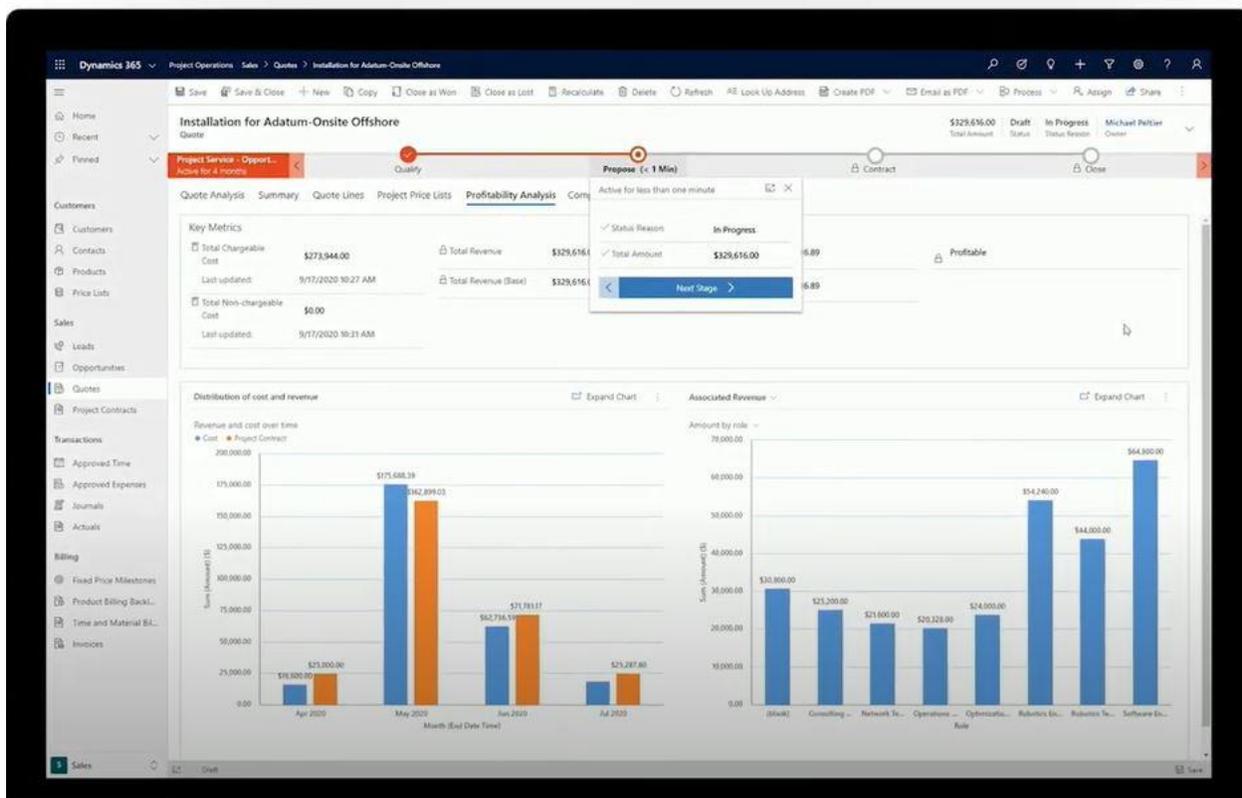


## Microsoft Dynamics 365 Project Operations Functional overview

### Project Estimation and Sales

Dynamics 365 Project Operations provides the ability to estimate projects at a high-level or detailed level. Use standardized templates to generate detailed project estimates, project schedule and a monetary estimate for the quote based on standard labor and billing rates or customized resource-based costing and pricing. Create fixed price, time and materials or retainer type project contracts with project billing mechanisms that meet the cash flow needs of your customers. Pricing based on geography, location and other factors.

