

Dynamics 365 Project Operations: Project Management and Accounting Fundamentals

Duration: 2 day Remote or Onsite

Focus Area: Business/IT Alignment

Difficulty level: 300

Intended Audience

Individuals responsible for overseeing the day-to-day business operations related to Projects and Project management.

Primary Audience: Accounting, Financial leads & Project managers

Secondary Audience: Business process leads

Overview

Individuals who attend this course will retain a working knowledge of the Project management and accounting module in Dynamics 365 Project Operations.

Objectives & Key takeaways

The chalk talk is intended to provide participants the opportunity to begin understanding and gain general awareness of how the Project management and accounting module in Dynamics 365 Project Operations functions (out-of-box) in preparation(s) for:

- A new implementation of Dynamics 365 Project Operations

Dynamics 365 Project Operations Topics covered:

- Project setup
- Project execution
- Project with SCM integration
- Project invoicing and Project analysis

Agenda

Day 1

- **Module 1: Project setup**
- **Module 2: Working with project transactions**
- **Module 3: Project SCM Integration**

Day 2

- **Module 4: Project Contracts and Invoicing**
- **Module 5: Project Inquiries and reports**

Course details

Module 1: Project setup

- Project Types
- Project Groups
- Project Hierarchies
- Project Work Breakdown Structure
- Project Stages
- Project quotation
- Posting Setup by Project Group or Category
- Project validation groups

Module 2: Working with project transactions

- Transaction Types
- Project-related Documents
- Categories and Category Groups
- Project Pricing
- Line Properties
- Hour Transactions
- Hour Journal
- Expense Transactions
- Expense Journals
- Beginning Balances
- Review Project Transactions
- Adjusting Transactions
- Intercompany

Module 3: Project SCM Integration

- Invoice Journals and Invoice Registers
- Item Transactions
- Item Journals
- Item Requirements
- Purchase Orders
- Purchase Requisitions
- Production Orders
- Sales Orders

Module 4: Project Contracts and Invoicing

- Project Invoicing Overview
- Project Contracts
- Billing Requirements for Transactions
- Billing Rules
- Invoice Proposals
- On-Account Invoicing
- Credit Notes
- Free Text Invoices

Module 4: Project Inquiries and reports

- Project Control
- Project Statement
- Project Reports

Pre-requisites

The pre-requisites that allow candidates to inherit the most value from this course are:

- General knowledge of the Windows operating system.
- Knowledge of general accounting principles and procedures.
- Prior working experience and knowledge of ERP solutions.

For more information

Contact your Microsoft Account Representative for further details.