DYNAMICSCON PRESENTATION
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POWERED BY DUG
SEPTEMBER 14-16, 2022

USING PROJECT MANAGEMENT AND ACCOUNTING TO CAPTURE UNIQUE BUSINESS PRACTICES

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AX user since 2008
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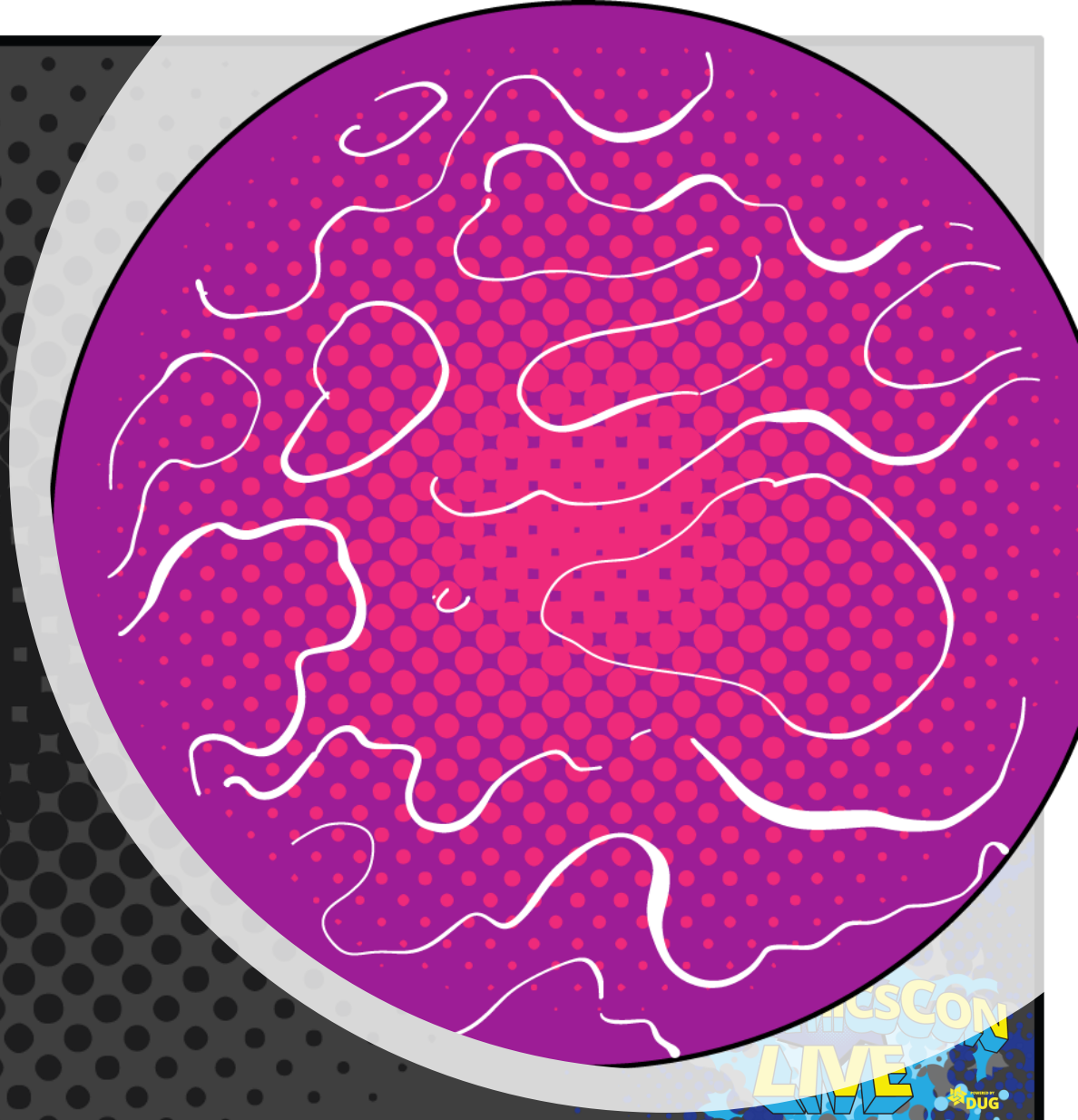
Agenda

- **Scope: Talking about Projects in FO**
  - NOT Project Operations in CE – but there is some integration
- **Common Use Cases**
- **What is a project?**
- **Other Use cases**
- **How Project ties to all other transactions**
- **Settings to watch out for**



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Common cases

- **Selling consulting labor**
  - This is what Microsoft shows in their documentation
  - But there are lots of other options.

