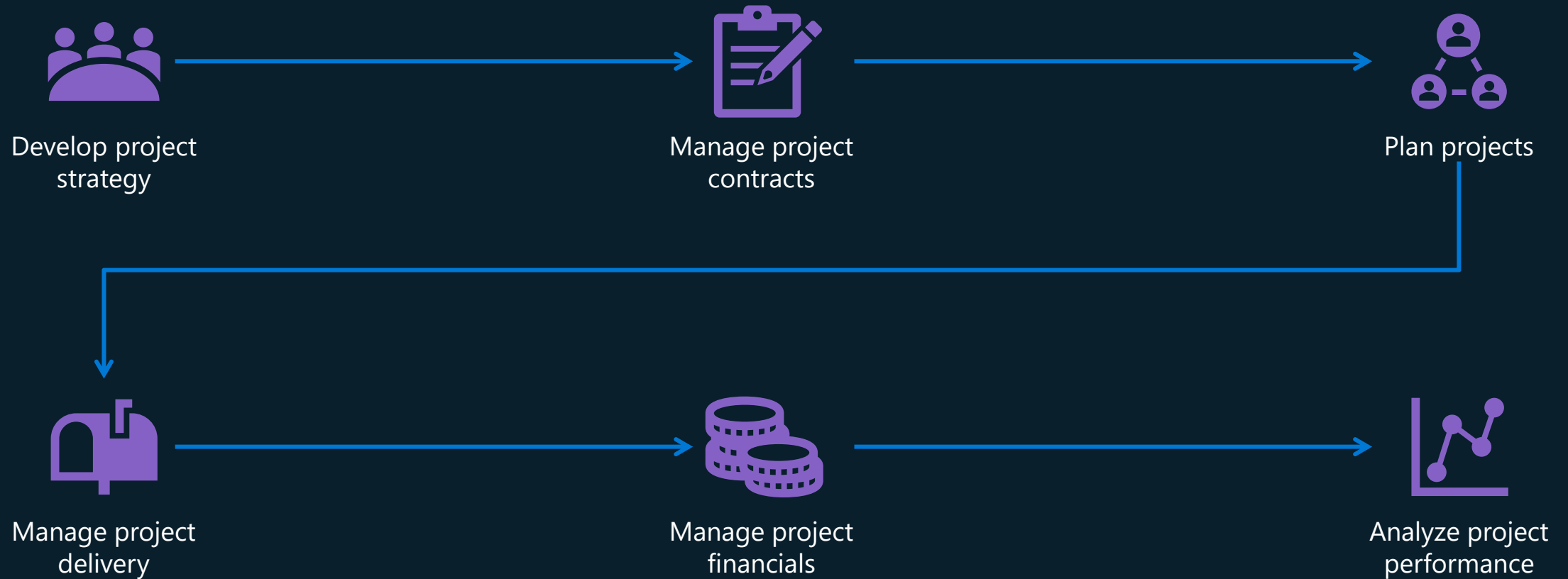
Finance  
Department

Sales and  
Marketing  
Teams

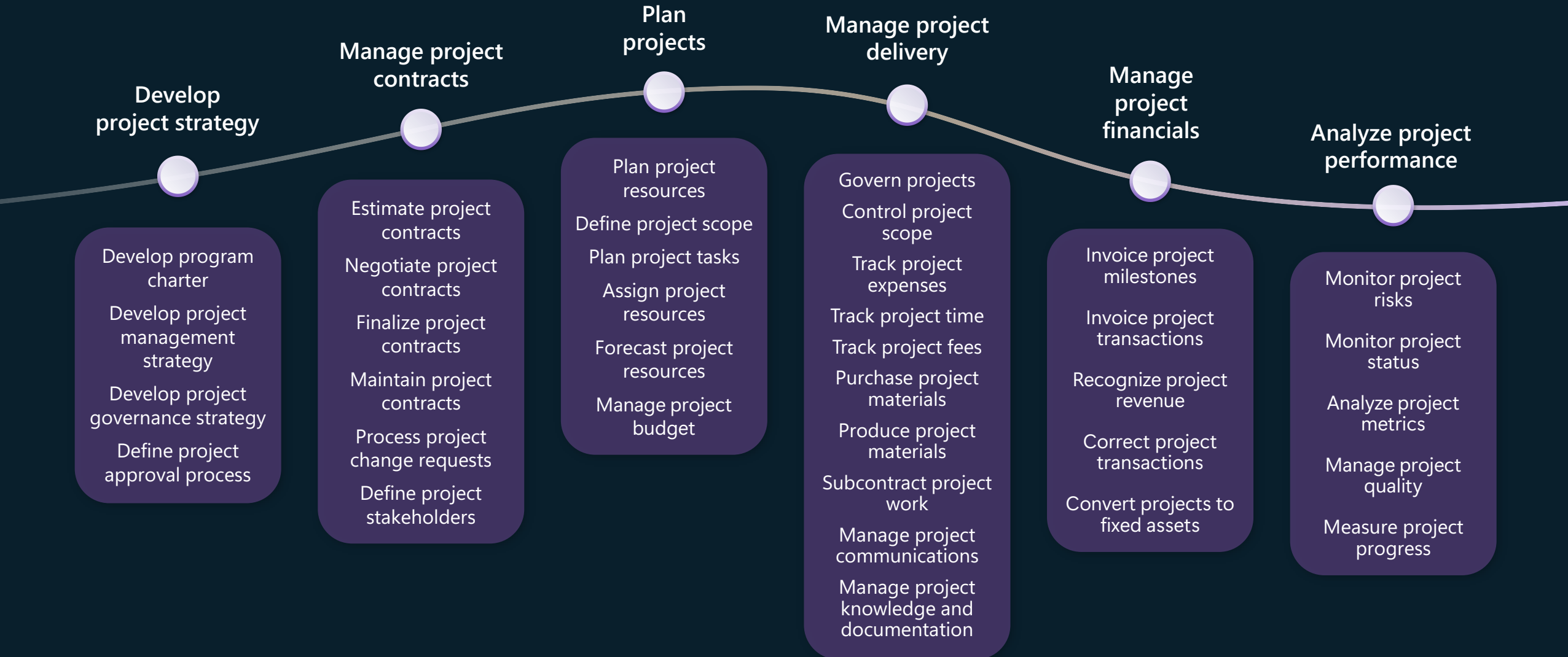
Business  
users

# Project to profit – Business Process Areas

# Project to profit – Business Process Areas



# Project to profit subprocess details



**Project to profit – Use Cases and Demo**

# Scenario: Contoso Robotics USA

Contoso Robotics USA is a company that specializes in installing conveyor systems for warehouses. Recently, they have been awarded a new project to install a state-of-the-art conveyor system for their client, A Datum Corporation. This project is crucial for A Datum Corporation as it aims to enhance their warehouse efficiency and streamline their operations.

Throughout this project, Contoso Robotics USA will leverage the powerful capabilities of Dynamics 365 Project Operations.

# Develop project strategy



# Project to profit Business Process – Develop project strategy



- Develop program charter
- Develop project management strategy
- Develop project governance strategy
- Define project approval process

