



User Guide

On the globally available platform...



Dynamics[®] 365 / CRM

CRM Versions Supported:

CRM 2015, CRM 2016, Dynamics 365, IFD and CRM Online

Time and Billing for Microsoft Dynamics 365 / CRM Online or On-Premise is a flexible enhancement that starts by allowing you to dollarize your resources flexibly with CRM Users and Contacts.

Manage their cost and selling amounts they generate automatically. Designed for user-easy time tracking flexibly, to close the loop on all time, cost, and revenue. As your Resources' time is tracked in CRM Activities to Jobs or Cases, cost and revenue accumulate.

T&B's Pre-Bill editor allows easy Account Activity line-item approval management. Completing your business cycle is Billing Generator production ease with final managed Invoice or Statement oversight for the best customer image and billing professionalism.

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Document Summary

The following document is intended to explain the Time and Billing module of TotalServ Pro solution by the knowledge of which you can easily manage your jobs/projects and monitor your resources closely in a transparent and accountable manner.

To help you understand Time & Billing in its entirety, each and every minute detail is captured in this document with related images. For better results, it is highly suggested to go through this document before actually using the TSP solution.

Design & Flow

Time and Billing module is especially designed keeping in view of the business flows requirement's and management level securities. This module has is handled in two levels within an organization. The First Level is the Project Manager, who in turn has all the powers to allocate to create the jobs to various resources along with facility to edit the posting which include the financial part of the project. Few such operations are like Editing an Expense created by the resource or Approve / Reject an expense. Finally the Project manager is responsible to create an invoice for the project or case wise.

Time and Billing Project Manager Flow

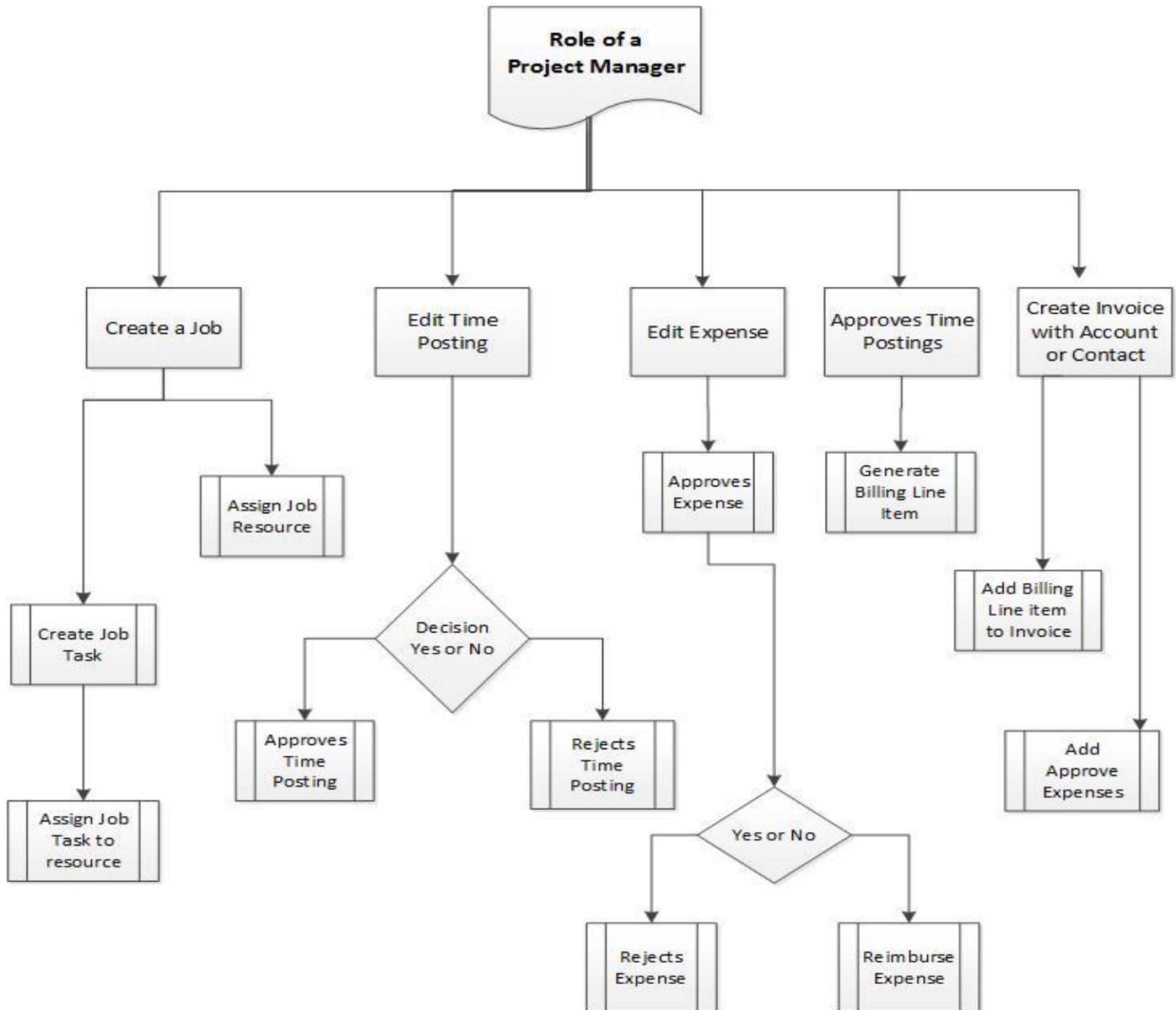


Figure 1: Time and Billing Project Manager's Flow

The other level of user is Resource. This user can only view the jobs assigned to him by the Project manager or may start using the same. The other functionalities that a resource will do is to create a time posting and mark them either they are billable or non-billable tasks. The resource can also create an expense for the project he is involved as per the norms of the company

Time and Billing Resource Flow

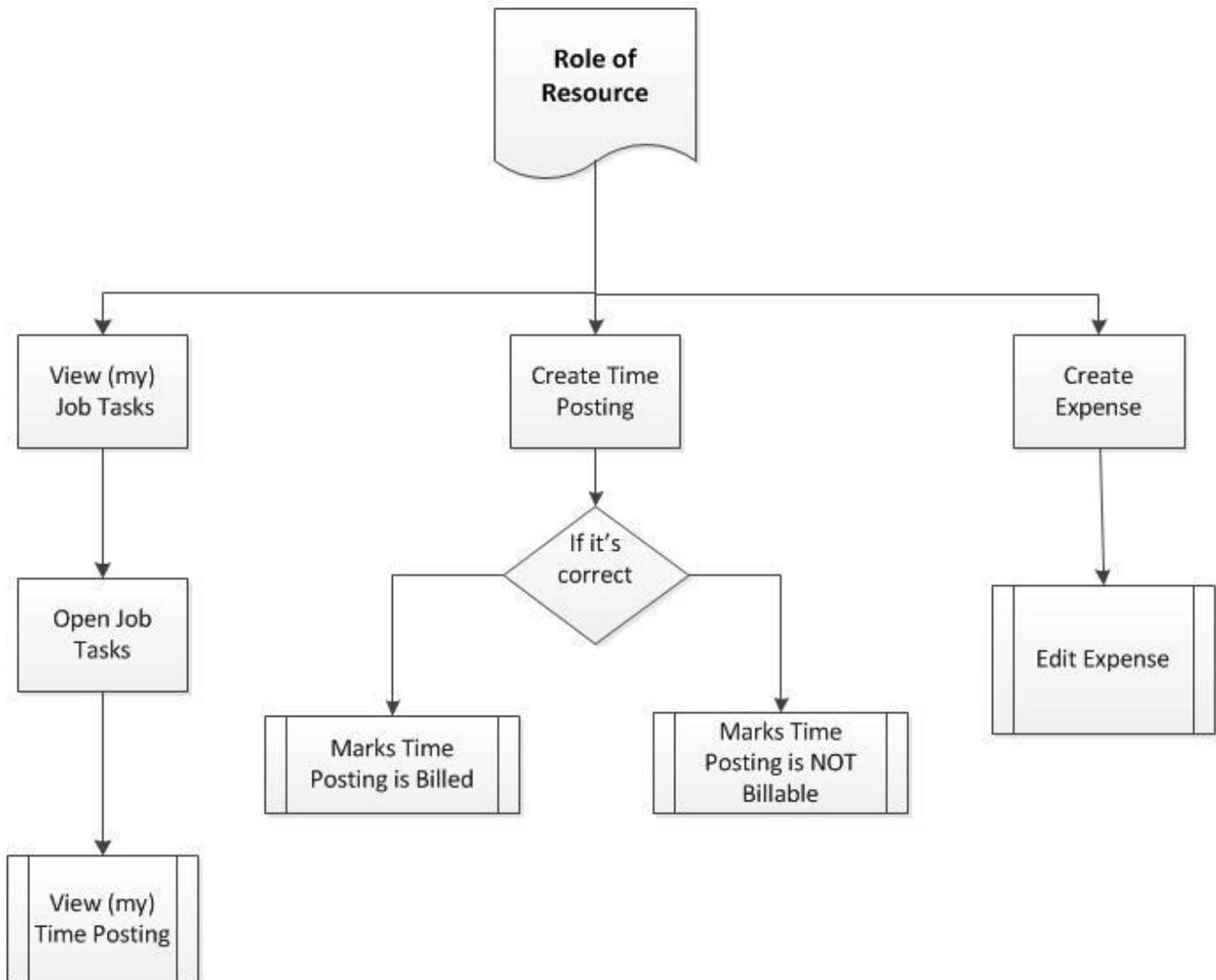


Figure 2: Time and Billing – Resource’s Flow

General

Security Role Privileges

Security Roles are the standard functions of Microsoft Dynamics CRM and Time and Billing is compliant to the privileges controlled by Security Roles. It defines your User’s access privileges whether to “Add” or “Create” records, “Modify” or “Write” records using the Time and Billing solution. All the Time and Billing functionalities can be controlled by the designated Security Roles explained briefly here and in CRM guides and Help.

Basically, a security role defines how different types of records can be accessed by one category of users, such as salespeople. To control access to data, you can modify existing security roles, create new security roles, or change which security roles are assigned to each user. Each user can have multiple security roles.

Security role privileges (A user's rights to perform specific actions on specific record types or to perform tasks. Privileges are assigned by system administrators to security roles. Users are then assigned security roles. Examples of privileges include Update Account and Publish Customizations) are cumulative: when a user has more than one security role, the user will have any privilege allowed in any of the assigned security roles.

- You can set your own guidelines for Security Roles privileges. **Navigate to Settings → Security →Users** as shown below.

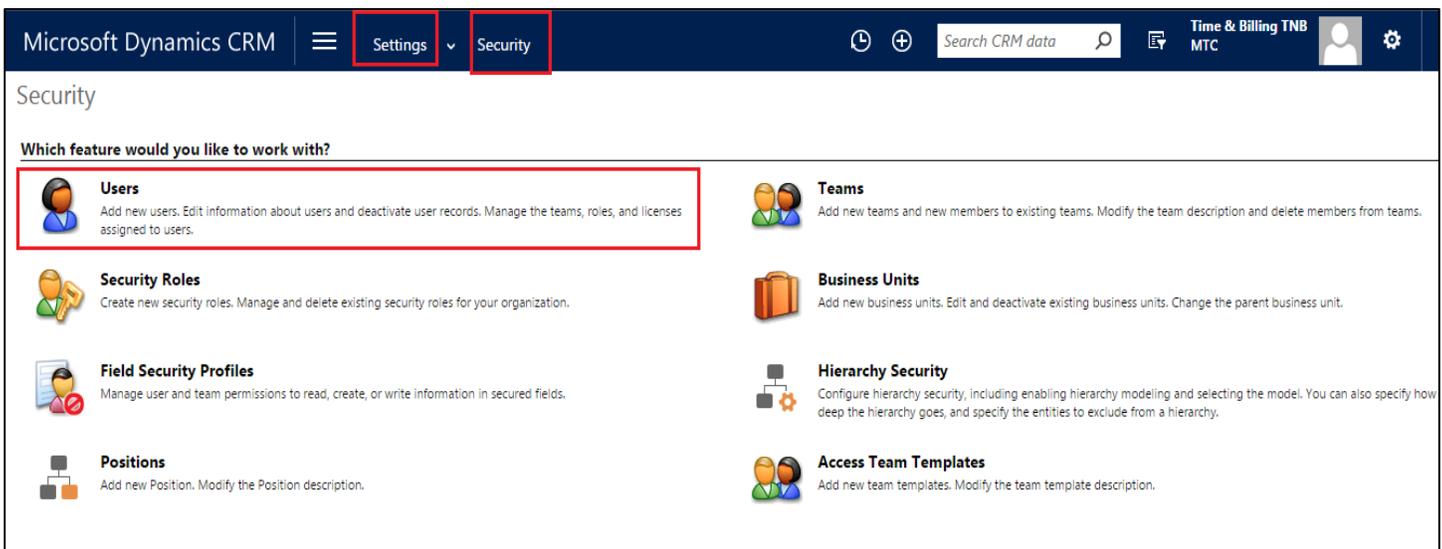


Figure 3: Navigation to Security Roles

- It opens a new window with a list of Enabled Users as shown below.

