

# **PROJECT OPERATIONS D365**

**Course Duration: 5 days**

## **Overview**

Project Operations for Dynamics 365 is an essential tool for managing projects efficiently, integrating various aspects like sales, resource management, finance, and project execution. This 5-day course is designed to provide participants with a comprehensive understanding of the platform, ensuring they can leverage its capabilities to optimize project delivery and performance. Attendees will gain hands-on experience and insights into best practices for utilizing Dynamics 365 for Project Operations.

## **Day 1 Course Content - Introduction to Project Operations D365**

- **Overview of Dynamics 365 Project Operations:** Explore the core features and benefits, understanding how it fits into the broader Dynamics 365 ecosystem.
- **Navigating the User Interface:** Learn how to navigate the interface efficiently, customizing your workspace for enhanced productivity.
- **Setting Up Project Operations:** Understand the initial setup process, including configurations and integrations necessary for seamless operations.
- **Key Concepts and Terminology:** Familiarize yourself with essential terms and concepts crucial for mastering Project Operations.

## **Day 2 Course Content - Sales and Project Management**

- **Managing Sales in Project Operations:** Discover how to manage project-based sales, from lead generation to closing deals.
- **Project Planning and Scheduling:** Learn techniques for effective project planning, including setting timelines and milestones.
- **Resource Management:** Understand how to allocate resources efficiently, ensuring optimal utilization and productivity.

- **Creating and Managing Tasks:** Dive into task creation, assignment, and tracking to ensure project success.

## **Day 3 Course Content - Financial Management and Analytics**

- **Project Costing and Budgeting:** Gain insights into project costing methodologies and budget management tools within D365.
- **Invoicing and Billing:** Learn the process of generating invoices and managing billing cycles to maintain cash flow.
- **Revenue Recognition:** Understand the principles of revenue recognition and how to apply them in Project Operations.
- **Data Analytics and Reporting:** Explore the analytics tools available for generating insightful reports and dashboards.

## **Day 4 Course Content - Collaboration and Communication**

- **Enhancing Team Collaboration:** Discover tools and features that facilitate better communication and collaboration among project teams.
- **Integrating with Microsoft Teams:** Learn how to leverage Microsoft Teams for enhanced project collaboration.
- **Managing Stakeholder Communication:** Develop strategies for effective communication with stakeholders throughout the project lifecycle.
- **Document Management:** Understand the document management capabilities of Project Operations for maintaining organized and accessible project documentation.

## **Day 5 Course Content - Advanced Features and Best Practices**

- **Customizing Project Operations:** Explore customization options to tailor the platform to your organization's unique needs.



- Automation and Workflow Management: Learn how to automate repetitive tasks and manage workflows efficiently.
- Best Practices for Project Success: Discuss proven strategies and best practices for ensuring successful project delivery.
- Troubleshooting and Support: Gain skills in troubleshooting common issues and accessing support resources to resolve them effectively.

This course ensures that by the end of day five, participants will be well-equipped to manage their projects using Dynamics 365 Project Operations, leading to improved project outcomes and increased organizational efficiency.