

What's New in Project Operations – 2025 Release Wave 2

Satish Panwar



Agenda

-
- What's New in Project Operations - Feature Reviews
 - Q&A

Time Entry Delegate



Time Entry – Delegate Setup

The screenshot displays the Dynamics 365 Project Operations interface in a 'SANDBOX' environment. The left-hand navigation pane includes sections for 'My Work' (Dashboards, Time Entries, Expenses, Material Usage, Approvals, Approvals Agent, Time Entry Calend...), 'Delegates (Produ...', 'Projects' (Projects, Schedule Board, Resource Utilization, Resources, Contract Workers, Roles, Project Reports), and 'Purchasing' (Vendors, Projects). The main content area shows the 'Satish Panwar - Saved' Delegate form. The form has tabs for 'General' and 'Related'. The 'General' tab is active, displaying the following fields:

Delegate	* Satish Panwar ×	🔍
Start	* 3/1/2026	📅
End	* 3/31/2026	📅
Organization Unit	🏢 Contoso US	
Delegate Name	* Satish Panwar	
Owner	* Angelo Briccetti (Offline)	

At the top of the interface, the 'Dynamics 365 Project Operations' header is visible, along with the 'SANDBOX' label and various utility icons (Search, Lightbulb, Plus, Filter, Bell, Gear, Question Mark, Copilot, and User Profile 'AB'). The top toolbar includes navigation arrows, 'Save', 'Save & Close', '+ New', 'Flow', and 'Share' options. A 'Form assist' button is located in the top right corner of the form area.

Time Entry – By Delegate

The screenshot displays the Dynamics 365 Project Operations interface. The main window shows a table titled "My Weekly Time Entries*" with columns for Time Source, Project, Project Task, Role, Type, Subcontract, Subcontract Line, Entry Status, Created By, and dates. Two rows are visible, both with a status of "Draft" and created by "Satish Panwar".

Overlaid on the right is the "Quick Create: Time Entry" dialog. It features a search bar for "Bookable Resource" with the text "Look for Bookable Resource". Below this is a dropdown menu for "Bookable Resources" showing "Angelo Briccetti" and "Satish Panwar" as users. Other fields in the dialog include Date, Duration, Type (with a "+ New" option and "Advanced" link), Project, Project Task, Role, Subcontract, Subcontract Line, Description, and External Comments. At the bottom right, there are "Save and Close" and "Cancel" buttons.

Time Sou...	Project	Project Task	Role	Type	Subcontr...	Subcontr...	Entry S...	Created By	Sun 3/22	Mon
Project Ser...				Work			Draft	Satish Panwar		
Project Ser...				Work			Draft	Satish Panwar		

Time Entry – Delegate Setup

Dynamics 365 | Project Operations | **SANDBOX**

← Show As Show Chart Refresh Visualize this view Email a Link Flow Run Report Excel Templates Export to Excel Import from Excel Share

My Weekly Time Entries*

Search views

- Approved Time
- My Rejected Time Entries
- My Time Entries as a Delegate
- My Time Entries by Date
- My Time Entries For This Week ⓘ
- My Time Entries to Copy
- ✓ My Weekly Time Entries* Default
- Time Entries by my Delegates

Save as new view Manage and share views

Submit Recall Delete Refresh Copy week Import Time Agent Edit entry 3/22/2026 - 3/28/2026

Project Task	Role	Type	Subcontr...	Subcontr...	Entry S...	Created By	Sun 3/22	Mon 3/23	Tue 3/24	Wed 3/25	Thu 3/26	Fri 3/27	Sat 3/28	Tot
		Work			Draft	Satish Panwar			1.00					1.00
							0.00	0.00	1.00	0.00	0.00	0.00	0.00	1.00

Projects

Time Entry Format



Time Entry Format – HH:MM

Dynamics 365 | Project Operations | **SANDBOX**

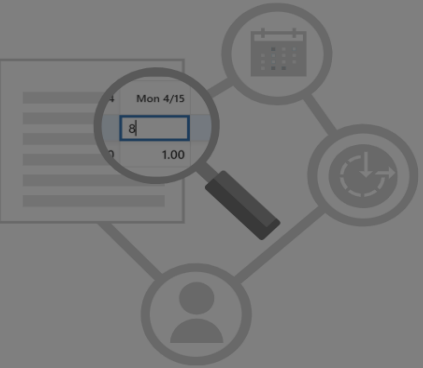
← Show As Show Chart Refresh Visualize this view Email a Link Flow Run Report Excel Templates

My Weekly Time Entries*

+ New Copy row Edit row Submit Recall Delete Refresh Copy week Import Time Agent

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.

Quick Create: Time Entry

Date * 3/24/2026

Duration * 1.33 hours

Duration (HH:MM) 01:20

Type * Work

Project ---

Project Task ---

Role Consulting Lead

Subcontract ---

Subcontract Line ---

Description ---

External Comments ---

Save and Close Cancel

Approvals UI



Approvals UI

Dynamics 365 | Project Operations

SANDBOX

You have 2 notifications. Select to view.

Approvals - Saved

Approvals

Time entries (14) Materials (0) Expenses (3) Recall requests (1) Absences/vacations (0) Non-project entries (0) Admin

Form assist

Calendar view for time approvals

Refresh Flow Run Report Excel Templates

3/22/2026 - 3/28/2026

<input type="checkbox"/>	Project	Task	NTE status	Resource	Billing type	Sun 3/22	Mon 3/23	Tue 3/24	Wed 3/25	Thu 3/26	Fri 3/27	Sat 3/28	Total	
<input type="checkbox"/>	SP Robotic Brew ...		Not Applicable	Satish Pan...	Not Avail...		2.00	1.00	3.00	1.50	6.00		13.50	
<input type="checkbox"/>	SP Robotic Brew ...	Marketing ...	Not Applicable	Satish Pan...	Chargea...		3.00						3.00	
<input type="checkbox"/>	SP Robotic Brew ...	Marketing ...	Not Applicable	Satish Pan...	Not Avail...			2.00	1.00	3.00	2.00		8.00	