# Manage project contracts



# Project to profit Business Process – Manage project contracts



# Use Case 1 – Finalize project contracts



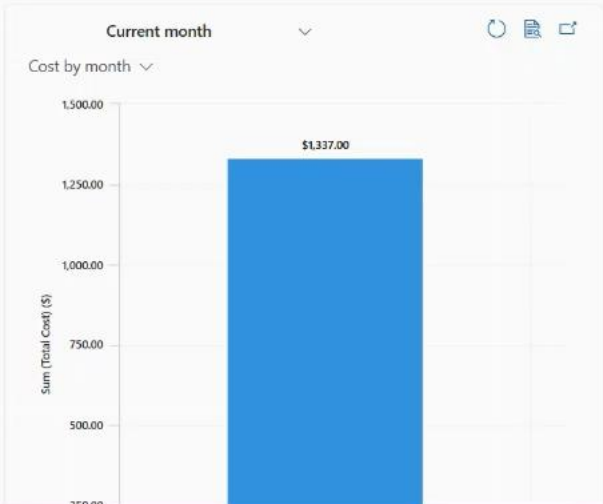
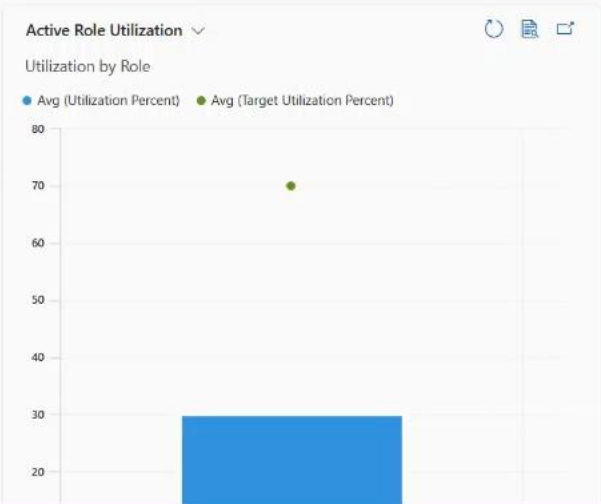
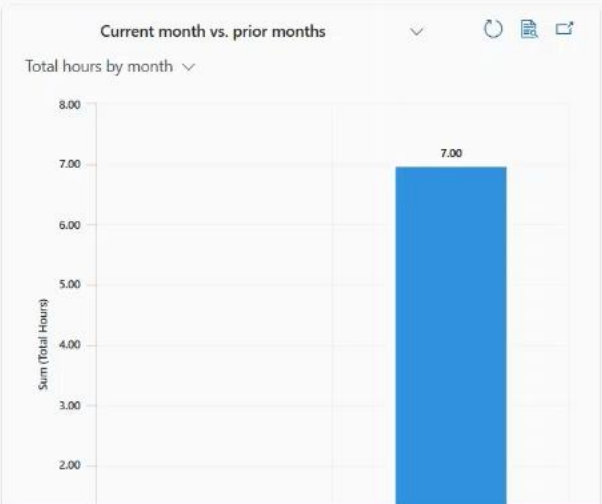
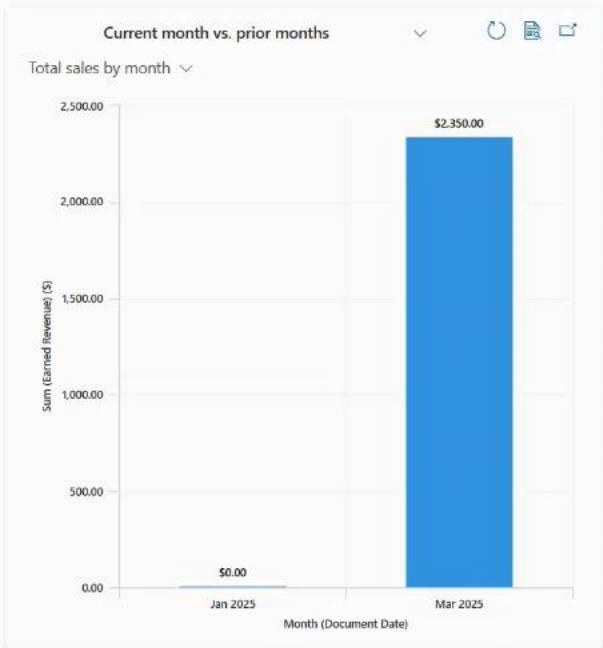