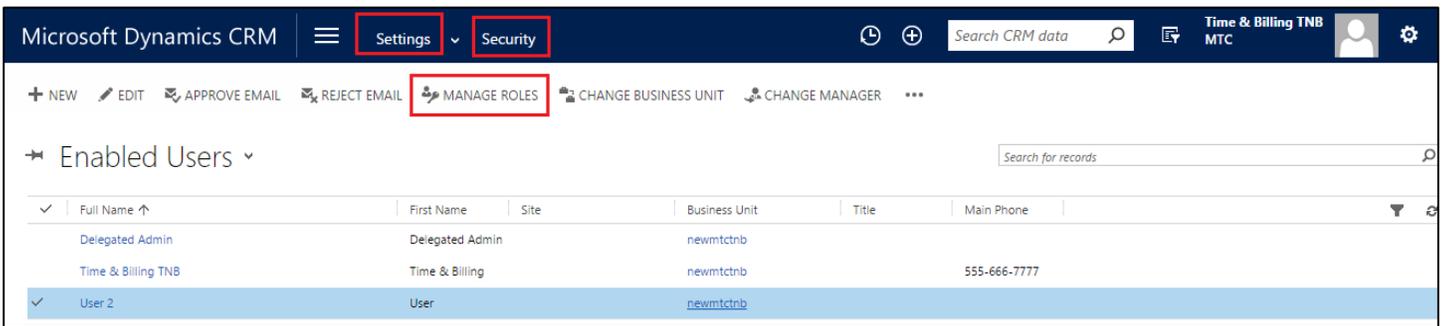


Figure 4: Select the User

- Select the check box against the username for whom you would like to manage the security roles and click on “Manage Roles” on the ribbon.
- A new window will open as shown below.

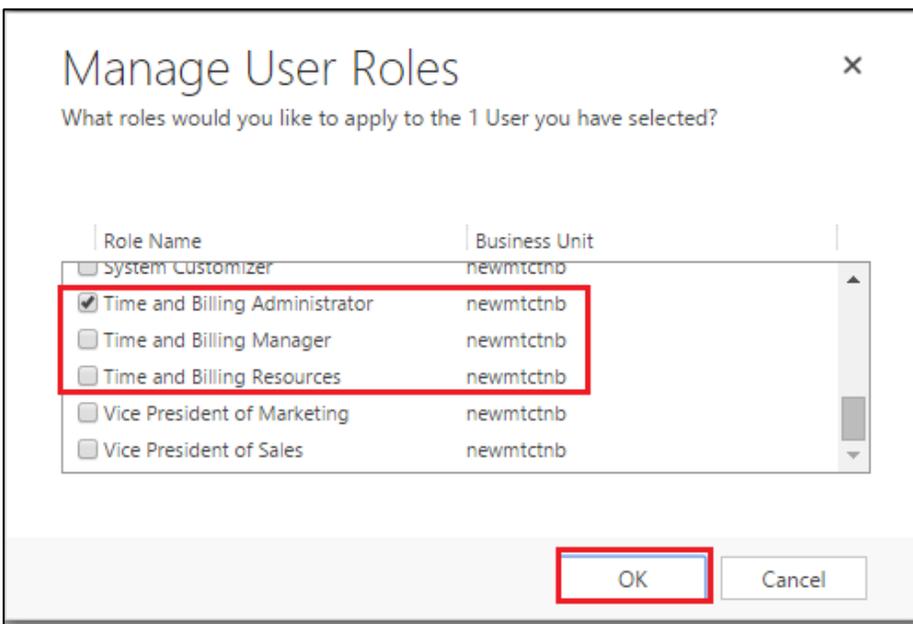


Figure 5: Manage User Roles

- Based on the Resource Position in the organization security roles are categorized into 3 types. They are:
 - **Time and Billing Administrator** – This resource has full privileges to create, delete, update, approve, reject and billing (Administrator level).
 - **Time and Billing Manager** – This resource will have the privileges to create, delete, update, approve and reject
 - **Time and Billing Resources:** This resource can able to see the assigned tasks and performs the time postings for daily activities.
- Based on the resource posting, select the security role as “Time and Billing Administrator” or “Time and Billing Manager” or “Time and Billing Resources” and “TSP License” and click on Ok to assign the role to the user.

Sitemap – Time and Billing

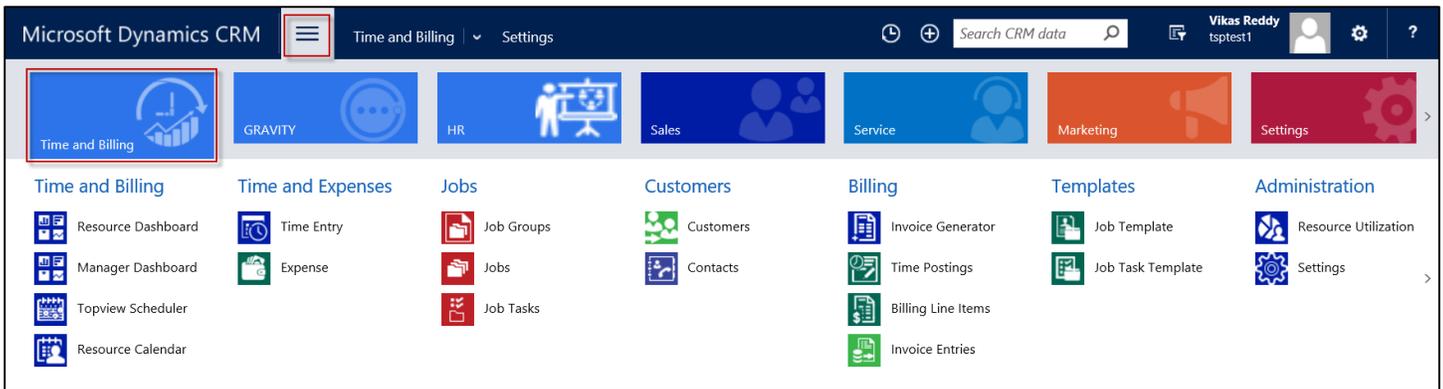


Figure 6: Site Map – Time & Billing

- On clicking **Settings**, an Administration window shows up with options such as Resources, Templates and Settings.

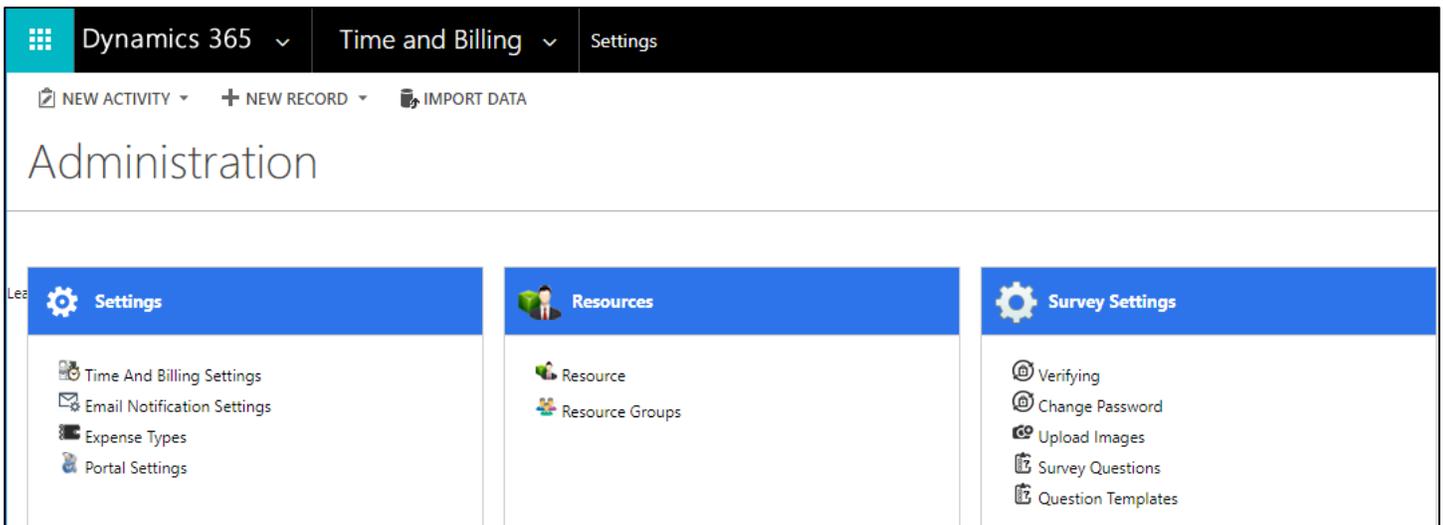


Figure 7: Administration Window

Time and Billing Settings

- You can set your own Time and Billing Settings.
- Navigate to **Time & Billing**→**Settings**→**Time and Billing Settings** as shown below.

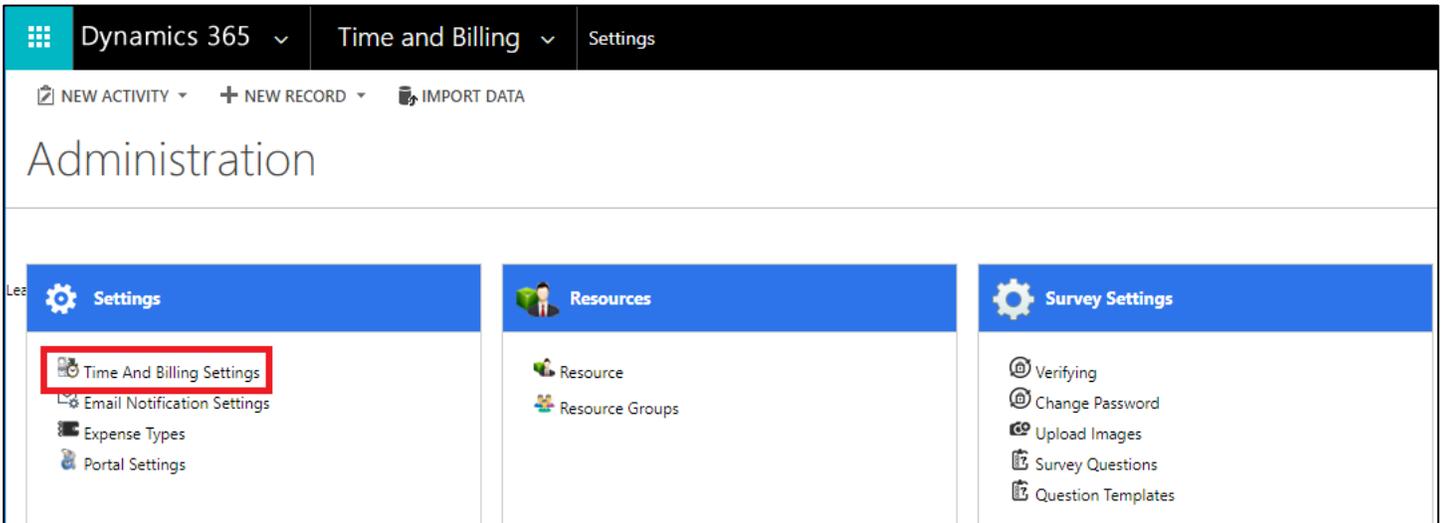


Figure 8: Time and Billing Settings

- Click on **Time and Billing Settings**.
- To create a new Time and Billing Settings record, click on +NEW button on the ribbon.
- All fields in the record has to be filled as explained below (also see the below image).