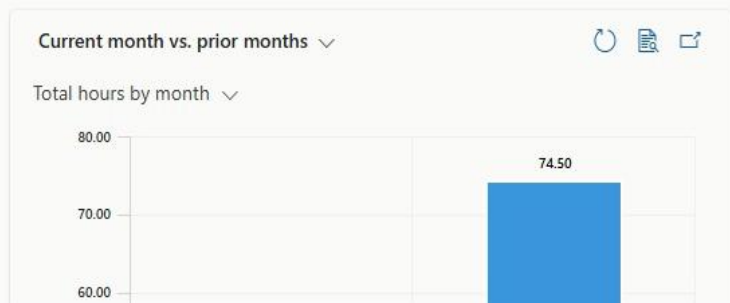
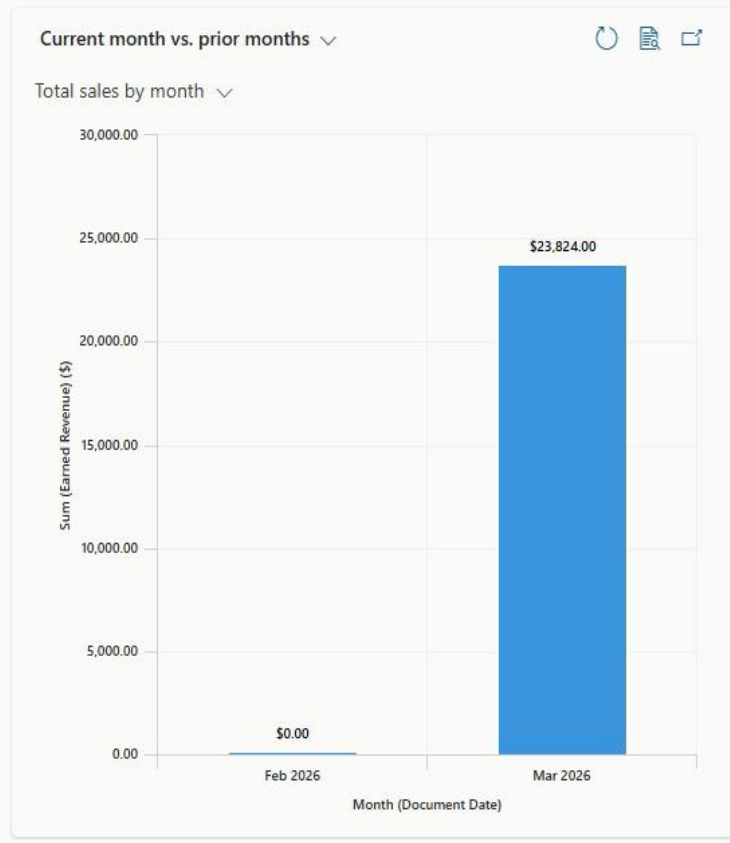
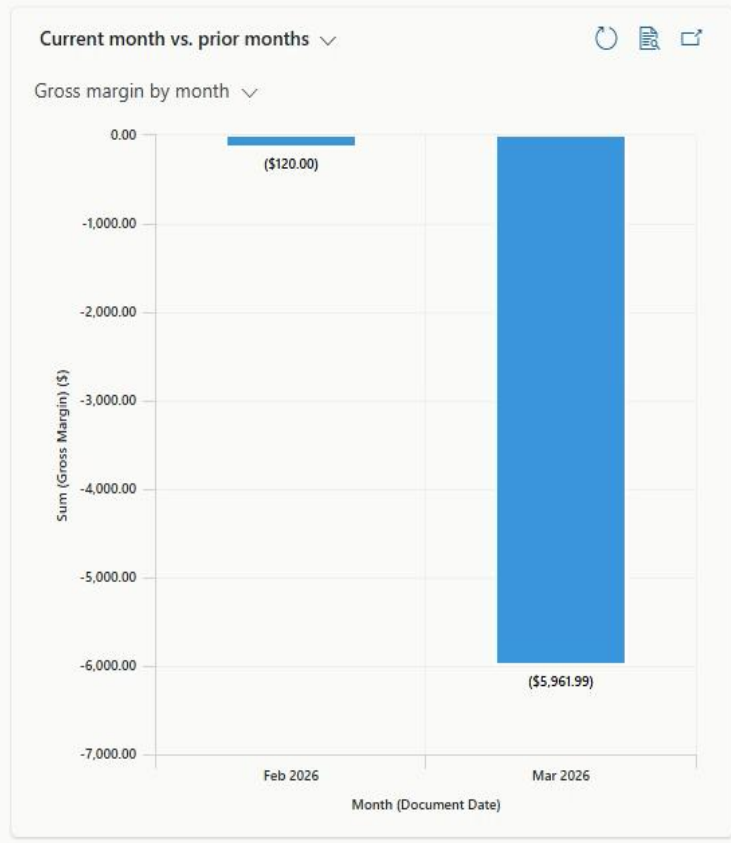
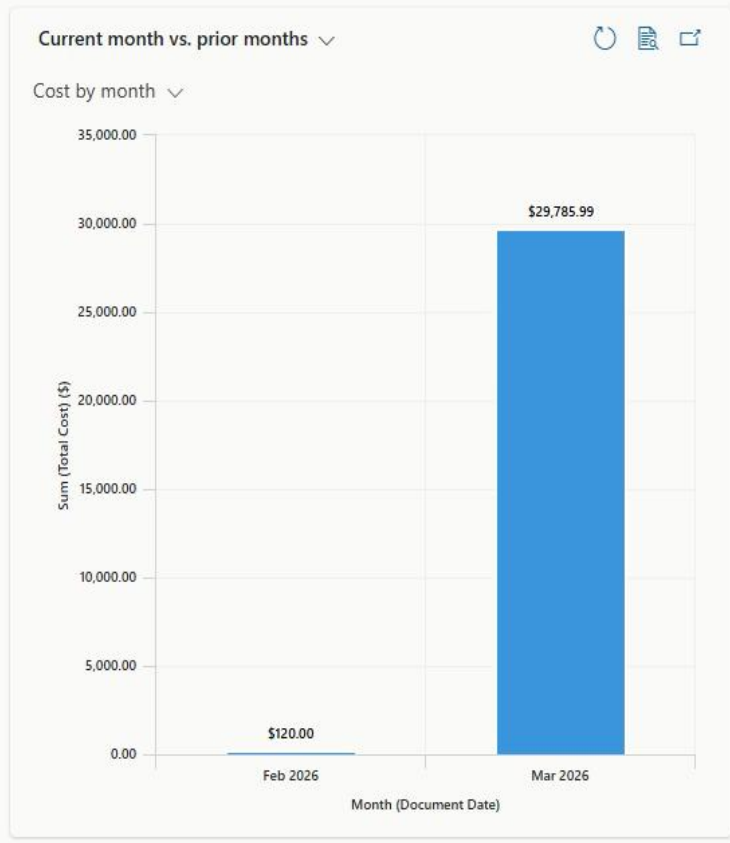
Rows: 1 - 3 of 3

Page 1

- Home
- Recent
- Pinned
- My Work
 - Dashboards
 - Time Entries
 - Expenses
 - Material Usage
 - Approvals
 - Approvals Agent (...)
 - Time Entry Calend...
 - Delegates (Produ...
- Projects
 - Projects
 - Schedule Board
 - Resource Utilization
 - Resources
 - Contract Workers
 - Roles
 - Project Reports
- Purchasing
 - Vendors
- Projects

← Save As + New ✓ Set As Default Refresh All Share

Practice Management Dashboard



Enable improved project budgeting time phasing grid



Time Phased - Budget Lines

Dynamics 365 Project Operations **SANDBOX** Copilot SP

← Save Save & Close Copilot + New Project Copy Project Import Tasks Budget Calendar Deactivate Book Delete Share

Robotic Brew System Modernization - New - Saved 4/8/2026 12:00 AM Due Date \$264,408.00 Estimated Labor Cost 5.62 Cost Consumption % 2.19 Progress %

Project Service - Project ... Active for 6 days New (6 D) Quote Plan Deliver Complete Close

Summary Tasks Team Resource Assignments Resource Reconciliation Time Phased Estimates **Budget** Tracking Sales Estimates Task Billing Setup Risks Calendar Related Form assist

