



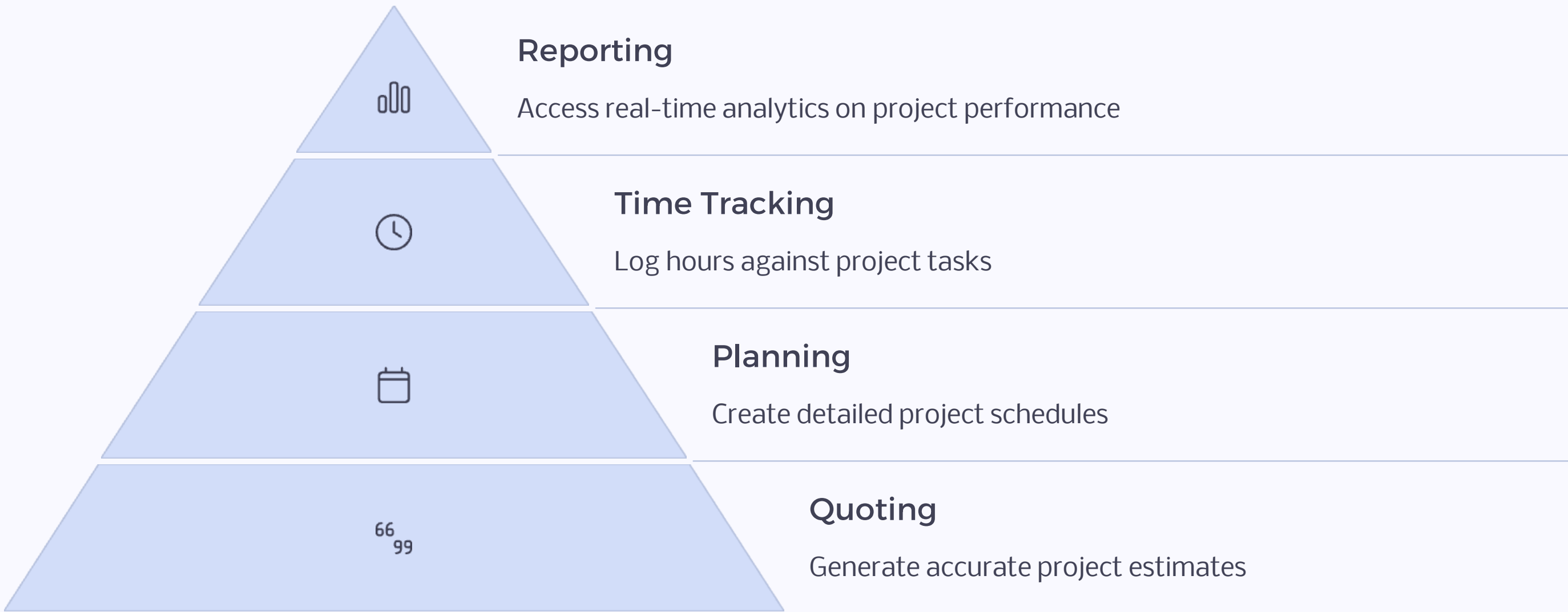
Microsoft Dynamics 365 for Project Managers

Discover the top features that will transform how you plan, execute, and deliver projects using Microsoft's powerful business platform.

