



Powered by
 Microsoft

A comprehensive guide to **Dynamics 365** **Project Operations**



White Paper

 proMX.net

Content

Introduction	03	Success stories	11
Understanding Project Operations	04	Extending Project Operations	12
The 10 biggest advantages of Project Operations	05	Other Dynamics 365 modules	12
		Integration with other systems	13
Working with Project Operations	06	proMX 365 Productivity Suite	14
Project Operations for different roles	07		
An AI assistant for everyone in your project team	08	Implementing Project Operations	15
Project Operations for different industries	09		
Feature focus: How to make projects more predictable	10		

01.

Introduction

If a project-oriented service company wants to be successful, it needs to make their clients happy. And clients would like their projects to:

- be completed on time
- not be significantly more expensive than planned
- be transparent

These three requirements can be complicated, though, because often projects are highly complex, difficult to predict and collaborative. The challenge becomes even greater if the departments involved in the project fail to work together.

This is hard to avoid when they work in disconnected systems: The sales department has its own CRM system, the project team uses another tool, employees make do with a number of different applications, the accounting department has nothing to do with all of this and management is forced to go through the hustle of gathering the information it needs from all these different solutions.

This is why once a company reaches a certain level of professionalization, coordinating projects across an end-to-end, AI-based system like Dynamics 365 Project Operations that connects sales, project management and finance only makes sense.



02.

Understanding Project Operations

Dynamics 365 Project Operations is Microsoft's end-to-end project management platform. It connects the entire project lifecycle, from sales and planning to resource management, delivery, financials and reporting, while using AI-powered features to support smarter project decisions and more practical outcomes.

Project Operations goes beyond just one project aspect. It combines all aspects of the project business and enables project employees to work within the same solution and speak the same language. That way, collaboration become more productive and transparent, and projects more predictable and profitable.

What Project Operations covers



Without Project Operations

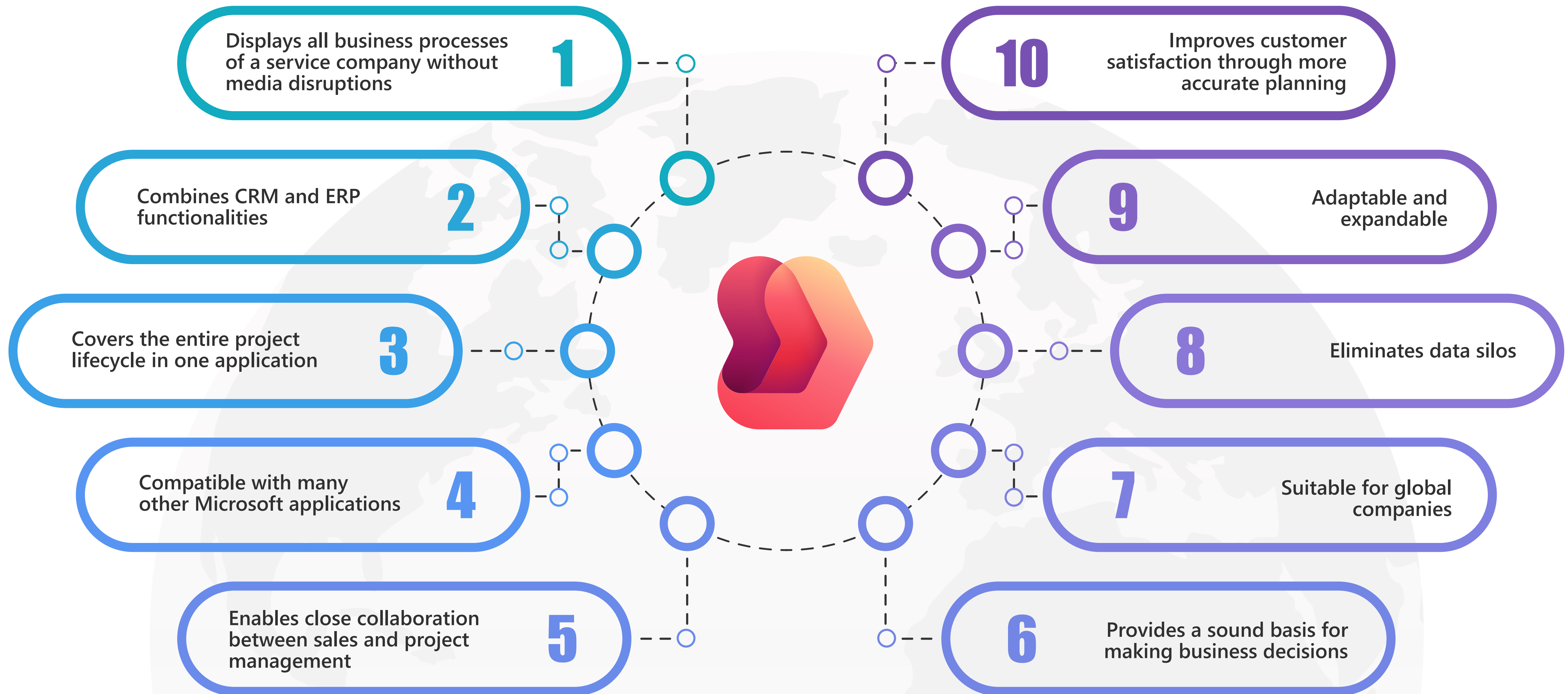
- ✗ Different systems for sales, project management, resource management, project teams, accounting, management
- ✗ Separate CRM and ERP
- ✗ Departments work with different data
- ✗ Poor project handovers from sales to project management
- ✗ Uncertain basis for decision making