Budget version Version - 1 Status Draft Time Phased Weekly

Sales Budget Lines + New budget line Refresh Flow

Descript...	Tr...	Transact...	Start*	End*	Task	Role	Resource	Resourc...	Select P...	Write In...	Product	Quant...	Unit	Unit Gr...	Unit F
>	Time		3/18/2026	3/28/2026	Marketin...	Team Me...		Contoso ...	Un...			64.00	Hour	Time	\$3
>	Time		3/18/2026	3/25/2026	Assessme...	Project M...	Dishant P...	Contoso ...	Un...			152.00	Hour	Time	\$4
∨	Time		3/18/2026	4/1/2026	Develop T...	Team Me...		Contoso ...	Un...			88.00	Hour	Time	\$3

Name	Start Date	End Date	Quantity	Unit Price	Amount	Extended Amount
2026 Quarter3 March Third	3/18/2026	3/22/2026	24.00	\$350.00	\$8,400.00	\$8,400.00
2026 Quarter3 March Fou...	3/23/2026	3/29/2026	40.00	\$350.00	\$14,000.00	\$14,000.00
2026 Quarter3 March Last	3/30/2026	4/1/2026	24.00	\$350.00	\$8,400.00	\$8,400.00

Rows: 3

>	Time		3/18/2026	3/27/2026	Conduct ...	Team Me...		Contoso ...	Un...			56.00	Hour	Time	\$3
---	------	--	-----------	-----------	-------------	------------	--	-------------	-------	--	--	-------	------	------	-----

Rows: 12

Time Phased - Budget Lines

Dynamics 365 | Project Operations
SANDBOX

Save Save & Close Copilot New Project Copy Project Import Tasks Budget Calendar Deactivate Book Delete
Share

Robotic Brew System Modernization - New - Saved 4/8/2026 12:00 AM Due Date \$264,408.00 Estimated Labor Cost 5.62 Cost Consumption % 2.19 Progress %

Project Service - Project ... Active for 6 days

New (6 D)
Quote
Plan
Deliver
Complete
Close

Summary Tasks Team Resource Assignments Resource Reconciliation Time Phased Estimates **Budget** Tracking Sales Estimates Task Billing Setup Risks Calendar Related

Budget version: Version - 1 Status: Draft Time Phased: Weekly

Sales Budget Lines

3/1/2026 - 5/31/2026 Time Phase: Quantity

	Unit Group	Unit P...	Currency	Budg...	Exten...	3/1/2026	3/8/2026	3/15/2026	3/22/2026	3/29/2026	4/5/2026	4/12/2026	4/19/2026	4/26/2026
						Quantity	Quantity	Quantity	Quantity	Quantity	Quantity	Quantity	Quantity	Quantity
<input type="radio"/>	Time	\$350....	US Dollar	\$22,4...	\$22,4...			24.00	40.00					
<input type="radio"/>	Time	\$425....	US Dollar	\$64,6...	\$64,6...			71.25	80.75					
<input checked="" type="radio"/>	Time	\$350....	US Dollar	\$30,8...	\$30,8...			24.00	40.00	24.00				
<input type="radio"/>	Time	\$350....	US Dollar	\$19,6...	\$19,6...			24.00	32.00					
<input type="radio"/>	Time	\$350....	US Dollar	\$28,0...	\$28,0...			24.00	40.00	16.00				
<input type="radio"/>	Time	\$350....	US Dollar	\$19,6...	\$19,6...			24.00	32.00					
<input type="radio"/>	Time	\$160....	US Dollar	\$1,28...	\$1,28...			8.00						
<input type="radio"/>	Time	\$425....	US Dollar	\$64,6...	\$64,6...			71.25	80.75					

Rows: 12

Projects

Time Phased Options - Budget Lines

Dynamics 365 | Project Operations | **SANDBOX**

4/8/2026 12:00 AM Due Date | \$264,408.00 Estimated Labor Cost | 5.62 Cost Consumption % | 2.19 Progress %

Project: **Robotic Brew System Modernization - New** - Saved

Project Service - Project ... Active for 6 days

Summary | Tasks | Team | Resource Assignments | Resource Reconciliation | Time Phased Estimates | **Budget** | Tracking | Sales | Estimates | Task Billing Setup | Risks | Calendar | Related

Budget version: Version - 1 | Status: Draft | Time Phased: Weekly

Sales Budget Lines

3/1/2026 - 5/31/2026 | Time Phase: Quantity, Amount

	Unit Group	Unit P...	Curren	Exten...	3/1/2026	3/8/2026	3/15/2026	3/22/2026	3/29/2026	4/5/2026	4/12/2026	4/19/2026	4/26/2026
					Quantity	Quantity	Quantity	Quantity	Quantity	Quantity	Quantity	Quantity	Quantity
<input type="radio"/>	Time	\$350...	US Do	\$224...			24.00	40.00					
<input type="radio"/>	Time	\$425...	US Dollar	\$64.6...			71.25	80.75					
<input checked="" type="radio"/>	Time	\$350...	US Dollar	\$30.8...			24.00	40.00	24.00				
<input type="radio"/>	Time	\$350...	US Dollar	\$19.6...			24.00	32.00					
<input type="radio"/>	Time	\$350...	US Dollar	\$28.0...			24.00	40.00	16.00				
<input type="radio"/>	Time	\$350...	US Dollar	\$19.6...			24.00	32.00					
<input type="radio"/>	Time	\$160...	US Dollar	\$1.28...			8.00						
<input type="radio"/>	Time	\$125...	US Dollar	\$61.6...			71.25	80.75					

Rows: 12

Time Phased Options - Budget Lines

Dynamics 365 Project Operations
SANDBOX

Copilot

Share

Robotic Brew System Modernization - New - Saved 4/8/2026 12:00 AM Due Date

\$264,408.00 Estimated Labor Cost
5.62 Cost Consumption %
2.19 Progress %

Project Service - Project ...
Active for 6 days

New (6 D)

Quote

Plan

Deliver

Complete

Close

Summary Tasks Team Resource Assignments Resource Reconciliation Time Phased Estimates Budget Tracking Sales Estimates Task Billing Setup Risks Calendar Related

Budget version Version -1 Status Draft Time Phased Weekly

Sales Budget Lines
 + New budget line Refresh Flow

< 3/1/2026 - 5/31/2026 > Time Phase: Quantity, Amount

	Exten...	3/1/2026		3/8/2026		3/15/2026		3/22/2026		3/29/2026		4/5/2026	
		Quantity	Amount	Quantity	Amount	Quantity	Amount	Quantity	Amount	Quantity	Amount	Quantity	Amount
<input type="radio"/>	\$22.4...					24.00	\$8,400.00	40.00	\$14,000.00				
<input type="radio"/>	\$64.6...					71.25	\$11,400.00	80.75	\$53,295.00				
<input checked="" type="radio"/>	\$30.8...					24.00	\$8,400.00	40.00	\$14,000.00	24.00	\$8,400.00		
<input type="radio"/>	\$19.6...					24.00	\$8,400.00	32.00	\$11,200.00				
<input type="radio"/>	\$28.0...					24.00	\$8,400.00	40.00	\$14,000.00	16.00	\$5,600.00		
<input type="radio"/>	\$19.6...					24.00	\$8,400.00	32.00	\$11,200.00				
<input type="radio"/>	\$1.28...					8.00	\$1,280.00						
<input type="radio"/>	\$64.6...					71.25	\$11,400.00	80.75	\$53,295.00				