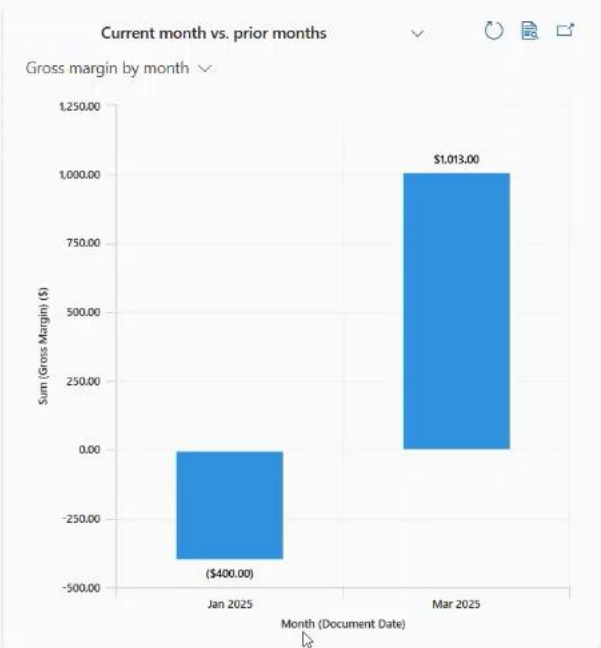
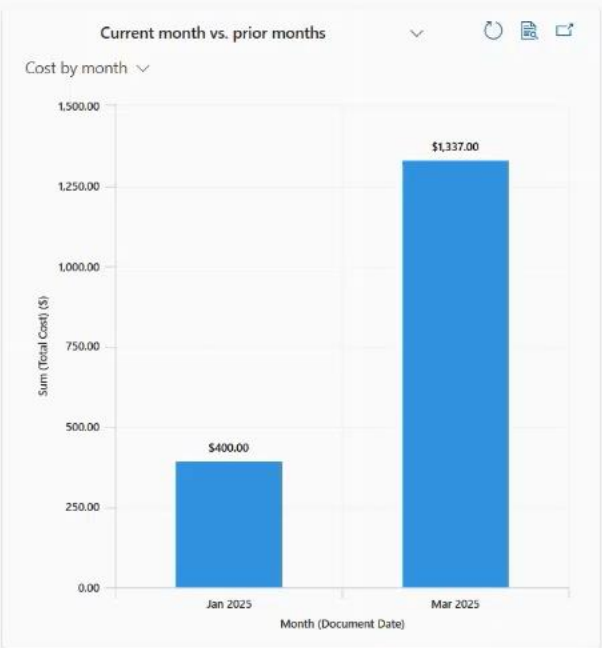
Following negotiations between A Datum Corporation and Contoso Robotics USA, both parties have agreed to install the conveyor system by December 31st on a Time and Material basis. The contract specifies that invoices should be sent at the end of each month.