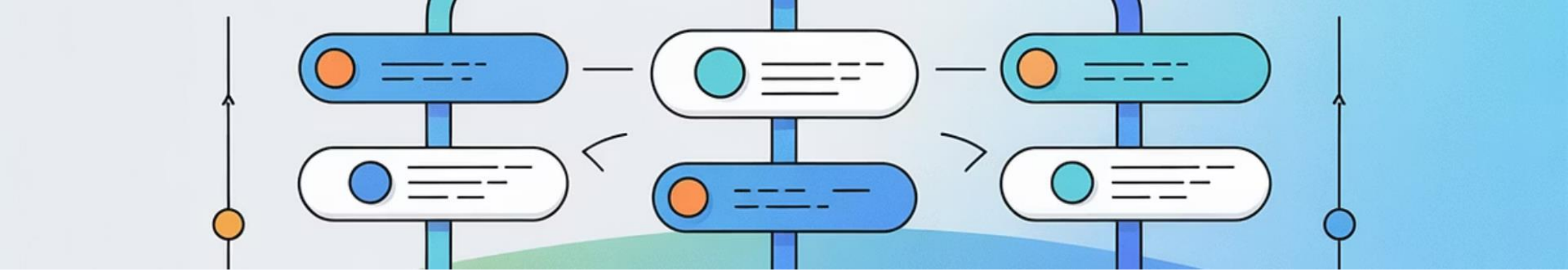


by Kimberly Wiethoff

Project Operations Module



The Project Operations Module centralizes all project data. This integration helps you make data-driven decisions throughout the project lifecycle.



Work Breakdown Structures

Define Project Scope

Break down high-level objectives into manageable components.

Create Task Hierarchy

Structure tasks and subtasks with clear dependencies.