Rows: 12

P Projects

Home Recent Pinned My Work Dashboards Time Entries Expenses Material Usage Approvals Approvals Agent Time Entry Calend Delegates Projects Schedule Board Resource Utilization Resources Contract Workers Roles Project Reports Purchasing Vendors Purchase Price Lists

Time Phased Forecast Update - Budget Lines

Dynamics 365 Project Operations
SANDBOX

Robotic Brew System Modernization - New - Saved

4/25/2026 12:00 AM Due Date | \$235,076.00 Estimated Labor Cost | 6.31 Cost Consumption % | 2.32 Progress %

Project Service - Project ... Active for 6 days

New (6 D) | Quote | Plan | Deliver | Complete | Close

Summary | Tasks | Team | Resource Assignments | Resource Reconciliation | Time Phased Estimates | **Budget** | Tracking | Sales | Estimates | Task Billing Setup | Risks | Calendar | Related

Budget version: [Version - 1](#) | Status: **Approved** | Time Phased: **Weekly**

Track Cost Budget Lines (Amount)

3/18/2026 - 4/24/2026 | Time Phase: Quantity, Actual Quantit...

	Unit	Unit P...	Actual...	Budg...	Actual...	Forecast Amount	Amount Vari...	Consu...	Earne...	3/22/2026			
										Quantity	Actual Quantity	Amount	Forecast Qua...
○		\$120...		\$960...	\$0.00	\$960.00	\$0.00	0.00	0.00				
○		\$385...		\$58,6...	\$0.00	\$62,182.84	(\$3,567.84)	0.00	0.00	80.75	0.00	\$50,065.00	90.00
○		\$620...		\$4,96...	\$0.00	\$4,960.00	\$0.00	0.00	0.00	8.00	0.00	\$4,960.00	8.00
○		\$385...		\$58,6...	\$0.00	\$58,615.00	\$0.00	0.00	0.00	80.75	0.00	\$50,065.00	80.75

Rows: 4

Budget Import Strategy



Budget Import Strategy

Dynamics 365 | Project Operations SANDBOX

Project: **Robotic Brew System Modernization - New** - Saved 4/25/2026 1
Due Date

Project Phases: **New (6 D)** | Quote | Plan | Deliver

Summary | Tasks | Team | Resource Assignments | Resource Reconciliation | Time Phased Estimates | Budget | Tracking | Sales | Estimates | Task Billing Setu

General

Name: * Robotic Brew System Modernization - New

Description: Providing refurbishing and rebranding services for Contoso stores in San Diego as part of a franchise agreement. Also

Customer: [Adatum](#)

Currency: [US Dollar](#)

Contracting Unit: * [Contoso US](#)

Allow percent complete update: No

Project manager: * [Dishant Popli \(Offline\)](#) ×

Estimates

Start: 3/18/2026 9:00 AM

Finish: 4/24/2026 5:00 PM

Effort (Hours): 1,032.00

Estimated Labor Cost: \$235,076.00

Estimated Expense Cost: \$0.00

Estimated Material Cost: \$0.00

Estimated Total Cost: \$235,076.00

Calendar

Schedule mode: * Fixed duration

Hours per day: * 8.00

Hours per week: * 40.00

Days per month: * 20

Cost Budget

Distribution: Time

Import Budget

Select the budget import strategy.
Strategy: * Merge with Existing Lines

Select the source entity for budget lines.
Source: * Estimate

Select the source for project's Time estimates.
Time estimates source: * Resource assignments

Cost budget contingency

Time (%): ---

Expense (%): ---

Material (%): ---

Cost budget line import options

Import cost lines: Yes

Summarize Time lines by: ---

Summarize Expense lines by: ---

Summarize Material lines by: ---

Sales budget line import options

Import sales lines: Yes

Summarize Time lines by: ---

Summarize Expense lines by: ---

Summarize Material lines by: ---

Import | Discard Changes

Budget Import Strategy

The screenshot displays the Microsoft Dynamics 365 Project Operations interface. The main window shows a project named "Robotic Brew System Modernization - New" with various tabs like Summary, Tasks, Team, etc. An "Import Budget" dialog box is open on the right, allowing users to choose how to import budget lines. The dialog includes options for merging with existing lines, re-importing source lines, or performing a full reset. It also allows selection of the source for time estimates and setting cost budget contingency (Time, Expense, Material) and import options for cost and sales lines.

Import Budget

Merge with Existing Lines

Re-Import Source Lines (Preserve Manual)

Full Reset (Remove All Lines)

Category: Merge with Existing Lines

Budget lines: Estimate

Source: *

Select the source for project's Time estimates.

Time estimates source: *

Resource assignments

Cost budget contingency

Time (%)

Expense (%)

Material (%)

Cost budget line import options

Import cost lines: Yes

Summarize Time lines by

Summarize Expense lines by

Summarize Material lines by

Sales budget line import options

Import sales lines: Yes

Summarize Time lines by

Summarize Expense lines by

Summarize Material lines by

Import **Discard Changes**

General

Name: * Robotic Brew System Modernization - New

Description: Providing refurbishing and rebranding services for Contoso stores in San Diego as part of a franchise agreement. Also

Customer: Adatum

Currency: US Dollar

Contracting Unit: * Contoso US

Allow percent complete update: No

Project manager: * Dishant Popli (Offline)

Estimates

Start: 3/18/2026 9:00 AM

Finish: 4/24/2026 5:00 PM

Effort (Hours): 1,032.00

Estimated Labor Cost: \$235,076.00

Estimated Expense Cost: \$0.00

Estimated Material Cost: \$0.00

Estimated Total Cost: \$235,076.00

Calendar

Schedule mode: * Fixed duration

Hours per day: * 8.00

Hours per week: * 40.00

Days per month: * 20

Cost Budget

Distribution: Time

Budget matching to actuals



Budget Matching To Actuals

Dynamics 365 | Project Operations
SANDBOX

🔍 💡 + 🏠 🔔 ⚙️ ? Copilot SP

← ↶ 💾 Save 🗑️ Save & Close 🤖 Copilot + New Project 📄 Copy Project → ➡️ Import Tasks 📄 Budget 📅 Calendar 🚫 Deactivate 📅 Book 🗑️ Delete ⋮ 🔗 Share

Robotic Brew System Modernization - New - Saved

Project

4/25/2026 12:00 AM
Due Date

\$235,076.00
Estimated Labor Cost

6.31
Cost Consumption %

2.32
Progress %

Project Service - Project ...
Active for 6 days

🕒
New (6 D)

📄
Quote

📅
Plan

📦
Deliver

🏆
Complete

🚪
Close

Summary Tasks Team Resource Assignments Resource Reconciliation Time Phased Estimates Budget Tracking Sales Estimates Task Billing Setup Risks Calendar Related ⌵
Form assist

Status

Overall Project Status: ---

Comments: ---

Status Updated On:

Schedule Performance (Current Plan):

Cost Performance (Current Plan):

AI Assisted Reports (Reporting Entity)

Name ↑ Date ↓ Report ... Statu:

We didn't find anything to show here

Rows: 0

Budget

Ignore date constraints when matching budgets to actuals:

Extend budget start before project start (Years):

Extend budget end after project end (Years):

P
Projects

Copy Project



Copy Project

The screenshot displays the Microsoft Dynamics 365 Project Operations interface. The top navigation bar includes 'Dynamics 365', 'Project Operations', and a 'SANDBOX' environment indicator. A search bar and various utility icons are on the right. The left-hand navigation pane lists various project management tools like 'Home', 'Recent', 'Pinned', 'My Work', 'Dashboards', 'Time Entries', 'Expenses', 'Material Usage', 'Approvals', 'Time Entry Calend...', 'Delegates (Produ...', 'Projects', 'Schedule Board', 'Resource Utilization', 'Resources', 'Contract Workers', 'Roles', 'Project Reports', 'Purchasing', 'Vendors', and 'Purchase Price Lists'.