- Dynamics 365 | Project Operations
- Home
- Recent
- Pinned
- My Work
  - Dashboards
  - Time Entries
  - Expenses
  - Approvals
  - Material Usage
  - Approvals Agent (Pre...
- Projects
  - Projects
  - Schedule Board
  - Resource Utilization
  - Resources
  - Roles
  - Contract Workers
  - Project Reports
- Purchasing
  - Vendors
  - Purchase Price Lists
  - Subcontracts
  - Contracted Resource...
  - Materials on Order
  - Subcontract Milesto...
  - Vendor Invoices
- Projects

# SANDBOX

Save As + New Set As Default Refresh All Share

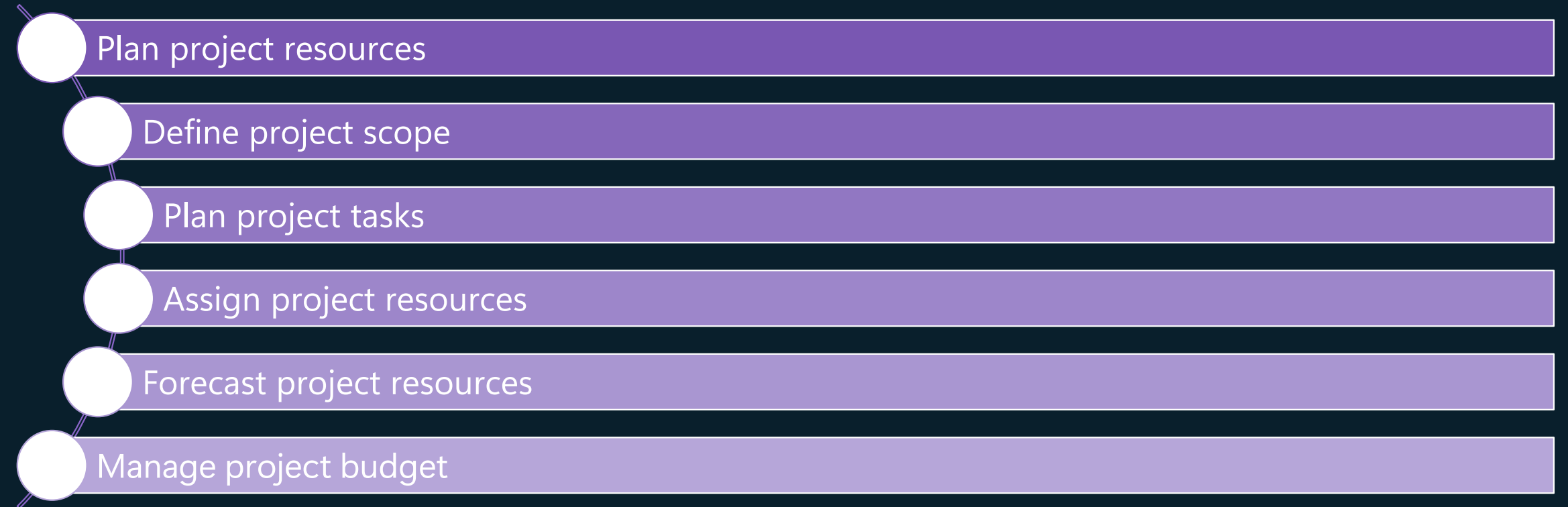
## Practice Management Dashboard



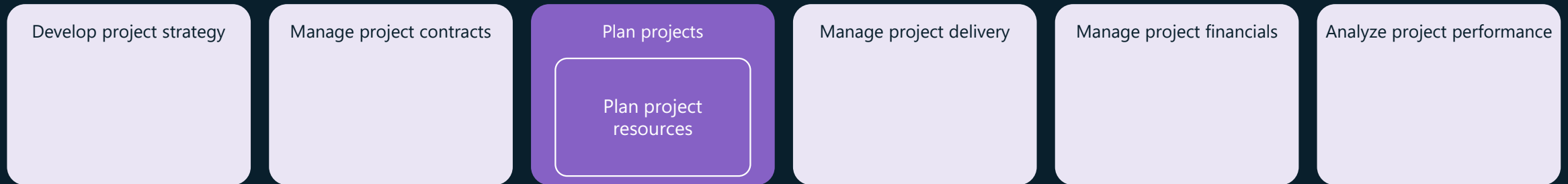
# Plan Projects



# Project to profit Business Process – Plan projects



# Use Case 2 – Plan Project Resources



Following the agreement between A Datum Corporation and Contoso Robotics USA, the project manager at Contoso Robotics USA needs to plan the appropriate resources to ensure the successful installation.