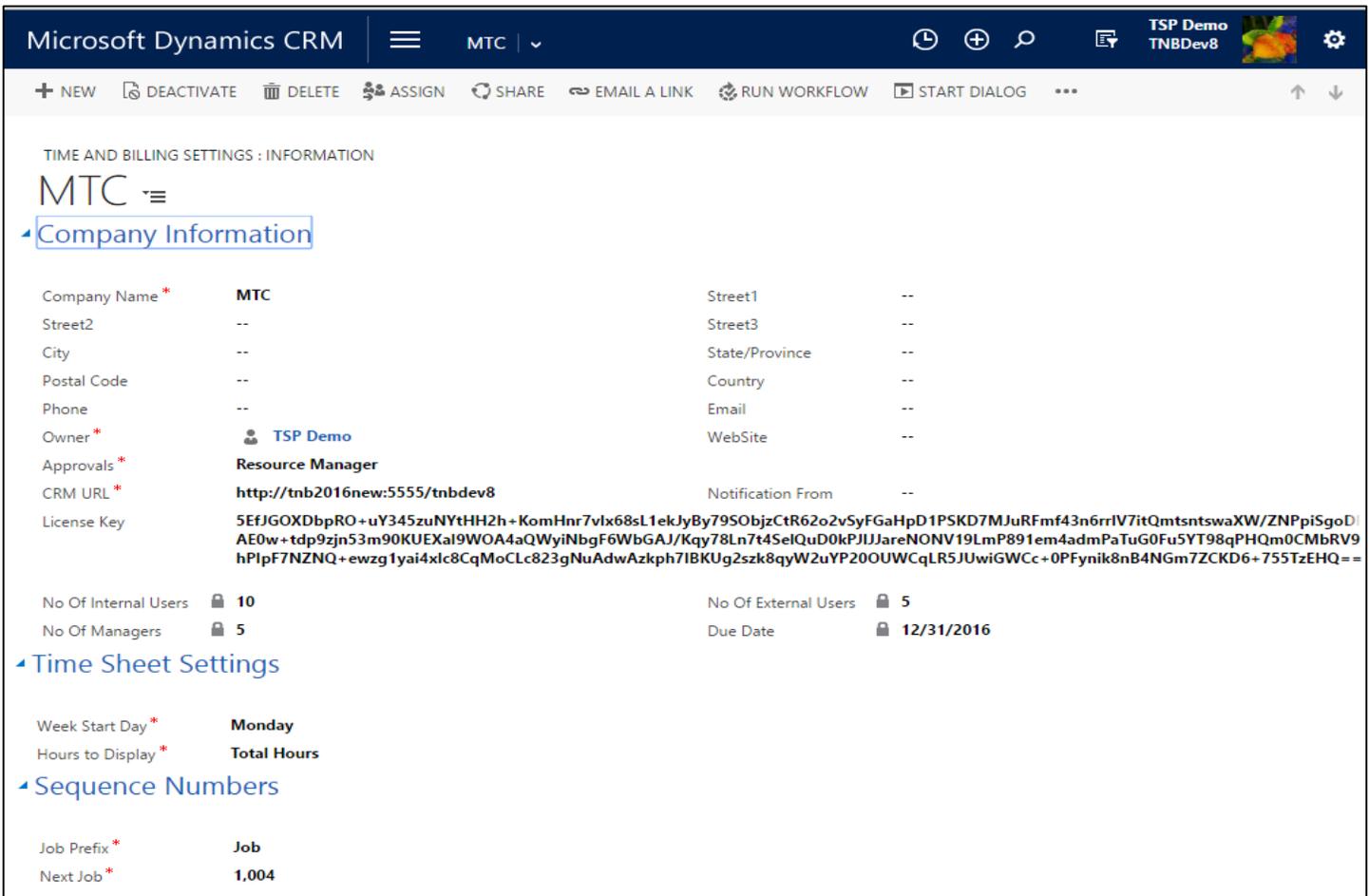


Figure 9: Time and Billing Settings

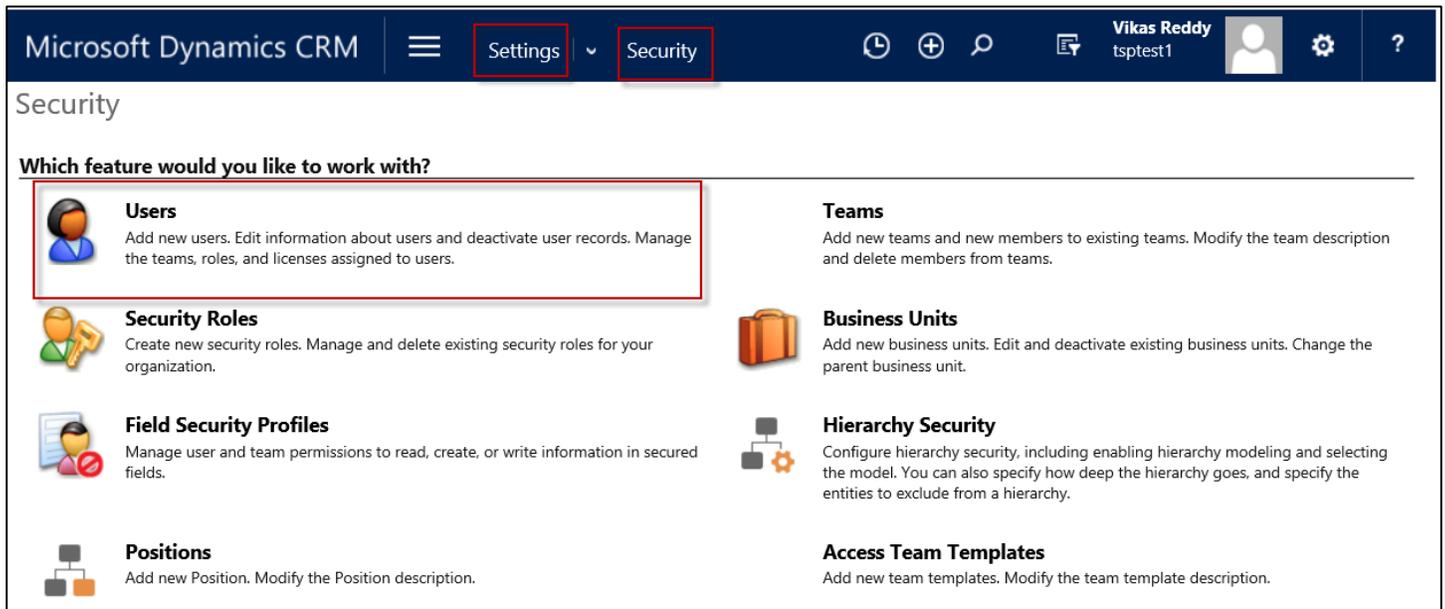
- All Inputs – fields marked with asterisks are mandatory.

- Input Company Name, Owner and Approvals under **Company Information**.
- **Approvals can be selected as Project Manager or Resource Manager or Both from the drop down. Consequently, all the Time Postings of resources would be sent for approval as per the selection made.**
- Under **Time Sheet Settings**, you can define the Week Start Day and Hours to Display.
- If Monday is the Start Day, then in Time sheets you will have a week from Monday to Sunday or if you start your week on Wednesday then the Time sheets will have week from Wednesday to Tuesday.
- Similarly Hours to Display – on every click the Options change from Billable Hours to Total Hours and vice versa. So select the appropriate choice. These fields would be displayed in future for processing Time sheets.
- **Gantt Chart & Task Status Colors Settings** – All the job tasks created on Gantt Chart and their statuses can be differentiated by color coding using this settings.
- **TNB Gravity Settings** – Chart of Account for BLI, Chart of Account for Expense, Cost of Sales – Labor and Payroll Clearing Account can be set using this settings.
 - **Chart of Account for BLI** – This is the revenue account which refers to customers’ payment towards the billing line items generated.
 - **Chart of Account for Expense** – This is a revenue account which refers to customers’ payment towards the expenses involved for carrying out jobs/job tasks.
 - **Cost of Sales – Labor** – This is a cost account which refers to the costs involved in terms of labor for completing the job/job tasks.
 - **Payroll Clearing Account** – This is a cost account which refers to the internal payroll for the resources.
- After making the necessary changes in the Time and Billing Settings, you are required to save the changes to reflect the same in the CRM.

Users

Users are the basic functional units of an organization. They are people assigned with specific task roles. Any organization has all the users listed in its CRM.

To view users in an organization, follow the navigation: **Settings → Security → Users**



The screenshot shows the Microsoft Dynamics CRM interface. At the top, the navigation bar includes 'Microsoft Dynamics CRM', a menu icon, 'Settings', and 'Security'. Below this, the 'Security' page is displayed with the heading 'Which feature would you like to work with?'. Several options are listed, each with an icon and a brief description:

- Users**: Add new users. Edit information about users and deactivate user records. Manage the teams, roles, and licenses assigned to users. (This option is highlighted with a red box in the image.)
- Security Roles**: Create new security roles. Manage and delete existing security roles for your organization.
- Field Security Profiles**: Manage user and team permissions to read, create, or write information in secured fields.
- Positions**: Add new Position. Modify the Position description.
- Teams**: Add new teams and new members to existing teams. Modify the team description and delete members from teams.
- Business Units**: Add new business units. Edit and deactivate existing business units. Change the parent business unit.
- Hierarchy Security**: Configure hierarchy security, including enabling hierarchy modeling and selecting the model. You can also specify how deep the hierarchy goes, and specify the entities to exclude from a hierarchy.
- Access Team Templates**: Add new team templates. Modify the team template description.

Click on Users to see the Enabled Users in your CRM.

Full Name ↑	First Name	Site	Business Unit	Title	Mail
John Silvani	John		tsptest1		
Randall Ykema	Randall		tsptest1		
Vikas Reddy	Vikas		tsptest1		

You can manage roles of each user by selecting that user and clicking on **Manage Roles** and follow the process as explained under [Security Role Privileges](#).

Creating a New User (On-Premise)

For creating a new user in the CRM, follow the navigation: **Settings → Security → Users**

- Click on +NEW button on the ribbon.

- A new window pops up with blank fields as shown below.

Account Information

User Name * ✖ --

User Information

Full Name * --
 Title --
 Primary Email --
 Mobile Phone --
 Main Phone --

POSTS

Enter post here POST

Both Auto posts User posts

TEAMS

Team Name ↑

To enable this content, create the record.

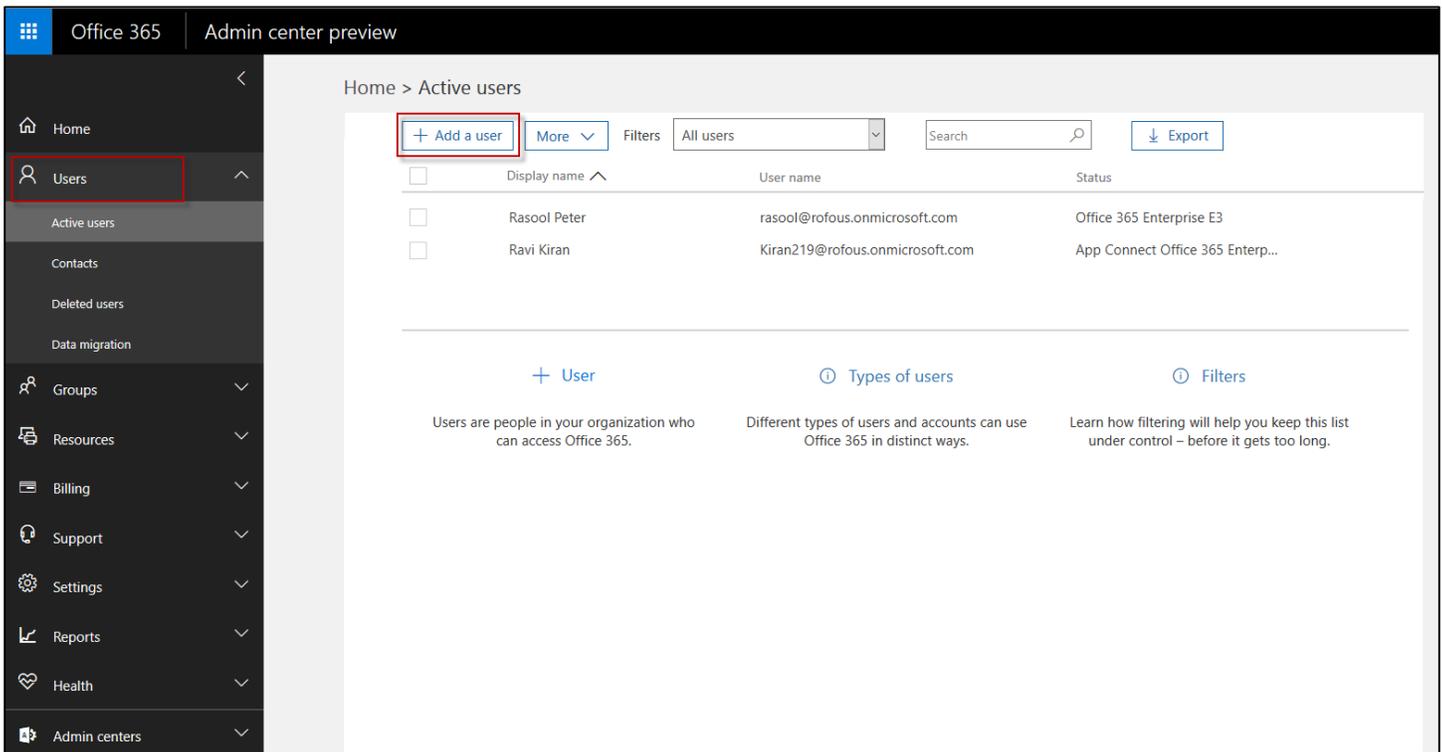
- Input all fields with the right data. Fields marked with asterisk are mandatory.
- Finally, click on Save to reflect the changes.

Note: The above procedure holds good for On-premise CRM but for Online CRM, users must be created from Microsoft Office 365 linked with it.

Creating a New User (Online)

For creating a new user using CRM Online instance, you need to follow the below procedure:

- Open the Admin Portal of your Office 365 account.
- Go to Users. Click on Active users.
- To add a new user, click on **+ Add a user**. Then a side window shows up.



- Fill all the fields required and click on **Add button** to create a new user.

NU

New User ✕

new@domain.com

First name

Last name

Display name *

User name *

Domain

Location

∨ [Contact information](#)

∨ [Password](#) Auto-generated

∨ [Roles](#) User (no administrator access)

∧ [Product licenses](#) Assign a product license

∨ Office 365 Enterprise E3 Off
23 of 25 licenses available

∨ Microsoft Dynamics CRM Online Professional Off
24 of 25 licenses available

Create user without product license Off
They may have limited or no access to Office 365 until you assign a product license.

Activate Windows
Go to Settings to activate Windows.

Add

Cancel

Need help?

Feedback

Resource

A **Resource** carries out the job task. Resources page will allow you to add resources to your job/project. Each task is assigned to a resource who will then start working on that particular job task. A resource could possibly become a contact to the user.

- To create a new resource follow the navigation: **Time & Billing**→ **Settings**→**Resource**
- Click on Resource under Resources option.

Name	Resource Type	Resource Group...	Designation	Default Work Ty...	Price Per Hour	User	Crn
Bob Smith	External			Software Develo...	50.00		3/8/2016
David Jhon	Internal			Software Develo...	10.00		6/10/2016
John Silvani	Internal			Manager	250.00	John Silvani	3/8/2016
Randall Ykema	Internal			Graphic Designer	120.00	Randall Ykema	7/21/2016
Thomson S	Internal			Software Develo...	20.00		6/10/2016
Vikas Reddy	External			Sample	175.00	Vikas Reddy	3/4/2016 1

- You can see a list of active resources if there are any in your CRM else click on +NEW button on the ribbon to create a new resource.