The main content area shows a project card for 'SP Robotic Brew System Modernization - US - Saved'. A 'Copy Project' dropdown menu is open, offering options to 'Copy to Existing Project' and 'Copy to New Project'. The project card includes a progress bar with stages: New (8 Hrs), Quote, Plan, Deliver, Complete, and Close. Key metrics are displayed: Due Date (4/9/2026 12:00 AM), Estimated Labor Cost (\$39,680.00), Cost Consumption % (0.00), and Progress % (0.00). Below the progress bar are tabs for 'Summary', 'Tasks', 'Team', 'Resource Assignments', 'Resource Reconciliation', 'Time Phased Estimates', 'Tracking', 'Sales', 'Estimates', 'Risks', 'Calendar', and 'Related'. A 'Form assist' button is also present.

The 'General' section contains the following fields:

- Name: SP Robotic Brew System Modernization - US
- Description: ---
- Customer: ---
- Currency: US Dollar
- Contracting Unit: Contoso US
- Allow percent complete update: No
- Project manager: Satish Panwar (Offline)

The 'Estimates' section displays the following data:

Start	3/24/2026	9:00 AM
Finish	4/8/2026	5:00 PM
Effort (Hours)	368.00	
Estimated Labor Cost	\$39,680.00	
Estimated Expense Cost	\$0.00	
Estimated Material Cost	\$0.00	
Estimated Total Cost	\$39,680.00	

The 'Actuals' section displays the following data:

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

The 'Calendar' section shows the following settings:

- Schedule mode: Fixed duration
- Hours per day: 8.00
- Hours per week: 40.00
- Days per month: 20

The 'Timeline' section includes a search bar for 'Search timeline' and a note field 'Enter a note...'.

- Home
- Recent
- Pinned
- My Work**
 - Dashboards
 - Time Entries
 - Expenses
 - Material Usage
 - Approvals
 - Approvals Agent (...)
 - Time Entry Calend...
 - Delegates (Produ...
- Projects**
 - Projects
 - Schedule Board
 - Resource Utilization
 - Resources
 - Contract Workers
 - Roles
 - Project Reports
- Purchasing**
 - Vendors
 - Purchase Price Lists

Save Save & Close Copilot New Project Copy Project Import Tasks Budget Calendar Deactivate Book Delete Share

SP Robotic Brew System Modernization - US - Saved 4/9/2026 12:00 AM Due Date \$39,680.00 Estimated Labor Cost 0.00 Cost Consumption % 0.00 Progress %

Project

Project Service - Project ... Active for 8 hours

New (8 Hrs) Quote Plan Deliver Complete Close

Summary Tasks Team Resource Assignments Resource Reconciliation Time Phased Estimates Tracking Sales Estimates Risks Calendar Related Form assist

General

Name * SP Robotic Brew System Modernization - US

Description ---

Customer ---

Currency US Dollar

Contracting Unit * Contoso US

Allow percent complete update No

Project manager * Satish Panwar (Offline)

Estimates

Start 3/24/2026 9:00 AM

Finish 4/8/2026 5:00 PM

Effort (Hours) 368.00

Estimated Labor Cost \$39,680.00

Estimated Expense Cost \$0.00

Estimated Material Cost \$0.00

Estimated Total Cost \$39,680.00

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

Status

Overall Project Status ---

Comments ---

Status Updated On

Calendar

Schedule mode * Fixed duration

Hours per day * 8.00

Hours per week * 40.00

Days per month * 20

Timeline

Search timeline

Enter a note...

Import Project Tasks

Deployment type:



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

My Active Projects*

Edit columns Edit filters Filter by keyword

<input type="checkbox"/>	Name ↑	Customer	Start Date	Finish Date	Actual St...	Actual Fi...	Effort (H...	Effort Co...	% Compl...	Estimate...	Actual To...	Cost Con...
<input type="checkbox"/>	Brew System Modernization		3/18/2026	3/26/2026 ...			88.00	0.00	0.00	\$32,560.00	\$960.00	2.95
<input type="checkbox"/>	Contoso Brew System Modernization		3/25/2026				0.00	0.00	0.00	\$0.00	\$0.00	
<input type="checkbox"/>	Robotic Brew System Modernizatio...	Adatum	3/18/2026	4/25/2026 ...			1,032.00	24.00	2.32	\$235,076.00	\$14,880.00	6.31

WBS Enhancements Overview

Deployment type:



WBS Enhancements Overview

- Expand / Collapse all tasks
- Outline
- WBS Baseline
- Effort remaining (Grid)
- Advanced scheduling types
 - Finish to Start
 - Finish to Finish
 - Start to Start
 - Start to Finish
- Dependency types
 - Immediate
 - Lag by
 - Lead by
- Assignments grid
 - Group by Task (Sort by outline)
 - View by Daily/Weekly/Monthly Frequency (7 – 14 – 21)

Task Details Pane

Deployment type:



← 📄 📄 Save Save & Close Copilot + New Project Copy Project Import Tasks Budget Calendar Deactivate Book Delete Refresh Project Totals Refresh Share

Robotic Brew System Modernization - Saved 3/16/2026 5:00 PM Due Date | \$23,520.00 Estimated Labor Cost | 0.00 Cost Consumption % | 0.00 Progress %

Project

Project Service - Project ... Active for 35 days
New (35 D)
Quote
Plan
Deliver
Complete
Close

Summary **Tasks** Team Resource Assignments Resource Reconciliation Time Phased Estimates Tracking Sales Estimates Risks Calendar Related Form assist

Grid Board Timeline Charts Assignments People Share Baseline Filters Conditional coloring

