What's New in Project Operations – 2023 Release Wave 2

Adi Vijayashankar
Amar Kumar
Venkatesh Vadlamani
Martin Walker

Agenda

- What's New 2023 Release Wave 2 - Feature Reviews
- Q&A

Generate project plan using Copilot

GA ✓

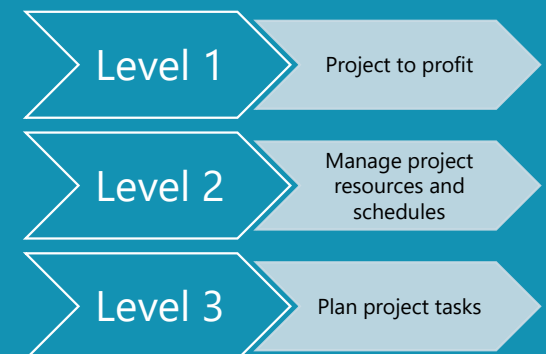On a project, a project manager can generate the WBS using generative AI.

Once the project description is updated, generative AI can produce a hierarchical task structure for the project with durations.

The project manager can then edit the task plan for any changes, add or remove tasks, edit durations, and add dependencies between tasks with a great starting point.

Business Process Catalog Reference

Level 1 — Project to profit

Level 2 — Manage project resources and schedules

Level 3 — Plan project tasks

Deployment type:
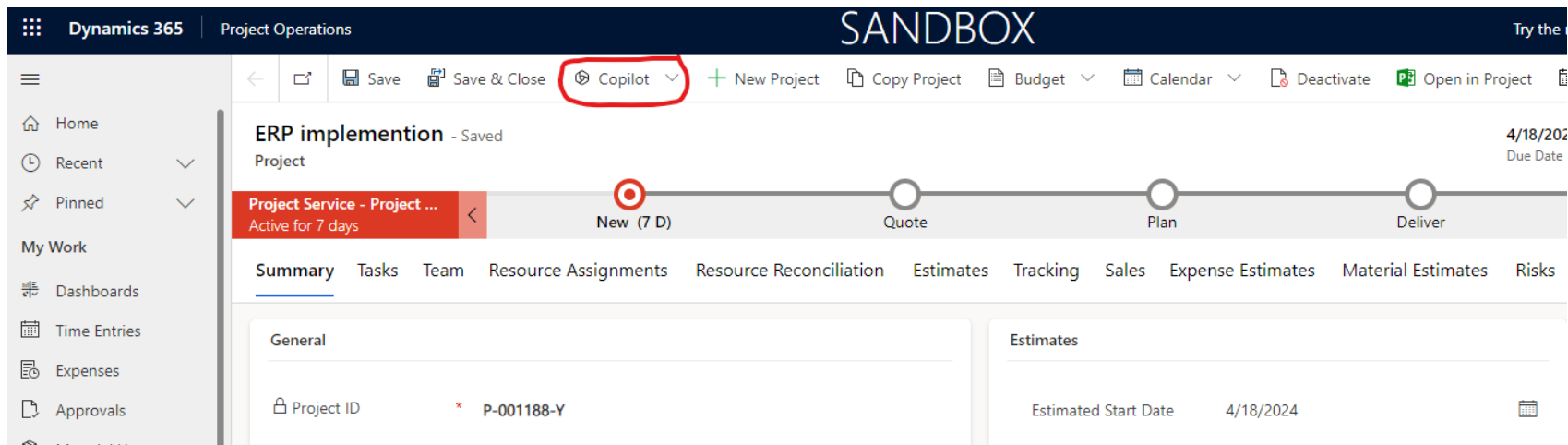
Lite Deployment — Resource non-stock

Use Case – Generate project plan

Contoso Consulting USA is a professional services company who implement ERP for various organisation. Contoso will be using project operations resource/non-stock to manage their projects.

As project manager for D365 implementation, June Law wants to create a project plan.

To prepare the project plan quickly and more efficiently, June Law would like to use the new "Task plan" feature in co-pilot to auto-populate the tasks in work breakdown structure which she could then use to make updates.
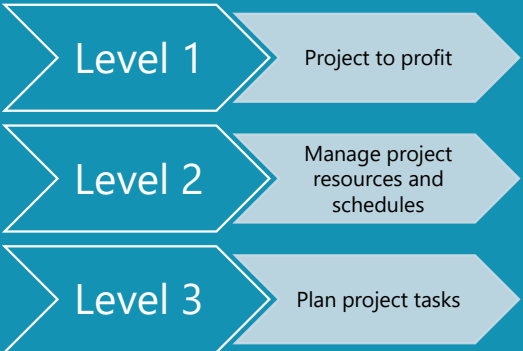
SANDBOX

Focused view | Show Chart | + New Project | Delete | ⌄ | Refresh | Collaborate | Visualize this view | Email a Lin... | Share ⌄

Give your app a fresh new look by trying out the latest layouts, themes, and colors. You can switch back at any time.

All Active Projects ⌄

Filter by keyword

	Project ID ⌄	Name ↑ ⌄	Customer ⌄	Start Date ⌄	Finish Date ⌄	Actual Start ⌄	Actual Finish ⌄	Effort (Ho... ⌄	Effort Com... ⌄	% Complete ⌄	Estimated ... ⌄	Actual Tot... ⌄	Cost Cons... ⌄
	P-001010-Q	AB_ProjectTest	SP Test Cust...	7/25/2022	7/25/2022 4...			0.00	0.00	0.00	$0.00	$0.00	
	P-001195-M	AV D365 ERP & CRM ...	Gamma Sol...	4/25/2024	6/6/2024 12...			0.00	0.00	0.00	$0.00	$0.00	
	P-001170-B	Cost PL Demo		3/25/2024				0.00	0.00	0.00	$0.00	$0.00	
	P-001182-M	Drug Discovery	Gamma Sol...	4/16/2024	8/20/2024 1...			0.00	0.00	0.00	$0.00	$0.00	
	P-001188-Y	ERP implemention	Gamma Sol...	4/18/2024	4/18/2024 3...			0.00	0.00	0.00	$0.00	$0.00	
	P-001147-V	EXT PRJ	Gamma Sol...	2/1/2024	12/31/2024 ...			1,000.00	0.00	0.00	$0.00	$0.00	
	P-001163-N	Extr Project for Adob...	Gamma Sol...	3/12/2024				0.00	1.00	100.00	$0.00	$120.00	
	P-001012-R	Fresh Buildout - Facili...	H-E-B	9/19/2022	5/26/2023 1...	9/19/2022		312.00	192.00	52.17	$72,096.00	$35,035.50	40.83
	P-001076-D	Fresh Buildout - Facili...	H-E-B	7/14/2023	9/14/2023 1...			312.00	0.00	0.00	$72,096.00	$0.00	0.00
	P-001013-S	Fresh Buildout - Site ...	H-E-B	10/10/2022	10/13/2022 ...	10/10/2022		88.00	0.00	0.00	$14,480.00	$0.00	0.00
	P-001014-M	Fresh Buildout - Site ...	H-E-B	10/17/2022	10/21/2022 ...	10/17/2022	10/21/2022	56.00	56.00	100.00	$9,904.00	$9,272.00	100.00
	P-001015-H	Fresh Buildout - Site ...	H-E-B	10/24/2022	11/1/2022 1...	10/3/2022	10/28/2022	48.00	48.00	100.00	$8,704.00	$8,704.00	100.00
	P-001016-M	Fresh Buildout - Site ...	Garden Desi...	10/3/2022	1/18/2023 1...			112.00	0.00	0.00	$20,560.00	$0.00	0.00
	P-001023-K	Garden design Nov s...	Garden Desi...	11/14/2022	11/14/2022 ...			0.00	0.00	0.00	$60.00	$0.00	
	P-001039-V	Hong Kong contstruc...	Garden Desi...	1/13/2023	2/9/2023 1:...			91.57	0.00	0.00	$10,932.40	$0.00	0.00
	P-001192-Y	ICV	Gamma Sol...	4/19/2024	4/23/2024 4...			32.00	0.00	0.00	$12,448.00	$0.00	0.00
	P-001193-J	ICV2	Gamma Sol...	4/19/2024	4/24/2024 1...			48.00	0.00	0.00	$13,520.00	$0.00	0.00
	P-001044-L	Installation work	RB Hyperdri...	1/19/2023				0.00	0.00	0.00	$0.00	$0.00	
	P-001046-C	LA Project AD	LA test lead	2/16/2023	3/4/2023 1:...	2/16/2023	3/3/2023	88.00	0.00	0.00	$27,944.00	$0.00	0.00
	P-001029-Q	MAW_TestPS01	MW Test Cu...	11/23/2022	12/2/2022 1...			56.00	0.00	0.00	$6,552.00	$0.00	0.00

Navigation (left sidebar)

Home
Recent
Pinned

My Work
- Dashboards
- Time Entries
- Expenses
- Approvals
- Material Usage

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

Save   Save & Close   Copilot   + New Project   Budget   Calendar   Deactivate   Open in Project   Book   Delete   Refresh Project Totals   Refresh   Share

Copilot

Simplify project management using Copilot: plan tasks, assess risks with mitigations, and track project progress, financials, and schedules seamlessly

Dynamics 365 ERP & CRM implementation
Project

| | $0.00 | --- | 0.00 |
| Due Date | Estimated Labor Cost | Cost Consumption % | Progress % |

Project Service - Project ...
Active for less than one mi...

New (< 1 Min) — Quote — Plan — Deliver — Complete — Close

Summary Tasks Team Resource Assignments Resource Reconciliation Estimates Tracking Sales Expense Estimates Material Estimates Risks Calendar Related ∨

General

🔒 Project ID	* P-001196-F
Name	* Dynamics 365 ERP & CRM implementation
Description	Dynamics 365 Finance, Operations and Sales implementation including all phases initiate, implement, prepare and operate
🔒 Owning Company	* USPM
Customer	---
🔒 Scheduling engine	Project for the Web
🔒 Currency	US Dollar
🔒 Scheduling Engine	Project for the Web
Contracting Unit	* Contoso Robotics US
Project manager	* Adi VijayShankar

Status

Overall Project Status	---
Comments	---

Estimates

Estimated Start Date	4/26/2024
Finish Date	---
Effort (Hours)	0.00
Estimated Labor Cost	$0.00
Estimated Expense Cost	$0.00
Estimated Material Cost	$0.00
🔒 Estimated Total Cost	$0.00

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	$0.00
🔒 Actual Expense Cost	$0.00
🔒 Actual Material Cost	$0.00
🔒 Actual Total Cost	$0.00
🔒 Effort Completed (Hours)	0.00

Timeline

Search timeline

Enter a note...