Microsoft Dynamics CRM | New Resource

RESOURCE
New Resource

General

Resource Type: **Internal**

User: --

Created By: --

Currency: **US Dollar**

Name*: []

Designation: --

Price Per Hour*: --

Vendor: --

Settings

Is Project/Resource Manager:

Can Approve/Reject Time Postings:

Can Approve/Reject TimeSheets:

Can Approve/Reject Expenses:

Can TimePost For Future Dates:

Can Complete Job:

Can Complete/Stop JobTask:

Can TimePost For:

Job:

JobTask:

Account:

Contact:

Case:

Issue:

Status: **Active**

Figure 10: Active Resources form

Fields to be filled while creating a new resource:

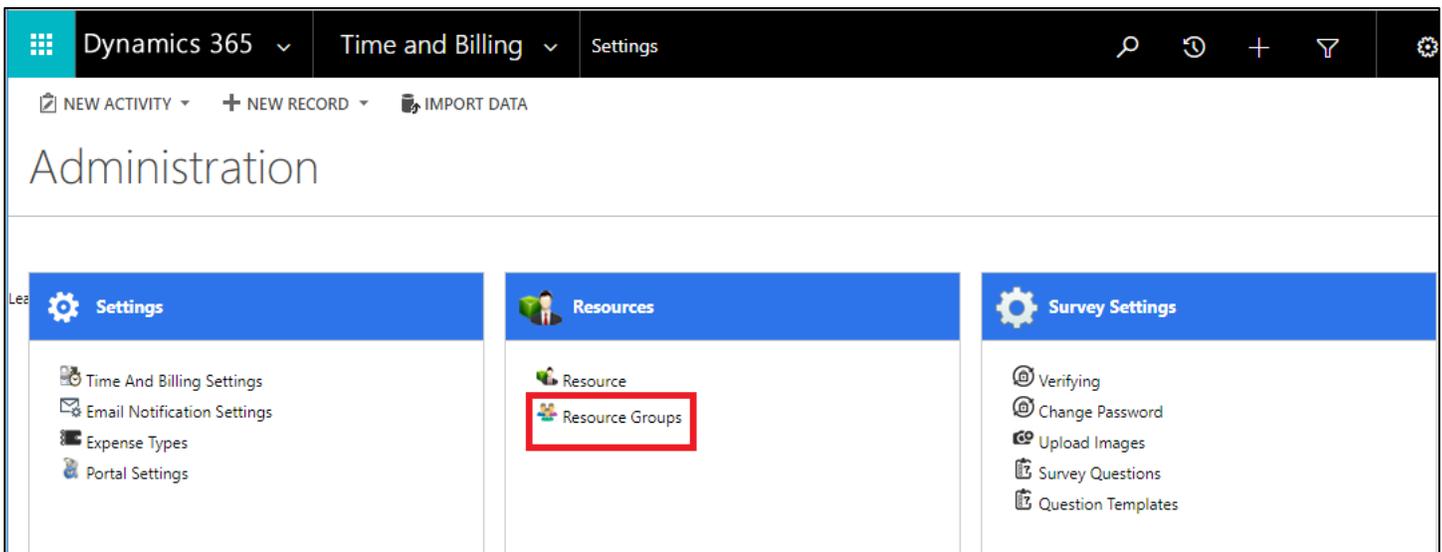
- Resource type has to be set either as Internal or External.
- User has to be picked from the look up search
- Name, Contact, Designation, Price Per Hour and Vendor has to be filled.
- Default Work Type, Resource Group, Cost Per Hour and Resource Manager has to be set.
- Resource can be selected as Project/Resource Manager for:

- Approving/Rejecting Time Postings
- Approving/Rejecting Time Sheets
- Approving/Rejecting Expenses
- Time Posting for Future Dates
- Completing the Job
- Completing/Stopping the Job Task
- Creating Expenses/Time Post for Others
- Un-approving Time Sheets
- Un-approving Expenses
- Can Time Post for:
 - Job
 - Job Task
 - Account
 - Contact
 - Case
 - Issue

Resource Group

Resource Groups are created for different level of users and carry a specific set of attributes. These groups help in actually saving time and work while assigning Job or Job tasks to a bunch of resources. Any changes made to the resource group will automatically reflect for every individual resource who are linked to that group. This will be irrespective of the original values assigned to individual like cost per hour.

- Navigate Time & Billing → Settings → Resource Groups



- Click on Resource Groups.
- A new window opens up. You can see all the Active Resource Groups if there are any in the CRM.
- You can create a new resource group by clicking on +NEW button on the ribbon.
- This is exclusively used for Group of resources only and not for Individual resources.

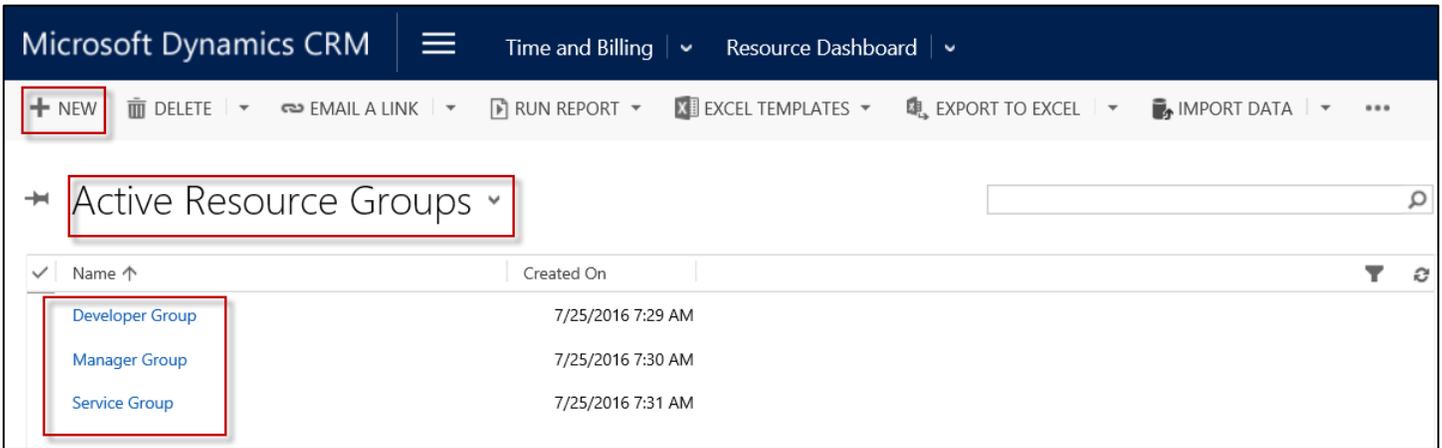
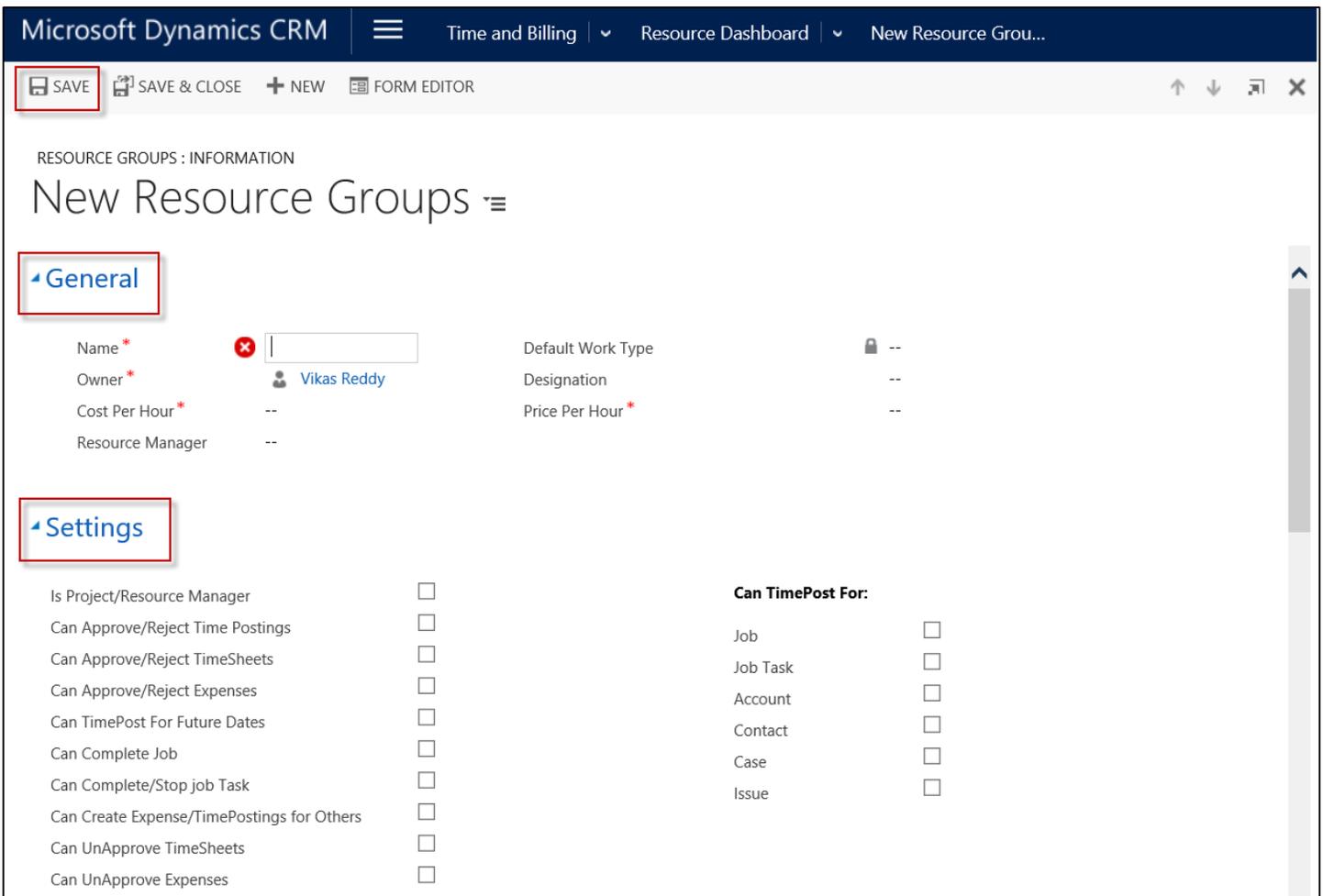


Figure 11: Resource Group showing active groups

- In order to create New Resource Group, you will have to fill details under **General, Settings, and Resources**.



← Resources

Name ↑	Resource Type	Resource Gro...	Designation	Price Per Hour	User	Created On
To enable this content, create the record.						

Figure 12: Resource Group Form

- Under Settings, select the check box against:
 - Is Project/Resource Manager
 - Can Approve/Reject Time Postings
 - Can Approve/Reject Time Sheets
 - Can Approve/Reject Expenses
 - Can Time Post for Future Dates
 - Can Complete Job
 - Can Complete/Stop Job Task
 - Can Create Expense/Time Postings for Others
 - Can Un Approve Time Sheets
 - Can Un Approve Expenses

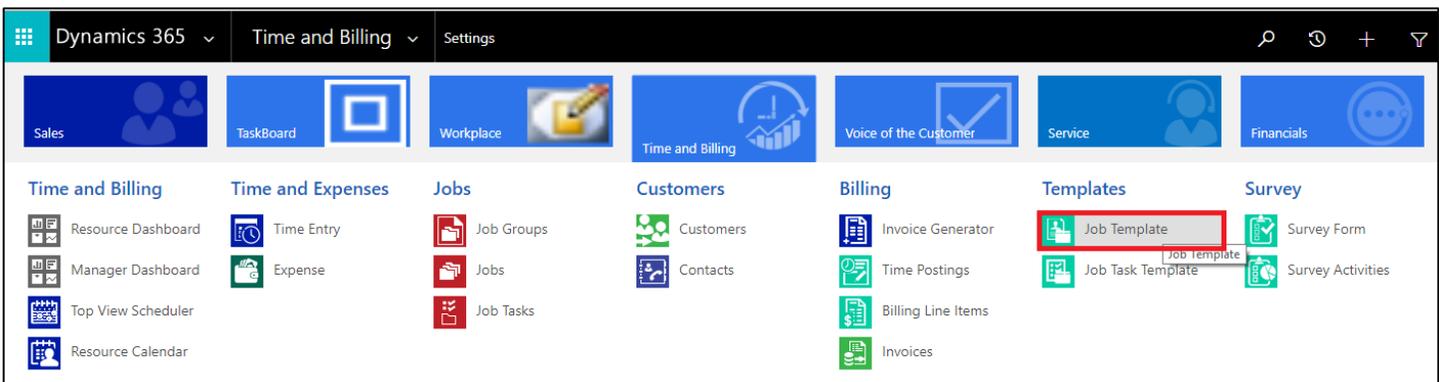
Can Time Post for:

- Job
 - Job Task
 - Account
 - Contact
 - Case
 - Issue
- Save the page to record details.
 - Only after you save the page, other sections such as Resources, Work Types and Resource Work Type Costs would be available to add/edit.