With Project Operations

- ✓ Combines all departments involved in projects in one seamless solution
- ✓ All CRM and ERP functionalities in one solution
- ✓ All departments work with the same data
- ✓ Seamless collaboration of sales and project management
- ✓ Decisions are based on latest AI data and machine learning

The 10 biggest advantages of Project Operations



03.

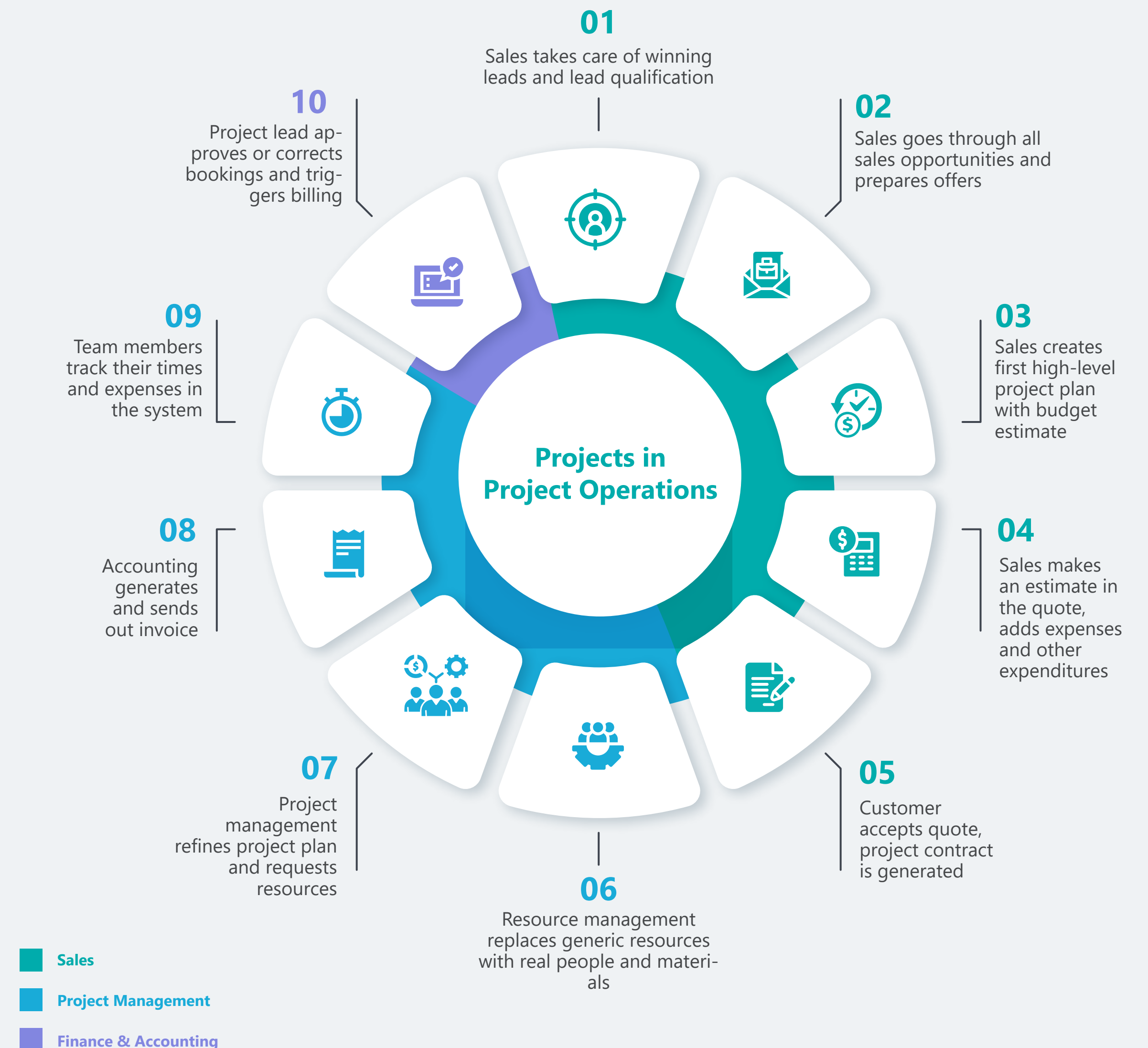
Working with Project Operations

Gurkan Salk

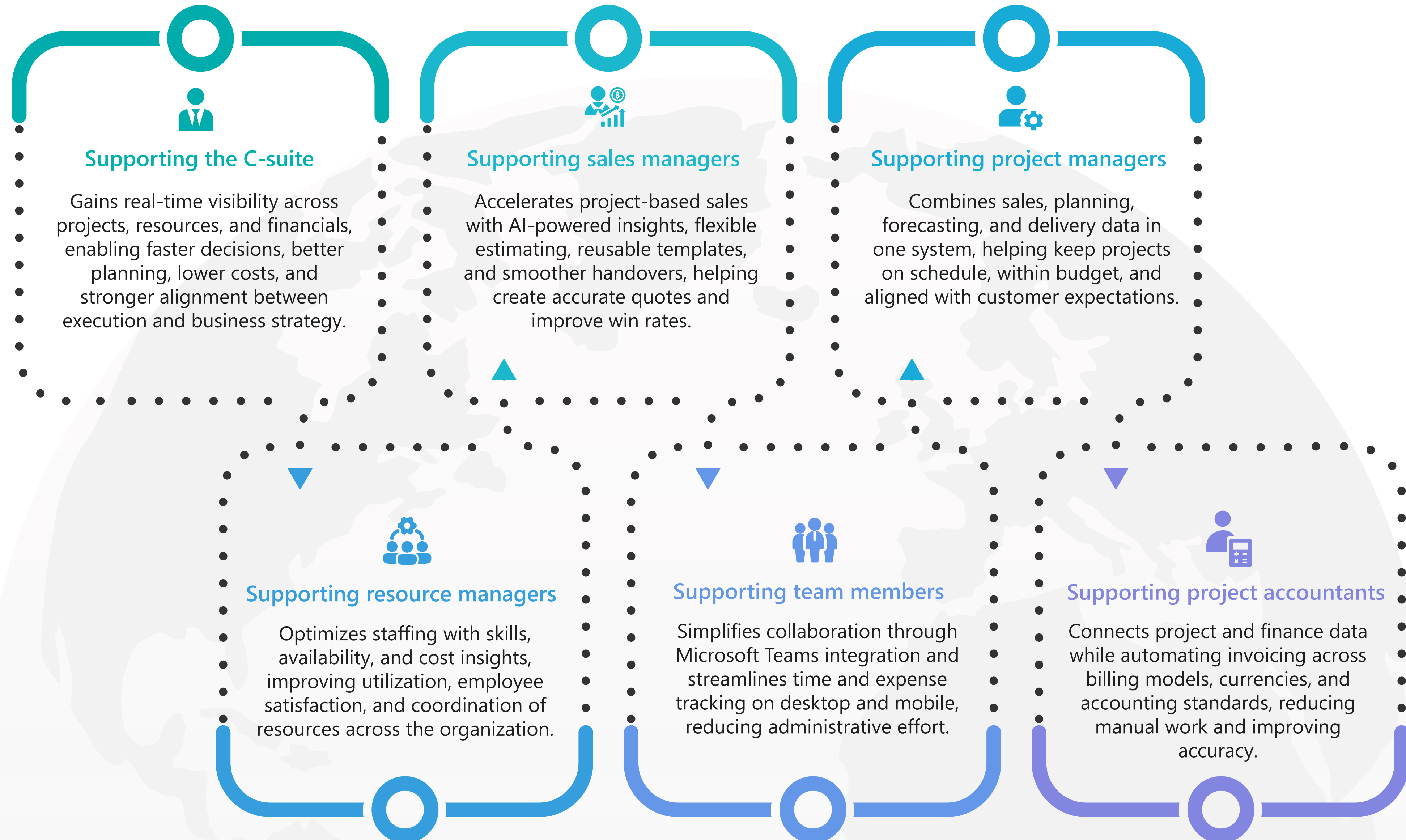
General Manager, Dynamics 365 Project Operations, Microsoft