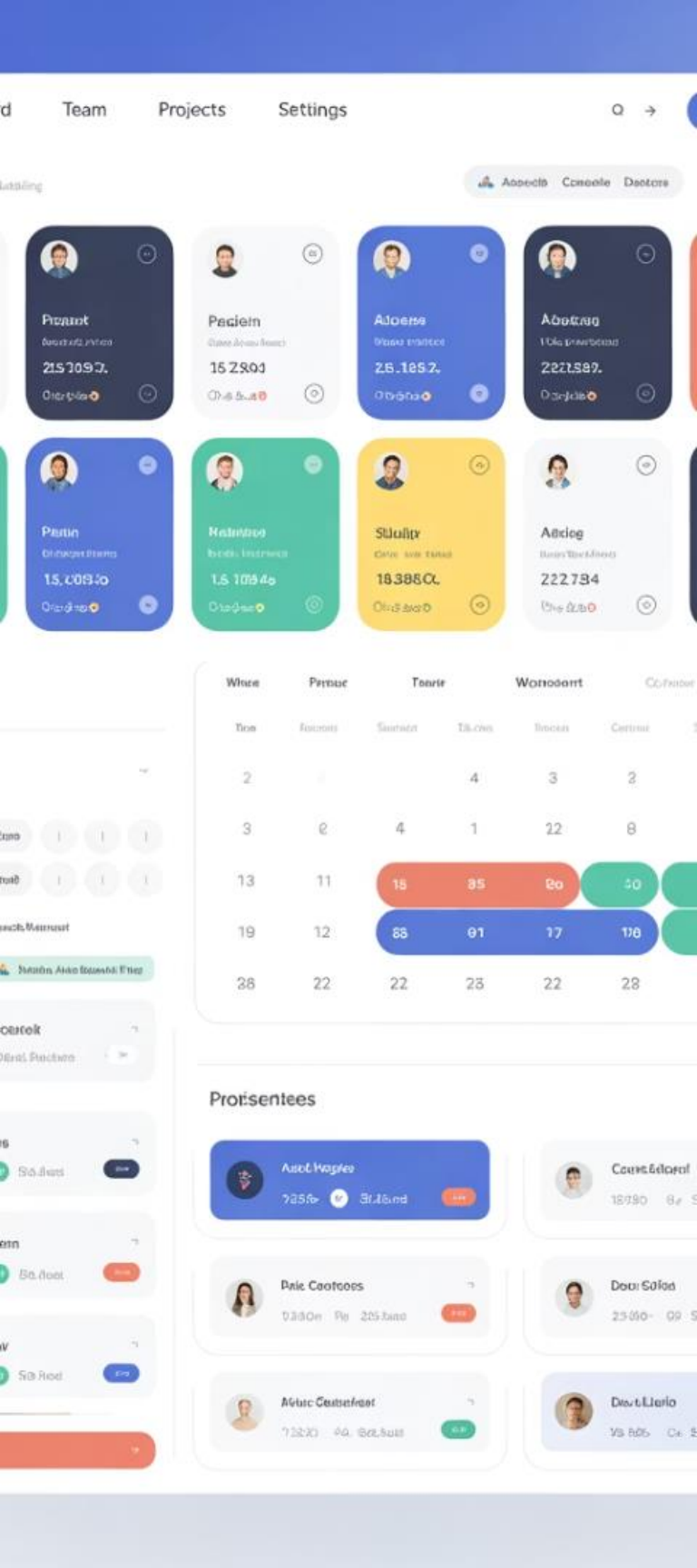
Assign Resources

Link team members to specific deliverables.

Monitor Progress

Track completion against the structured roadmap.

WBS provides a clear roadmap of deliverables and timelines. This ensures alignment with project goals and simplifies complex projects.



Resource Scheduling and Forecasting



Identify Skills

Match project requirements with team capabilities.



Check Availability

View resource calendars across multiple projects.



Allocate Resources

Assign team members to tasks based on capacity.