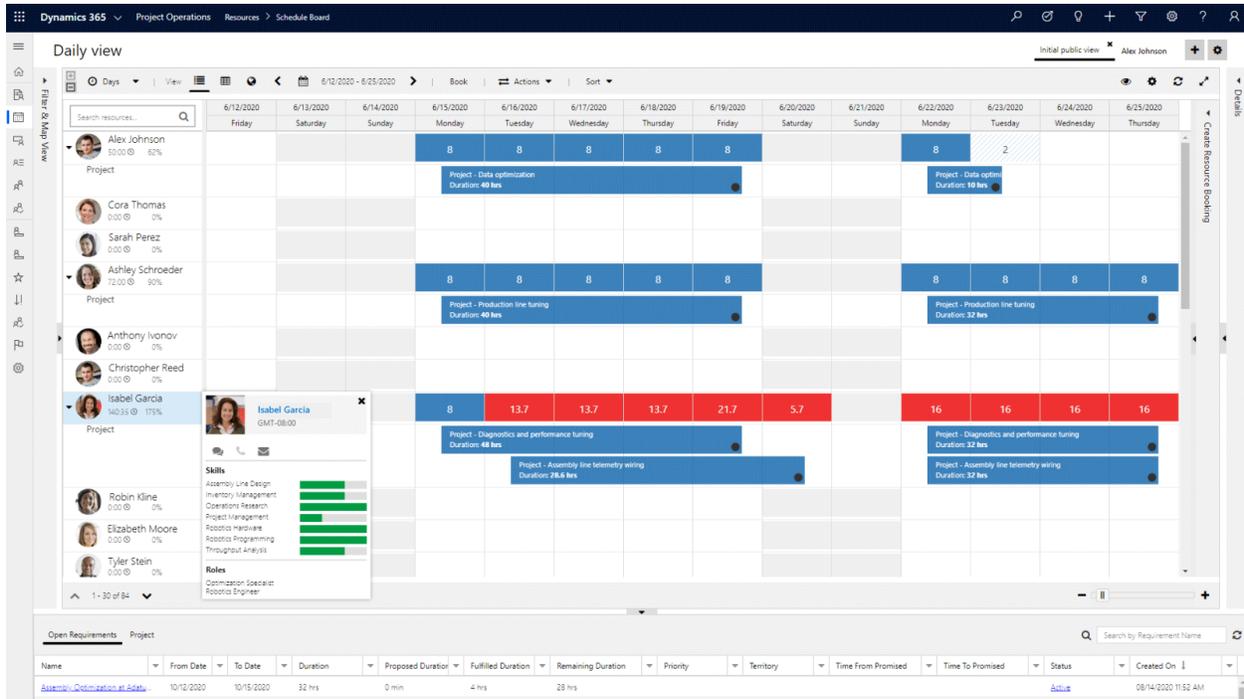


Project Estimation and Project Profitability with revenue forecasts to ensure Project bids are made with diligence.

Dynamics 365 Project Operations enables seamless collaboration between the sales and delivery teams to help refine customer quotes and accurately scope the work. Transfer project estimates directly to the relevant quote lines, saving time and avoiding errors or duplicate entries that may come from manual entry. After a quote is accepted and the project begins, use the tracking grid to monitor progress.