	Task Name	Start	Finish	Duration	Effort	Effort completed	Priority	+ Add column
1	Store Refurbishment and Rebranding	2/17/2026	2/25/2026	7 days	272 hours	0 hours	Medium	
2	Assessment and Planning	2/17/2026	2/25/2026	7 days	88 hours	0 hours	Medium	
3	Site Inspection for Contoso Stores	2/17/2026	2/25/2026	7 days	56 hours	0 hours	Important	
4	Budget and Resource Planning	2/17/2026	2/18/2026	2 days	16 hours	0 hours	Urgent	
5	Design Approval and Branding Guidelines	2/17/2026	2/18/2026	2 days	16 hours	0 hours	Urgent	
6	Refurbishment Execution	2/17/2026	2/25/2026	7 days	128 hours	0 hours	Medium	
7	Store Equipment Upgrade	2/17/2026	2/23/2026	5 days	40 hours	0 hours	Medium	
8	Interior Renovation and Repainting	2/17/2026	2/25/2026	7 days	56 hours	0 hours	Medium	
9	Installation of New Robotic Brew Systems	2/17/2026	2/20/2026	4 days	32 hours	0 hours	Important	
10	Rebranding and Finalization	2/17/2026	2/19/2026	3 days	56 hours	0 hours	Medium	
11	Signage and Visual Branding Installation	2/17/2026	2/19/2026	3 days	24 hours	0 hours	Low	
12	Brand Compliance Verification	2/17/2026	2/18/2026	2 days	16 hours	0 hours	Important	

+ Add new task

What-if analysis (Quotes)



What-If Analysis (Quotes)

Dynamics 365 | Project Operations
SANDBOX

🔍 💡 + 🔼 🔔 ⚙️ ? Copilot SP

← ↶ 📄 Save 📄 Save & Close 📄 Activate Quote ➕ New 📄 Copy 📄 Recalculate 🗑️ Delete 🔄 Refresh 📄 Export to PDF 🔍 Check Access 🔍 Look Up Address ⋮ 🔗 Share

Marketing Services - Saved

Quote · Project Quote Information

\$90,600.82
Total Cost

\$175,550.68
Total revenue

48.39
Gross Margin (%)

Draft ▼

Status

Summary Project Lines Product Lines Pricing Analysis What-if analysis Related ▼

📄 Form assist

Scenario comparison

Top 5 scenarios by profitability

● Extended amount ● Total cost ● Budget variance ● Gross margin %

Scenario(s)	Extended amount	Total cost	Budget variance	Gross margin %
Increase gross margin	\$324,034.31	\$215,191.31	(\$324,034.31)	33.59
Optimize Profit	\$200,233.53	\$109,108.44	(\$200,233.53)	45.51

All scenarios

➕ Create Scenario 🔍 See associated records 🔗 Show As ▼

<input type="checkbox"/>	Scenario title ↑	Description	Gross margin ...	Total cost	Extended amount	Budget variance	Status	Applied On	Applied By
<input type="checkbox"/>	Increase gross margin	Increase the margin by 25%	33.59	\$215,191.31	\$324,034.31	(\$324,034.31)	Draft		
<input type="checkbox"/>	Optimize Profit	by 30%	45.51	\$109,108.44	\$200,233.53	(\$200,233.53)	Applied	3/24/2026 11:48 ...	PFO Pooja Fandan (O...

S Sales

- Home
- Recent
- Pinned
- Customers
 - Customers
 - Contacts
 - Products
 - Price Lists
- Sales
 - Leads
 - Opportunities
 - Quotes**
 - Project Contracts
- Transactions
 - Approved Time
 - Approved Expenses
 - Journals
 - Actuals
- Billing
 - Billing hub
 - Retainers and Adv...
 - Available Retainer...
 - Fixed Price Milest
- Sales

Save Save & Close Activate Quote New Copy Recalculate Delete Refresh Export to PDF Check Access Look Up Address Process Share

Marketing Services - Saved \$90,600.82 Total Cost | \$175,550.68 Total revenue | 48.39 Gross Margin (%) | Draft Status

Quote · Project Quote Information

Summary Project Lines Product Lines Pricing Analysis What-if analysis Related

[Form assist](#)

Customer Budget

(\$175,550.68)

Over customer budget

Profitability (%)

48.39

Gross margin

Scheduled to Deliver

No data



Name * Marketing Services

Customer * [A Datum Corporation](#)

Account Manager + [Pooja Fandan \(Offline\)](#)

Product Price List * [US Bill Rates](#)

Customer billing + New Quote Customer

Ac...	Billing...	Bill To C...	Bill To N...	Paymen...	Is Roun...	Not-t...
<input type="checkbox"/> Ac... * ↑ ↓ %	Billing...	Bill To C...	Bill To N...	Paymen...	Is Roun...	Not-t...
<input type="checkbox"/> A Datum ...	100.00			<input checked="" type="checkbox"/> Yes		

Refund retainers



Refund Retainers

Dynamics 365 | Project Operations | **SANDBOX** | Copilot | SP

You have 5 notifications. Select to view.

Save Save & Close + New Copy Confirm Close as Lost Delete Refresh Check Access Create Invoice Process Recalculate Share

SP Robotic Brew System Modernization 01 contract - Saved

Order · Project Information

\$0.00 Total Amount | Draft Status | Draft Status Reason | SP Satish Panwar Owner

Summary Contract Lines Project Price Lists Contract Performance Customers **Advances and Retainers** Related

