CONVERGENCE | AI + ERP

MIAMI | 2025

Streamlining Time, Expense, and Approvals with Dynamics 365

Rupa Mantravadi
Group Product Manager (GPM),
Dynamics 365 Project Operations

Ajit Chandran
Senior Product Manager,
Dynamics 365 Project Operations

Archana Prasad
Principal Solution Architect Manager
Dynamics 365 FastTrack

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Project Operations

Leading the way in Service-centric ERP

Copilot Adaptive Experiences

Deal management	Work planning	Resourcing	Project Execution	Subcontracting	Billing & Finance
Multiple Contract Types	Project scheduling	Skills management	Time, Expense and Material usage	Capacity planning	Project costing and accounting
Lead to Project Contracts	Gantt, Kanban boards	Resource requests	Mobile Apps	Supplier onboarding & vendor management	Electronic invoicing
CPQ for Services	Estimates and Budgets	Booking reconciliations	Policies & rules for Entry and Approvals	Goods and Services delivery	Credit and collections
Advanced contract limits	Project Templates	Workforce planning and management	Budget tracking and earned value	Invoice three-way match	Fixed Price and Subscriptions

Core Financials, Operational HR, and Globalization Studio (Tax, localization, compliance)

Extend

MICROSOFT CLOUD

Connectors & Common Data Framework	Copilot	Collaboration	Security	AI & Analytics	Low-Code Agility	Sustainability
Dataverse, Azure Synapse, Azure Data & AI		Microsoft 365 & Teams	Microsoft Security	Power BI	Power Apps, Power Automate & Power Pages	Cloud for Sustainability

AI adoption in PMO

80%

of project management (PM) tasks will be done by AI by 2030

https://www.gartner.com/en/newsroom/press-releases/2019-03-20-gartner-says-80-percent-of-today-s-project-management

17.3%

CAGR – The AI in Project Management Market is projected to grow from USD 2.5 billion in 2023 to USD 5.7 billion by 2028.

https://www.marketsandmarkets.com/Market-Reports/ai-in-project-management-market-114598376.html