## Project Resourcing and Utilization Management

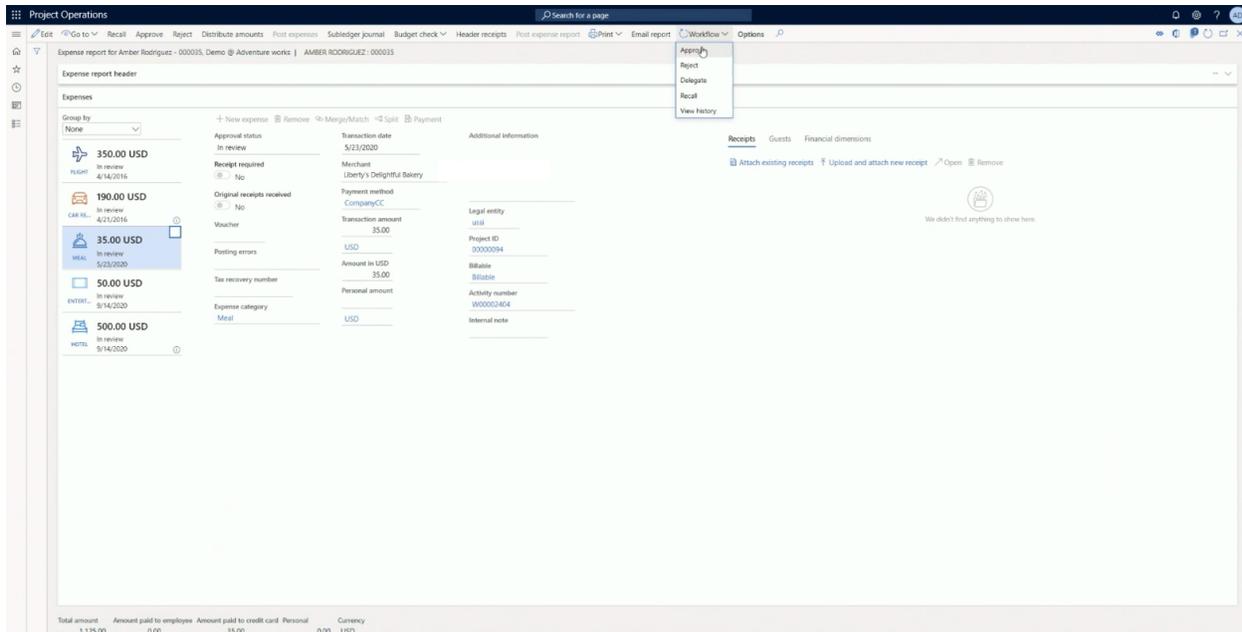
Match Project Delivery needs with the right resources with the Project Scheduler color coded to show soft-bookings, hard-bookings and over-bookings. Streamline Project Scheduling with Skill-based matching for assignments and immediate visibility into project team member availability with the Microsoft Dynamics Universal Resource Scheduler. Track resource and team member historical utilization as well as forecast utilization for the future based on booking and anticipated workload.



Microsoft Dynamics 365 Project Operations Resource Scheduler provides visibility into team member project bookings and availability.

## Project Time Entry and Expense Management

Project Timesheet Entry and Project Expense entry from a web interface or mobile application. Automatically create expense lines from uploaded receipt images. Time and Expense approvals supported by automated workflows via the web browser interface or mobile application. Configurable time and expense policy rules to ensure compliance.