Form assist

Advances and Retainers

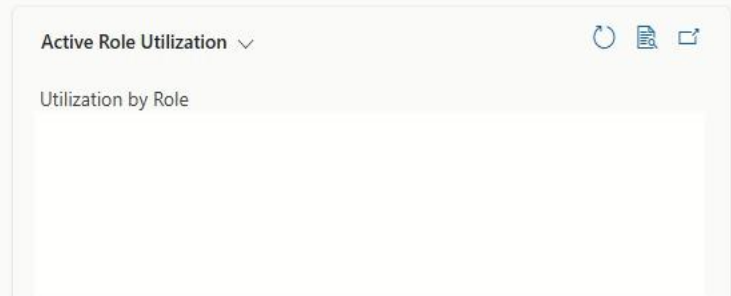
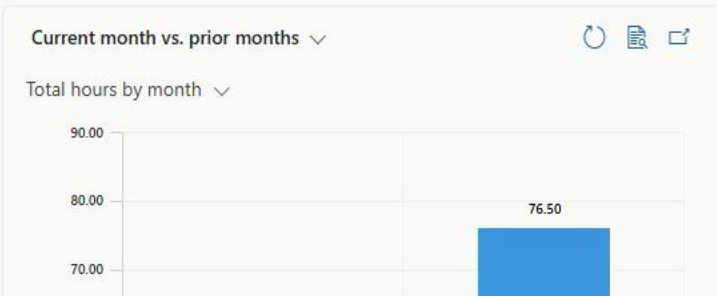
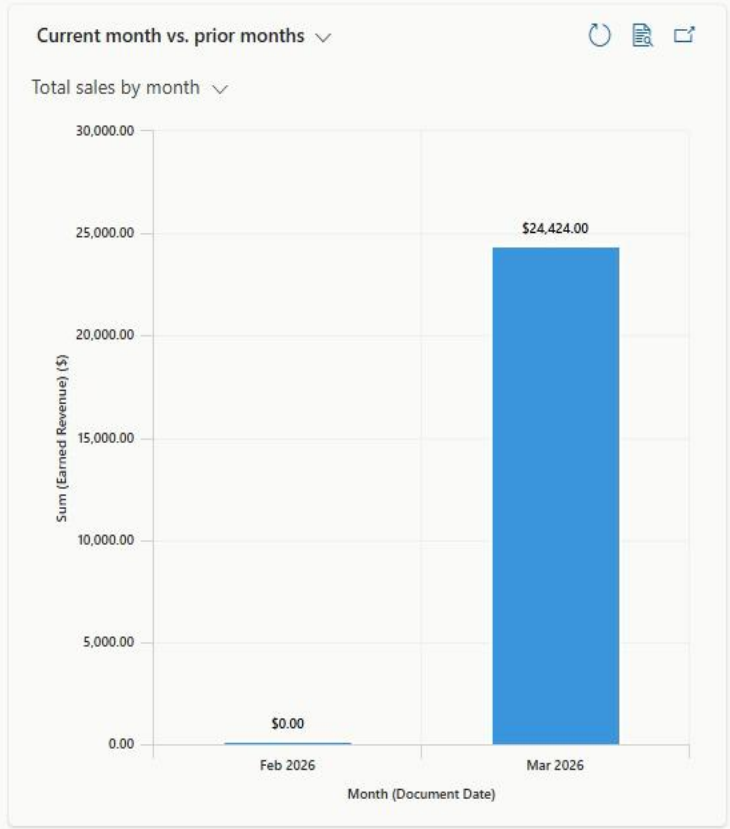
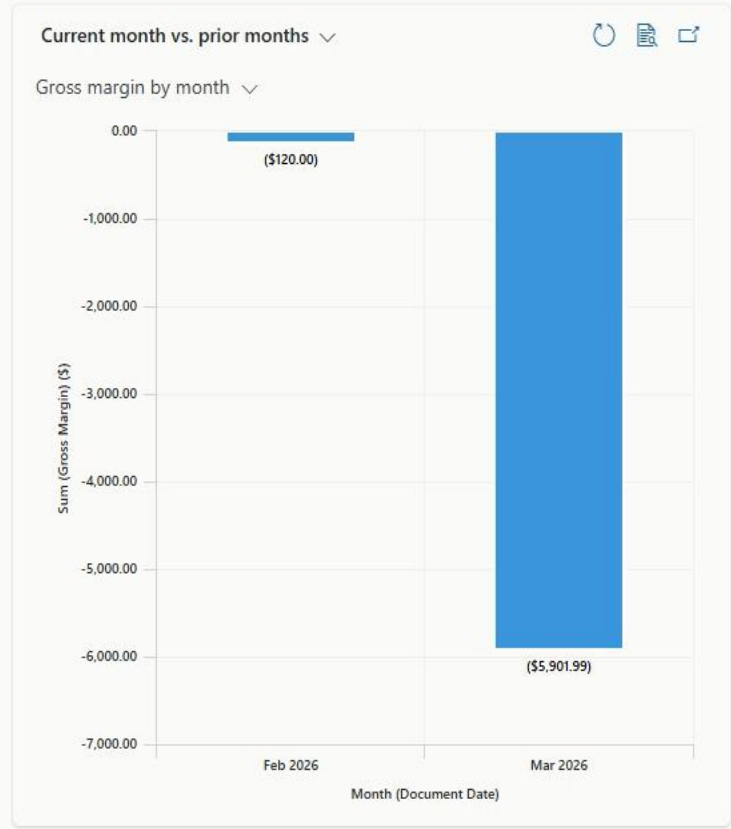
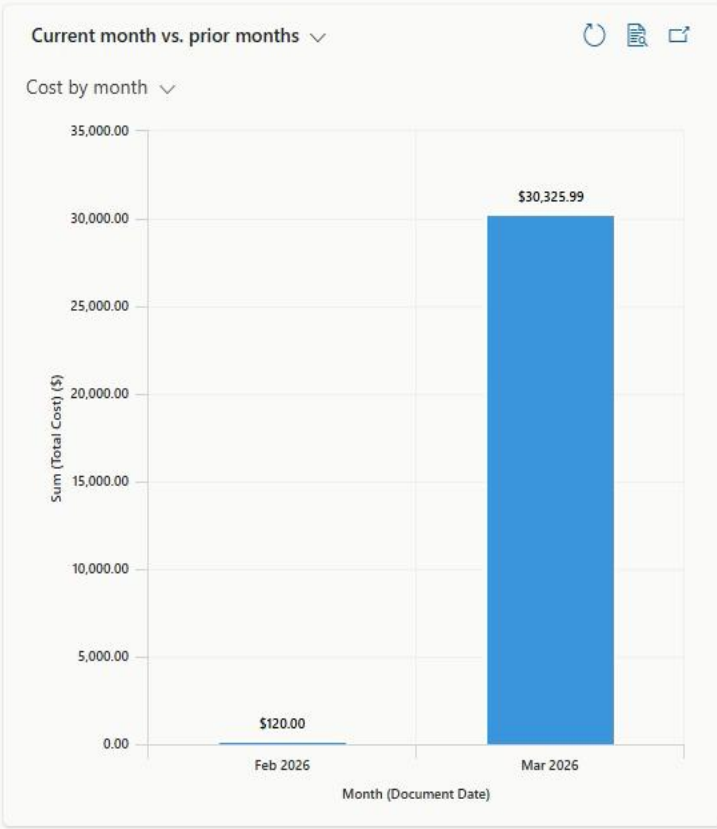
Refund Edit Activate Deactivate

<input checked="" type="checkbox"/>	Project Contract Cust...	Description	Invoice Date	Amount	Invoice Status	Available Amount	Used Amount	Refunded amount	Refund status
<input checked="" type="checkbox"/>	Adatum	Retainer1	3/22/2026	\$1,000.00	Customer invoic...	\$400.00	\$600.00		

Rows: 1 Selected: 1

- ☰
- 🏠 Home
- 🕒 Recent
- 📌 Pinned
- My Work**
- 📊 Dashboards
- 📅 Time Entries
- 📄 Expenses
- 📦 Material Usage
- 📄 Approvals
- 👤 Approvals Agent (...)
- 📅 Time Entry Calend...
- 👤 Delegates (Produ...
- Projects**
- 📅 Projects
- 📅 Schedule Board
- 👤 Resource Utilization
- 👤 Resources
- 👤 Contract Workers
- 👤 Roles
- 📄 Project Reports
- Purchasing**
- 📄 Vendors
- P** Projects