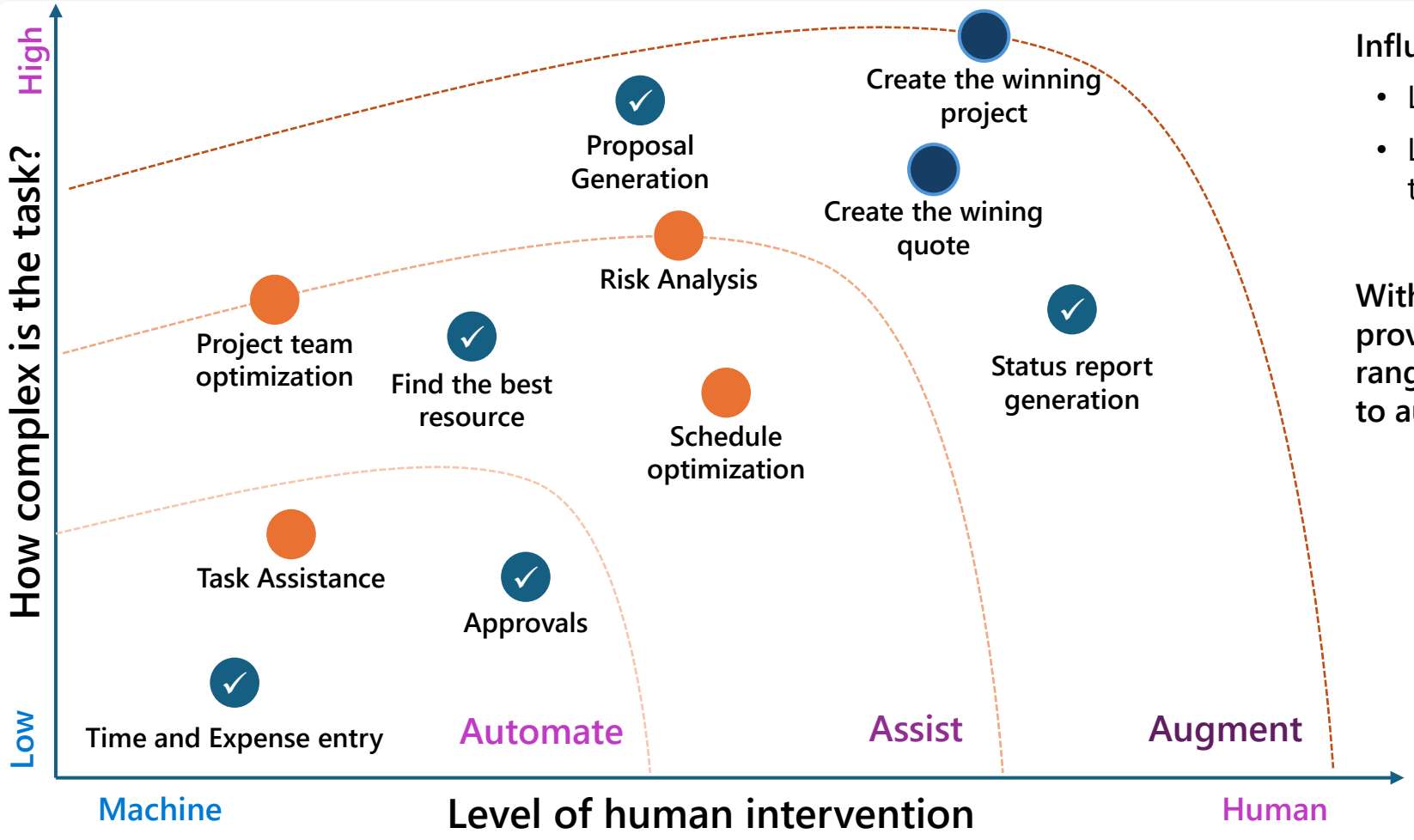
93%

of companies that invested in AI in Project Management have reported a positive ROI in the last 12 months.

Capterra research 2024: https://www.capterra.com/resources/data-on-ai-in-project-management/

Generative AI spectrum for Project Operations

AUTOMATE → ASSIST → AUGMENT*



Influence of GenAI will be determined by

- Level of complexity
- Level of human intervention needed to get the expected output from AI

Within these two dimensions, GenAI can provide support on a spectrum that ranges from automation, to assistance, to augmentation*.

- Released
- In consideration
- Longer term

Time, Expense and Approvals Agent

Dynamics 365 Project Operations

Agents & Supported Deployments

Deployment type	Time Entry Agent	Expense Agent	Approvals Agent
Project Operations Core	✓		✓
Project Operations Integrated with ERP	✓	✓	✓
Project Operations for Manufacturing		✓	

Time Agent

Automating Time Entry to
Maximize Revenue and Productivity

Challenges

What current state looks like

Time consuming to manually file and approve time sheets

Delayed invoices to clients with errors

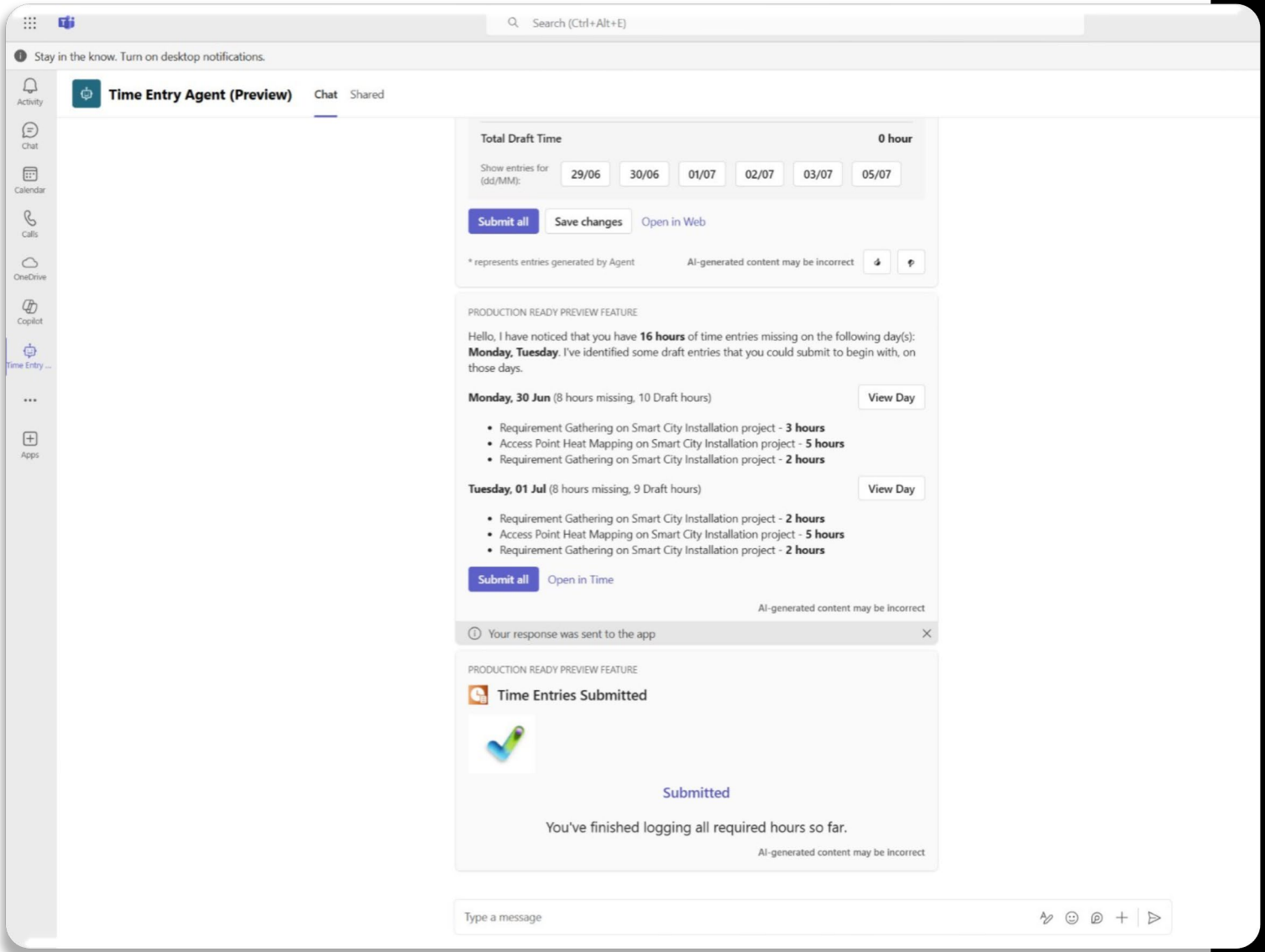
Revenue leakage due to inaccurate filing