Get started

Navigation sidebar:

Home
Recent
Pinned

My Work
Dashboards
Time Entries
Expenses
Approvals
Material Usage

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

← ⬀ 💾 Save   💾 Save & Close   ⊛ Copilot ∨   + New Project   📄 Budget ∨   📅 Calendar ∨   📄 Deactivate   📄 Open in Project   📅 Book   🗑 Delete   📄 Refresh Project Totals   ↻ Refresh   ⋮   ↪ Share ∨

⚠ You have 2 notifications. Select to view.   ∨

Dynamics 365 ERP & CRM implementation - Saved
Project

| --- | $0.00 | --- | 0.00 |
| Due Date | Estimated Labor Cost | Cost Consumption % | Progress % |

| Project Service - Project ... | New (< 1 Min) | Quote | Plan | Deliver | Complete | Close |
| Active for less than one mi... | | | | | | |

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Contracting Unit	* ⊡ Contoso Robotics US
Project manager	* AV Adi VijayShankar

Status

Overall Project Status	---

Estimates

Estimated Start Date	4/26/2024 📅
Finish Date	--- 📅
Effort (Hours)	0.00
Estimated Labor Cost	$0.00
Estimated Expense Cost	$0.00
Estimated Material Cost	$0.00
🔒 Estimated Total Cost	$0.00

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	$0.00
🔒 Actual Expense Cost	$0.00
🔒 Actual Material Cost	$0.00
🔒 Actual Total Cost	$0.00
🔒 Effort Completed (Hours)	0.00

Timeline   + 🔖 ▽ ☰ ⋮

🔍 Search timeline

✎ Enter a note... 📎

Increase WBS limits to 1,500 tasks

✓ GA

This feature enhances the flexibility and complexity of project planning and management by providing an enhanced capability to generate comprehensive work breakdown structures for up to 1000 tasks.

It empowers you to create structures that are twice as extensive as the current limit

Business Process Catalog Reference

Level 1 — Project to profit

Level 2 — Manage project resources and schedules

Level 3 — Plan project tasks

Deployment type:

Lite Deployment — Resource non-stock

Display save status notification for WBS changes

GA

This feature displays the status of an ongoing save operation to anyone viewing the project in Project Operations.

Business Process Catalog Reference

Level 1 — Project to profit

Level 2 — Manage project resources and schedules

Level 3 — Plan project tasks

Deployment type:

Lite Deployment — Resource non-stock

Display save status notification for WBS changes

In-Progress

Saved

Failed

Remove team member limits for externally scheduled projects

✓ **GA**

This feature allows customers using externally scheduled projects to assign more than 300 team members per externally scheduled project. This limit was designed to accommodate Project for the web and is not required for projects that use other project management tools.

Business Process Catalog Reference

Level 1 — Project to profit

Level 2 — Govern project

Level 3 — Develop PM plan

Deployment type:

Lite Deployment — Resource non-stock
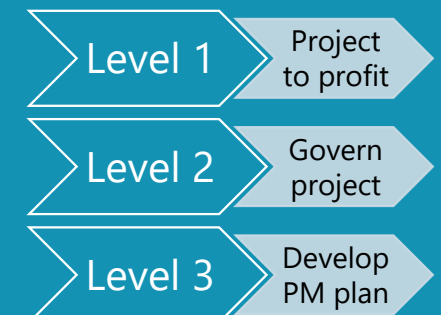
Get recommendations on best resources for your project

Resource recommendations capability aids Project Managers to review the resources intuitively, compare multiple resources, shortlist and proceed to book them for the project.

Resource Challenges: Availability and skill match are common challenges in resource scheduling for project managers.

Balancing Priorities: Project managers must balance cost, utilization, availability, and skill match, which can sometimes conflict.

Employee vs. External Resource: Choosing between an employee and an external resource significantly impacts business viability and profitability.

Deployment type:

| Lite Deployment | Resource non-stock |
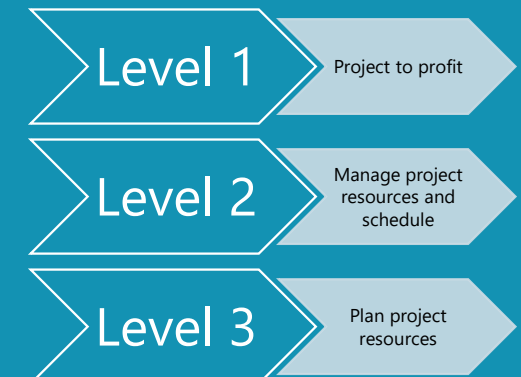
Level 1	Project to profit
Level 2	Manage project resources and schedule
Level 3	Plan project resources

Get recommendations on best resources for your project

Prerequisite

Feature Control

• Enable Resource Recommendation Engine Feature in Project Operations

Enable below dataflow
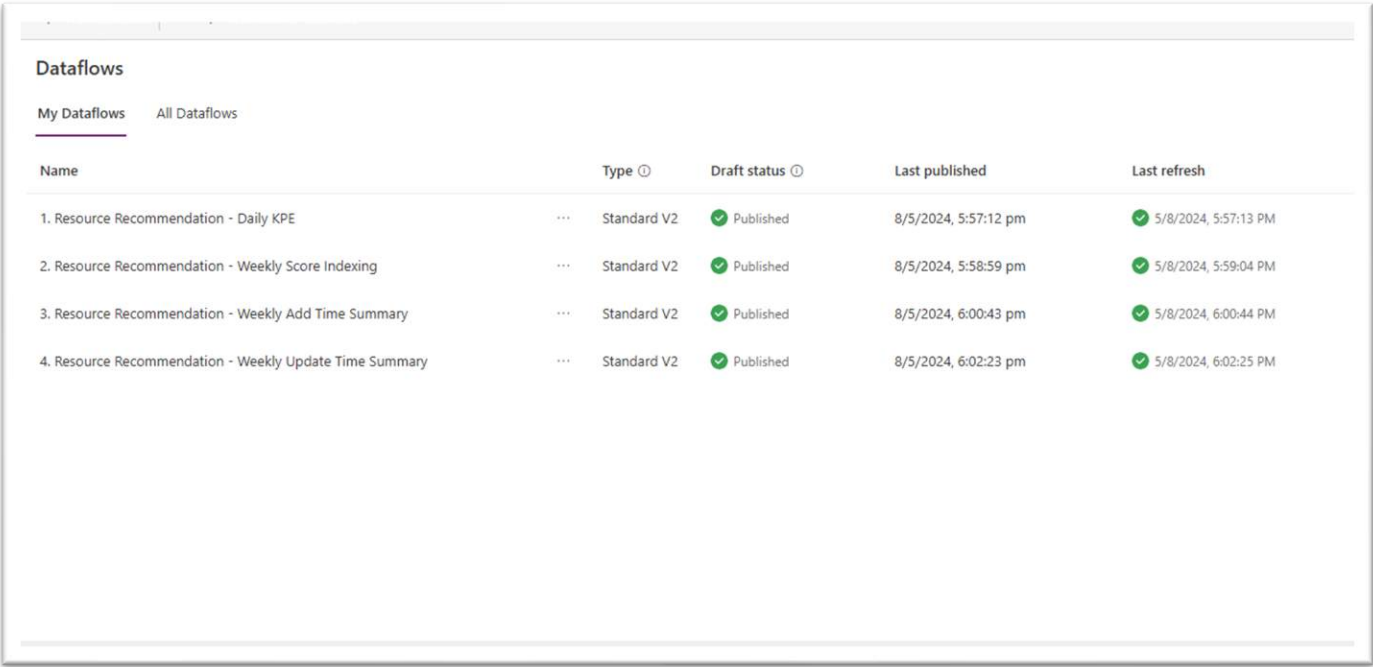
1. Resource Recommendation - Daily KPE
2. Resource Recommendation - Weekly Scoring Indexing
3. Resource Recommendation - Weekly Add Time Summary
4. Resource Recommendation - Weekly Update Time Summary

Activate these dataflows in sequence

Check the refresh timestamp against all these dataflow before using the feature.

References:

[Prerequisites to use resource recommendations (preview) | Microsoft Learn](#)

Dataflows

My Dataflows   All Dataflows

Name		Type ⓘ	Draft status ⓘ	Last published	Last refresh
1. Resource Recommendation - Daily KPE	···	Standard V2	✓ Published	8/5/2024, 5:57:12 pm	✓ 5/8/2024, 5:57:13 PM
2. Resource Recommendation - Weekly Score Indexing	···	Standard V2	✓ Published	8/5/2024, 5:58:59 pm	✓ 5/8/2024, 5:59:04 PM
3. Resource Recommendation - Weekly Add Time Summary	···	Standard V2	✓ Published	8/5/2024, 6:00:43 pm	✓ 5/8/2024, 6:00:44 PM
4. Resource Recommendation - Weekly Update Time Summary	···	Standard V2	✓ Published	8/5/2024, 6:02:23 pm	✓ 5/8/2024, 6:02:25 PM