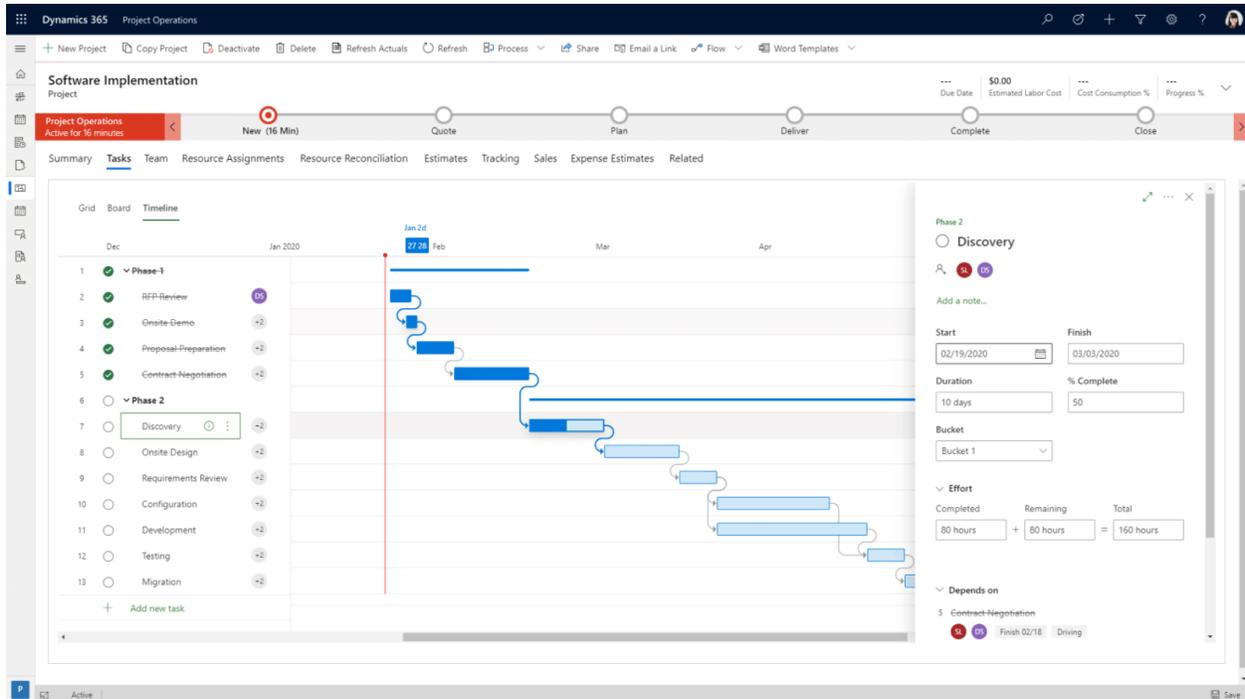


*Project Expenses in Microsoft Dynamics 365 are subject to policy rules by expense category to ensure compliance.*

There are even several pre-configured policy settings available right out of the box that aim to keep you compliant with common legal and regional requirements. Set policies for unique business needs as well. Like a travel expense policy that automatically prompts employees to add a note of explanation. Date ranges give the option to put an expiration date on the policy. Dynamics 365 Project Operations also eases expenses for the employees submitting them. Company credit card transactions can be imported manually or set up to be imported automatically on a recurring schedule, making it easier to submit each item to the right project's expense report. Easily itemize or split expenses on the same report. Quickly upload receipts with or without a credit card transaction associated. Link the itemized expenses to their respective lines in the report, responding to any triggered policy prompts, and simply submit the expense report for manager approval, all in just a few easy clicks. Managers can review the expense reports, and once they approve them, Dynamics 365 Project Operations logs the entire workflow in detail to help with any future audits. Empower your teams to do their best work while keeping projects on budget and on time.

## Project Management

Project Management in Microsoft Dynamics 365 with Gantt charts, work break down structures, task management and project dashboards to ensure you can successfully manage the project. Microsoft Dynamics 365 Project Operations supports both Waterfall and Agile methodologies to meet the needs of all your projects. Quickly build detailed project plans from scratch or from pre-built templates with work breakdown structures, budget estimates including time and expense forecasts, and required resources.



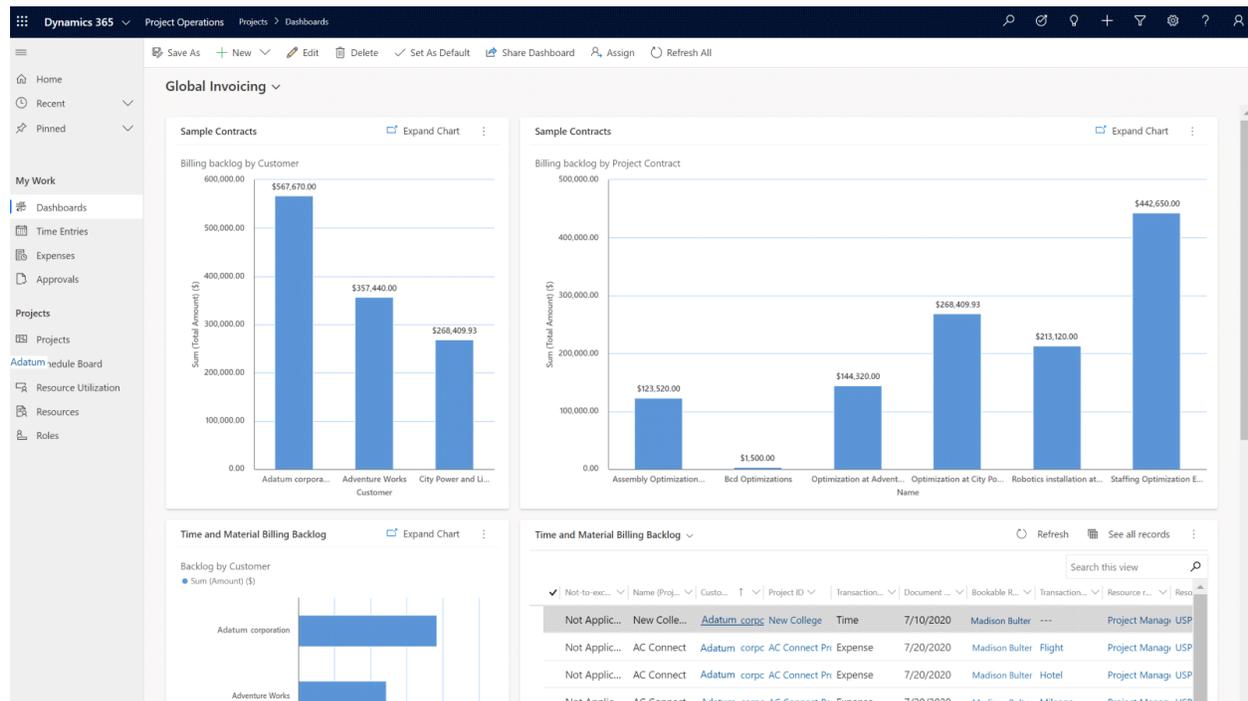
*Gantt chart interface in Microsoft Dynamics 365 Project Operations shows task dependencies and provides the ability to modify the project timeline for changing needs.*