Practice Management Dashboard

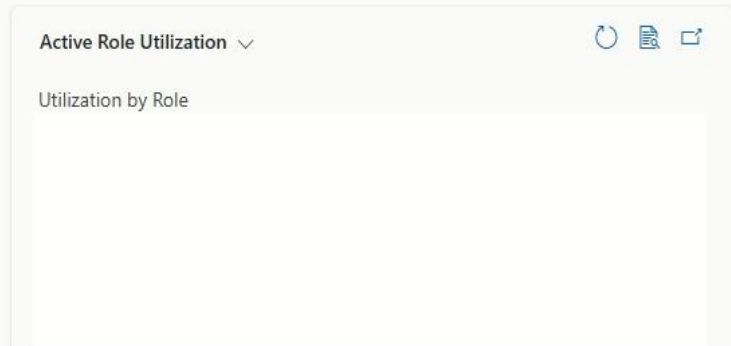
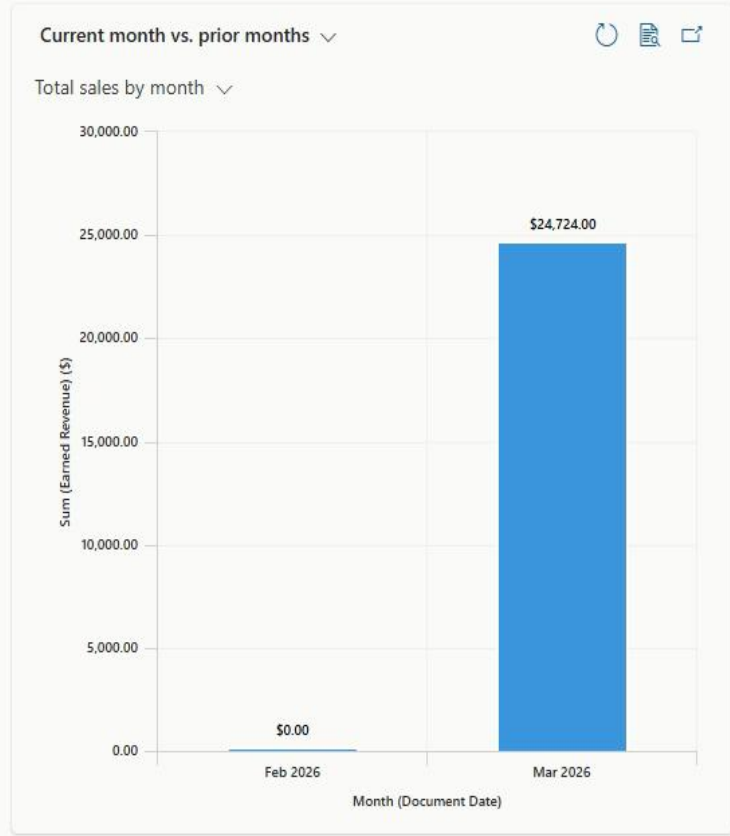
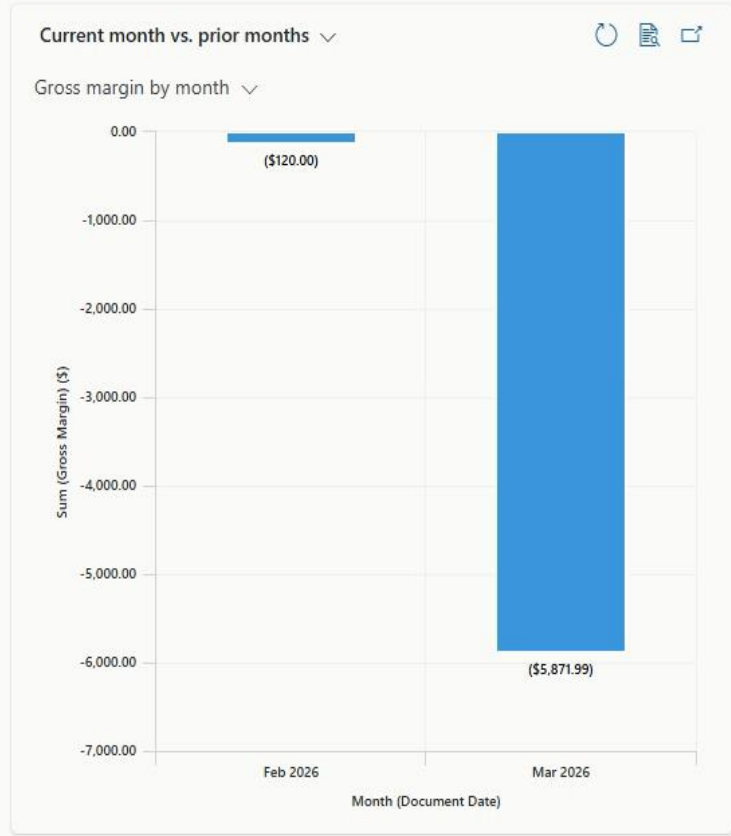
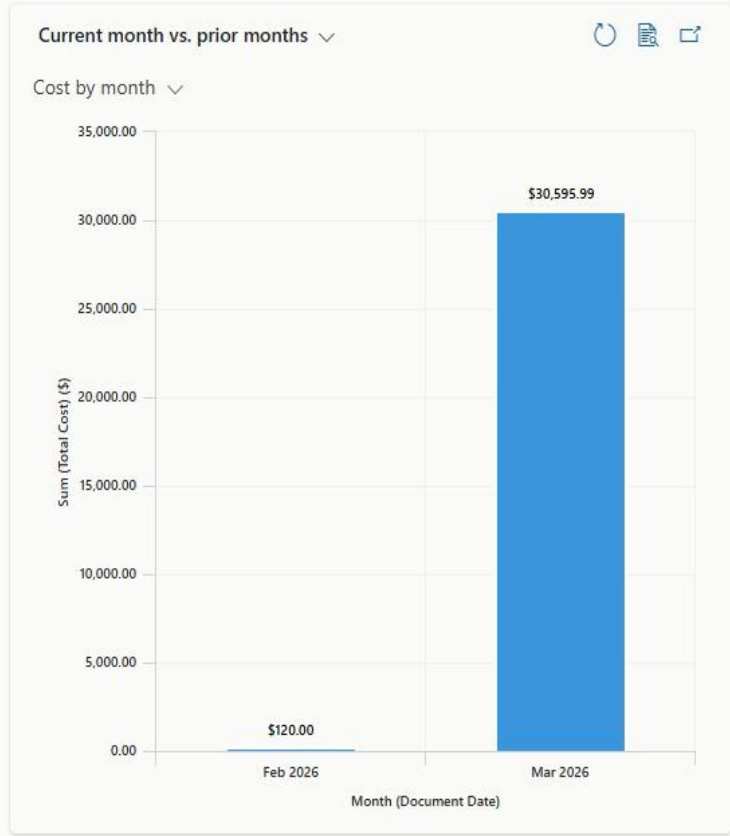


Subcontracting UX improvements



- Home
- Recent
- Pinned
- My Work
 - Dashboards
 - Time Entries
 - Expenses
 - Material Usage
 - Approvals
 - Approvals Agent (...)
 - Time Entry Calend...
 - Delegates (Produ...
- Projects
 - Projects
 - Schedule Board
 - Resource Utilization
 - Resources
 - Contract Workers
 - Roles
 - Project Reports
- Purchasing
 - Vendors
 - Purchase Price Lists
- Projects

Practice Management Dashboard



Resources - General

- [Overview - Dynamics 365 Project Operations | Microsoft Docs](#)
- [Dynamics 365 Project Operations series - Microsoft Dynamics Blog](#)
- [Roadmap - Product Updates | Microsoft Dynamics 365](#)
- [New and planned features for Dynamics 365 Project Operations](#)
 - [2025 release wave 2 | Microsoft Learn](#)
- [What's new February 2026 - Project Operations Core | Microsoft Learn](#)
- [What's new February 2026 - Project Operations Integrated with ERP | Microsoft Learn](#)
- [Ideas - Ideas \(dynamics.com\)](#)
- [FastTrack - Microsoft FastTrack for Dynamics 365](#)



Thank you



Microsoft Dynamics 365