Dynamics 365 | Project Operations

New look ⬤

My Active Projects

Edit columns Edit filters Filter by keyword

	Project ID ⌄	Name ↑ ⌄	Customer ⌄	Start Date ⌄	Finish Date ⌄	Actual Start ↑ ⌄	Actual Finish ⌄	Effort (Hou... ⌄	Effort Com... ⌄	% Complete ⌄	Estimated T... ⌄	Actual Tota... ⌄	Cost Consu... ⌄
☐	P-001182-M	Drug Discovery	Gamma Solut...	4/16/2024	8/20/2024 5:...			0.00	0.00	0.00	$0.00	$0.00	
☐	P-001188-Y	ERP implemention	Gamma Solut...	4/18/2024	4/18/2024 9:...			0.00	0.00	0.00	$0.00	$0.00	
☐	P-001199-H	FP Percentage Balance	Gamma Solut...	5/2/2024	5/30/2024 1:...			0.00	0.00	0.00	$0.00	$0.00	
☐	P-001200-T	FP Percentage Balance 2	Gamma Solut...	5/14/2024	7/10/2024 5:...			8.00	0.00	0.00	$2,704.00	$0.00	0.00
☐	P-001192-Y	ICV	Gamma Solut...	4/19/2024	4/23/2024 9:...			32.00	0.00	0.00	$12,448.00	$0.00	0.00
☐	P-001193-J	ICV2	Gamma Solut...	4/19/2024	4/24/2024 5:...			48.00	8.00	16.67	$13,520.00	$1,800.00	14.74
☐	P-001181-B	Office renovation	Gamma Solut...	4/15/2024	4/20/2024 5:...			0.00	0.00	0.00	$0.00	$0.00	
☐	P-001201-W	QUICK Create	Gamma Solut...	5/14/2024	7/23/2024 5:...			400.00	0.00	0.00	$135,200.00	$0.00	0.00
☐	P-001189-L	Sample project	Gamma Solut...	4/18/2024	4/26/2024 5:...			40.00	8.00	20.00	$12,112.00	$2,704.00	22.32
☐	P-001180-H	TT FY 23 W2 00001	Gamma Solut...	4/1/2024	5/8/2024 5:3...			0.00	0.00	0.00	$0.00	$0.00	
☐	P-001197-R	TT FY 23 W2 00002	Gamma Solut...	5/1/2024	5/31/2024 12...	4/29/2024		176.00	164.00	77.36	$40,696.00	$37,430.00	77.61
☐	P-001211-J	TT FY 23 W2 00003	Gamma Solut...	5/1/2024	7/10/2024 5:...			400.00	0.00	0.00	$77,648.00	$0.00	0.00
☐	P-001212-Z	TT FY 23 W2 00004	Gamma Solut...	4/1/2024	7/10/2024 5:...			400.00	0.00	0.00	$77,648.00	$0.00	0.00
☐	P-001217-N	TT FY 23 W2 00005	Gamma Solut...	6/1/2024	8/10/2024 5:...			400.00	14.00	3.50	$77,648.00	$1,890.00	2.43

Rows: 14

Sidebar Navigation

Home
Recent
Pinned

My Work
Dashboards
Time Entries
Expenses
Approvals
Material Usage

Projects
Projects
Schedule Board
Resource Utilization
Resources
Roles
Contract Workers
Project Reports

Purchasing
Vendors
Purchase Price Lists
Subcontracts
Contracted Resou...
Materials on Order
Subcontract Miles...

Projects

Toolbar
← Focused view | Show Chart | + New Project | Delete | Refresh | Collaborate | Visualize this view | Email a Link | Flow | Excel Templates | Export to Excel | Share

Enable default financial dimensions for bookable resources

✓ **GA**

This feature recognizes the financial dimensions specified on the employee from time entries and brings the employee reference into the integration journal.

The employee's financial dimensions applies to the integration journal, and costs will be posted with the employee's financial dimensions to both the project subledger and the associated general ledger voucher.

Business Process Catalog Reference

Level 1 — Project to profit

Level 2 — Manage project delivery

Level 3 — Enter time — Approve time

Deployment type:
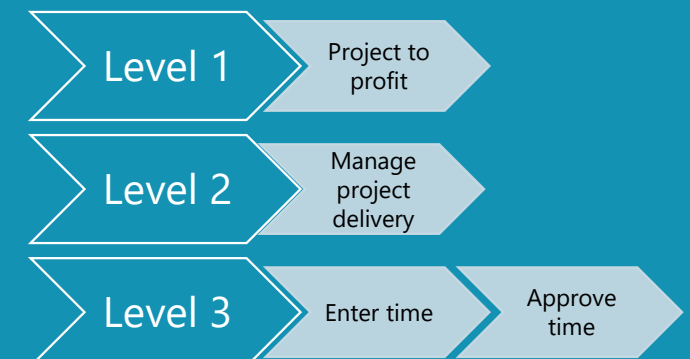
Resource non-stock

Use case to enable default financial dimensions for bookable resources

Contoso Robotics USA (USPM) is a professional services company who implement ERP for various organisation. Contoso will be using project operations resource/non-stock to manage their projects.

All employees are expected to submit their timesheet weekly by 4 pm on Friday.

In the employee master, Contoso Robotics capture the service line financial dimension of each employee so that it gets captured while timesheet is being processed in project operations.

- Adi is a Solution Architect, working in the Business Application department.

- He is setup as an employee in the Employee master of USPM with "Strategy Consulting" as the Service line financial dimension.

- When Adi is submitting his timesheet in Project Operations , Adi's resource is linked to the integration journal and cost should be posted with the financial dimension into the project subledger and associated general ledger voucher with financial dimension mapped.

Worker to Bookable resource

Enable default financial dimension for bookable resources

Worker to Bookable resource

Prerequisite

Required Dual write solutions
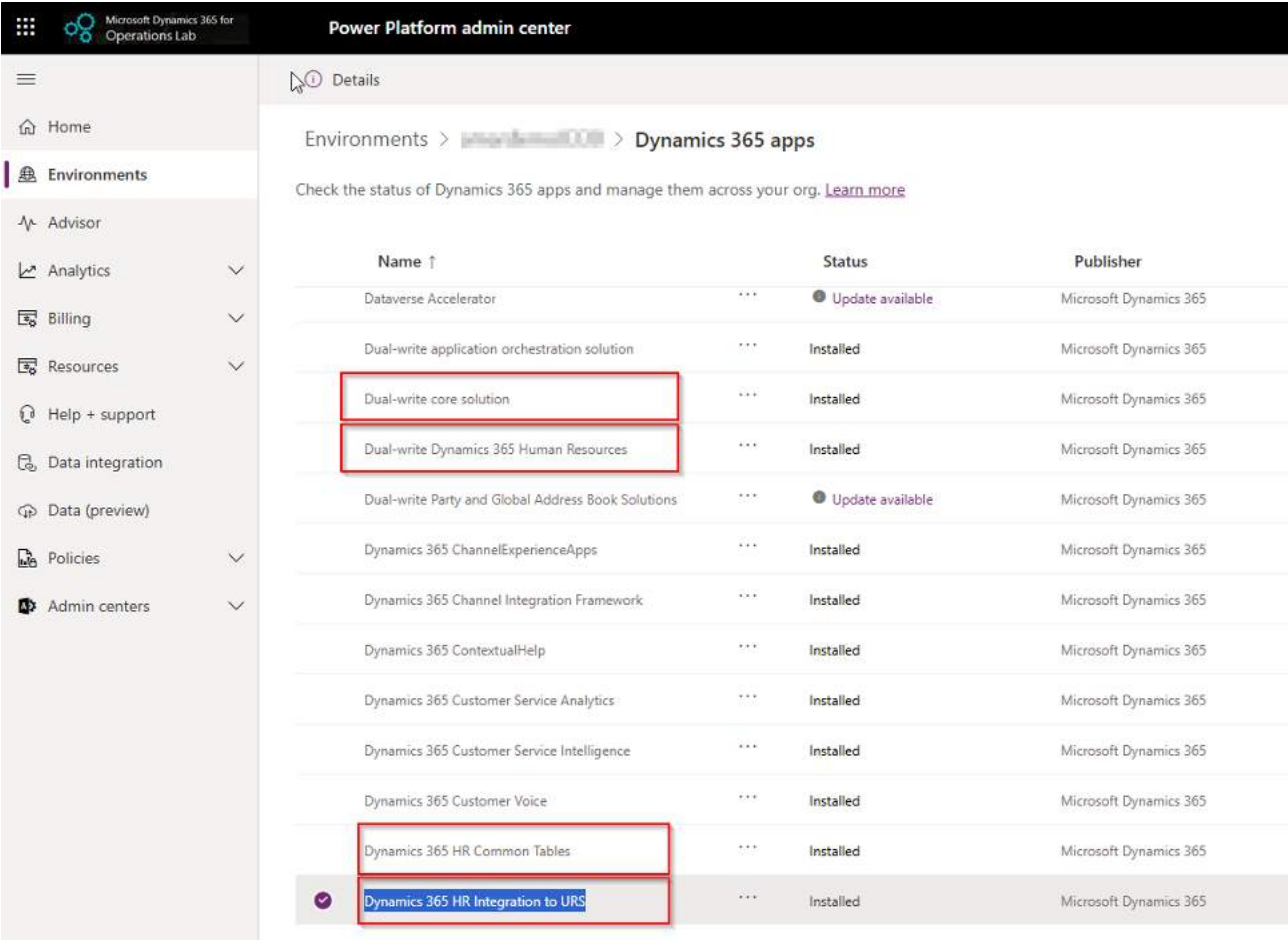
- Dual-write core solution
- Dynamics 365 HR common tables
- Dual-write Dynamics 365 Human Resource
- Dynamics 365 HR Integration to URS

Dual Write maps –Initial Sync from FO>CE

- *Worker*
- *Certificate type*
- *Skills*
- *Rating level*
- *Rating model*

References:

[Human resources to bookable resource integration - Human Resources | Dynamics 365 | Microsoft Learn](#)

Enable default financial dimensions for bookable resources

Prerequisite

Required Dual write solutions

- Dynamics 365 HR Integration to URS

Feature (to be enabled in FO)

- Use employment default dimensions on integration journals

Dual Write maps –Initial Sync from CE>FO

- *Project worker resource import*

References:

Financial dimension defaults | Microsoft Learn

Edit   + New   Delete   Options

Skills | Adi VJ

Standard view ⌄

Filter

Skill	Level type	Level	Level date	Examiner	Years of experi...	Verified	Verified by
	Actual						

← Edit + New ⬚ Delete Options

Skills | Adi VJ

Standard view ⌄

🔍 Filter

Skill	Level type	Level	Level date	Examiner	Years of experi...	Verified	Verified by
	Actual						

KA

← ▯ ⊏ 🖫 Save   🖫 Save & Close   + New   ▦ Show Work Hours   ▱ Deactivate   🗑 Delete   ↻ Refresh   🔍 Check Access   ▤ Process ⌄   ⩗ Assign   ⯮ Flow ⌄   ⋮   ⤴ Share ⌄

Adi VijayShankar - Saved
Bookable Resource

General   Project Service   Scheduling   Work Hours   Omnichannel   **Time Entries**   Related ⌄

☰ Home

🕒 Recent ⌄

📌 Pinned ⌄

Resources

▣ Resources

▦ Schedule Board

⧉ Utilization

▤ Requirements

⯮ Bookings

⯮ Requests

Settings

▤ Roles

▤ Skills

☆ Proficiency Models

↕ Priorities

⯮ Requirement Statuses

⚑ Booking Statuses

⚙ Scheduling Paramete...