Time Entry Agent

Takes away need for manual time entry creation by scanning planned assignments, bookings or previous week to pre-populate entries

New Teams chat interface to review entries created by the agent

Reminder for missing time entries to support project managers with tracking team's submissions



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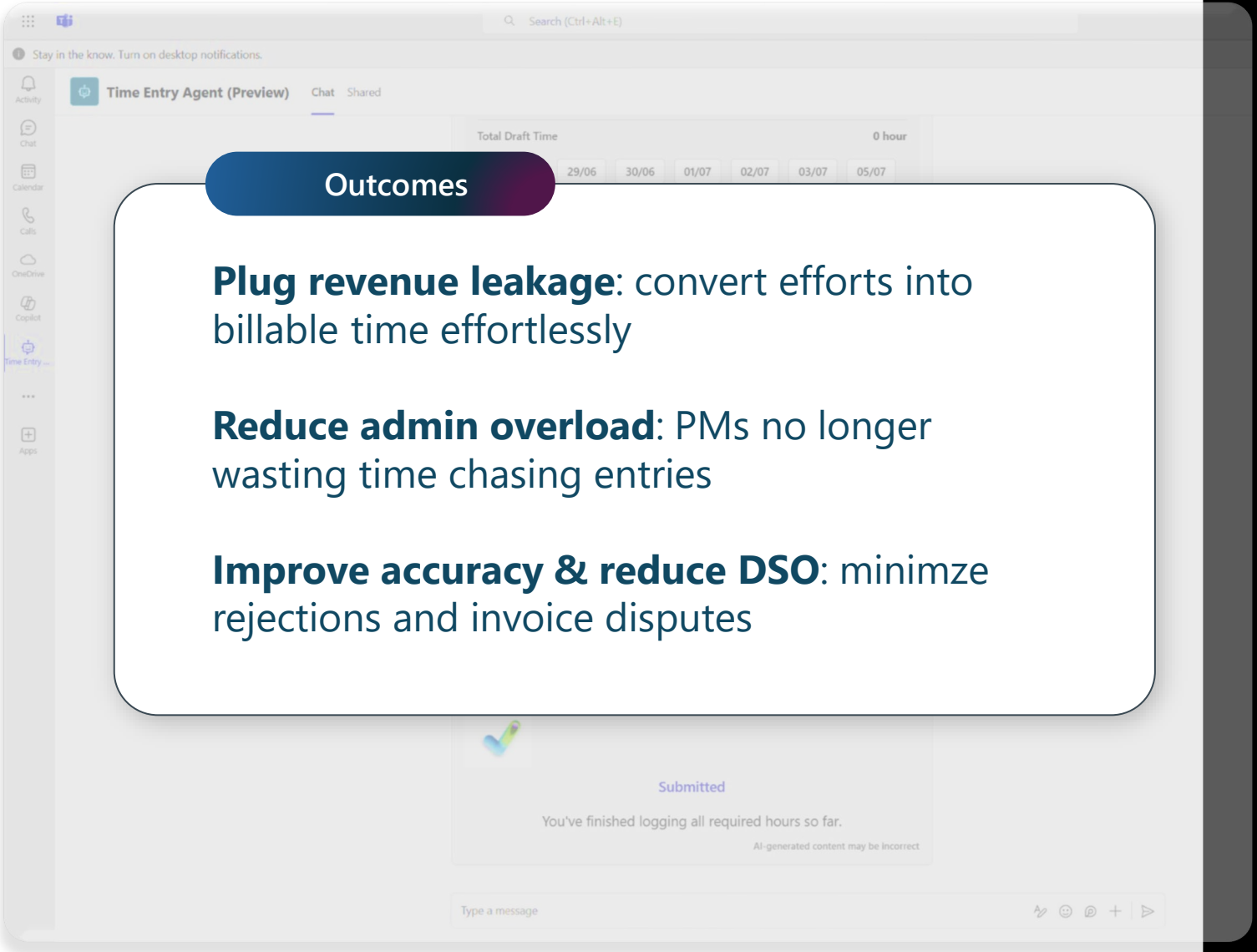


Outcomes

Plug revenue leakage: convert efforts into billable time effortlessly

Reduce admin overload: PMs no longer wasting time chasing entries

Improve accuracy & reduce DSO: minimze rejections and invoice disputes

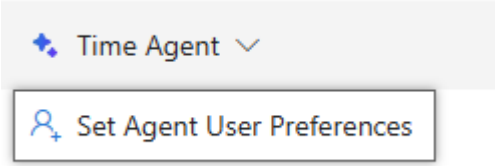
Time Entry Agent : Public Preview capabilities