"proMX is one of our most proficient partners with deep expertise in Dynamics 365 Project Operations as well as a proven track record of providing high-quality solutions that digitally transform services organizations with project-centric services. I'm excited that they share our enthusiasm for Dynamics 365 Project Operations and look forward to us jointly bringing more profitability to businesses everywhere."

As an end-to-end project delivery platform, Project Operations supports every stakeholder involved in planning, executing, and governing projects. AI-powered insights, shared data, and connected workflows help teams work more efficiently across the entire project lifecycle.



Project Operations for different roles



An AI assistant for everyone in your project team

Artificial Intelligence in Dynamics 365 Project Operations means a smart assistant for everyone on your team, regardless of their role. Microsoft’s Copilot is natively built into both the ERP and CRM apps of Dynamics 365, and is Microsoft’s AI-powered assistant that uses generative AI and natural language interactions to help people automate repetitive tasks as well as provide contextual recommendations and insights:



AI-generated project status reports



AI-assisted risk assessment



AI-generated project task plans



AI support for project delivery and decision-making

Agents

An AI Agent is a specialized AI-powered assistant designed to autonomously perform or coordinate specific business tasks, using business data, workflows, and organizational rules to help users complete work with less manual effort. Within Dynamics 365 Project Operations, agents such as the Time Entry Agent, Expense Agent, and Approvals Agent help automate key project-related processes.

AI feature	Role	What does it help with?	Outcome
Time entry agent	Copilot + Team member	Creates draft time entries based on project assignments, resource bookings, or previous week’s entries	Reduces manual time-entry effort and helps minimize missed submissions
Expense agent	Copilot + Team member	Processes receipts from Outlook shared mailbox, Expense Mobile app, or Dynamics 365 Finance and Operations, then creates expense lines automatically	Reduces manual receipt reading, category selection, and expense data entry
Approvals agent	Copilot + Project manager	Reviews submitted time, expense, and material entries against uploaded policy documents and classifies records as Ready for approval or Needs review	Speeds up review and helps reduce mistaken approvals

How do you adopt AI successfully, and make sure it’s actually useful for your team? Learn more from one of our customers:

READ MORE

Project Operations for different industries



In our industry-specific white papers, you'll learn all about how your business can benefit from Microsoft technologies.

[LEARN MORE](#)