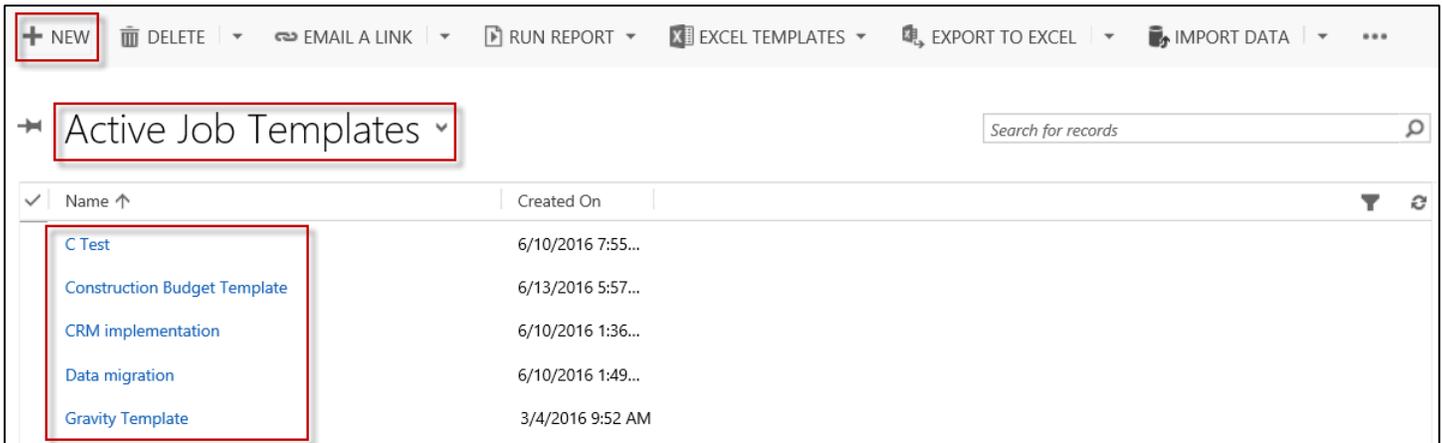
Job Template

A Job Template is a form which bears important information such as Job Name, Owner Name, Job Tasks, Resources, Billing Information among others required for successful job completion. You can create different Job Templates for different Job Requirements. They basically help in saving time by eliminating the need to create additional jobs for similar or repetitive jobs over and over again.

For using Job Template, follow the navigation: CRM → Time & Billing → Templates → Job Template

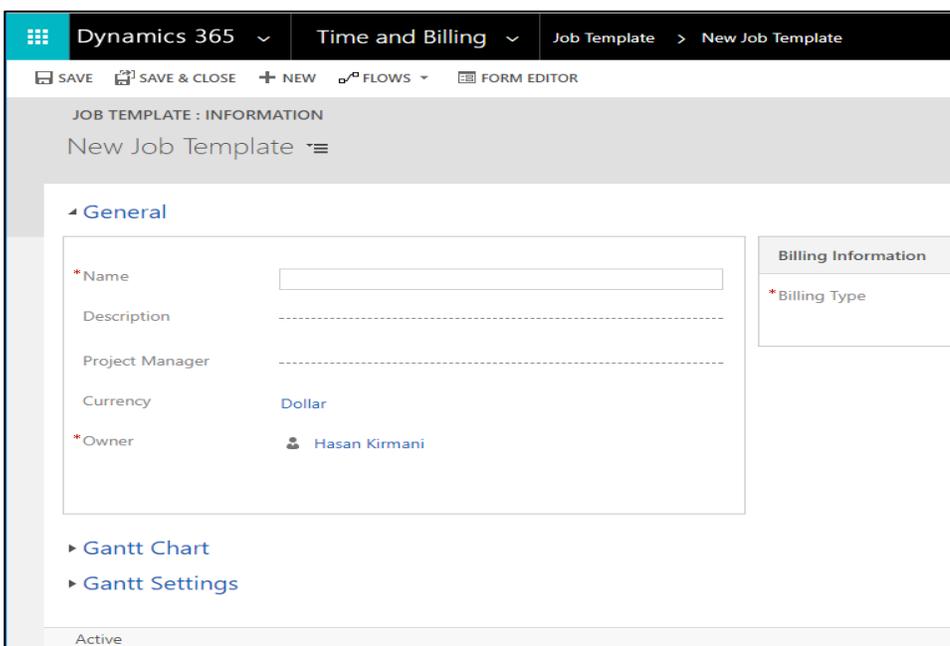


- Click on Job Template. You can see the list of Active Job Templates if there are any.
- To create a new Job Template, click on +NEW button on the ribbon.



Name	Created On
C Test	6/10/2016 7:55...
Construction Budget Template	6/13/2016 5:57...
CRM implementation	6/10/2016 1:36...
Data migration	6/10/2016 1:49...
Gravity Template	3/4/2016 9:52 AM

- A new window pops up with a series of fields to be filled by you.
- Fill the General section which has **Name, Description and Billing Information fields.**
- It is important to note that there are 6 Billing Types namely
 - Time and Materials
 - Fixed price- completion of contract
 - Fixed price – percentage complete
 - Mile stone
 - Cost Plus
 - Internal use
- You can set any of the above billing types for the Job Template you create.
- Save the details to unlock Job Task Template section from where you can add Job Task Templates.
- Also, do the Gantt Settings by selecting Yes/No options for **Cascade Changes, Recalculate Parents, Move Parent as Group and Show Today Line.**
- **Fields marked with asterisks are mandatory.**



General

*Name:

Description:

Project Manager:

Currency: Dollar

*Owner: Hasan Kirmani

Billing Information

*Billing Type:

[Gantt Chart](#)

[Gantt Settings](#)

Active

JOB TEMPLATE : INFORMATION
CRM Implementation

General

- *Name: CRM Implementation
- Description: -----
- Project Manager: -----
- Currency: Dollar
- *Owner: Hasan Kirmani

Billing Information

- *Billing Type: Time and Materials
- *Rate Structure: Fixed Price - Completion of contract, Fixed Price - Percentage Complete, Milestone, Cost Plus, Internal Use

Gantt Chart

#	Task Name	Start	Finish	Duration	Effort	Assigned Resources
1	Analysis	01/30/2018	01/31/2018	2 days	8 hours	Hasan Kirmani [100%]
2	Design	02/01/2018	02/02/2018	2 days	8 hours	Hasan Kirmani [100%]
3	Testing	02/05/2018	02/07/2018	3 days	8 hours	Hasan Kirmani [100%]
4	Deployment	02/08/2018	02/12/2018	3 days	8 hours	Hasan Kirmani [100%]
5	Maintainance	02/13/2018	02/15/2018	3 days	8 hours	Hasan Kirmani [100%]

Figure 13: Job Template entry form

Job Task Template

A Job Task Template is a form which bears important information such as Task Name, Owner Name, Job Template to which it is linked, Priority and Estimated Hours among others. Like Job Template, Job Task Template is also created with the view to eliminate the process of creating additional job task templates for similar or repetitive jobs tasks. Different job task templates can be created for different job tasks and can be recalled when a new job involves the same job tasks thereby saving time and improving efficiency.

To view Job Task Template, follow the navigation: **Time & Billing**→**Settings**→**Templates**→**Job Task Template**.

Alternatively, you can also view Job Task Template by following the navigation: **Time & Billing** →**Templates**→**Job Task Template**.

Settings

- Time and Billing
- Time and Expenses
- Jobs
- Customers
- Billing
- Templates
- Survey

Templates

- Job Template
- Job Task Template**

- Click on Job Task Template. You can see the list of Active Job Task Templates if there are any.

Active JobTask Template

Name ↑	Estimated Hours...	Priority	Created On
Administrative Costs		Medium	6/13/2016 6:02 AM
Agendia _(PS) G- Proof of Insurance provide to Customer	10.00	Medium	3/4/2016 9:53 AM
Analysis	4.00	Medium	6/10/2016 1:43 PM
Construction	7.00	Medium	6/10/2016 1:43 PM
Demolition		Medium	6/13/2016 6:07 AM
Deployment	4.00	Medium	6/10/2016 1:43 PM
Design	5.00	Medium	6/10/2016 1:43 PM
Dumpster and Removal		Medium	6/13/2016 6:07 AM
Dust control, Surface protection		Medium	6/13/2016 6:07 AM
Engineering Fee		Medium	6/13/2016 6:02 AM
Extracting Source Data		Medium	6/13/2016 5:55 AM
Financing costs		Medium	6/13/2016 6:02 AM
General Requirements		Medium	6/13/2016 6:02 AM
Impact Free		Medium	6/13/2016 6:02 AM
Job-site Access		Medium	6/13/2016 6:07 AM

- To create a new Job Template, click on +NEW button on the ribbon.
- A new window pops up with a series of fields to be filled by you.
- Fill details such as **Task Name, Job Template, Owner, Priority, Estimated Hours and Description** as required.

Microsoft Dynamics CRM | Time and Billing | Job Task Template | New Job Task Temp...

JOB TASK TEMPLATE : INFORMATION

New Job Task Template

General

Task Name * Owner *

Job Template * --

Priority Medium Estimated Hours --

Description --

- Finally, save the edits to reflect in your CRM. **Fields marked with asterisks are mandatory.**

Time and Billing

Time and Billing helps you to identify all the job tasks and associated resources required to complete a project on time and bill the resources accordingly.

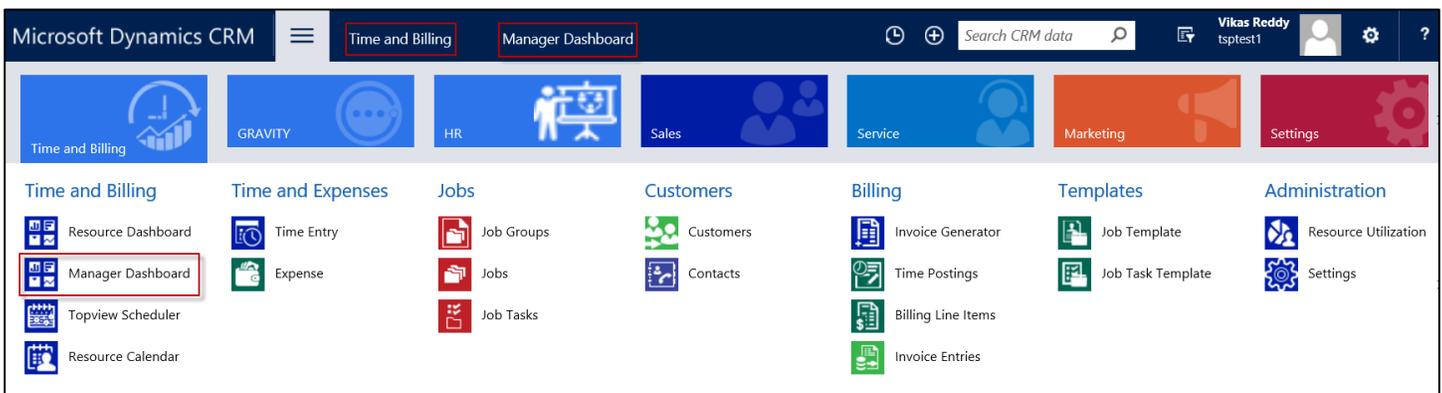
Dashboards

Dashboards give at-a-glance insights about the status of jobs, job tasks, resources involved and their costs. Time and Billing solution supports 2 types of dashboards namely, **Manager Dashboard** and **Resource Dashboard**.

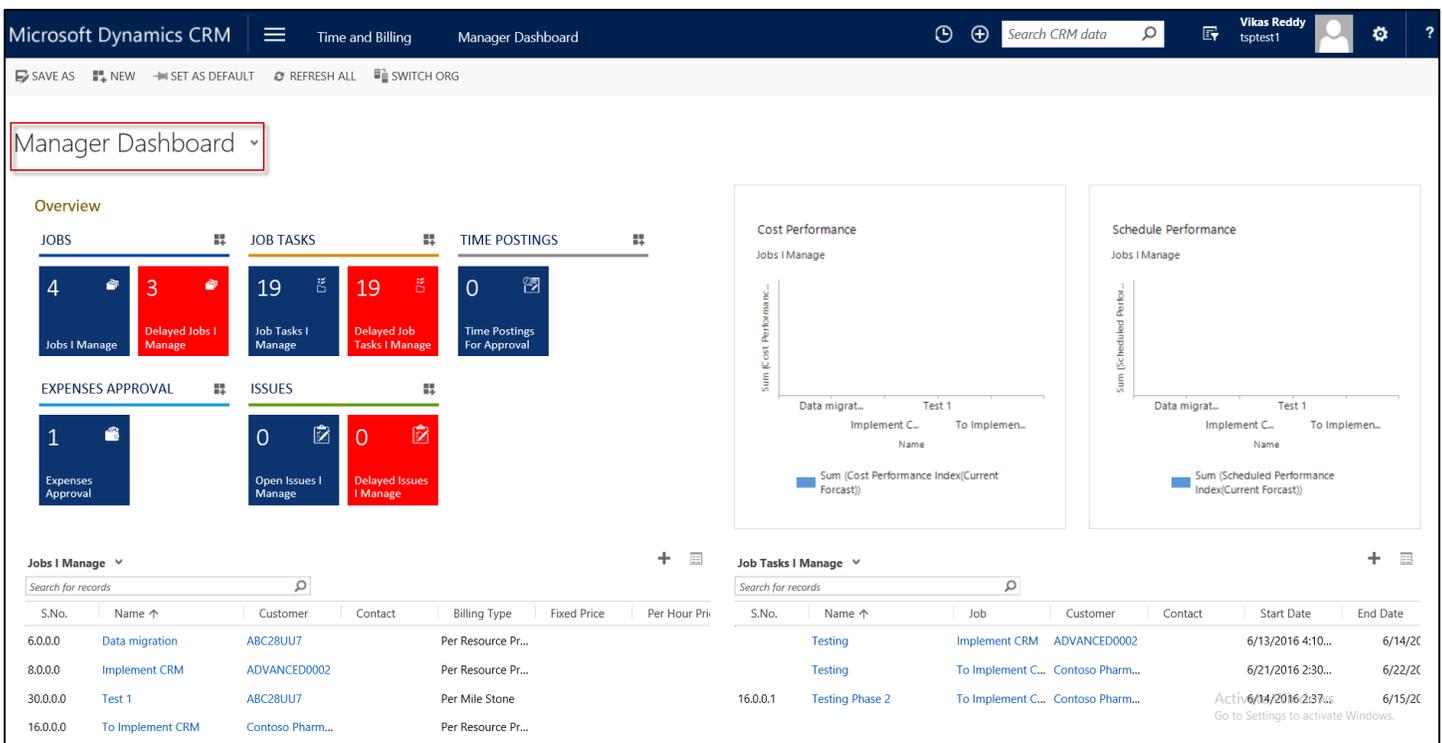
Manager Dashboard

Any user with **Manager Security Role** can access and view the Manager Dashboard to get insights about Jobs and Job Tasks managed by them as well as the Time Postings and Expenses Approval required for their resources. All these statistics can be viewed in the form of graphical representations (histograms and pie charts) on the Manager Dashboard.