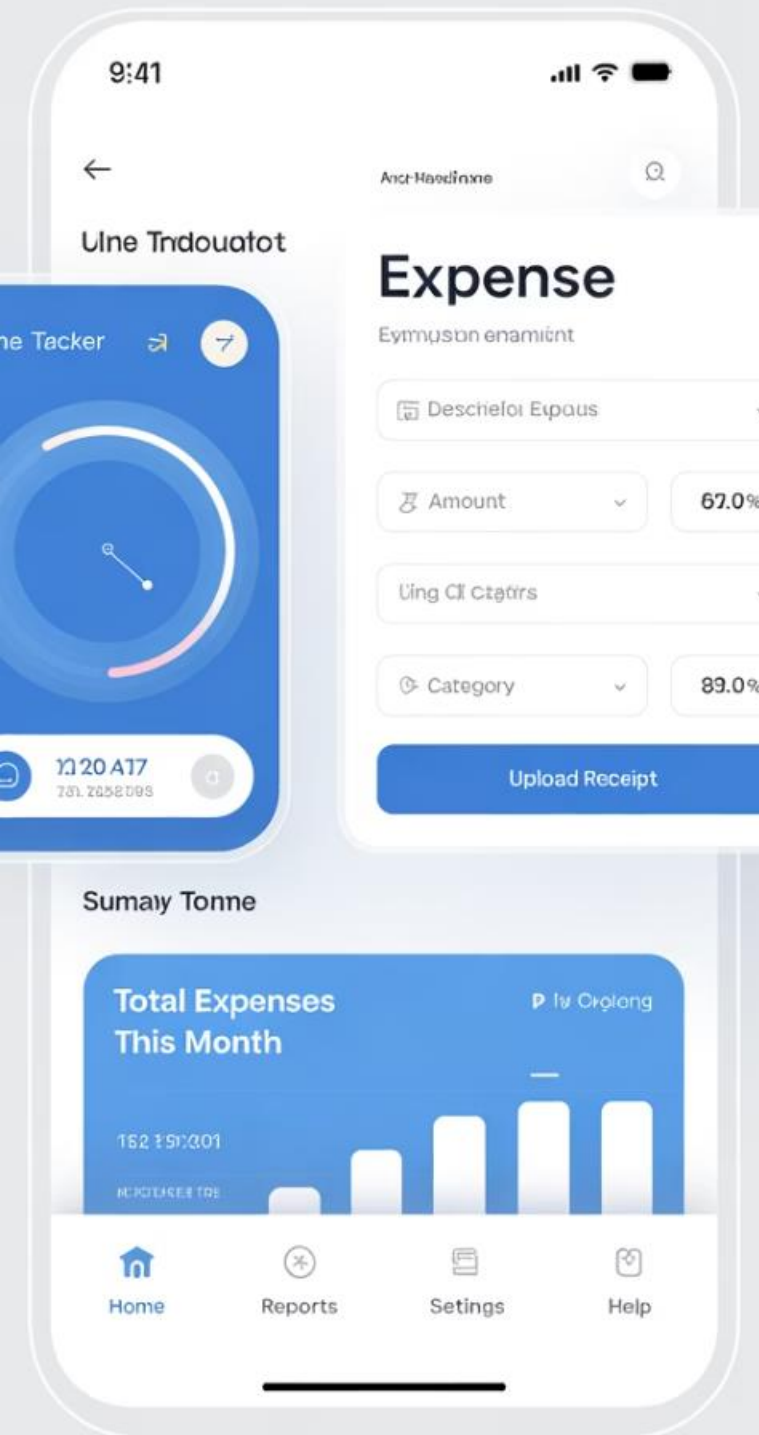


Forecast Needs

Predict future resource requirements.

Effective resource scheduling enhances capacity planning. It helps reduce conflicts and bottlenecks across your project portfolio.

Time and Expense Tracking



Mobile Time Entry

Team members log hours from anywhere using the mobile app.

- Project-specific timesheets
- Task categorization

Expense Management

Capture and categorize project expenses with receipt uploads.

- Receipt scanning
- Expense categories

Approval Workflows

Streamline reviews with automated approval routing.

- Multi-level approvals
- Notification alerts

Accurate time and expense tracking supports precise project costing. This leads to better financial forecasting and client billing.

Project Budgeting and Cost Control

Budget Setup

Create detailed project budgets with cost categories and revenue forecasts.

Link budgets directly to work breakdown structures for granular control.

Real-time Tracking

Monitor actual costs against planned expenditures as they occur.

View burn rates and forecast completion costs with predictive analytics.

Variance Analysis

Identify budget deviations early with automated variance calculations.

Drill down to root causes of overruns for corrective action.

Integrated financial tracking keeps projects on budget. Early variance detection helps prevent costly overruns.