Enabling Agent

Admin set up (enabling PA flows, Feature flag, Publishing agent in MCS)

Publish Teams app and share with team members (*optional*)

Team members set agent preferences for time entry sources and use of Outlook calendar



Agent behavior

Monday* (*Beginning of a week can be configured as needed)	Days in between	Friday (last working day)
• **Creates time entries for entire week** based on sources chosen in preferences • Also generates basic comments *(when Outlook access isn't provided in preferences)* • Notifies users on Teams *(if Teams app is enabled)*	• User can review, modify and submit time entries during this period • Review can be done via the web app (time entry grid) OR Teams chat with limited editing (if Teams app is enabled)	• When Outlook access is provided, **enhanced comments are generated** based on relevant meeting info • Sends user a reminder in Teams to submit missing entries (based on working hours)

Focused view | Show Chart | New Project | Delete | Refresh | Visualize this view | Email a Link | Flow | Excel Templates | Export to Excel | Import | Share

My Team's Active Projects

Edit columns | Edit filters | Filter by keyword

Name	Customer	Start Date	Finish Date	Actual Start	Actual Finish	Effort (Hours)	Effort Comple...	% Complete	Estimated Tota...	Actual Total C...	Cost Consump...
Government AI Case Study		6/23/2025	7/11/2025 5:00 ...			0.00	0.00	0.00	$0.00	$0.00	
Smart City Installation		6/23/2025	7/4/2025 5:00 PM			372.00	0.00	0.00	$0.00	$0.00	

Approvals Agent

Challenges

What current state looks like

Manual validations are time-consuming and error-prone

Overloaded PMs & outdated rules lead to delays and invoice rejections

Inconsistent approvals risking revenue leakage and compliance issues

Approval Agent

Approvers are assisted in identifying entries that are ready for approval and those that require attention by evaluating each entry against the corresponding policy

On entries that require attention, the agent can generate the reason by quoting policies that are not met, ensuring proactive resolution of these

Entries ready for approval can be auto-approved if desired

Time entries reviewed by Agent*

Review status (Project ...	Review reason (Project Approval)	Date (Project Appro...
Needs review	- Policy 8: Time entries submitted with comments having spelling or grammar m...	6/25/2025
Needs review	- Policy 13: Time submitted for project 'Robotics Installation'.	7/1/2025
Needs review	- Policy 10: Time entries submitted beyond the finish date on the associated task...	6/24/2025
Needs review	- Policy 1: Time entries with revenue of time submitted as 0. - Policy 10: Time ent...	9/4/2025
Needs review	- Policy 1.1.1: Falls outside dates.	7/14/2025
Ready for approval	No policy violations found.	7/16/2025
Needs review	- Policy 10: Time entries that were submitted beyond the finish date on the asso...	7/14/2025
Needs review	Time entries submitted on a non-working day.	7/13/2025
Ready for approval	No policy violations found.	7/15/2025
Needs review	Time entry falls outside the resource assignment period and team member start ...	7/23/2025
Needs review	- Policy 1: Time entries with revenue of time submitted as 0.	3/31/2025
Needs review	- Policy 13: Time submitted for project 'Robotics Installation'.	6/23/2025
Needs review	- Policy 13: Time submitted for project 'Robotics Installation'.	6/30/2025