To view Manager Dashboard, follow the navigation: **Time & Billing → Manager Dashboard**.



- Click on **Manager Dashboard**. You can get the overview of Jobs, Job Tasks, Time Postings, Expenses Approval and Issues that a Manager is involved in as shown below.



Important Notes

Under Jobs, you can find “Jobs I Manage” and “Delayed Jobs I Manage.”

- **Jobs I Manage** refers to the list of jobs being handled by a Manager and the number on it gives the idea of total number of such jobs.
- **Delayed Jobs I Manage** refers to the jobs that are overdue and which needs Manager’s immediate attention. The number on it gives the idea of total number of such jobs.

Under Job Tasks, you can find “Job Tasks I Manage” and “Delayed Job Tasks I Manage.”

- **Job Tasks I Manage** refers to the job tasks within a job that a Manager is working on and the number on it gives the idea of the total number of such job tasks.
- **Delayed Job Tasks I Manage** refers to the job tasks that are overdue and which needs Manager’s immediate attention. The number on it gives the idea of total number of such job tasks.

Under Time Postings, you can find “Time Postings for Approval” which refers to all the time postings that need your approval.

Under Expenses Approval, you can find “Expenses Approval” which refers to all the expenses that need your approval.

Under Issues, you can find “Open Issues I Manage” and “Delayed Issues I Manage.”

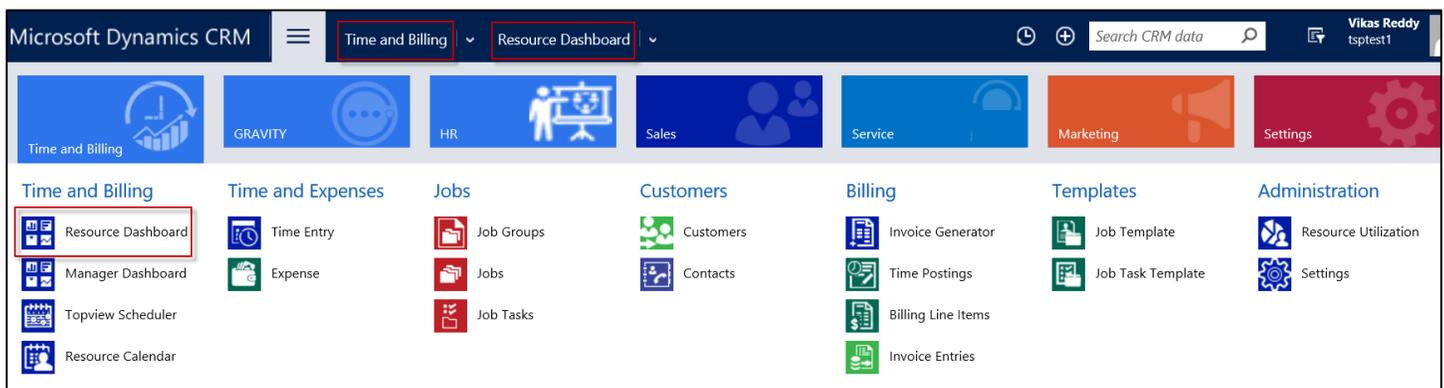
- **Open Issues I Manage** refers to the ongoing issues that a Manager is involved in and the number on it gives the idea of the total number of such issues.
- **Delayed Issues I Manage** refers to the issues that are overdue and which needs Manager’s immediate attention. The number on it gives the idea of total number of such issues.

It is important to note that a Manager has the option to create a new Job, Job Task, Time Posting, Expenses and Issues right from the Manager Dashboard itself.

Resource Dashboard

Any user with **Resource Security Role** can access and view the Resource Dashboard to get insights about Jobs, Job Tasks, Time Postings, Expenses Approval and Issues they are actively involved in. All these statistics can be viewed in the form of graphical representations (histograms and pie charts) on the Resource Dashboard.

To view Resource Dashboard, follow the navigation: **Time & Billing → Resource Dashboard.**



The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes 'Time and Billing' and 'Resource Dashboard', both highlighted with red boxes. Below the navigation bar, there are several tabs: 'Time and Billing', 'Time and Expenses', 'Jobs', 'Customers', 'Billing', 'Templates', and 'Administration'. Under the 'Time and Billing' tab, the 'Resource Dashboard' option is highlighted with a red box. Other options under 'Time and Billing' include 'Manager Dashboard', 'Topview Scheduler', and 'Resource Calendar'. Other tabs include 'Time and Expenses' (Time Entry, Expense), 'Jobs' (Job Groups, Jobs, Job Tasks), 'Customers' (Customers, Contacts), 'Billing' (Invoice Generator, Time Postings, Billing Line Items, Invoice Entries), 'Templates' (Job Template, Job Task Template), and 'Administration' (Resource Utilization, Settings).

- Click on Resource Dashboard. You can get the overview of the Jobs, Job Tasks, Time Postings, Expenses Approval and Issues that a Resource is involved in as shown below.

The screenshot displays the Microsoft Dynamics CRM Resource Dashboard. At the top, there are navigation tabs for 'Time and Billing' and 'Resource Dashboard'. The main area is divided into several sections:

- Overview:** A central area with six summary cards: 'Jobs I am working in' (13), 'Delayed Jobs' (13), 'Job Tasks I am working in' (25), 'Job Tasks which are delayed' (24), 'Time postings which are rejected' (0), and 'Expenses which are rejected' (0).
- ISSUES:** Two cards showing 'Issues which I am working in' (0) and 'Delayed Issues' (0).
- Time Postings For This Month:** A bar chart showing counts for various jobs like CRM Implement, CRM Migration, Data migration, Data Migration, Resource Sched., and To Implement.
- Approved/UnApproved Time postings:** A pie chart showing 51 Approved and 22 UnApproved postings.
- Job Tasks I am Working In:** A table listing job tasks with columns for S.No., Name, Customer, Contact, Job, Start Date, and End Date.
- Jobs I am Working In:** A table listing jobs with columns for S.No., Name, Customer, Contact, Start Date, End Date, and Billing Type.

Important Notes

Under Jobs, you can find “Jobs I am working in” and “Delayed Jobs.”

- **Jobs I am working in** refers to the list of jobs that a resource is involved in and the number on it gives the idea of total number of such jobs.
- **Delayed Jobs** refers to the jobs that are overdue and which needs resource’s immediate attention. The number on it gives the idea of total number of such jobs.

Under Job Tasks, you can find “Job Tasks I am working in” and “Job Tasks which are delayed.”

- **Job Tasks I am working in** refers to the job tasks within a job that a resource is working on and the number on it gives the idea of the total number of such job tasks.
- **Job Tasks which are delayed** refers to the job tasks that are overdue and which needs resource’s immediate attention. The number on it gives the idea of total number of such job tasks.

Under Time Postings, you can find “Time Postings which are rejected” which refers to all the time postings that are rejected by respective Managers if any.

Under Expenses, you can find “Expenses which are rejected” which refers to all the expenses that are rejected by respective Managers if any.

Under Issues, you can find “Issues which I am working in” and “Delayed Issues.”

- **Issues which I am working in** refers to the ongoing issues that a resource is involved in and the number on it gives the idea of the total number of such issues.

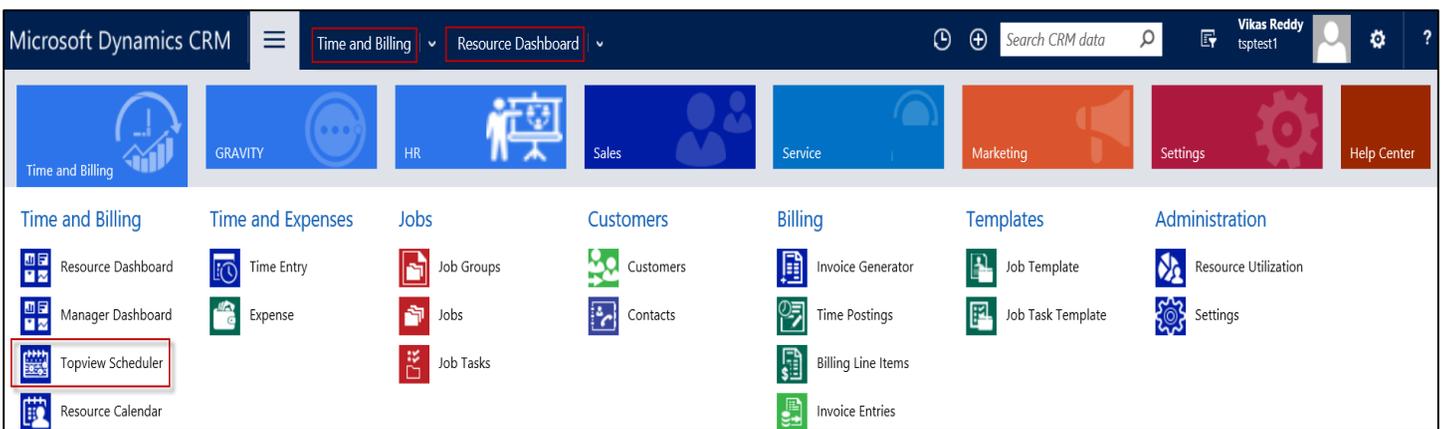
- **Delayed Issues** refers to the issues that are overdue and which needs resource’s immediate attention. The number on it gives the idea of total number of such issues.

It is important to note that a Resource has the option to create a new Time Posting and Expenses right from the Resource Dashboard itself.

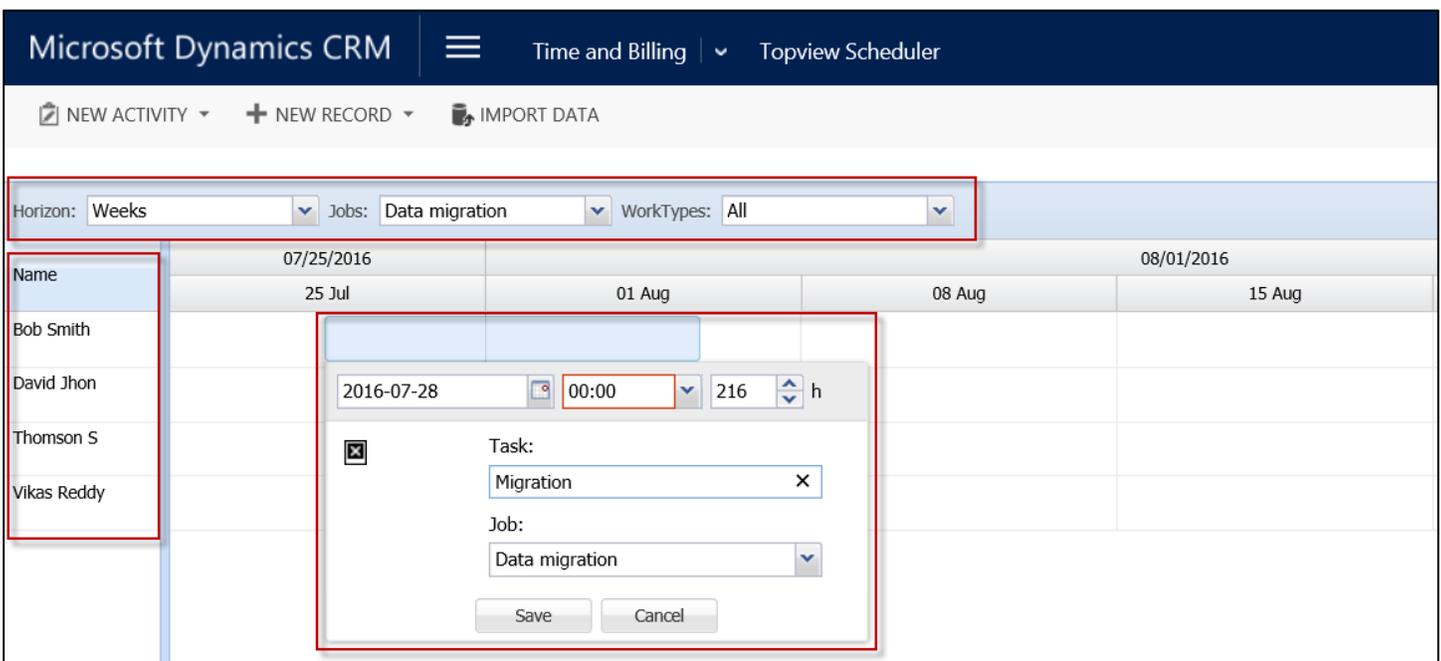
Top View Scheduler

Top View Scheduler is a new and innovative feature in Time & Billing that allows Managers to get the complete overview of the jobs in an organization along with detailed mapping of resources with job/job tasks over specific timelines. Managers can always go ahead and add tasks to resources based on their work schedules as seen in the Top View Scheduler. All the actions taken by the Manager would be automatically updated in all the associated records.