- Home
- Recent
- Pinned
- My Work
  - Dashboards
  - Time Entries
  - Expenses
  - Approvals
  - Material Usage
  - Approvals Agent (...)
- Projects
  - Projects**
  - Schedule Board
  - Resource Utilization
  - Resources
  - Roles
  - Contract Workers
  - Projects

My Active Projects Focused view Show Chart Edit columns Edit filters Share

Ask about data in table. Use / to reference other data. Project Status: Active Project manager: Me Visualize

<input type="checkbox"/>	Project ID	Name	Customer	Start Date	Finish D...	Actual S...	Actual F...	Effort (...	Effort C...	% Com...	Estimat...	Actual T
<input type="checkbox"/>	P-001046...	LA Project AD	LA test le...	2/16/2023	3/3/2023 ...	2/16/2023	3/3/2023	88.00	0.00	0.00	\$27,944.00	\$
<input type="checkbox"/>	P-001270...	LA Project AD - C...	LA test le...	3/12/2025	5/9/2025 ...			96.00	0.00	0.00	\$0.00	\$
<input type="checkbox"/>	P-001269-Y	LA Project closure...		3/13/2025				0.00	0.00	0.00	\$0.00	\$
<input type="checkbox"/>	P-001283...	LA test Tech talk	A Datum ...	4/7/2025	5/5/2025 ...			336.00	0.00	0.00	\$52,832.00	\$

Rows: 4

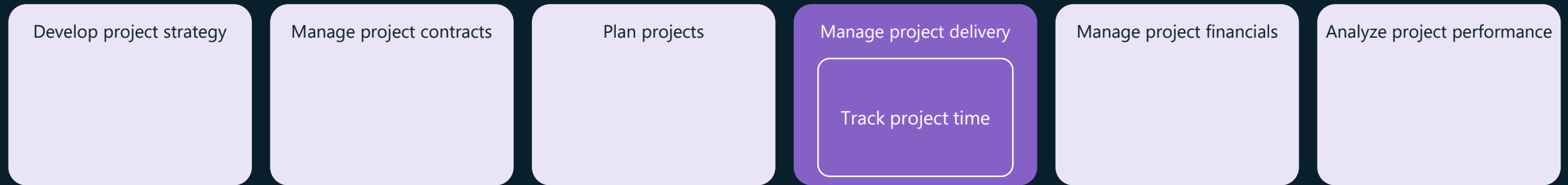
# Manage project delivery



# Project to profit Business Process – Manage project delivery



# Use Case 3 – Track Project Time



Contoso Robotics begins work on the conveyor system for A Datum Corporation. As engineers and consultants carry out the tasks, they log their time against the project. Project managers reviews and approves the submitted time entries to keep delivery on track.

- Home
- Recent
- Pinned
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  - Expenses
  - Approvals
  - Material Usage
  - Approvals Agent (...)
- Projects
  - Projects
  - Schedule Board
  - Resource Utilization
  - Resources
  - Roles
  - Contract Workers
  - Projects

[←](#)
[Show As](#)
[Show Chart](#)
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**My Weekly Time Entries\***
[Edit columns](#)
[Edit filters](#)

[+ New](#)
[Copy row](#)
[Edit row](#)
[Submit](#)
[Recall](#)
[Delete](#)
[Refresh](#)
[Copy week](#)
[Import](#)
[Edit entry](#)
4/6/2025 - 4/12/2025

**New Time Entry**  
Click here to start creating time entries.



Capture your time entries in a weekly format and update hours per day. Just add a row to get started.

# Manage project financials



# Project to profit Business Process – Manage project financials



# Use Case 5 – Invoice project transactions



Let's say Contoso Robotics has a Time and Material (T&M) contract with their client. This means the client pays based on actual work done — specifically, the hours logged by consultants

- Home
- Recent
- Pinned
- Customers
  - Customers
  - Contacts
  - Price Lists
- Sales
  - Leads
  - Opportunities
  - Quotes
  - Project Contracts**
- Transactions
  - Approved Time
  - Approved Expenses
  - Journals
- Sales

← **My Project Contracts** 📄 Focused view 📊 Show Chart ✎ Edit ⋮ 🔧 Edit columns 🔍 Edit filters 🔗 Share

Ask about data in table. Use / to reference other data. 🌈 **Owner: Me** × **Status: Active, Submitted** × **Order Type: Work based** × 🌈 Visualize

