

Dynamics 365 Project Operations – Expense Mobile App

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Objectives of this TechTalk

Introduction and demonstration of Expense Mobile App for resource/non-stocked and stocked/production-based deployments. The app is not relevant to Lite deployments.

What it doesn't cover

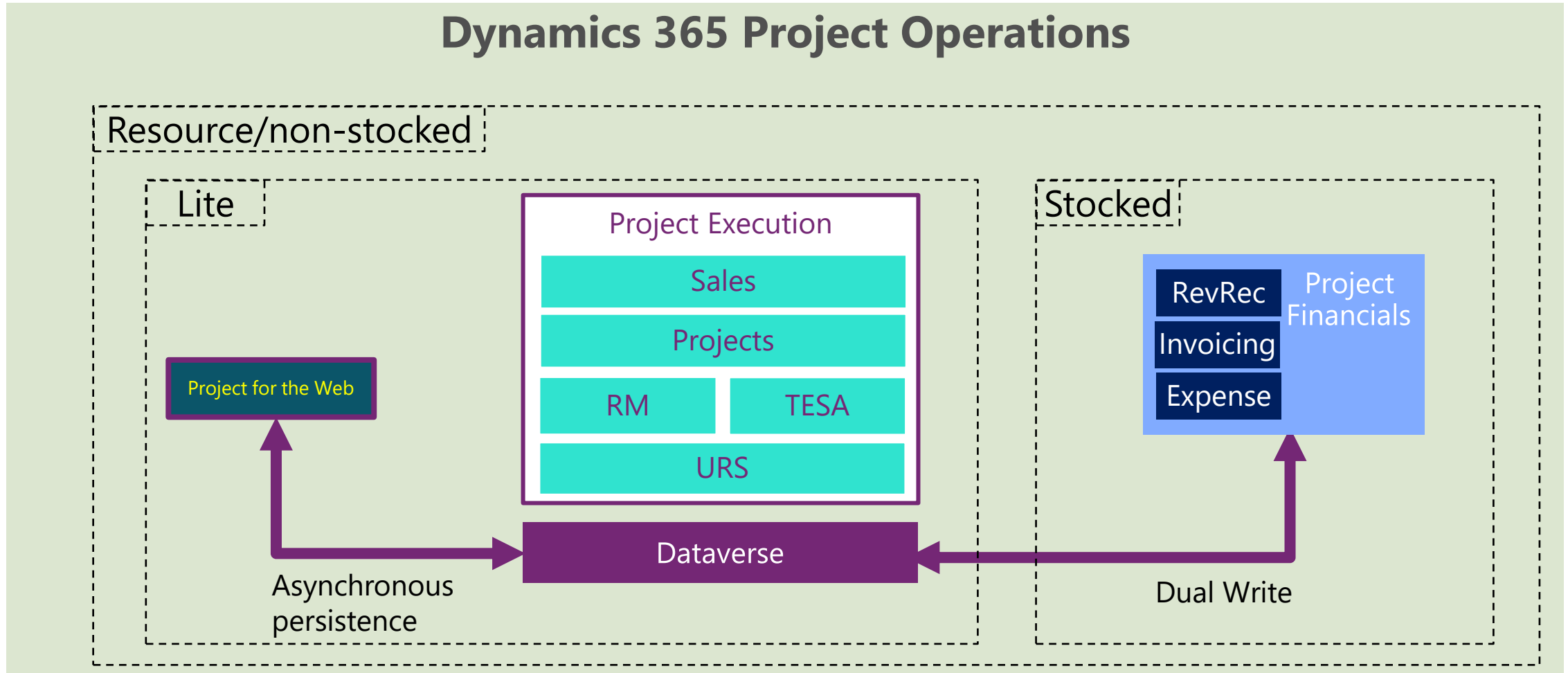
1. Expense Management setup / configurations
2. Workflow setup
3. Deployment models of Dynamics 365 Project Operations

Agenda

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1. Overview
 2. Setup
 3. Demo
 4. Q&A