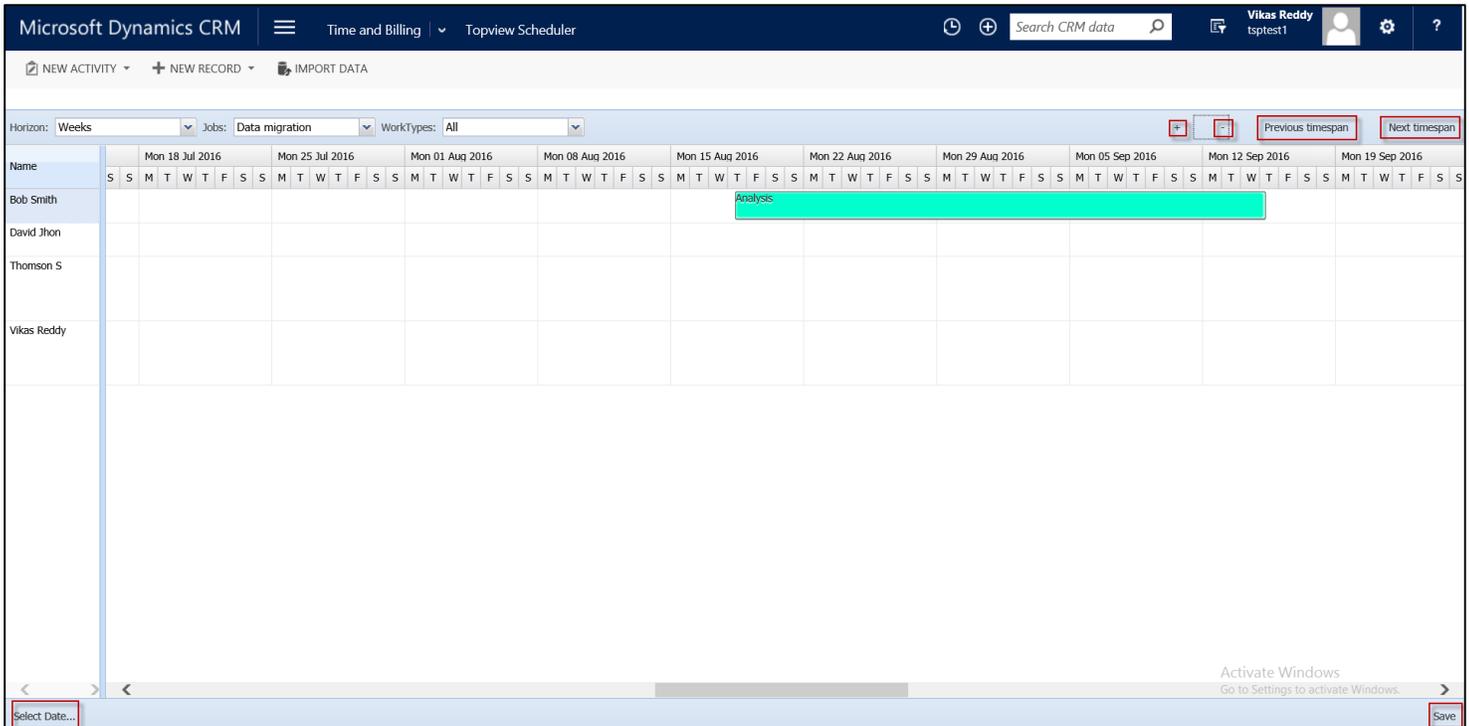
To view Top View Scheduler, follow the navigation: **Time & Billing → Top View Scheduler.**



- Click on **Top View Scheduler**. It gives a complete overview of the jobs in an organization along with detailed mapping of resources with job/job tasks over specific timelines.



- On the left side of the screen, the first column has all the resources enlisted. On the right side of the screen, you can see the jobs/job tasks associated with respective resources.
- You can select Horizon, Job and Work Types to filter the views accordingly.
- If you wish to add any task to a resource, simply hover the mouse to a particular time and date, and drag it horizontally to the required time and date. A task window would pop up automatically prompting you to name the job task and select the Job from the drop down menu. Finally, save the inputs to reflect the same on the background.
- You also have the option to Zoom In (+) and Zoom Out (-) to view and follow the job/job tasks on calendar closely.
- Previous timespan and Next timespan can come handy to you while navigating from one column of the calendar to another column.



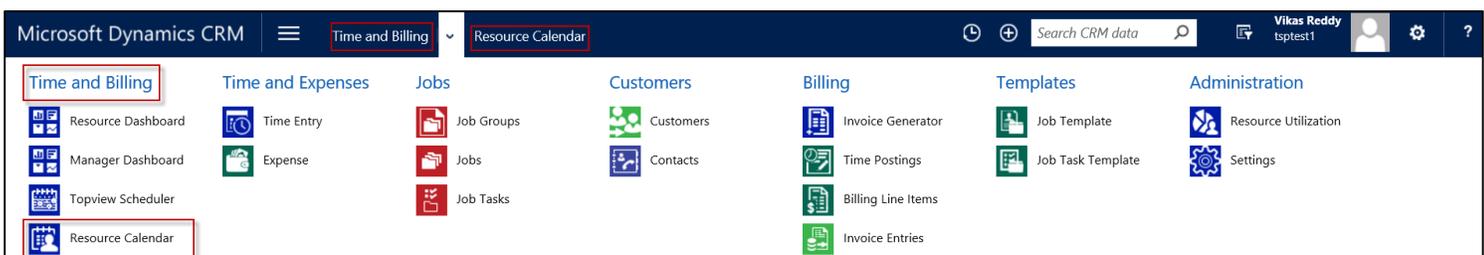
- Finally, click on Save button to register the edits. There is also a Select Date button on the bottom left side of the screen which allows you to navigate to a particular date.

Resource Calendar

Resource Calendar helps you to view the resource activities.

- Only Registered Users in the CRM can avail the Resource Calendar facility.
- Single or multiple users' facility is also available in Resource Calendar.

To view Resource Calendar, follow the navigation: Time and Billing → Resource Calendar.



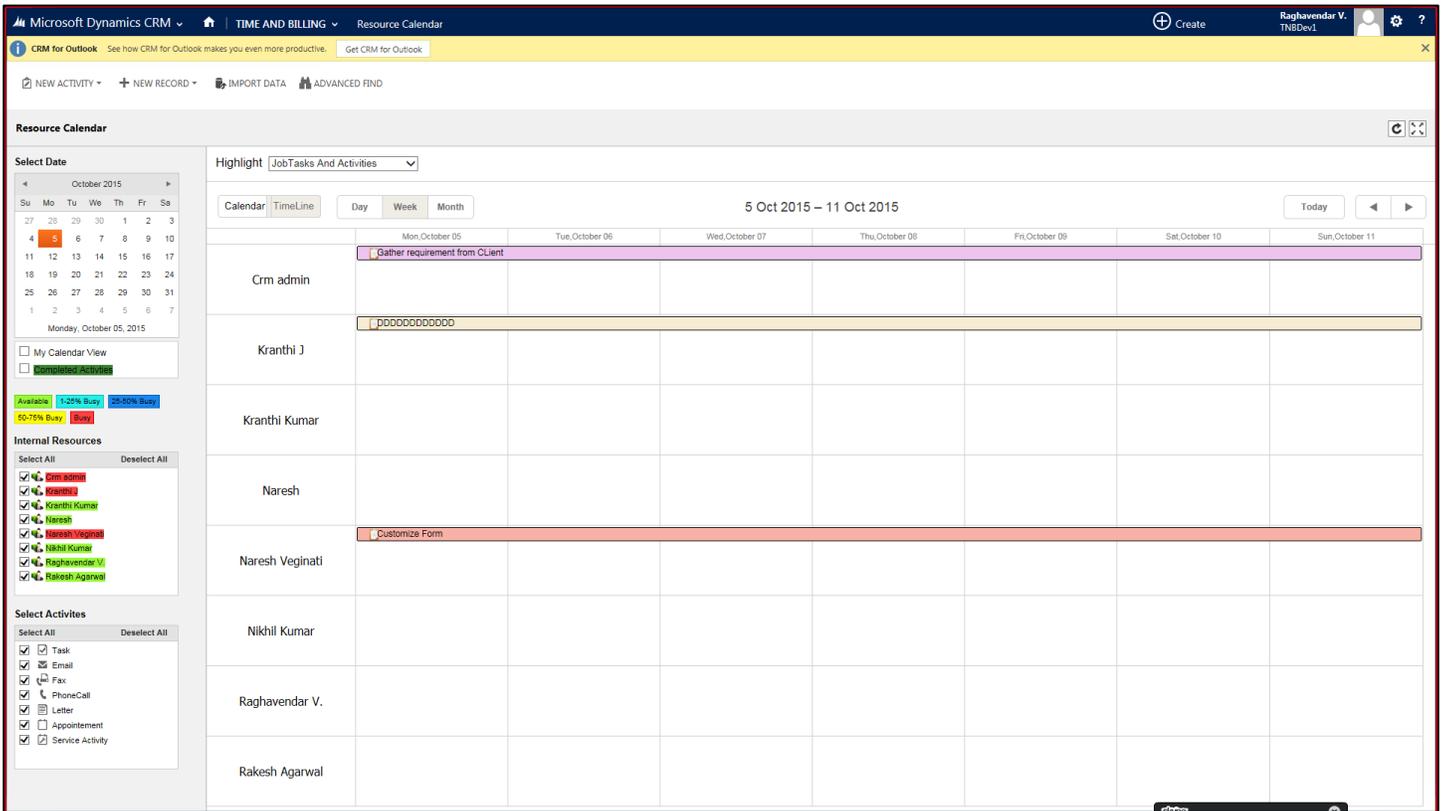


Figure 14: Calendar View

- The working pane has Date Calendar on top, and Activities list at the bottom.
- The right side of screen displays the Calendar with activities details
- To View the Calendar Select the Users from the User list by selecting the check box
- Only the users in the CRM are listed in this list.

Calendar View – Day view

- In a highlight drop down list we can see three types of options i.e. Job Task and Activities, Resources, and Accounts.
- Select the option as per your requirement. For example, selected as Job task and activities in the highlight.
- To view the activities day wise click on Day as shown below or select the date in the calendar as shown below.
- This will display the list of activities of the all users as per selected day.
- Double click on any activity will open a CRM window to show details

Figure 15: Calendar View - Day Wise

Calendar View – Week view

- To view the activities Week wise click on Week as shown below or select the Week in the calendar as shown below.
- This will display the list of activities of the all users as per selected Week.
- Double click on any activity will open a CRM window to show details