<input type="checkbox"/>	Sales Order N... <span>▼</span>	Name <span>↑</span> <span>▼</span>	Status Reason <span>▼</span>	Total Amount <span>▼</span>	Customer <span>▼</span>	Email (Customer) <span>▼</span>
<input type="checkbox"/>	ORD-01025-Q5...	Ad Installation work(Onsite)	New	\$38,022.50	LA Adatum corp	
<input checked="" type="checkbox"/>	ORD-01151-Z1...	<a href="#">LA test TT</a>	New	\$71,320.00	<a href="#">A Datum corporation</a>	
<input type="checkbox"/>	ORD-01152-K6...	LA TT	New	\$0.00	A Datum corporation	

Rows: 3 Selected: 1

# Analyze project performance



# Project to profit Business Process – Analyze project performance



# Use Case 5 – Monitor project status



Contoso Consulting USA is a professional services company who implement ERP for various organisation.

Project manager from Contoso wants to create an internal status report.

- Home
- Recent
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  - Projects
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  - Resources
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  - Contract Workers
  - Project Reports
- Purchasing
  - Vendors
  - Purchase Price Lists
  - Subcontracts
  - Contracted Resource...
  - Materials on Order
  - Subcontract Milesto...
  - Vendor Invoices

**MWDemoProject3** - Saved 3/2/2024 1:00 AM **\$362,160.00** 0.37 0.33

Project Due Date Estimated Labor Cost Cost Consumption % Progress %

Project Service - Project ...
New (10 Mo)
Quote
Plan
Deliver
Complete
Close

- [Summary](#)
[Tasks](#)
[Team](#)
[Resource Assignments](#)
[Resource Reconciliation](#)
[Time phased estimates](#)
[Tracking](#)
[Sales](#)
[Task Billing Setup](#)
[Estimates](#)
[Risks](#)
[Calendar](#)
[Related](#)

General	
Project ID	* P-001099-S
Name	* MWDemoProject3
Description	Software implementation project
Owning Company	* USPM
Customer	MWDemoCustomer3
Scheduling engine	Project for the Web
Currency	US Dollar
Scheduling Engine	Project for the Web
Contracting Unit	* Contoso Robotics US
Project manager	* Martin Walker

Status	
Overall Project Status	---
Comments	---
Status Updated On	---

Estimates	
Estimated Start Date	8/29/2023
Finish Date	3/2/2024
Effort (Hours)	1,500.00
Estimated Labor Cost	\$362,160.00
Estimated Expense Cost	\$7,000.00
Estimated Material Cost	\$0.00
Estimated Total Cost	\$369,160.00

Calendar	
Schedule mode	* Fixed effort
Hours per day	* 8.00
Hours per week	* 40.00
Days per month	* 20

Actuals	
Actual Start	---
Actual Finish	---
Actual Labor Cost	\$1,351.00
Actual Expense Cost	\$0.00
Actual Material Cost	\$0.00
Actual Total Cost	\$1,351.00
Effort Completed (Hours)	5.00

**Timeline**

Search timeline

Enter a note...

**Get started**

Capture and manage all records in your timeline.

# Resources

# Resources

- [Project Operations Business Processes](#)
- [Project Operations Documentation](#)
- [Project Operations Learning Path](#)
- [Project Operations TechTalk Series](#)



Q&A



Dankie Faleminderit **Shukran** Chnorakaloutioun Hvala Blagodaria

Děkuji **Tak** Dank u Tānan Kiitos **Merci** Danke Ευχαριστώ A dank

Mahalo הודת. **Dhanyavād** Köszönöm Takk Terima kasih **Grazie** Grazzi

감사합니다 Paldies Choukrane Aċiū **Благодарам** ありがとうございます

谢谢 Баярлалаа **Dziękuję** Obrigado Mulțumesc **Спасибо** Ngiyabonga

Ďakujem Tack Nandri Kop khun **Teşekkür ederim** Дякую Хвала Diolch