Architecture

Dynamics 365 Project Operations

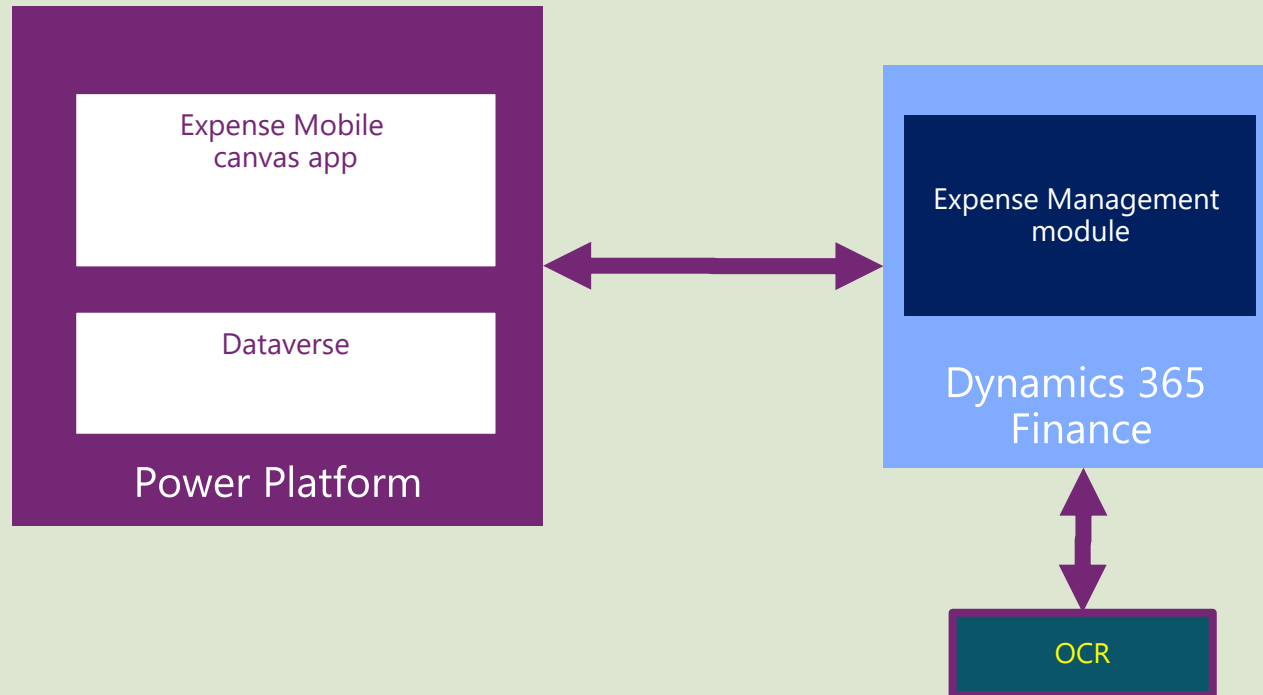


Key



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

Expense Mobile Architecture



Expense Mobile App features

Available in public preview -

- Create expenses and expense reports
- Create new receipts, attach and detach receipts, and delete receipts
- Use OCR to capture photos of receipts and extract relevant information
- Save, submit, and recall expense reports as needed
- Leverage pre-configured web automation workflows in the app
- Leverage pre-configured web expense policies in the app

Available at GA -

- Mileage
- Per-diem
- Expense itemization
- Reject/Approve reports
- Defaulting project details on expense lines

Non- Functional features



High Performance



High Reliability



Extensible and Customizable



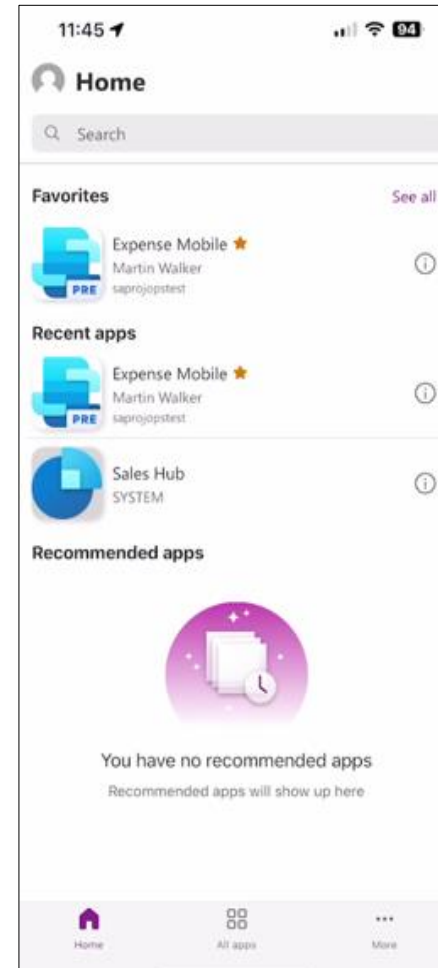
Design – easy intuitive navigation,
readable text, high quality pictures