▤ Show Chart   + New Time Entry   ▤ Add Existing Time Entry   ↻ Refresh   ⯮ Flow ⌄   ▦ Run Report ⌄   ▦ Excel Templates ⌄   ▦ Export Time Entries   ⌄   Show As ⌄

Time Entry Associated View ⌄

🔍 Filter by keyword

R Resources ⌄

← | □ | □ | 🖫 Save | 🖫 Save & Close | + New | 🖵 Show Work Hours | 🗋 Deactivate | 🗑 Delete | ↻ Refresh | 🔍 Check Access | 🗗 Process ∨ | 🖳 Assign | ⌇ Flow ∨ | ⋮ | 🖉 Share ∨

Adi VijayShankar - Saved
Bookable Resource

General | Project Service | Scheduling | Work Hours | Omnichannel | **Time Entries** | Related ∨

🖼 Show Chart | + New Time Entry | 🗒 Add Existing Time Entry | ↻ Refresh | ⌇ Flow ∨ | 🔲 Run Report ∨ | 🔳 Excel Templates ∨ | 🔳 Export Time Entries | ∨ | Show As ∨

Time Entry Associated View ∨

🔍 Filter by keyword

Resources

🏠 Home

🕐 Recent ∨

📌 Pinned ∨

Resources

🖻 Resources

📅 Schedule Board

🖵 Utilization

🗎 Requirements

🔀 Bookings

🔀 Requests

Settings

🖳 Roles

🖳 Skills

⭐ Proficiency Models

⎁ Priorities

🔀 Requirement Statuses

🏳 Booking Statuses

⚙ Scheduling Paramete...

R Resources ⇅

Create budgets with summarization during estimate import

GA ✓

This feature enables flexible forecast line creation from budgets by summarizing budget lines at a task, role, or contract level for better forecast management.

Business Process Catalog Reference

Level 1 — Project to profit

Level 2 — Manage project financials

Level 3 — Manage project budget

Deployment type:

Lite Deployment — Resource non-stock
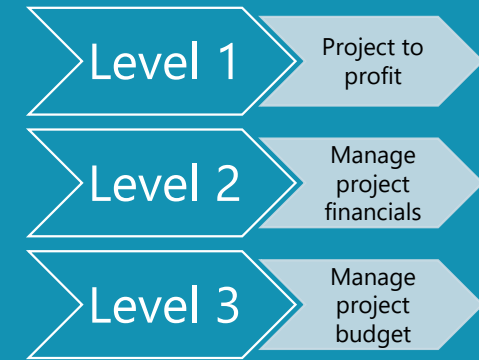
Use Case – Support historical tracking using project sales budget

June Law, the project manager has already created task plan and assigned the generic roles for the tasks and now while she wants to generate budget based on the estimate. Although, while generating the budget she wants it to be generated at higher aggregate level for cost budgets.

Project WBS Estimate → Create budget period → Create and summarize budget as needed

← ⊡ 🖫 Save 🖫 Save & Close ⊛ Copilot ∨   + New Project 🗋 Copy Project 🖹 Budget ∨   🖾 Calendar ∨   🗋 Deactivate 🖳 Open in Project 🖾 Book 🗋 Delete 🖺 Refresh Project Totals ↺ Refresh ⋮   ☛ Share ∨

≡

- ⌂ Home
- ◔ Recent ∨
- ⌿ Pinned ∨

My Work

- ⚏ Dashboards
- 🖾 Time Entries
- 🗟 Expenses
- 🗋 Approvals
- 🏦 Material Usage

Projects

- 🖾 Projects
- 🖾 Schedule Board
- ⊑ Resource Utilization
- 🖾 Resources
- ⚖ Roles
- ⚐ Contract Workers
- 🖾 Project Reports

Purchasing

- 🖳 Vendors
- 🖾 Purchase Price Lists
- 🗑 Subcontracts
- 🗟 Contracted Resource...
- 🖾 Materials on Order
- 🖾 Subcontract Mileston...
- 🖾 Vendor Invoices

P Projects ◇

TT FY 23 W2 00007 - Saved
Project

9/28/2024 5:30 AM $77,648.00   0.00   0.00 ∨
Due Date   Estimated Labor Cost   Cost Consumption %   Progress %

Project Service - Project ... | ● New (69 Hrs)   ○ Quote   ○ Plan   ○ Deliver   ○ Complete   ○ Close
Active for 69 hours

Summary Tasks Team Resource Assignments Resource Reconciliation Time phased estimates Tracking Sales Estimates Risks Calendar Related ∨

General

🔒 Project ID   *   P-001227-M

Name   *   TT FY 23 W2 00007

Description   **Budget definition project**

🔒 Owning Company   *   ✉ USPM

Customer   *   🗟 Gamma Solutions

🔒 Scheduling engine   Project for the Web

🔒 Currency   ♨ US Dollar

🔒 Scheduling Engine   Project for the Web

🔒 Contracting Unit   *   ⊹ Contoso Robotics US

Project manager   *   (KA) Kumar Amar

Status

Overall Project Status   ---

Comments   ---

🔒 Status Updated On   ---

Estimates

Estimated Start Date   7/21/2024   🖾

🔒 Finish Date   9/28/2024   🖾   5:30 AM

🔒 Effort (Hours)   400.00

🔒 Estimated Labor Cost $77,648.00

Estimated Expense Cost $0.00

Estimated Material Cost $0.00

🔒 Estimated Total Cost $77,648.00

Calendar

🔒 Schedule mode   *   Fixed effort

Hours per day   *   8.00

Hours per week   *   40.00

Days per month   *   20

AI Assisted Reports (Reporting Entity)

Actuals

Actual Start   ---   🖾

Actual Finish   ---   🖾

🔒 Actual Labor Cost $0.00

🔒 Actual Expense Cost $0.00

🔒 Actual Material Cost $0.00

🔒 Actual Total Cost $0.00

🔒 Effort Completed (Hours)   0.00

Timeline   + 🔖 ▽ ☰ ⋮

🔍 Search timeline

✎ Enter a note...   📎

⊚ Highlights   ∨

∨ Recent ────────

(KA) Modified on: 1:16 PM
⇌ Note modified by ☌ Kumar Amar   ✎ 🗋 ⚲ 🗑
Project budget creation from selected source completed with er
The budget has been created with 6 budget lines, import...
📎 Log_Budget_Import_7292024 74638 AM.txt

Try the new look

← ⌐ 🖫 Save 🖫 Save & Close ⓢ Copilot ∨ + New Project 🗋 Copy Project 🖹 Budget ∨ 📅 Calendar ∨ 🗋 Deactivate 📊 Open in Project 📅 Book 🗑 Delete 🖹 Refresh Project Totals ↻ Refresh ⋮ ↗ Share ∨

TT FY 23 W2 00007 - Saved
Project

| 9/28/2024 5:30 AM | $77,648.00 | 0.00 | 0.00 |
| Due Date | Estimated Labor Cost | Cost Consumption % | Progress % |

Project Service - Project ...
Active for 69 hours

New (69 Hrs) ─── Quote ─── Plan ─── Deliver ─── Complete ─── Close

Summary Tasks Team Resource Assignments Resource Reconciliation Time phased estimates Tracking Sales Estimates Risks Calendar Related ∨

Navigation (left panel):
- Home
- Recent
- Pinned

My Work
- Dashboards
- Time Entries
- Expenses
- Approvals
- Material Usage

Projects
- Projects
- Schedule Board
- Resource Utilization
- Resources
- Roles
- Contract Workers
- Project Reports

Purchasing
- Vendors
- Purchase Price Lists
- Subcontracts
- Contracted Resource...
- Materials on Order
- Subcontract Mileston...
- Vendor Invoices
- Projects

General

Field	Value
Project ID	P-001227-M
Name	TT FY 23 W2 00007
Description	Budget definition project
Owning Company	USPM
Customer	Gamma Solutions
Scheduling engine	Project for the Web
Currency	US Dollar
Scheduling Engine	Project for the Web
Contracting Unit	Contoso Robotics US
Project manager	Kumar Amar

Status

Field	Value
Overall Project Status	---
Comments	---
Status Updated On	---

Estimates

Field	Value
Estimated Start Date	7/21/2024
Finish Date	9/28/2024 5:30 AM
Effort (Hours)	400.00
Estimated Labor Cost	$77,648.00
Estimated Expense Cost	$0.00
Estimated Material Cost	$0.00
Estimated Total Cost	$77,648.00

Calendar

Field	Value
Schedule mode	Fixed effort
Hours per day	8.00
Hours per week	40.00
Days per month	20

AI Assisted Reports (Reporting Entity)

Actuals

Field	Value
Actual Start	---
Actual Finish	---
Actual Labor Cost	$0.00
Actual Expense Cost	$0.00
Actual Material Cost	$0.00
Actual Total Cost	$0.00
Effort Completed (Hours)	0.00

Timeline

Search timeline

Enter a note...

Highlights

Recent

KA Modified on: 1:16 PM
Note modified by Kumar Amar
Project budget creation from selected source completed with er
The budget has been created with 6 budget lines, import...
Log_Budget_Import_7292024 74638 AM.txt

Support historical tracking using project sales budget

GA ✓

Versioned Snapshot:
Project managers can create these snapshots at different project lifecycle stages, accommodating revisions and scope changes.

Budget Revisions:
Project managers can revise the project sales budget when encountering new scopes or changes.
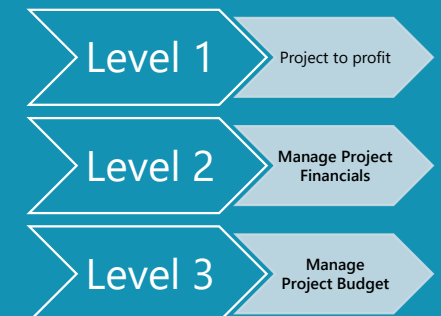This enables ongoing tracking of billed sales against the updated budget.