Power BI Dashboards

360°

Project View

Complete visibility across all project dimensions

15+

KPI Templates

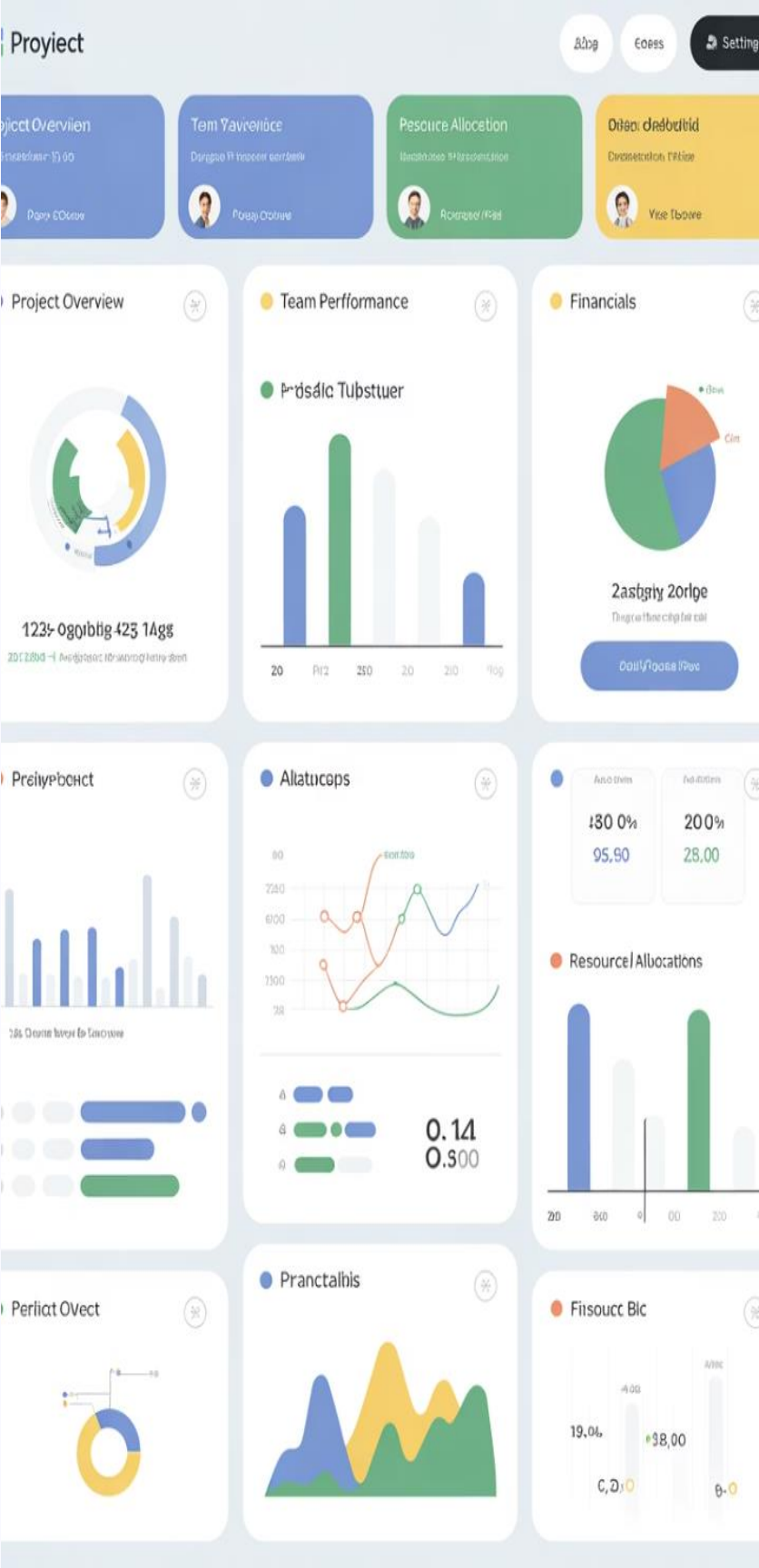
Pre-built visualizations for instant insights

5min

Refresh Rate

Near real-time data updates for current status

Power BI dashboards transform complex project data into visual insights. This improves transparency and supports faster, informed decision-making.



Microsoft Teams Integration

Chat & Meetings
Discuss project details without
switching platforms

Notifications
Receive alerts about project
changes



Document Sharing
Access and collaborate on project
files

Task Updates
Update project tasks during team
conversations

Teams integration promotes better collaboration and communication. Your team stays aligned without switching between different applications.

Automated Workflows and Alerts



Define Triggers

Set conditions that initiate automated processes.

- Task completions
- Budget thresholds
- Timeline milestones



Configure Actions

Specify what happens when triggers are activated.