Feature focus: How to make projects more predictable

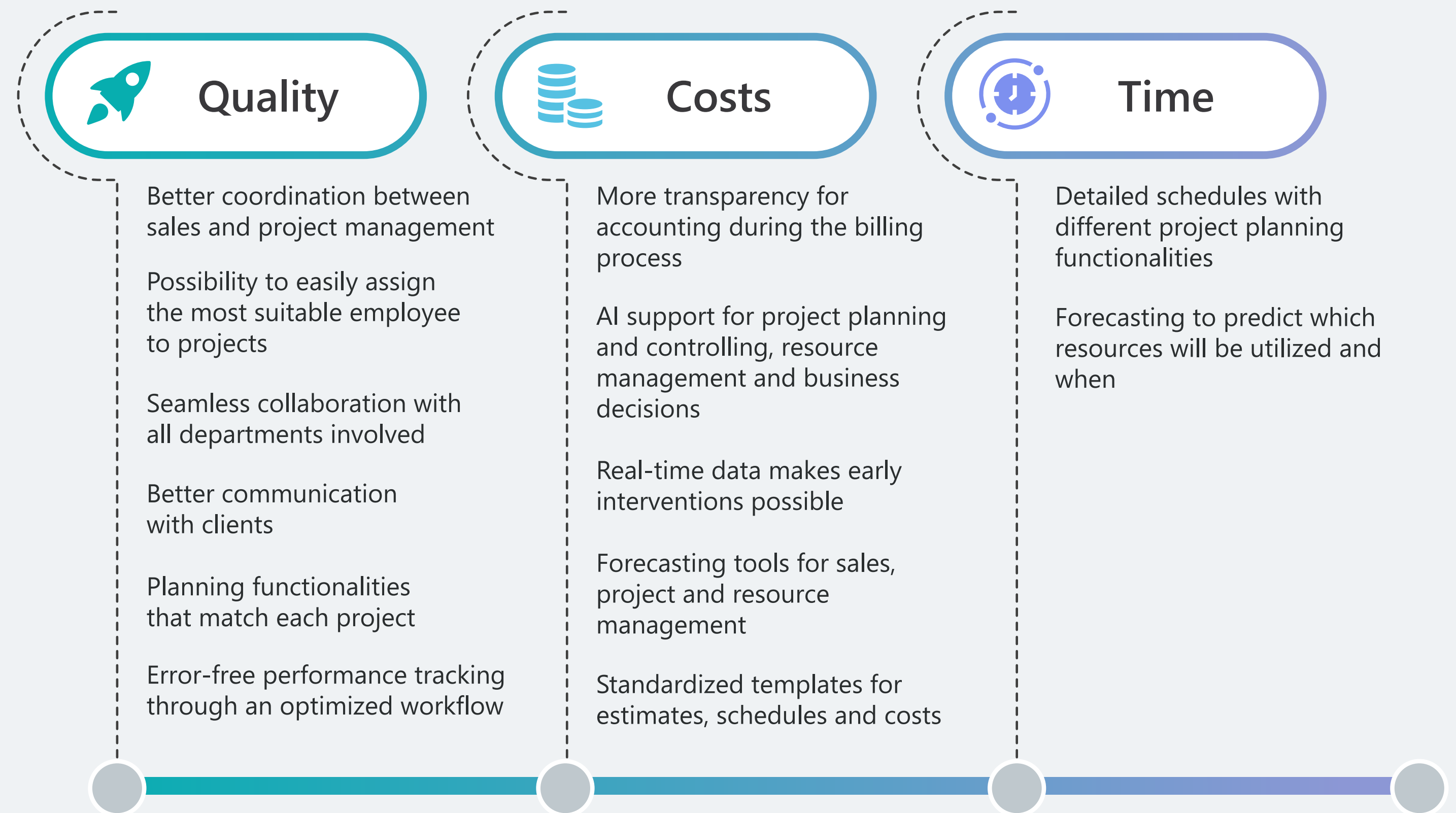
Customer satisfaction depends on whether the goals that were set or promised before the start of the project are met or not, especially deadlines and budgets. However, as projects are made up of many interdependent tasks and require different resources, they are not always easy to predict.

Predictability in the project business means knowing:

- Which resources are needed and when
- When the next phase of the project starts
- What costs will arise
- When the project will be completed

While artificial intelligence supports analysis and early signals, project predictability is ultimately achieved through structured planning, transparent data, and consistent execution. Project Operations combines these foundations with AI-supported insights to help teams stay in control.

There is a very clear focus on the factors quality, costs and time. Project Operations offers various functionalities for handling projects as well, fast and cost-effective as possible.



Success stories



Deutsche Bahn manages Climate Protection Portfolio with Dynamics 365 Project Operations to contribute to transport and climate change

As the leader in German rail transportation, Deutsche Bahn plays a critical role in Germany’s commitment to investing in a cleaner transportation infrastructure. The complexity and scale of this endeavour requires comprehensive project management, full transparency in KPI tracking, and data-driven reporting and analysis.

Company size: 50,000+

Industry: Logistics & transportation

Solutions:  Project Operations  Power BI  Azure Maps

[READ SUCCESS STORY](#)



HFA implements a unified, future-ready operational system to support collaboration, deeper financial visibility, and consistent project delivery

Over the past five years, HFA has doubled its workforce, expanded across three legal entities in two countries, and grown its distributed workforce across the United States. As the firm’s reach and project complexity increased, so did the importance of a seamless, scalable digital ecosystem.

Company size: 500+

Industry: Architectural Engineering & Construction

Solutions:  Project Operations  Sales  Power BI

[READ SUCCESS STORY](#)

Read more success stories on our website:

[TAKE ME THERE](#)

04.

Extending Project Operations

Other Dynamics 365 modules

Project Operations can be extended into a full-fledged ERP system for service organizations when combined with other Dynamics 365 apps.