Empower your project managers with visual project planning and delivery tools through embedded project for the web capabilities. Adaptable project plans can be visualized by grid, board, and timeline views. Easy to use desktop controls like drag and drop, cut and paste and multi-select simplify processes and improve productivity. Quickly add tasks, columns, and fields to view additional information.

Use the Project Billing dashboard to easily manage billing backlogs for all projects and make faster invoicing decisions. Choose to view by time and material or by fixed-price milestones. And drill down through rich interactive charts to quickly analyze key metrics in real-time. Take action right where you are, marking billable transactions as ready to invoice. Invoice creation can be done manually or automated according to a pre-determined schedule, complete with certain line items, auto-populated based on the contract.

## Project Accounting and Financials

Project Revenue Recognition that is compliant with US GAAP, IFRS and other GAAP standards including revenue recognition based on estimates, percentage completion and time entries. Project Invoicing with billing queues to allow for efficient invoicing and improved cash flow. Setup Project Cost and Revenue profiles that drive revenue and cost accruals for milestone billing and fixed fee projects. Automated Workflows for ensuring review of Project invoices before they are posted. Microsoft Dynamics 365 Project Operations is integrated with Microsoft Dynamics 365 Finance ERP for General Ledger Postings, Accounts Payable, Accounts Receivable using Microsoft Dataverse.



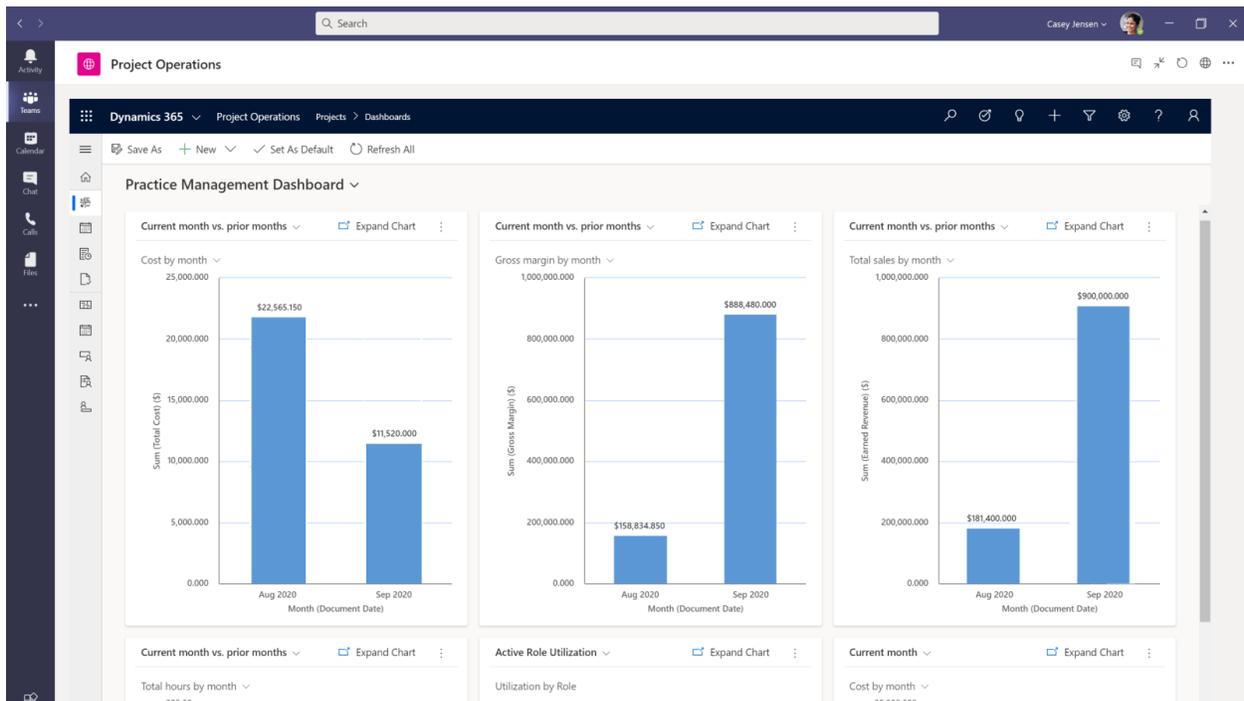
Microsoft Dynamics 365 Project Operations provides ability to track billing backlog and ensure efficient invoicing for improve cash flows.