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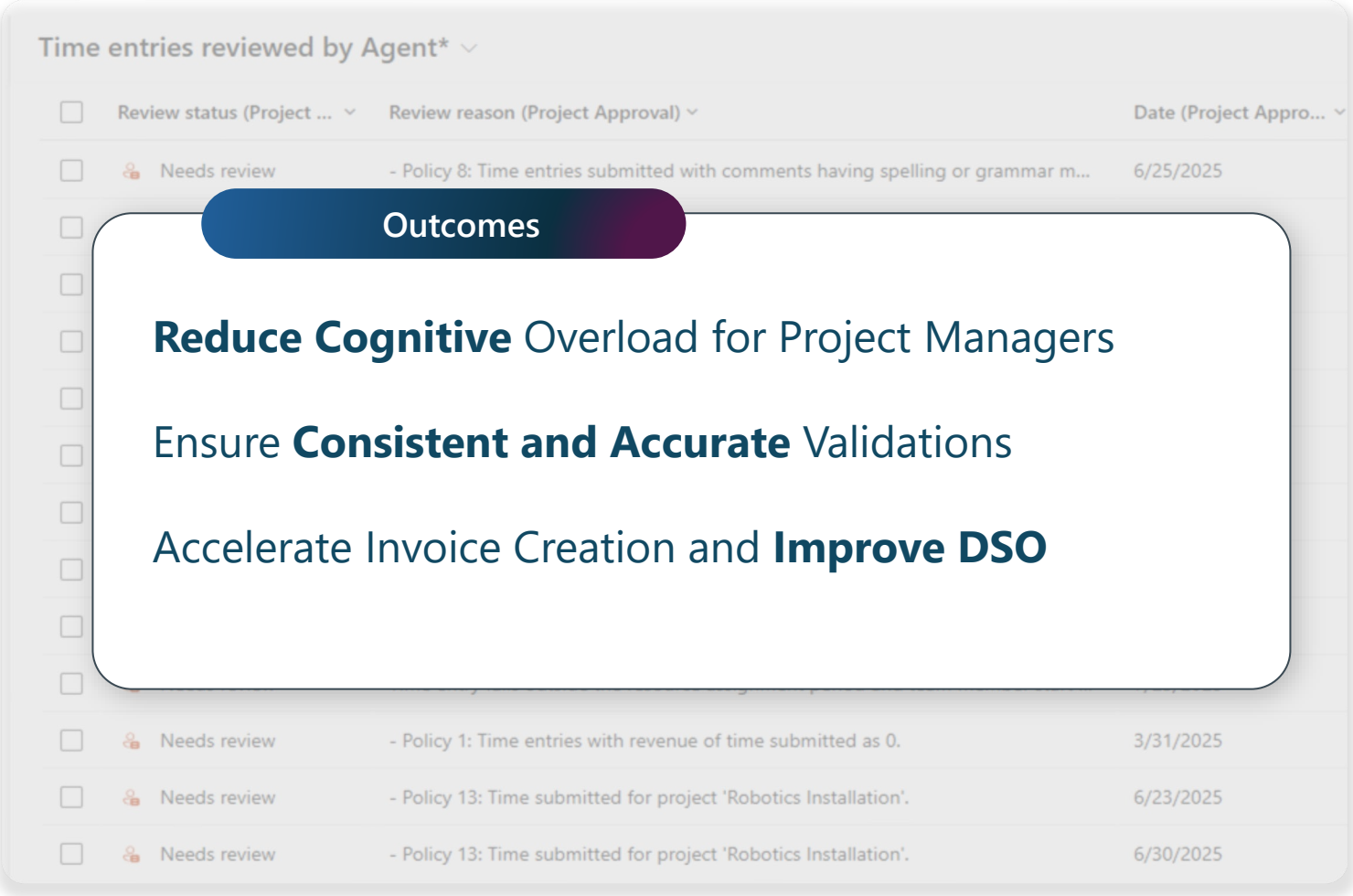


Outcomes

Reduce Cognitive Overload for Project Managers

Ensure **Consistent and Accurate** Validations

Accelerate Invoice Creation and **Improve DSO**

Power Platform admin center | Project Parameter: Information | Time and Expense Agent review | Time and Expense Agent review | Overview - Approvals Agent

aurorabapenvef159.crm10.dynamics.com/main.aspx?appid=23210040-b0d0-ef11-a730-6045bd04f0ed&pagetype=entityrecord&etn=msdyn_projectparameter&id=1b9aabe8-b4d0-ef11-a730-6045bd04f0ed

Dynamics 365 | Project Operations

Save | Save & Close | Summarize | Delete | Feature Control | Refresh | Check Access | Flow | Word Templates | Run Report | Share

- Home
- Recent
- Pinned

General

- Parameters
- Organizational Units
- Transaction Categories
- Expense Categories
- Invoice Frequencies
- Recurring Invoice Set...
- Calendar Templates

Schedule integration

- Operation sets
- PSS error logs
- Upgrade logs

Settings

Parameter - Saved

Project Parameter

General | Price List | Amount Based Pricing Dimensions | Markup Based Pricing Dimensions | Budget Match Priorities | **Time and Expense Agent (Preview)** | Related

Rules

Approval Policy: Approvals Policy.docx | Delete

Mode: Classify

Rules

Metrics

See all records | Show As

Name	This week	This month	This quarter	This year
Approvals	0	0	121	121
Classified as 'Needs review'	0	0	84	84
Classified as 'Ready for approval'	0	0	37	37
Hours saved	0	0	21	21

