CONVERGENCE | AI + ERP

MIAMI | 2025

Redefining how Projects are planned and sold in Dynamics 365 Project Operations using AI and Agents

Rupa Mantravadi
Group Product Manager (GPM), Project Operations
Microsoft

Sean Galliher
AI Business Solutions Global Black Belt
Microsoft

Sponsored By Microsoft

Hosted By DYNAMICS USER GROUP

Topics

- Recently Released Features
- Proposal Agent
- Change Orders
- What if Analysis

Recently released features

- Enhanced limits on project and tasks
- Upgrade to Planner P3 license
  - Task history
  - Advanced dependencies with lead and lag
  - Baseline
- Enterprise Task Custom Columns
- Update progress of a task on task grid
- Access control on task grid
- Time zone agnostic dates on Project and Project Task
- Schedule API performance improvement
- Lock/Unlock task grid on project deactivate/activate

Classified as Microsoft Confidential

Enhanced limits on projects and tasks

Maximum tasks in a project	3,000
Maximum duration of a project	15 years
Maximum team members for a project	1000
Maximum total custom fields for a project	10
Maximum resources assigned to a task	50

Classified as Microsoft Confidential

Upgrade to Planner P3 License

NEW

Task History

Complete audit trail and timeline view

NEW

Advanced Dependencies

Support for additional dependencies

NEW

Lead and Lag Dependencies

Precise timing control for dependencies

NEW

Baseline (Single)

Progress tracking & variance analysis

Classified as Microsoft Confidential

Enterprise Task Custom Columns

Take control of your task management with powerful custom columns that can now be pinned for enhanced workflow efficiency.

Benefits of Pinned Custom Columns

Enhanced Visibility

Critical information stays in view as you navigate through large task lists

Faster Workflows

Reduce time spent moving to task main form and view the details there

Better Organization

Customize your view to match your team's specific needs and priorities

Custom column creation must be done through the Maker portal.

Classified as Microsoft Confidential

Update progress of a task on the task

Simplified Process Flow

Before

Navigate to timesheet
Fill out time entries
Mark completion

→

Now

Click to complete
Or adjust progress %
On task grid
Done! ✨

Streamlined Workflow

Eliminate unnecessary steps and focus on what matters most - getting tasks done.

One-Click Completion

Mark tasks as complete instantly without navigating to separate forms

Visual Progress Updates

Update percentage completion with clear visual feedback

Skip Timesheet Complexity

Perfect for projects where time tracking isn't essential

Classified as Microsoft Confidential

Access Control on Task Grid

Before: Unrestricted Access

All Users

Full access to task grid

- Unnecessary changes
- No access control
- Security concerns

After: Controlled Access

Hierarchical Control

System Level

Project Level

- Controlled modifications
- Enhanced security
- Flexible permissions

Classified as Microsoft Confidential

Demo: New Features

Microsoft

Proposal Generation

Classified as Microsoft Confidential

Microsoft

Change Orders

Classified as Microsoft Confidential

Microsoft

What – If Analysis

Classified as Microsoft Confidential

CONVERGENCE | AI + ERP

QUESTIONS

Sponsored By Microsoft

Hosted By DYNAMICS USER GROUP

CONVERGENCE | AI + ERP

THANK YOU

Sponsored By Microsoft

Hosted By DYNAMICS USER GROUP