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What is a project

- **It is NOT a subledger like production**
  - Referencing transactions in GL
    - But not a dimension
- **Integrated across all postings**
- **Separate posting profile settings**
- **Asynchronous transactions**
  - e.g. invoicing independent of “completion”.
  - Bill for individual transactions
- **Different kinds of projects**
- **Foundation for other modules**
- **Licensing: it’s in there**

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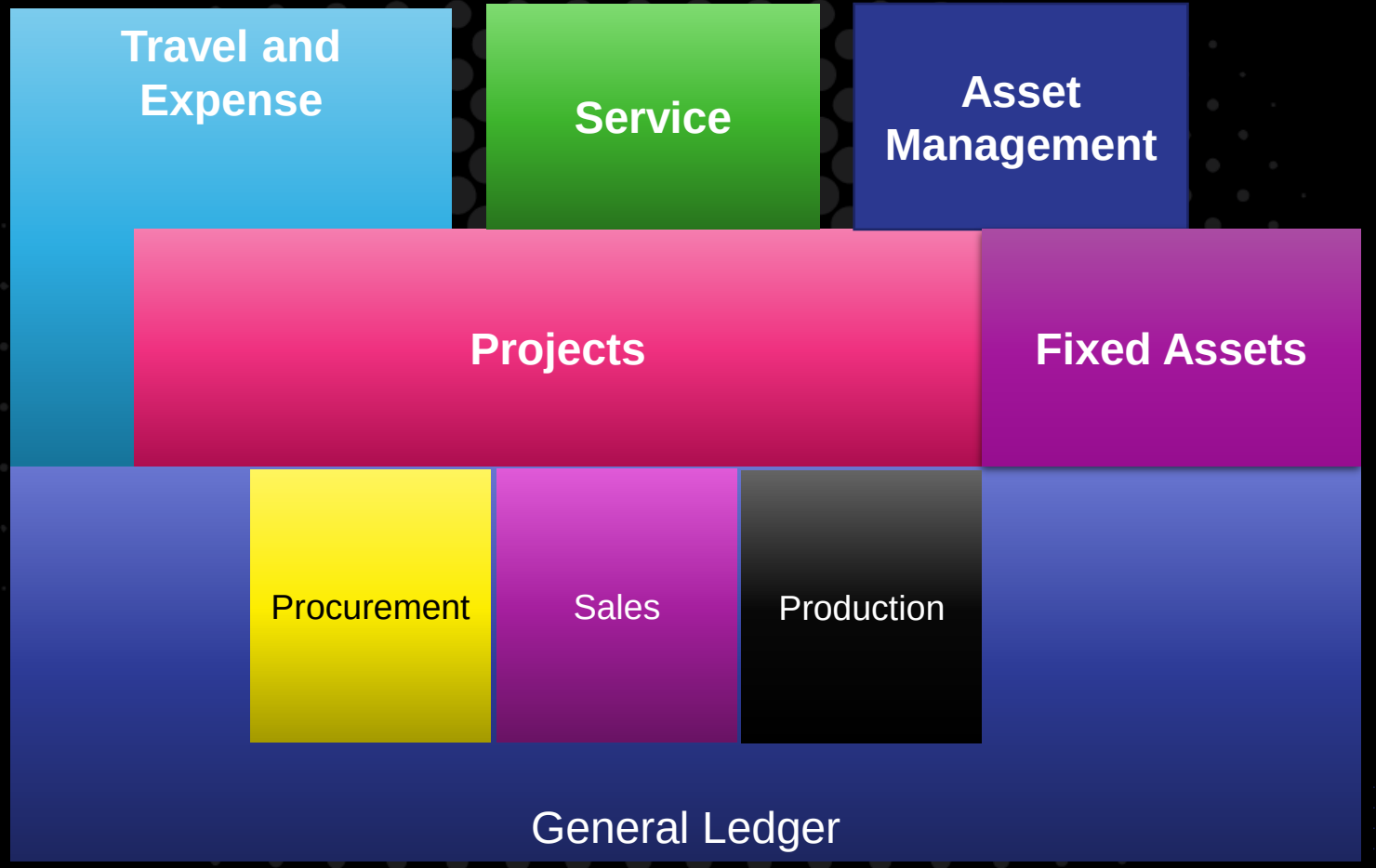
Where does Project fit?