Factors affecting Days Sales Outstanding

See all records | Show As

54°F Mostly cloudy | Search | 4:46 PM 2/25/2025

Expense Agent

Revolutionize expense management

Challenges

What current state looks like

Employees delay submitting expense reports

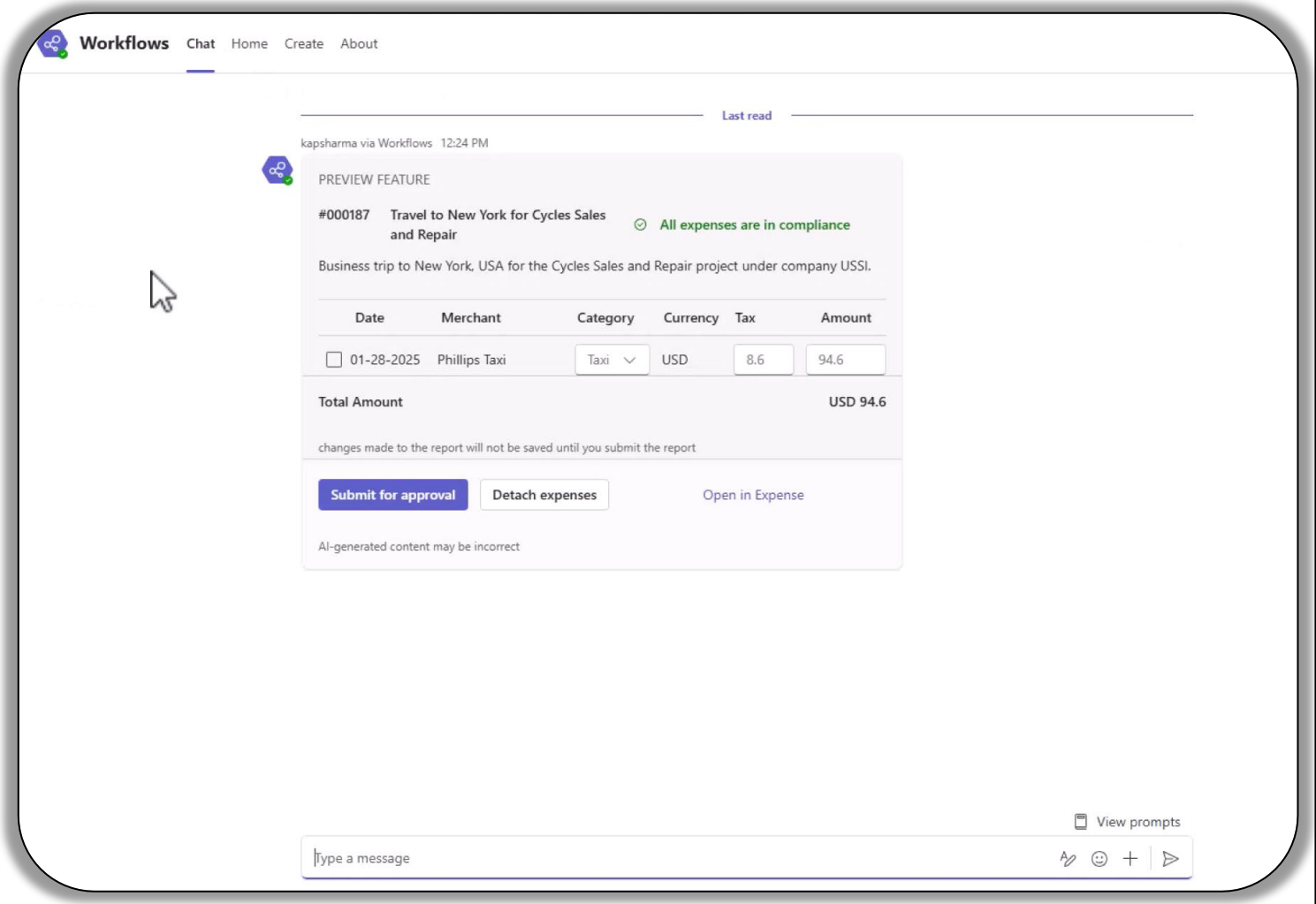
Multiple receipts from flights, hotels, transportation, meals, …

Administrative overhead for finance teams

Expense Agent

Employees can effortlessly submit receipts via Outlook, Expense Mobile app, or Dynamics 365 Finance & Operations and create expense entries

The agent processes email attachments to create unattached receipts, which then are used to create corresponding expense lines