This feature helps with planning Project budget management and time-phased forecasting

Business Process Catalog Reference

Create and delete project sales budgets | Microsoft Learn

Deployment type:

Lite Deployment   Resource non-stock

Level 1 — Project to profit

Level 2 — Manage Project Financials

Level 3 — Manage Project Budget

Use Case – Support historical tracking using project sales budget

Contoso Consulting USA is a professional services company who implement ERP for various organisation. Contoso will be using project operations resource/non-stock to manage their projects. Definition of budget and proper versioning in case of any revisions becomes the import ask by project managers.

June Law, while working on a project can easily create budget based on estimate defined and in case of any possible changes after project execution has started, she will be able to revise the project budget by creating a new version.

Initial version
- Import from Estimate
- Approval

Budget Revision
- Unplanned Actuals
- Changing reality of the project

← 目 ⊡ | 🖫 Save 🖫 Save & Close ⊛ Copilot ∨ + New Project 🗋 Copy Project 🖹 Budget ∨ 📅 Calendar ∨ 🕃 Deactivate 📊 Open in Project 📅 Book 🗑 Delete 🖹 Refresh Project Totals ⋮   ↩ Share ∨

TT FY 23 W2 00008 - Saved
Project

9/28/2024 5:30 AM | $77,648.00 | 3.13 | 4.50
Due Date | Estimated Labor Cost | Cost Consumption % | Progress %

Project Service - Project ... < | New (7 Min) | Quote | Plan | Deliver | Complete | Close
Active for 7 minutes

Summary Tasks Team Resource Assignments Resource Reconciliation Time phased estimates Budget Tracking Sales Task Billing Setup Estimates Risks Calendar Actuals Related ∨

General

🔒 Project ID	P-001229-F
Name	TT FY 23 W2 00008
Description	Budget definition project
🔒 Owning Company	🏢 USPM
🔒 Customer	🔲 Gamma Solutions
🔒 Scheduling engine	Project for the Web
🔒 Currency	💰 US Dollar
🔒 Scheduling Engine	Project for the Web
🔒 Contracting Unit	🔗 Contoso Robotics US
Project manager	🔵 Kumar Amar

Status

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

Estimates

Estimated Start Date	7/21/2024
🔒 Finish Date	9/28/2024 5:30 AM
🔒 Effort (Hours)	400.00
🔒 Estimated Labor Cost	$77,648.00
Estimated Expense Cost	$0.00
Estimated Material Cost	$0.00
🔒 Estimated Total Cost	$77,648.00

Calendar

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

AI Assisted Reports (Reporting Entity)

Actuals

Actual Start	---
Actual Finish	---
🔒 Actual Labor Cost	$2,430.00
🔒 Actual Expense Cost	$0.00
🔒 Actual Material Cost	$0.00
🔒 Actual Total Cost	$2,430.00
🔒 Effort Completed (Hours)	18.00

Timeline

🔍 Search timeline

✏ Enter a note...

🔵 Highlights

Recent

🔵 Modified on: 9:39 PM
≡ Note modified by ⊡ Kumar Amar ✏ 🗋 ✂ 🗑
Project budget creation from selected source completed success
The budget has been created successfully with 6 budget ...
View more

Side navigation:

- ⌂ Home
- ⏱ Recent ∨
- 📌 Pinned ∨

My Work
- Dashboards
- Time Entries
- Expenses
- Approvals
- Material Usage

Projects
- Projects
- Schedule Board
- Resource Utilization
- Resources
- Roles
- Contract Workers
- Project Reports

Purchasing
- Vendors
- Purchase Price Lists
- Subcontracts
- Contracted Resource...
- Materials on Order
- Subcontract Mileston...
- Vendor Invoices

P Projects

Dynamics 365 | Project Operations

Try the new look | Save | Save & Close | Copilot | + New Project | Copy Project | Budget | Calendar | Deactivate | Open in Project | Book | Delete | Refresh Project Totals | Share

TT FY 23 W2 00008 - Saved
Project

9/28/2024 5:30 AM — Due Date
$77,648.00 — Estimated Labor Cost
3.13 — Cost Consumption %
4.50 — Progress %

Project Service - Project ...
Active for 7 minutes

New (7 Min) — Quote — Plan — Deliver — Complete — Close

Summary | Tasks | Team | Resource Assignments | Resource Reconciliation | Time phased estimates | Budget | Tracking | Sales | Task Billing Setup | Estimates | Risks | Calendar | Actuals | Related

General

Project ID	P-001229-F
Name	TT FY 23 W2 00008
Description	Budget definition project
Owning Company	USPM
Customer	Gamma Solutions
Scheduling engine	Project for the Web
Currency	US Dollar
Scheduling Engine	Project for the Web
Contracting Unit	Contoso Robotics US
Project manager	Kumar Amar

Status

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

Estimates

Estimated Start Date	7/21/2024
Finish Date	9/28/2024 — 5:30 AM
Effort (Hours)	400.00
Estimated Labor Cost	$77,648.00
Estimated Expense Cost	$0.00
Estimated Material Cost	$0.00
Estimated Total Cost	$77,648.00

Calendar

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

AI Assisted Reports (Reporting Entity)

Actuals

Actual Start	---
Actual Finish	---
Actual Labor Cost	$2,430.00
Actual Expense Cost	$0.00
Actual Material Cost	$0.00
Actual Total Cost	$2,430.00
Effort Completed (Hours)	18.00

Timeline

Search timeline

Enter a note...

Highlights

Recent

Modified on: 9:39 PM
Note modified by Kumar Amar
Project budget creation from selected source completed success
The budget has been created successfully with 6 budget ...
View more

Dynamics 365 | Project Operations

Try the new look

Save | Save & Close | Copilot | + New Project | Copy Project | Budget | Calendar | Deactivate | Open in Project | Book | Delete | Refresh Project Totals | Share

TT FY 23 W2 00008 - Saved
Project

9/28/2024 5:30 AM — Due Date
$77,648.00 — Estimated Labor Cost
3.13 — Cost Consumption %
4.50 — Progress %

Project Service - Project ... — Active for 7 minutes | New (7 Min) | Quote | Plan | Deliver | Complete | Close

Summary | Tasks | Team | Resource Assignments | Resource Reconciliation | Time phased estimates | Budget | Tracking | Sales | Task Billing Setup | Estimates | Risks | Calendar | Actuals | Related

General

Field	Value
Project ID	P-001229-F
Name	TT FY 23 W2 00008
Description	Budget definition project
Owning Company	USPM
Customer	Gamma Solutions
Scheduling engine	Project for the Web
Currency	US Dollar
Scheduling Engine	Project for the Web
Contracting Unit	Contoso Robotics US
Project manager	Kumar Amar

Status

Field	Value
Overall Project Status	---
Comments	---
Status Updated On	---

Estimates

Field	Value
Estimated Start Date	7/21/2024
Finish Date	9/28/2024 5:30 AM
Effort (Hours)	400.00
Estimated Labor Cost	$77,648.00
Estimated Expense Cost	$0.00
Estimated Material Cost	$0.00
Estimated Total Cost	$77,648.00

Calendar

Field	Value
Schedule mode	Fixed effort
Hours per day	8.00
Hours per week	40.00
Days per month	20

AI Assisted Reports (Reporting Entity)

Actuals

Field	Value
Actual Start	---
Actual Finish	---
Actual Labor Cost	$2,430.00
Actual Expense Cost	$0.00
Actual Material Cost	$0.00
Actual Total Cost	$2,430.00
Effort Completed (Hours)	18.00

Timeline

Search timeline

Enter a note...

Highlights

Recent

Modified on: 9:39 PM
Note modified by Kumar Amar
Project budget creation from selected source completed success
The budget has been created successfully with 6 budget ...
View more

Navigation (left sidebar)

- Home
- Recent
- Pinned

My Work
- Dashboards
- Time Entries
- Expenses
- Approvals
- Material Usage

Projects
- Projects
- Schedule Board
- Resource Utilization
- Resources
- Roles
- Contract Workers
- Project Reports

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- Vendors
- Purchase Price Lists
- Subcontracts
- Contracted Resource...
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- Subcontract Mileston...
- Vendor Invoices

Projects

Assess issues and risks using project manager Copilot

GA ✓

The project manager can be on top of the project and leverage copilot to assess risks and issues with minimal effort.

With Copilot, the project manager can do:
- Periodic Assessment:
  - Copilot assesses the project periodically.
  - Data on risks and issues is recorded in Project Operations.

- Risk Mitigation:
  - Copilot generates mitigation plans for identified risks.
  - Project managers can customize these plans.

Business Process Catalog Reference

Level 1 — Project to profit

Level 2 — Monitor and analyse project performance

Level 3 — Monitor project status

Deployment type:

Lite Deployment — Resource non-stock

Dynamics 365 | Project Operations

Try the new look ⬤

KA

← 🗅 ↗ 💾 Save 🖫 Save & Close ◎ Copilot ⌄ + New Project 🗎 Copy Project 🗎 Budget ⌄ 📅 Calendar ⌄ 🗎 Deactivate 🗎 Open in Project 🗓 Book 🗑 Delete 🗎 Refresh Project Totals ⋮ ↗ Share ⌄

① Risk assessments were created with AI. Make sure AI-ge... ...using. Learn more at https://go.microsoft.com/fwlink/?linkid=2239705
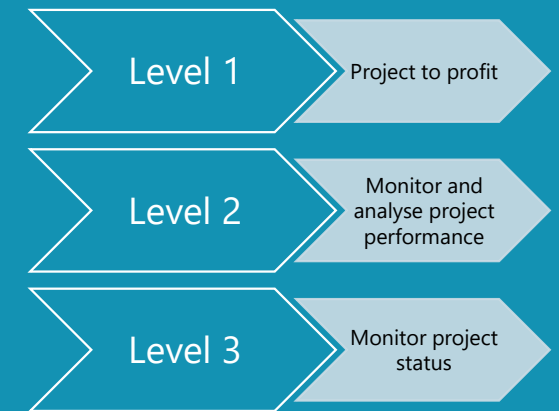
Status report >
Task plan
Risk Assessments

TT FY 23 W2 00002 — Saved
Project

| 5/31/2024 12:00 AM | $40,696.00 | 77.61 | 77.36 |
| Due Date | Estimated Labor Cost | Cost Consumption % | Progress % |