Overview/Pre-requisites

- Dynamics 365 Finance – 10.0.34 with latest QU
- Expense Management module is configured
- Enable feature - Use expense mobile application for intuitive expense entry experience
- Install Expense Management Service add-in (LCS) for OCR capabilities
- Install Expense Mobile Power App (See setup slide)
- Access via Power Apps mobile app
- Supported for both iOS and Android
- Licensing requirements – Team Members license
- Manageable by Intune

Expense Mobile App Setup

- Install the Expense Mobile Power App via AppSource into Dataverse environment
- AAD app registration
- Configure the custom connector
- Share Mobile app with the users
- Provide access to the users in Dataverse
- User install Power Apps Mobile App from their Appstore
- Launch Expense Mobile App



Demo: Capture and Submit Expenses



Productivity



Azure



Power Apps



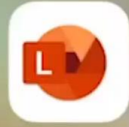
Power Automate



Power BI



Microsoft 3...



Lens



Thrive



Planner



TestFlight



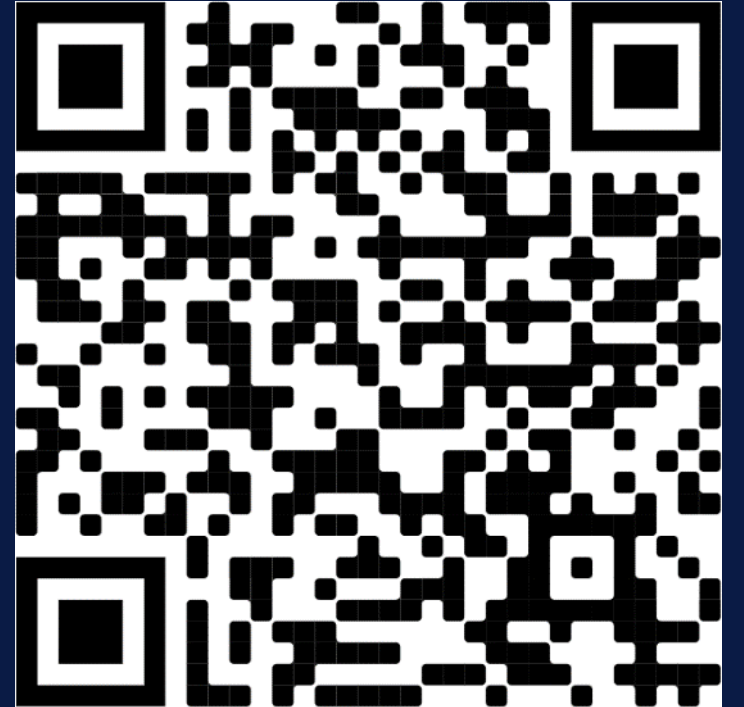
Resources – Expense Management

- [Expense overview | Microsoft Learn](#)
- [Expense mobile app overview | Microsoft Learn](#)
- [Install and configure the Expense mobile app | Microsoft Learn](#)
- [Install and open the Expense mobile app on a mobile device | Microsoft Learn](#)
- [Manage expenses, expense reports, and receipts by using the Expense mobile app overview | Microsoft Learn](#)
- [Expense mobile app FAQ | Microsoft Learn](#)
- [Manage your mobile app with Microsoft Intune - Power Apps | Microsoft Learn](#)
- [Capture a receipt using OCR | Microsoft Learn](#)
- [Dynamics 365 Project Operations Expenses and Materials - TechTalk - YouTube](#)
- Submit feedback via teams channel [Mobile Experiences](#)

Useful links on SLA, Compliance, and Support

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

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Q & A



Thank you



Microsoft Dynamics 365