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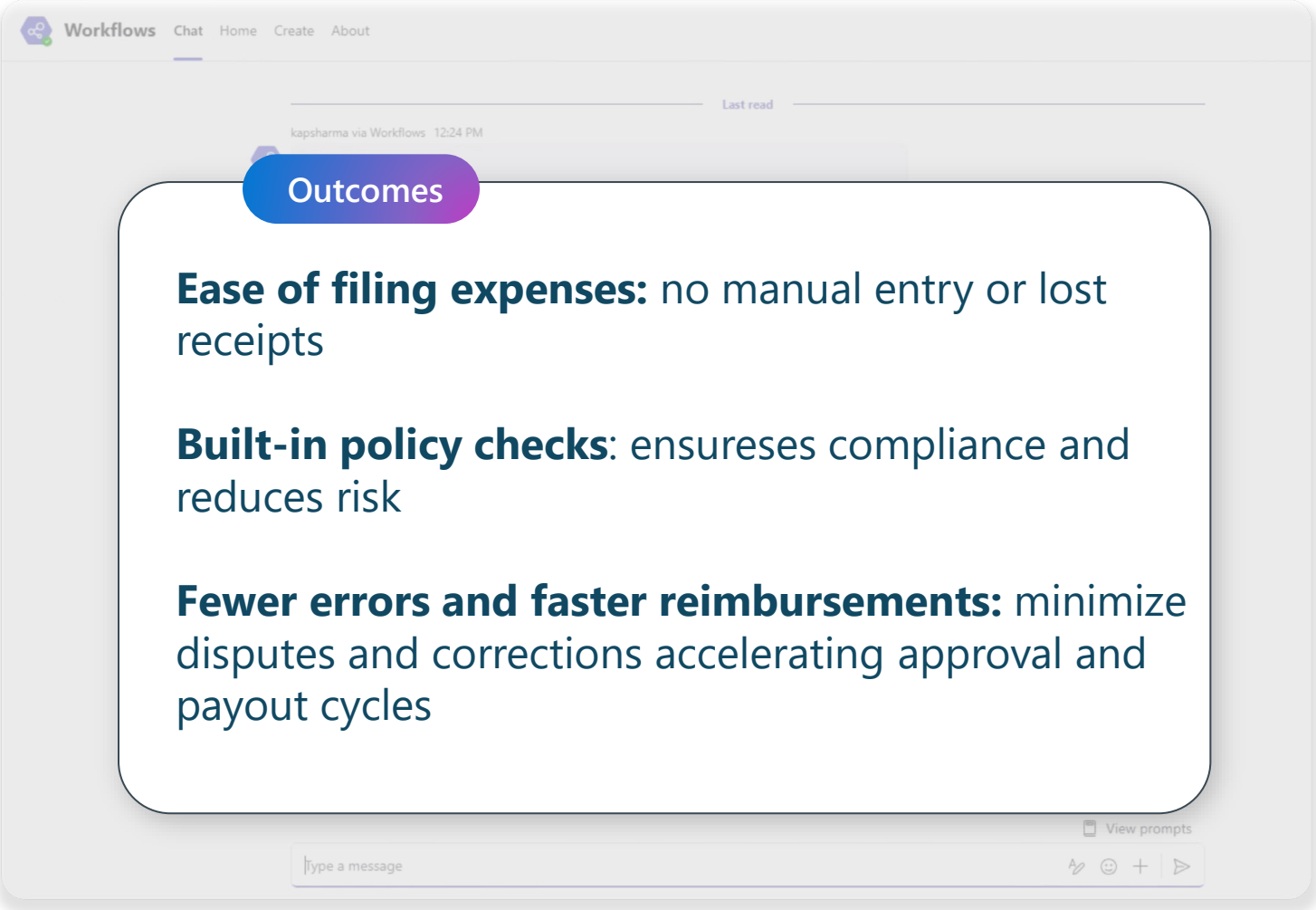


Outcomes

Ease of filing expenses: no manual entry or lost receipts

Built-in policy checks: ensureses compliance and reduces risk

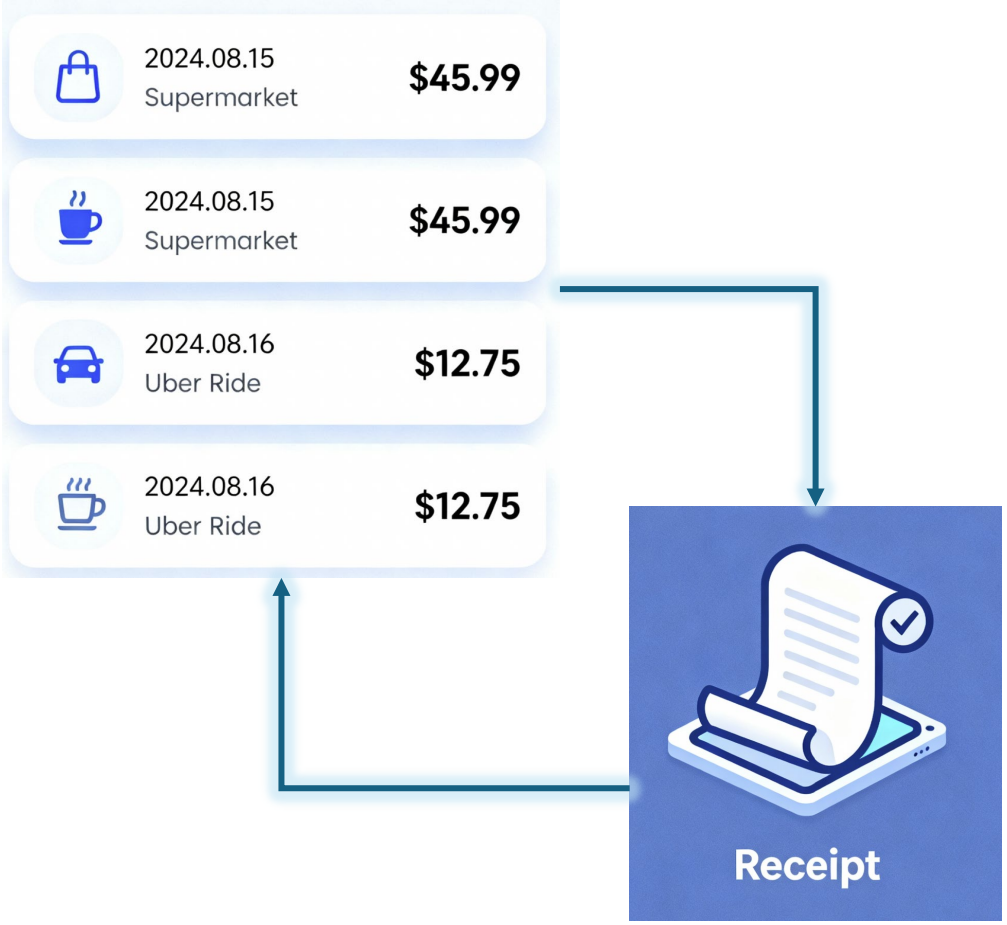
Fewer errors and faster reimbursements: minimize disputes and corrections accelerating approval and payout cycles

Auto-matching Receipts with Expenses

Expense agent automatically links the uploaded receipts with corresponding expense transactions.