Project Service - Project ...
Active for 56 days

New — Quote — Plan — Deliver — Complete (53 D) — Close

Summary | Tasks | Team | Resource Assignments | Resource Reconciliation | Time phased estimates | Budget | Tracking | Sales | Task Billing Setup | Estimates | Risks | Calendar | Related ⌄

General

🔒 Project ID	*	P-001197-R
Name	*	TT FY 23 W2 00002
Description		Resource recommendations, Budget, Project status and Issue and Risk register
🔒 Owning Company	*	🔷 USPM
🔒 Customer		🔲 Gamma Solutions
🔒 Scheduling engine		Project for the Web
🔒 Currency		🔵 US Dollar
🔒 Scheduling Engine		Project for the Web
🔒 Contracting Unit	*	🔷 Contoso Robotics US
Project manager	*	KA Kumar Amar

Estimates

Estimated Start Date	5/1/2024	📅
🔒 Finish Date	5/31/2024 📅	12:00 AM
🔒 Effort (Hours)	176.00
🔒 Estimated Labor Cost	$40,696.00
Estimated Expense Cost	$0.00
Estimated Material Cost	$0.00
🔒 Estimated Total Cost	$40,696.00

Calendar

🔒 Schedule mode	*	Fixed effort
Hours per day	*	8.00
Hours per week	*	40.00

Actuals

Actual Start	4/29/2024	📅
Actual Finish	---	📅
🔒 Actual Labor Cost	$37,430.00
🔒 Actual Expense Cost	$0.00
🔒 Actual Material Cost	$0.00
🔒 Actual Total Cost	$37,430.00
🔒 Effort Completed (Hours)	164.00

Timeline

🔍 Search timeline

✎ Enter a note...

💬 Highlights ⌄

Cost Budget

Generate status reports with project manager Copilot

✓ **GA**

Every project manager must send status reports periodically. Usually, these reports contain information relating to the progress of work, budgets, and schedule tracking.

With generative AI, this currently manual task and overhead can be automated. The topics in the status report will cover the following and more:
- Budget tracking
- Vendor and employee productivity
- Work progress and deliverable tracking
- Profitability and revenue targets
- Invoicing status

Business Process Catalog Reference

Level 1 — Project to profit

Level 2 — Monitor and analyse project performance

Level 3 — Monitor project status

Deployment type:

Lite Deployment — Resource non-stock
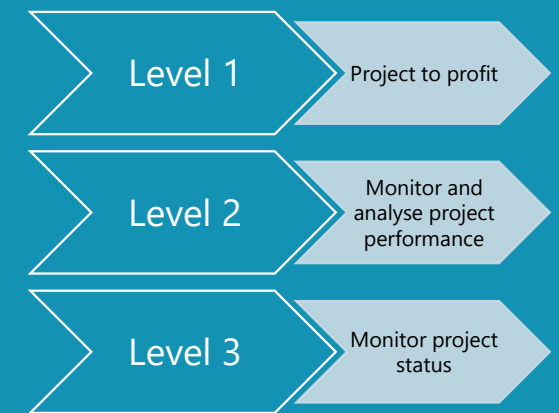
Use Case – Generate status report

Contoso Consulting USA is a professional services company who implement ERP for various organisation. Contoso will be using project operations resource/non-stock to manage their projects.

As project manager for D365 implementation, June Law wants to create an internal status report.

To prepare the status report quickly and more efficiently, June Law would like to use the new "internal report" feature in co-pilot.

Dynamics 365 | Project Operations

Try the new look

← 📄 ⎘ 💾 Save 💾 Save & Close | ⊕ Copilot ⌄ | + New Project | ⎗ Copy Project | 📅 Budget ⌄ | 📅 Calendar ⌄ | ⬚ Deactivate | 📊 Open in Project | 📅 Book | 🗑 Delete | ⋮ | ⬈ Share ⌄

MWDemoProject3 - Saved
Project

3/2/2024 1:00 AM — Due Date
$362,160.00 — Estimated Labor Cost
0.37 — Cost Consumption %
0.33 — Progress %

| Project Service - Project ... Active for 10 months | ‹ | ⦿ 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	📅
	1:00 AM	
🔒 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.

Left sidebar navigation:
- Home
- Recent ⌄
- Pinned ⌄

My Work
- Dashboards
- Time Entries
- Expenses
- Approvals
- Material Usage

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

Use deferrals for stock or production project scenarios

GA

This feature includes the following capabilities:

- Configure cost and revenue deferrals for different project transaction types.
- Record deferred cost and revenue to the project subledger.
- Adjust project transactions with cost and revenue deferrals

Business Process Catalog Reference

Deployment type:

Stock/Production

Level 1 — Project to profit

Level 2 — Manage project financials

Level 3 — Correct project transactions
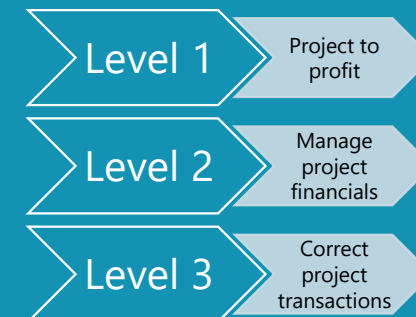
Use case for deferrals for stock or production project scenarios

Contoso Consulting USA is a professional services company who implement ERP for various organisation. Contoso will be using project operations stocked deployment to manage their projects.

Contoso's customer agrees to pay for a yearly subscription for support contract upfront. However, Contoso would like to create a deferral schedule to enable project cost for the service to be deferred monthly. Also, Contoso would like to generate bills for the entire year as subscription fee for services .

Contoso USA can configure and use advanced cost and revenue deferrals. A deferral schedule can be created to enable project revenue for the service to be recognized monthly. This approach helps manage revenue for the project, because it can be recognized when it's earned.

Project groups

Project group
TM_Def

Name
Time and materials with defe...

General ⌃

Project type
Time and material

Ledger posting search priority
Category

Line property search priority
Project

Default line property
Billable

Verify cost against remaining for...
◯ No

Ledger ⌃

Post costs - hour
Deferred

Post costs - expense
Deferred

Post costs - item
Deferred

On-account invoicing
Balance

Accrue revenue - hour
◯ No

Accrue revenue - expense
◯ No

Accrue revenue - item
◯ No

Accrue revenue - fee
◯ No

Deferred revenue - hour
⬤ Yes

Deferred revenue - expense
⬤ Yes

Deferred revenue - item
⬤ Yes

Deferred revenue - fee
⬤ Yes

Estimate ⌄

Cost accounts ⌄

Revenue accounts ⌄

Cancel PO receipts with connected item requirements

✅ **GA**

This feature allows you to cancel the product receipt for purchase orders - created from projects, not invoiced and associated with item requirements.

This feature will:
- Cancel posted item requirement packing slip
- Create reversal for posted project transaction
- The original entry and reversal entry are connected and aren't available for further adjustment

Business Process Catalog Reference

Deployment type:

Stock/ production

Level 1 — Project to profit

Level 2 — Manage project delivery

Level 3 — Consume materials on project

USSI
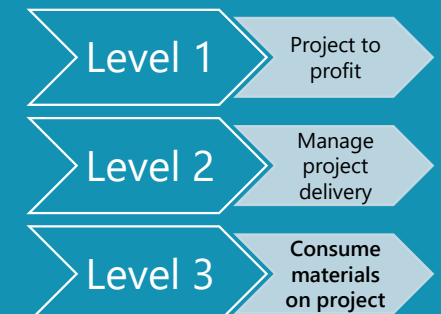
‹ ≡ ✎ Edit + New 🗑 Delete | Purchase order | Purchase | Manage | Receive | Invoice | Retail | Warehouse | Transportation | General | Options | 🔍

Generate

Receipts list   Pro forma receipts list
Product receipt   Pro forma product receipt
Intercompany picking list

Journals

Receipts list
Product receipt

All purchase orders | Standard view ⌄

Received

00000230 : US_SI_000006 - Capable Sales and Service   I Received   ✎ Confirmed

Lines | Header

Summary by Copilot	⌄

Purchase order header	⌄

Purchase order lines

+ Add line   ⁺ Add lines   Add products   🗑 Remove   Purchase order line ⌄   Financials ⌄   Inventory ⌄   Product and supply ⌄   Update line ⌄   Warehouse ⌄   Engineering change ⌄

○	Ty...	Budget check r...	Line number	Item number	Product name	Procurement category	Variant number	CW quantity	CW unit	Quantity	Unit	Unit price	Adjusted unit ...	Disc
○			1	S0018	Hardware: Network device					10.00	ea	3,144.00	0.00000	

Line details	⌃

Progress-based billing on fixed-price contracts

Microsoft Dynamics 365 Project Operations currently supports a milestone-based billing schedule so that companies can invoice their customers at predetermined amounts and dates during course of the project. However, a variation of this exists where a portion of the milestone is invoiced each period instead of the whole milestone. This feature enables project managers to split the value of the contract into a distinct schedule of values that are invoiced based on the progress of the work.
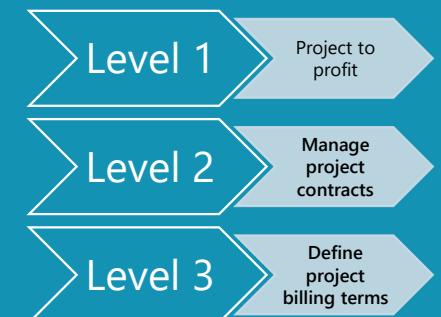
Business Process Catalog Reference

Level 1 — Project to profit

Level 2 — Manage project contracts

Level 3 — Define project billing terms

Deployment type:

Lite Deployment — Resource non-stocked (in roadmap)

SANDBOX

New look ⬤ 🔍

← ⬈ 💾 Save | 🖫 Save & Close | 🗑 Delete | ↻ Refresh | 🔑 Check Access | ⤢ Flow ∨ | 📑 Word Templates ∨ | 📊 Run Report ∨ | ⤴ Share ∨

MWTC1FP1 - Saved
Order Line · Project Information ∨

General   Chargeable Roles   Chargeable Categories   Project Contract Line Details   **Progress based invoice schedules**   Customers   Related ∨

Billing Start Date   8/5/2024   ▦

🚩 Generate Periodic Mil...   ⋮

☐	Milestone N... *↑∨	Project ∨	Project T...∨	Milestone Amount ∨	Next invoice % ∨	Next i...∨	Next in... *∨	Billing S...∨	Invoic... ∨
☐ ∨	08/31/2024			$50,000.00	20.0000	$10,0...	Ready f...	Not Sta...	$0.00

☐	Project Contract Line Customer ↑∨	Milestone Amount ∨	Milestone Date ∨	Invoice Status ∨	⧉
☐	A Datum Corporation	$40,000.0000	8/31/2024	Not Ready for invoicing	⧉
☐	A Datum Corporation	$10,000.0000	8/31/2024	Ready for invoicing	⧉

Rows: 2

| ☐ > | 09/30/2024 | | | $50,000.00 | 40.0000 | $20,0... | Ready f... | Not Sta... | $0.00 |
| ☐ ∨ | 10/31/2024 | | | $50,000.00 | 75.0000 | $37,5... | Ready f... | Not Sta... | $0.00 |

☐	Project Contract Line Customer ↑∨	Milestone Amount ∨	Milestone Date ∨	Invoice Status ∨	⧉
☐	A Datum Corporation	$12,500.0000	10/31/2024	Not Ready for invoicing	⧉

Rows: 6

Improved project invoicing usability and performance

GA ✓

Improvements to the invoice revision (correction) process that significantly reduces the time to correct project-based lines on proforma invoices.

