Technofocus

Implement with impact Optimize project-centric businesses with AI and Dynamics 365

Course Overview

Ready to transform how your business runs projects? This course introduces Dynamics 365 Project Operations and AI-driven tools that help you stay ahead in fast-changing environments. From planning to payments, discover how to manage every phase with clarity, speed, and confidence—while boosting collaboration and profitability.

Level - Intermediate

Duration - 12 Hours

Course Modules

Day 1

Dynamics 365 Project Operations – deployment and features

Benefits of Project Operations

Overview of Project Operations features

Deployment types

Project sales management

Project management

Resource management

Time tracking

Expense tracking

Proforma invoicing

Project accounting

Project to Profit

Project-centric sales management

Price lists

Project leads

Project opportunities

Project quotes

Project contracts

Increase productivity with better project management and delivery

Project stages

Project calendars

Project plan – Work breakdown structure

Request project resources

Estimates

Update a project

Track the progress of a project

Approve time and expenses

Interactive Simulated Lab Experience

Project sales activities

Create a new project and map it to a sales quote

Day 2

Drive customer satisfaction by booking the right resources at the right time

Bookings and assignments

Booking statuses

Resource administration

Resource management modes

Recommendations on best resources for projects

Booking allocation methods

Schedule assistant

Book a resource directly

Resource utilization

Simplify processes with Work and invoice management

Create and submit time entries

Expense deployment models

Basic expense entries

Full expense deployment

Manage the billing backlog

Proforma invoicing

Customer-facing invoices

Create invoice schedule on a project contract line

Boost project profitability with the Time and Expense Agent

Interactive Simulated Lab Experience

Work with resources

Time and expense scenarios

Create and update a time and material invoice

Day 3

Implement efficient Project accounting

Financial dimensions in Project Operations

Project categories

Configure accounting for internal projects

Configure accounting for billable projects

Define project cost and revenue profiles

Project Operations Integration journal

Revenue recognition

Improve Project delivery and subcontracting

Project management and phases

Initiate projects and setup

Implement the project

Analyze the project

Subcontracting process

Key concepts in subcontracting

Manage vendors and project price lists

Subcontractors as bookable resources

Header and line details for subcontracts

Subcontract project team members

Accelerate productivity with Copilot + Agents

Turn on Copilot

Task plans

Risk assessment

Project status report

Chat experience

Interactive Simulated Lab Experience

Create a work breakdown structure