- Approval requests
- Email notifications
- Status updates

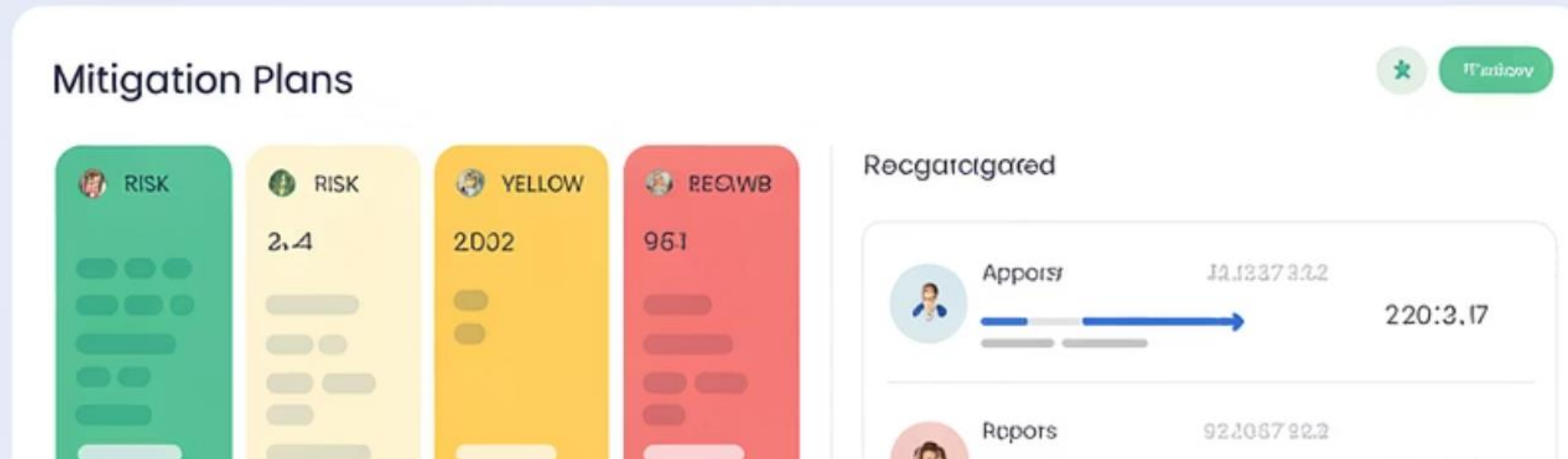


Deploy Workflow

Activate the automation throughout your project.

- Testing deployment
- User adoption
- Permissions setup

Power Automate integration saves time on repetitive tasks. It ensures compliance with project governance and approval processes.



Risk and Issue Tracking



Identify Risks

Document potential problems before they occur.



Assess Impact

Rate probability and consequence for prioritization.



Plan Mitigation

Create response strategies for each risk.



Assign Ownership

Delegate responsibility for risk management.

Proactive risk management prevents project disruptions. Tracking encourages accountability and ensures timely resolution of issues.

Client Billing and Invoicing

Time-and-Materials

Bill clients based on actual hours and expenses.



Fixed-Price

Invoice based on pre-defined project milestones.



Recurring Billing

Automate monthly or quarterly client charges.



Progress Billing

Generate invoices based on completion percentage.



Automated billing reduces manual errors and administrative time. Direct integration with project data improves cash flow visibility.