Business Process Catalog Reference

Level 1 — Project to profit

Level 2 — Manage project financials

Level 3 — Create project invoices

Deployment type:

Lite Deployment — Resource non-stock
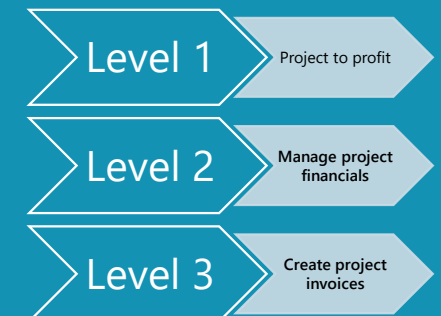
Improved project invoicing usability and performance

One of the critical aspects of project manager role is ensuring accurate and timely invoicing, newly added efficiencies help manage the projects effectively. The new usability investment that she can leverage are

With just a few clicks, PM efficiently reviews upcoming invoices in the project management system, identifying discrepancies with ease.

Correcting billable hours by selecting relevant transactions, effortlessly revising them, and ensuring accurate invoice amounts.

Adding missed billable items to the invoice during the review, ensuring a seamless process and preventing revenue gaps.

Flagging complex transactions for later review, maintaining focus on critical tasks without losing sight of important issues.

Evaluates the impact of changes on the invoice amount, gaining confidence to approve it.

Improvement in the scale and throughput which leverages xMultiple paradigms and parallelize CRUD options

These enhancements help the project manager to efficiently manage Projects financials, ensuring quick invoice generation, maintaining operational metrics, and satisfying clients.

Support for intercompany vendor invoices in resource and non-stocked based scenarios

GA ✓

Project Operations resource-based scenarios require support for intercompany vendor invoices. This feature allows the accounts payable team to record the intercompany invoice received from the supplier. There are scenarios where a supplier provides services to more than one legal entity and creates one invoice as required by the terms and conditions.

Business Process Catalog Reference

Deployment type:

Stocked	Resource non-stock

Level 1	Project to profit

Level 2	Manage Project delivery

Level 3	Purchase materials for project
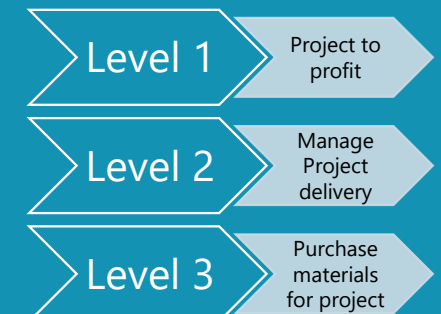
Use Case

Contoso Consulting is a professional services company who implement ERP for various organisation, they have presence in UK and USA. Contoso will be using project operations resource/non-stocked deployment to manage their projects.

Contoso subcontracts tax services for their customers. These services are required for customers of Contoso UK (GBPM) and Contoso USA (USPM) and the supplier is based in the US. In this context, the supplier can send an invoice for services performed for customers of Contoso UK to Contoso USA.

USPM | Contoso Robotics USA

Search for a page
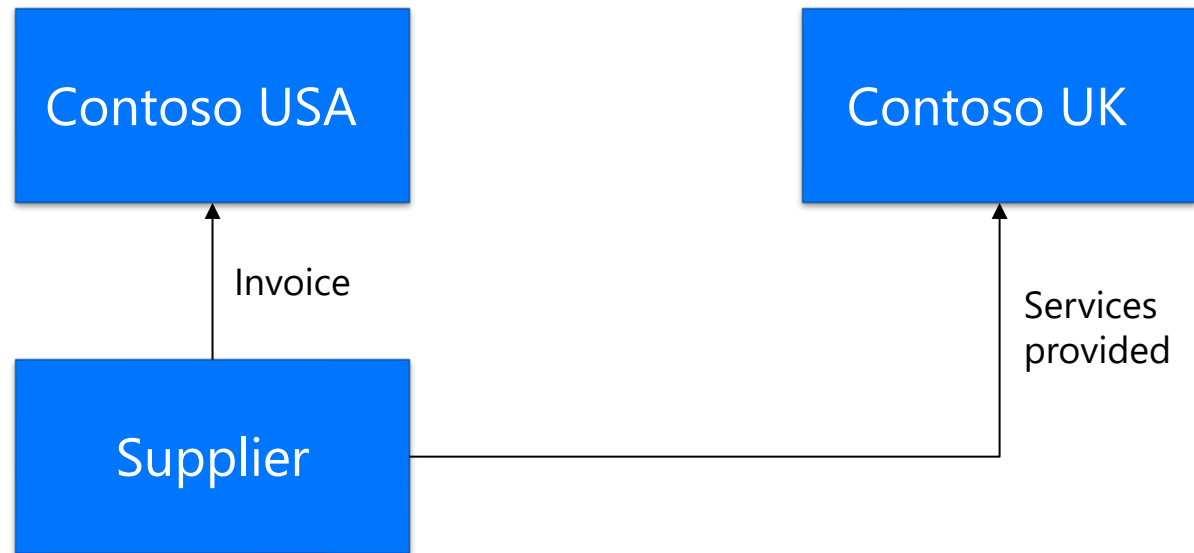
← ☰ 💾 Save + New 🗑 Delete   Match product receipts   Update match status   Totals   Post   Default from: Product receipt quantity ∨   📎 Attachments (0)   **Vendor invoice**   Financials   Review   Process   Options 🔍

Actions

Apply prepayment

Open lines in Excel

Vendor invoice | Standard view ∨

SPV001 : ABC Contractors

Lines   Header

Vendor invoice header

VENDOR		INVOICE IDENTIFICATION	Invoice description	RELATED DOCUMENTS	Product receipt	INVOICE DATES	Invoice date	Posting date	INVOICE STATUS DETAILS	Match status
Company	Invoice account	Number		Purchase order		Invoice received date	7/10/2024	7/10/2024	On hold	Not performed
uspm	ABC1001	SPV001				7/10/2024			○ No	
	ABC Contractors			Purchase agreement		Date of vendor VAT register	Due date		Header budget check results	
							7/10/2024		Budget check not performed	

Lines

+ Add line   🗑 Remove   Invoice line ∨   Financials ∨   Inventory ∨   Update line ∨

○ ⟳	Budget ch...	Item number	Item name	Procurement category	Deferred	Quantity	Unit	CW quantity	CW unit	Unit price	Line net a...	Product receipt qu...	Price match	Purchase order	Product re...	Auto-gene...
○				Subcontract labor	No	10.00	ea			100.00	1,000.00	Not performed	Not performed			☐

Line details

Line details   Setup   Product   Price and discount   **Project**   Foreign trade   Fixed assets   Financial dimensions   1099

PROJECT IDENTIFICATION	Project ID	Activity number	Project category	Item number	Line property	Role	TRANSACTION	COST PRICE	Unit price
Project company	P-001162-N		Default-Expense		Chargeable		Transaction ID	Quantity	100.00
gbpm							USPM-014272	10.00	Net amount
						Resource name	Project date		1,000.00
							7/10/2024		

Block vendor payments for vendor invoices until PM approval

GA ✓

This feature:
- Allows the accounts payable clerk to record the subcontractor invoice but holds the payments for project manager approval.
- Ensures the project manager approves the subcontractor invoices, performs three-way matching in Dataverse, and reconciles the invoice with the services delivered.
- Enables the accounts payable team to make the subcontractor payments using payment journals or the payment proposal process after the project manager gives approval.

Deployment type:
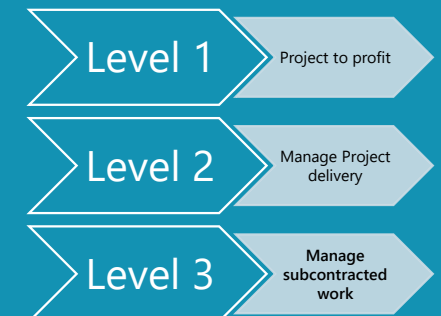
Resource non-stock

Level 1 — Project to profit

Level 2 — Manage Project delivery

Level 3 — Manage subcontracted work

Use Case

Contoso Consulting USA is a professional services company who implement ERP for various organisation. Contoso will be using project operations resource/non-stocked deployment to manage their projects.

Contoso subcontracts tax services for their customers. After the completion of the task and validation of the invoice receipted from the subcontractor, the project manager would like to approve the payment before it is processed by accounts payable.

← 💾 Save   Options   🔍

Standard view ⌄

Project management and accounting parameters

General	**Set up financial information for projects**		
Financial	**DETAIL LEDGER POSTING**	**PROJECT - SALES TAX**	Calculation date type
Intercompany	Invoice	Sales tax group method	Invoice date ⌄

Set up financial information for projects

DETAIL LEDGER POSTING

Invoice

Total	⌄

DETAIL WIP LEDGER POSTING

Post costs

Total	⌄

Accrue revenue

Total	⌄

Estimate

Total	⌄

PROJECT - SALES TAX

Sales tax group method

Project	⌄

Item sales tax group method

Item number	⌄

Fixed price milestone item sales tax gr...

HOURS	⌄

Calculation date type

Invoice date	⌄

Display the default description text of ...