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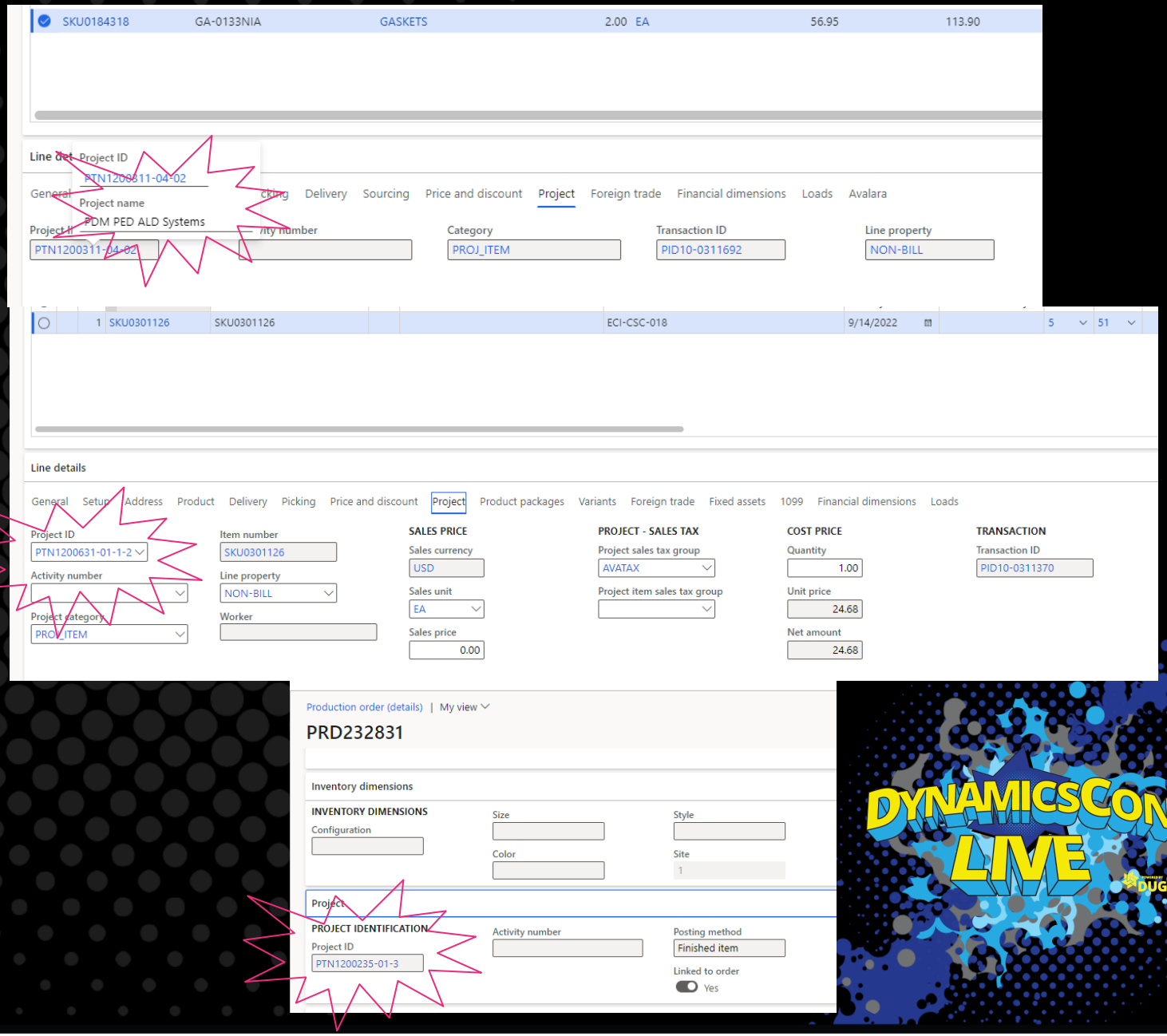
PROJECT REFERENCES

Available on nearly any transaction.

- **Sales orders, Purchase orders, Production Orders, GL Journals, etc.**

Get operational visibility without a financial transaction.