Contract Management



Contract Creation

Generate agreements from pre-approved templates



Approval Process

Route contracts through required stakeholders



Digital Signing

Collect electronic signatures securely

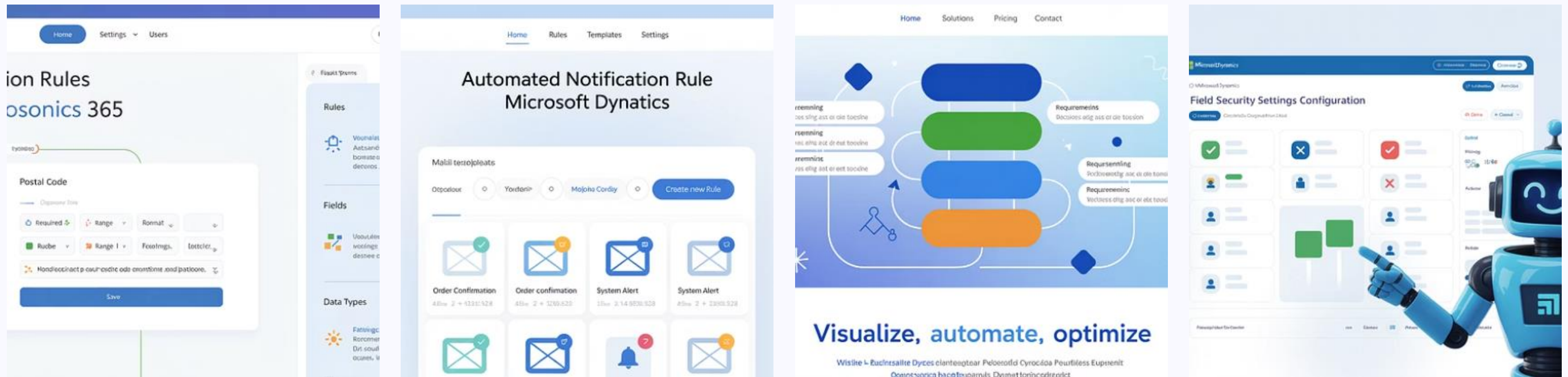


Obligation Tracking

Monitor deliverables against contractual terms

Effective contract management ensures project delivery meets legal obligations. This reduces risks and strengthens client relationships.

Custom Business Rules



Create custom business rules without coding. Configure validations, notifications, and automated actions that match your project methodology.

Mobile Accessibility



Cross-Platform Access

Use Dynamics 365 on iOS, Android, and Windows devices. Access critical project data from anywhere.



Secure Authentication

Protect sensitive project information with multi-factor authentication. Manage device access controls.



Offline Capabilities

Continue working without internet connection. Changes sync automatically when back online.



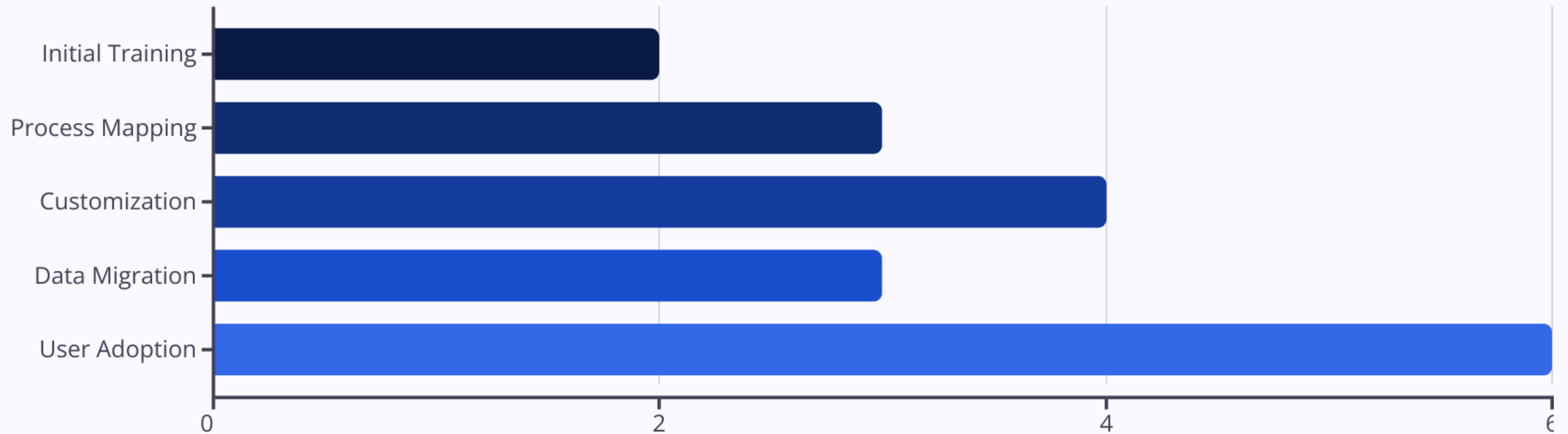
Push Notifications

Stay informed with real-time alerts. Receive updates about critical project events immediately.

Mobile access ensures project management continues outside the office. This flexibility improves response times and decision-making.



Next Steps for Project Managers



Microsoft Dynamics 365 transforms how project managers work. Start with proper training, map your processes, then customize the platform to your needs.

Final Thoughts

Microsoft Dynamics 365 is more than just an ERP or CRM system—it's a comprehensive toolset that empowers project managers to plan better, execute faster, and deliver value more effectively. Mastering these features can elevate your project management game and align execution with strategic business goals.