⚪ No

LEDGER

Automatically set accounting date to ...

🔵 Yes

ACCOUNTS RECEIVABLE FINANCIAL DIMENSIONS

Allow updates to project dimensions f...

🔵 Yes

VENDOR INVOICE

Manual verification by PM is required

🟢 Yes

Block vendor payments till PM confir...

🟢 Yes

Left navigation:
General
Financial
Intercompany
Set up invoicing options
Number sequences
Project Operations on Dynamics 365 Customer Engagement

← Edit   Voucher   View settlements   Settlement ∨   Paid by checks   Original document   Open details   Promissory note   Reverse ∨   Vendor 1099 transactions   Inquiry ∨

Vendor transactions | Cov19 : ABC1001

Standard view ∨

Show
All ∨

Date
7/2/2024

☐ Hide currency revaluations

List   **General**   Payment   Promissory note   Settlement   Remittance   History   1099   Financial dimensions

LEDGER

Transaction type
Purchase order

Correction
◯ No

Posting profile
Default

Posting definition

FOREIGN CURRENCY REVALUATION

Last foreign currency revaluation adju...

Last foreign currency revaluation adju...

Last foreign currency revaluation adju...

Reason code

Reason comment

Invoice
Cov19

Approved
⬤ Yes

Personnel number
000020

Invoice payment release date

Release date comment

Approved date
1/11/2023

Document

Document date

Date of vendor VAT register

Tax invoice ID - purchase

Prepayment facture

Receive document date

Expense mobile app

GA ✓

The new expense mobile app lets you easily enter expense details on the go.
You can capture receipts using the camera on your phone, and then match them with credit card or cash expenses. The expense mobile app will be available both on iOS and Android mobile devices.

Dynamics 365 expense management mobile app can perform the following tasks:
- Create expenses and expense reports.
- Use OCR to capture photos of receipts and extract relevant information.
- Create new receipts, attach and detach receipts, and delete receipts.
- Save, submit, and recall expense reports as needed.
- Access the app from the Power Apps mobile app for real-time expense submission.
- Access the app to approve the expense reports.
- Customize the app to fit your organization's needs.

Business Process Catalog Reference

TechTalk – Expense mobile app for Dynamics 365 Project Operations

Level 1	Project to profit
Level 2	Manage project delivery
Level 3	Enter expenses	Correct expenses	Approve expenses

Deployment type:

| Resource non-stock | Stock/ Production |
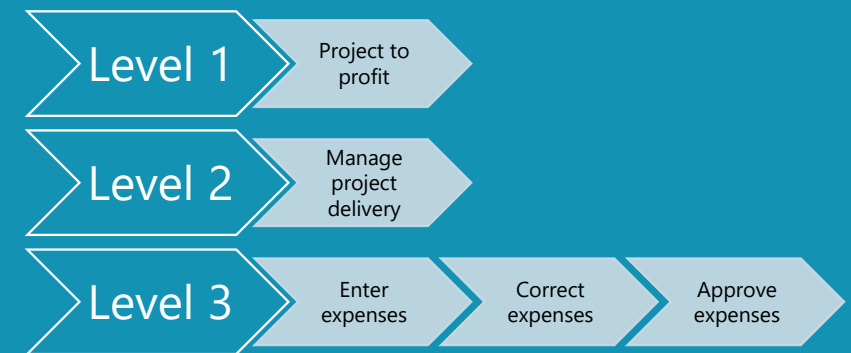
Support prospects on quotes

GA ✓

- A new feature has been implemented to handle the conversion of prospective accounts (prospects) into customer accounts.

- This feature includes user interface components and validation logic, enabling seamless transition and accurate quote generation for a wider range of accounts.

Business Process Catalog Reference

Level 1	Propsect to Quote
Level 2	Manage customer contact
Level 3	Create and manage contacts

Deployment type:

| Lite Deployment | Resource non-stock |

Support prospects on quotes

Create an account with type "Prospect".

Use this Account for creation of Quote.

When this quote is "closed as won" this needs to ensured that prospect is to be converted as "Customer".

Copy quotes and contracts across legal entities

The feature empowers you with the capability to explicitly indicate and define the desired target legal entity, customer, and business unit during the process of duplicating or replicating a quote or contract.

With this functionality, you have complete control and flexibility in specifying the precise entities and units involved in the replication process, thereby enhancing efficiency and accuracy in managing quotes and contracts within their respective contexts.

Business Process Catalog Reference
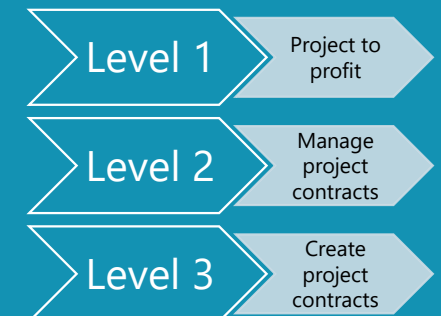
Deployment type:

Resource non-stock

Level 1 — Project to profit

Level 2 — Manage project contracts

Level 3 — Create project contracts

Use Case

Contoso Consulting USA is a professional services company who implement ERP for various organisation. Contoso will be using project operations Resource /Non-stocked deployment to manage their projects across various regions.

June Law, the Sales manager has already created quote for services provided by Contoso Consulting USA to a custom er. June Law wants to create a quote for service provided by Contoso Consulting UK which is similar to the quote prepared earlier for Contoso Consulting USA.

Note: This can also be used to copy contracts across legal entities.

Copy Contract

Select the properties and the pricing option for the new contract.

Topic	*	TNM2-copy
Customer	*	🗄 Olive and Cherry S... ✕ 🔍
Contracting Unit	*	🏛 Contoso Robotics ... ✕ 🔍
Currency	* 🔒	💰 US Dollar
Request Delivery Date	*	7/2/2024 🔲
Copy Pricing		No

OK   **Close**

TNM2 - Saved
Order

Summary   Contract Line

Sales Order Number   * 🔒

Owning Company   * 🔒

Name   * 🔒

Customer   * 🔒

Account Manager   + 🔒

Product Price List   * 🔒
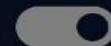
Opportunity   🔒

Home

Recent ⌄

Pinned ⌄

Customers
- Customers
- Contacts
- Price Lists

Sales
- Leads
- Opportunities
- Quotes
- **Project Contracts**

Transactions

Support cost-plus pricing for resource time

Currently, Project Operations supports the ability to define a bill rate across multiple dimensions. However, the cost is presently not a supposed configuration. This new feature provides the ability to define line items in a sales price rate as a function of a related cost rate. Enabling these capabilities supports less risk-averse contracting models such as cost plus.

Business Process Catalog Reference
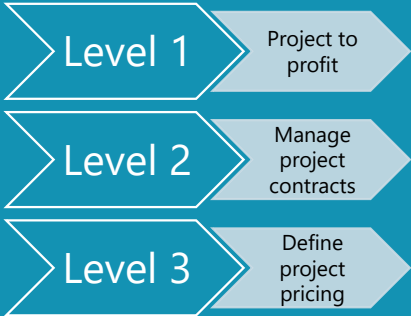
Deployment type:

Lite Deployment | Resource non-stock

Level 1 — Project to profit

Level 2 — Manage project contracts

Level 3 — Define project pricing

Use Case

Contoso Consulting USA is a professional services company who implement ERP for various organisation. Contoso will be using project operations resource/non-stocked deployment to manage their projects.

Scenario 1 :
When billing the customers , Contoso consulting USA need to have a 25% margin over the cost incurred when resources book time against the project. Using this feature the sales price for the resources time can be arrived as a markup on the cost actual ensuring the margin is constantly maintained

Scenario 2:
When billing the customers , Contoso consulting USA want to provide 20% discount on the cost incurred for project managers time and 40 % discount on account managers time as an initial fee was already collected as collateral to start the work. Using this feature, we can define a price based on role and give a –ve value to markup

New Role Price - Saved
Role Price

General   **Date Effective Overrides**   **Related** ⌄

Resourcing Company	🧩 INPM ✕	🔍

Resourcing Unit 🔒   ⊟ Contoso Robotics Global

Unit Schedule 🔒   ⬚ Time

Unit	🧩 Hour ✕	🔍

Description   ---

Pricing

Price Calculation *   Markup over transaction cost

Price 🔒

Markup over transaction cost   15.00

Currency 🔒   💰 Indian Rupee

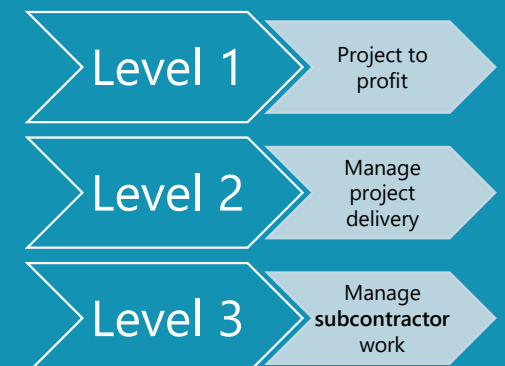# Explore advanced subcontract capabilities

GA ✓

- Subcontracts are visible to accounts payable as purchase orders, with receipts auto-generated upon work completion.

- Accounts payable can match invoices to reported work using the three-way match policy in Dynamics 365 Finance, preventing incorrect invoices.

Business Process Catalog Reference

| Level 1 | Project to profit |

| Level 2 | Manage project delivery |

| Level 3 | Manage **subcontractor** work |

Deployment type:

Resource non-stock

Resources - General

- [Overview - Dynamics 365 Project Operations | Microsoft Docs](#)

- [Dynamics 365 Project Operations series - Microsoft Dynamics Blog](#)

- [Community - Dynamics 365 General - Forums, Blogs, Support](#)

- [Roadmap](#) - [Product Updates | Microsoft Dynamics 365](#)

- [New and planned features for Dynamics 365 Project Operations](#)
  - [2024 release wave 2 | Microsoft Learn](#)
  - [2024 release wave 1 | Microsoft Learn](#)
  - [2023 release wave 2 | Microsoft Learn](#)

- [Ideas](#) - [Ideas (dynamics.com)](#)

- [FastTrack](#) - [Microsoft FastTrack, move to the cloud with confidence](#)

Microsoft Dynamics 365

Q & A

Microsoft Dynamics 365

Thank you