Sales

If a company does not only carry out projects, but also sells products, extending Project Operations **with Dynamics 365 Sales** is a good idea. The module accesses the same database as Project Operations, which means that changes made in one application will also apply to the information in the other one. That way, it is possible to manage the data from different sources in one view.

Finance

If you are looking for even more finance functionalities, it is possible to extend Project Operations with **Dynamics 365 Finance**. The so called “dual write” connects the modules, which means that data is automatically synchronized between both apps.

Field Service

In many organizations, the project business is complemented by field service. If that is the case, connecting **Project Operations and Field Service** only makes sense. The apps access the same calendar for resources, which simplifies assigning the same employees to both departments.



Project Operations can be connected to several other Dynamics 365 applications, for example Customer Service, Supply Chain Management, Marketing and Human Resources.

Integration with other systems

While Dynamics 365 Project Operations covers core project business processes from sales to delivery and reporting, many companies already rely on an established ERP system for financials, logistics, or backend operations. In these integration scenarios, Dynamics 365 Project Operations usually acts as the front end for project work, while the company's existing ERP system continues to handle backend processes.

Why integrate your ERP and Dynamics 365?



It's simpler than you think

Connecting SAP and Dynamics 365 is straightforward and requires no third-party software.



Extend instead of replace

Keep your existing SAP system and simply add Dynamics 365 features – no full system change needed.



Cost-effective and proven

Typical integration scenarios can be implemented without major costs or complexity

Work more efficiently by connecting ERP systems like SAP with Dynamics 365.

LEARN MORE

Reinventing your productivity with proMX 365

Built as an extension of Dynamics 365 Project Operations, the proMX 365 Productivity Suite addresses common gaps in project management. It provides tools where out-of-the-box solutions often fall short, all working natively within your Dynamics 365 environment.



Project Portfolio Management



proMX 365 Core



Absence Management

PROMX365 Productivity Suite

Tailored to Dynamics 365 to meet organizations' demands, proMX solutions offer capabilities that meet particular business and industry needs as well as local market requirements.



Time Tracking



Mobile Time Tracking



AI project intelligence



Pre-project

- Idea management
- Business case & ROI
- OKR
- CAPEX/OPEX
- Project Templates
- CPQ & RFP AI Agent



Execution

- Resource planning
- RAID
- Lifecycle tracking
- Milestones & critical path
- Baseline & scenario planning
- Deliverables
- Clock-in/out time
- Flex & overtime
- Notifications
- Azure DevOps & Jira integration



Post-project

- Lessons learned
- Snapshots
- Ratings
- Pulse check
- Benefits
- AI reports & dashboards

**Discover the proMX 365 Productivity Suite,
and learn how it can boost your productivity!**

DISCOVER

05.

Implementing Project Operations with proMX

Georg Glantschnig

VP, Dynamics 365 AI ERP, Microsoft Corporation

"proMX, a trusted Microsoft Solutions Partner, is passionate about helping teams work more efficiently and effectively. Their proven track record makes them a proficient partner for organizations seeking digital transformation. As they continue to expand internationally, proMX brings their expertise in Dynamics 365 Project Operations to the world."

As a long-standing Microsoft partner, proMX helps organization navigate every stage of their implementation journey with extensive experience from different industries and proven implementation methodologies.

With our close relationship to Microsoft, we provide customers with direct access to product expertise and insights into the latest platform developments. Beyond implementation, the proMX team remains a trusted advisor by offering ongoing support, optimization services, user training, and tailored workshops.

How an implementation works

An implementation partner is both a service provider and a partner in a close-partner-customer relationship, and proMX's implementation projects can be structured as follows:

- System analysis and fit-gap workshops
Individual recommendation for action
- Software implementation
- Custom adaptations to the system
- System maintenance and technical support
- Needs-based user training

If you're interested in getting your own impression of Dynamics 365 Project Operations, the simplest way to do so is to try it out yourself. We will be happy to create a free demo for you!

We offer a helping hand!

The ideal Microsoft partner is not only an expert in theory and technology but also in its customer's industry. Our consultants are familiar with the processes, priorities and challenges of different sectors.

 **Microsoft**
Solutions Partner
Modern Work
Business Applications
Data & AI
Digital & App Innovation



As a Microsoft Inner Circle member, proMX belongs to the top 1% of global Microsoft partners, recognized for outstanding performance, innovation, and customer impact.

Let's discuss your project management challenges!

REQUEST DEMO