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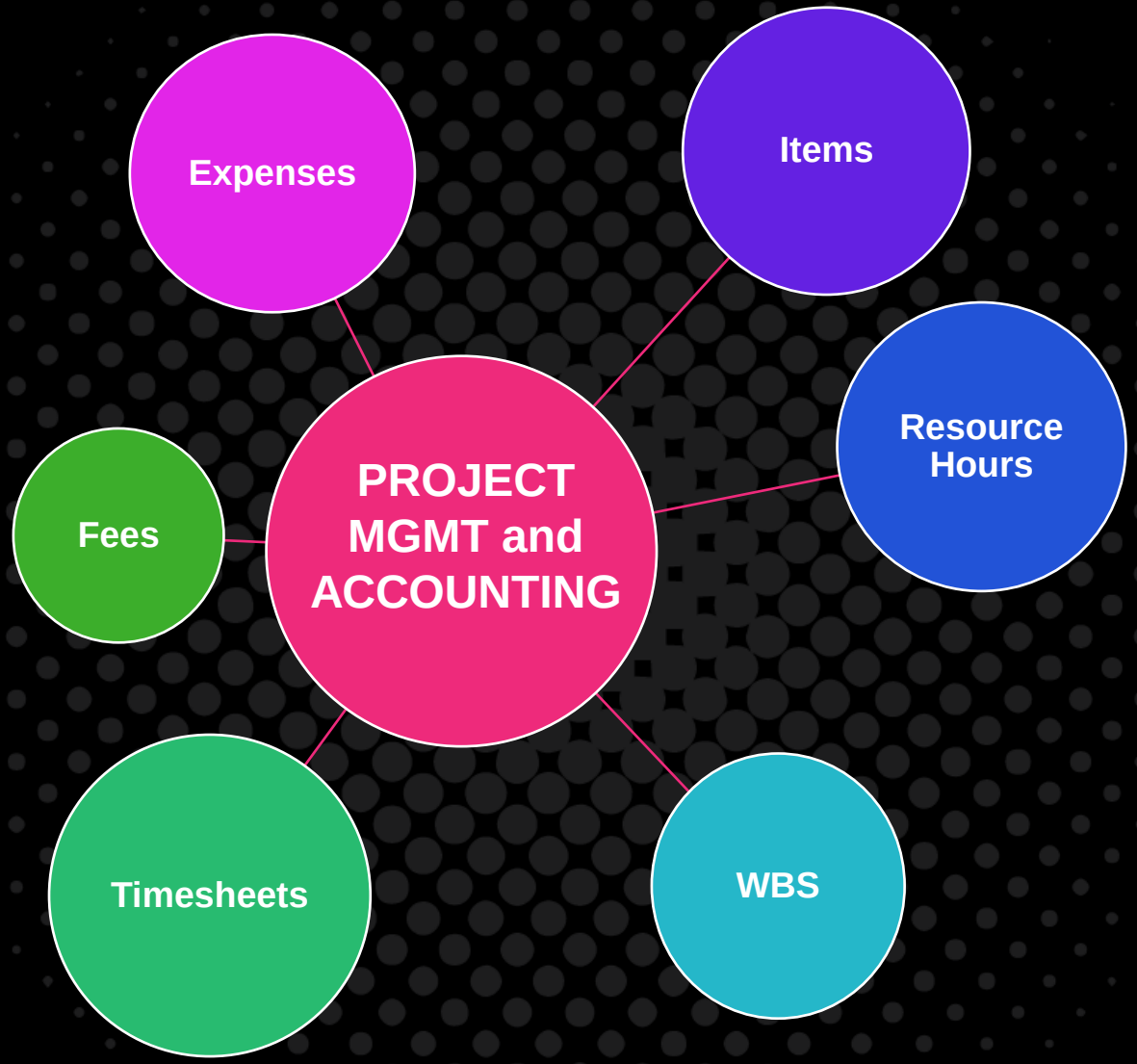

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What Settings do I need to know?

- **Project Group**
  - Posting
  - Organize
  - Types
  - Validation
- **Categories**
  - Posting
  - Organize
  - Set Costs
  - Validation
- **Line Properties**
  - Chargeable?
  - Accrue Revenue?
  - Charges?

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What if you need to...

- Capital Projects
- Selling Services
- Subscriptions
- Engineer To Order Sales
- Tracking building operating expenses
- Track Labor activities (WBS)
- Link to Collaboration Workspace (sharepoint)
- Keeping track of activity hours
- Operational Tracking separate from the Financial statements
- Multiple Funding sources
- Strong Budget Controls (e.g. Public Sector)
- Revenue Recognition/Accrual
- Progress Payments

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Operational Tracking

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Building Operating Expenses

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Engineer To Order Sales

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