Microsoft Dynamics 365 Project Operations gives you the flexibility to set up a variety of billing scenarios, including billing methods that apply only to a portion of contracts, individual contracts, or all contracts. You can even set up multiple billing methods on a single contract. The invoicing dashboard puts all the most important information and tasks at a project manager's fingertips. Customize invoicing options, number sequencing, and your project defaults for bill type, category, and forecast. Ledger posting setups give you greater control over your costs and revenue accounts, including the ability to configure based on category relation and account type. Create rule-based accounting profiles with ease and tailor them to your project types.

## Project Analytics and Reporting

Microsoft Dynamics 365 Project Operations empowers project-based services organizations with the reporting and analytical tools needed to improve project planning, make better decisions, and deliver on promised customer outcomes.

Project Dashboards provide insights that help you stay agile so you can proactively solve issues and make project changes as needed. Track Project Revenue, Costs and Project Profitability by period and across the practice as well as by project.



*Practice Management Dashboard in Microsoft Dynamics 365 Project Operations provides indicators like Project Revenue by month, Project cost by month, Project Gross Margin by month.*

Full project delivery transparency keeps your teams united so they can optimize operational performance while keeping customers happy. Empower your teams with greater control, visibility, and more actionable data. Improve collaboration, better serve your clients, and accelerate project delivery.

Dynamics 365 Project Operations puts rich project health metrics and enhanced reporting capabilities at your fingertips to help you drive financial performance and make more informed decisions. Front-and-center are your most important profit margin KPIs, with the ability to drill down into key project information like consumption, ledger postings, credit to revenue, forecasts, and more, delivering the insight and visibility project teams need to improve financial performance. Equip your services teams with project accounting tools that maximize profitability.



Unifying the Dots in your Business



## About Unify Dots

UNIFY Dots helps you connect the Dots by providing solutions that enable digital transformation. Unify Dots specializes in AI-powered Project Operations, ERP, CRM, Customer Engagement, Field Service, Ecommerce and Point of Sale solutions.

AI Agents and Copilot enabled work	Finance, Accounting, Treasury, Budgeting, Financial Reporting	Supply Chain, Order Management, Manufacturing and WMS	CRM: Sales, Service, Field Service
Human Resources Management and Talent	Shop floor management, Sustainability and ESG	Data Analytics, Business Intelligence	Customer Experience - Customer Data Platform and Marketing
Power Platform – Power Apps, Automate	IP: Mobile Order Management, Contract Management	E-Commerce & POS	Industry Accelerators – Manufacturing, Agri, Insurance, Maritime, Real Estate

Unify Dots has local presence in Asia Pacific, Australia, New Zealand, Europe, North America and operate on a global scale with a local touch. Unify Dots is also committed to improving the world and has pledged to donate at least 25% of its profit towards the case of helping educate children from low-income families in developing countries.

## Contact Unify Dots

Email us at [info@unifydots.com](mailto:info@unifydots.com) to get more information on implementing Microsoft Dynamics 365 Project Operations or contact us by calling one of our office locations or visit us at <https://unifydots.com>

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