Eliminates manual matching efforts.

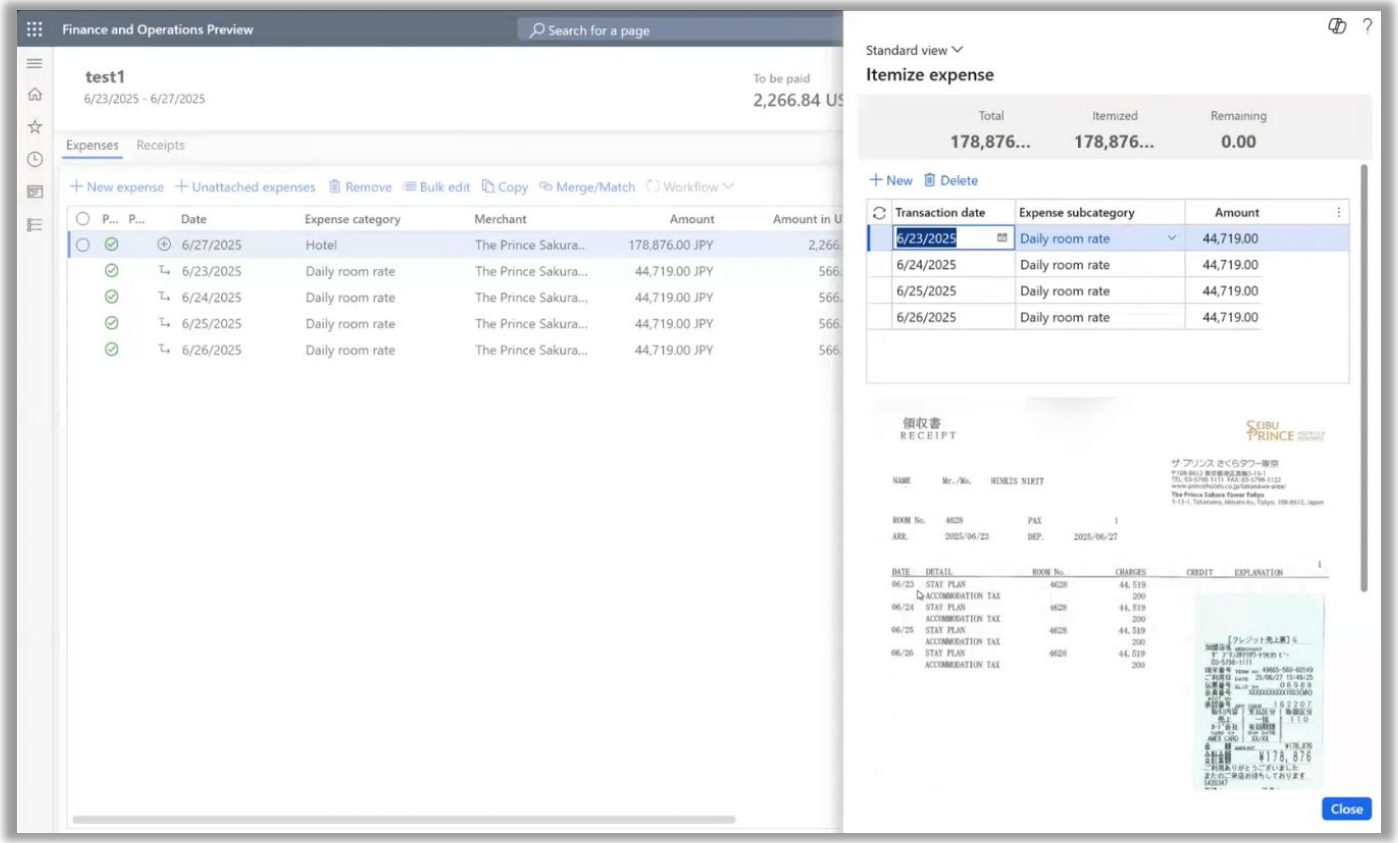
Creates expense lines with matched receipts attached to it.



Expense Itemizations

With itemization feature enabled, Expense Agent itemizes expenses based on the subcategories defined.

Expense agents extracts itemization details from receipts and generate line items, which users can confirm or update.



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Copilot

Favorites

Inbox

Sent Items

Drafts 1

gururajcs@FOCDS...

Inbox

Drafts 1

Sent Items

Deleted Items

Junk Email

Notes

Archive

Conversation Histo...

Search Folders

Go to Groups

Focused Other

All done for the day

Enjoy your empty inbox.

Send

No label

To

Bcc

Cc

Add a subject

Type / to insert files and more

Nothing in folder

(No subject)

Your Feedback Matters!

Streamlining Time, Expense, and Approvals with Dynamics 365

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QUESTIONS

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