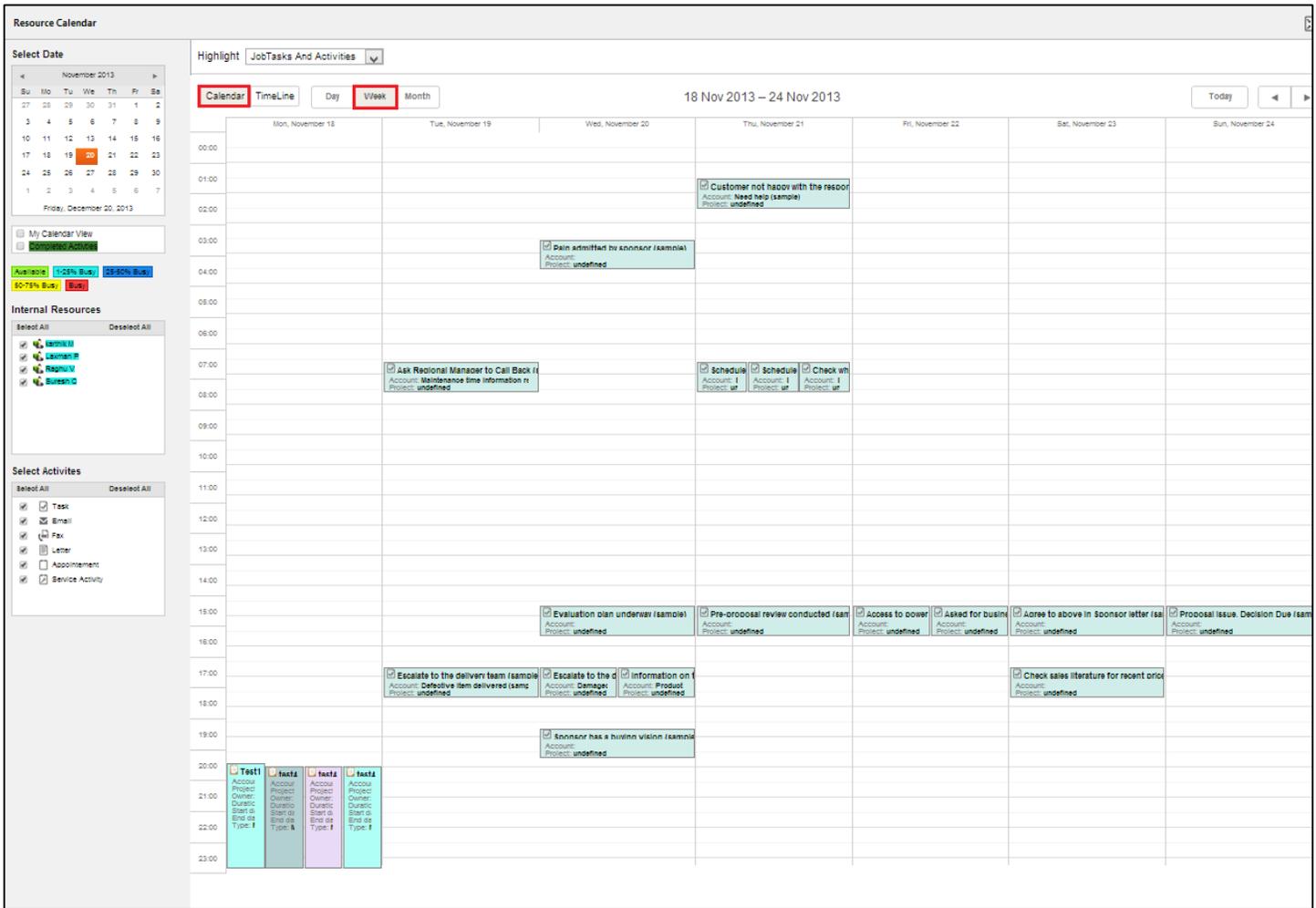
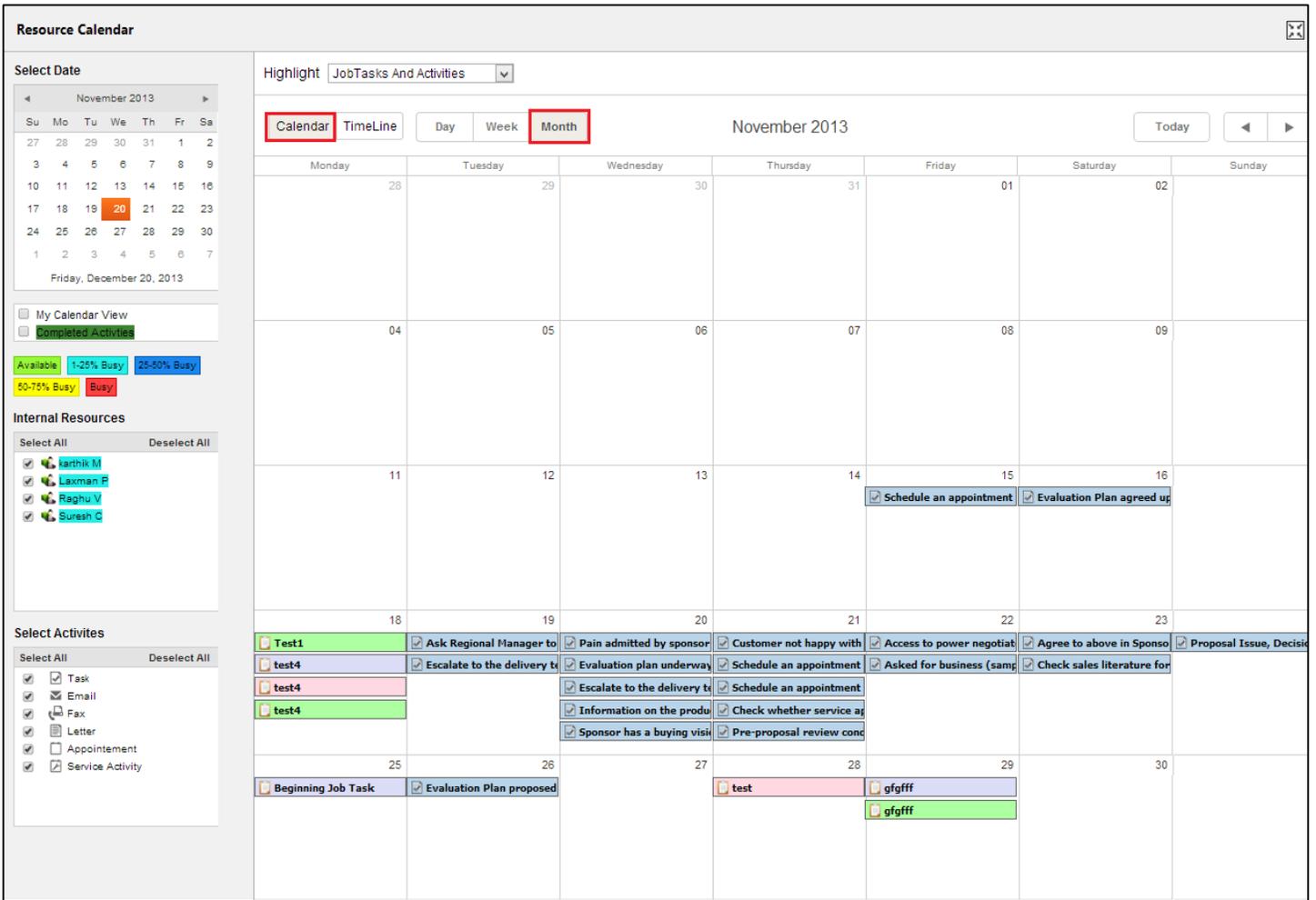


Figure 16: Calendar View - Week Wise

Calendar View – Month view

- To view the activities Month wise click on Month as shown below or select the Month in the calendar as shown below.
- This will display the list of activities of the all users as per Month.
- Double click on any activity will open a CRM window to show details



Resource Calendar

Select Date: November 2013

Highlight: JobTasks And Activities

Calendar | TimeLine | Day | Week | **Month**

November 2013

Today

Monday 28 | Tuesday 29 | Wednesday 30 | Thursday 31 | Friday 01 | Saturday 02 | Sunday

Monday 04 | Tuesday 05 | Wednesday 06 | Thursday 07 | Friday 08 | Saturday 09 | Sunday

Monday 11 | Tuesday 12 | Wednesday 13 | Thursday 14 | Friday 15 | Saturday 16 | Sunday

Monday 18 | Tuesday 19 | Wednesday 20 | Thursday 21 | Friday 22 | Saturday 23 | Sunday

Monday 25 | Tuesday 26 | Wednesday 27 | Thursday 28 | Friday 29 | Saturday 30 | Sunday

Internal Resources: Karthik M, Laxman P, Raghu V, Suresh C

Select Activities: Task, Email, Fax, Letter, Appointment, Service Activity

Completed Activities (Green): Test1, test4, test4, test4

Other Activities: Ask Regional Manager to, Pain admitted by sponsor, Customer not happy with, Access to power negotiat, Agree to above in Sponso, Proposal Issue, Decis, Escalate to the delivery t, Evaluation plan underway, Schedule an appointment, Asked for business (samp, Check sales literature for, Escalate to the delivery t, Schedule an appointment, Information on the produ, Check whether service ag, Sponsor has a buying visi, Pre-proposal review conc, Beginning Job Task, Evaluation Plan proposed, test, gfgfff, gfgfff

Figure 17: Calendar View - Month Wise

Calendar View – My Calendar and Completed Activities

- To see the Completed view records select the check box of Completed view as shown below.
- You can identify the Completed records with the GREEN color and type will give you the activity information as Completed.
- This will give the details of Completed records of all resources as per selected Day/Week/Month.
- You can also get the records of Completed activities of all resources as per selected Day/Week/Month.
- Similarly if you select My Calendar only information is displayed in calendar format for your selves only. And if you uncheck My Calendar you can view details for other resources also.

The screenshot displays the 'Resource Calendar' interface. On the left, there is a 'Select Date' calendar for November 2013, with the 20th highlighted. Below it, a sidebar contains checkboxes for 'My Calendar View' and 'Completed Activities', both of which are checked and highlighted with a red box. There are also status indicators for resource availability (Available, 1-25% Busy, 25-50% Busy, 50-75% Busy, Busy) and a list of 'Internal Resources' (Karthik M, Lakshman F, Raghu V, Suresh C). Below that is a 'Select Activities' section with checkboxes for Task, Email, Fax, Letter, Appointment, and Service Activity. The main area shows a calendar grid for November 2013 with various activities listed for different days, such as 'Product servicing require', 'Ask Regional Manager to', 'Check with customer and', etc. A 'Highlight' dropdown is set to 'JobTasks And Activities'.

Figure 18: My Calendar & Completed View

Time Line View – Day view

- In a highlight drop down list we can see three types of options i.e. Job Task and Activities, Resources, and Accounts.
- Select the option as per your requirement. For example, selected as Job task and activities in the highlight.
- To view the activities day wise click on Day as shown below or select the date in the calendar as shown below.
- This will display the list of activities of the all users as per selected day.
- Double click on any activity will open a CRM window to show details
- Against each user the day view will show from 0 hours to 23 hours, which enables us to have a clear picture of the resource activities.

The screenshot shows the 'Time Line View' interface. At the top, there is a 'Highlight' dropdown set to 'JobTasks And Activities'. Below it are view toggles for 'Calendar', 'TimeLine', 'Day', 'Week', and 'Month', with 'Day' selected. The main area displays a timeline for '8 Sep 2015' with a grid of hourly slots from 00:00 to 23:00. Some slots contain activity names, such as 'bljhn' and 'Evaluation Plan proposed'.

Figure 19: Time Line View - Hourly display

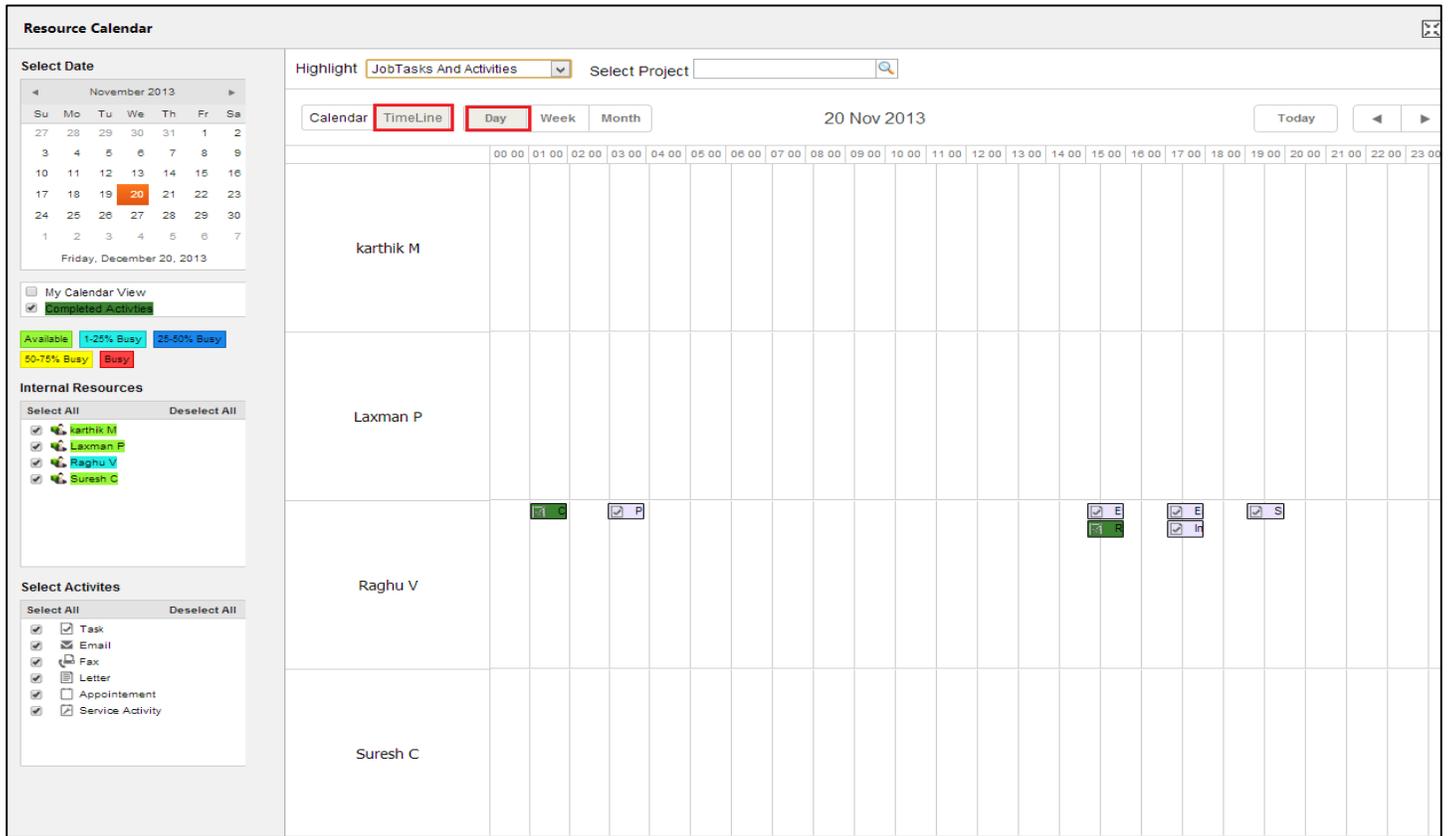


Figure 20: Time Line View - Day

Time Line View – Week view

- To view the activities Week wise click on Week as shown below or select the Week in the calendar as shown below.
- This will display the list of activities of the all users as per selected Week.
- Double click on any activity will open a CRM window to show details
- For example we have selected NOV 20, 2013 as date in the calendar but the Weekly views are displayed for the Current calendar starting from Monday to Sunday i.e. No 18, 2013 to Nov 24, 2013.

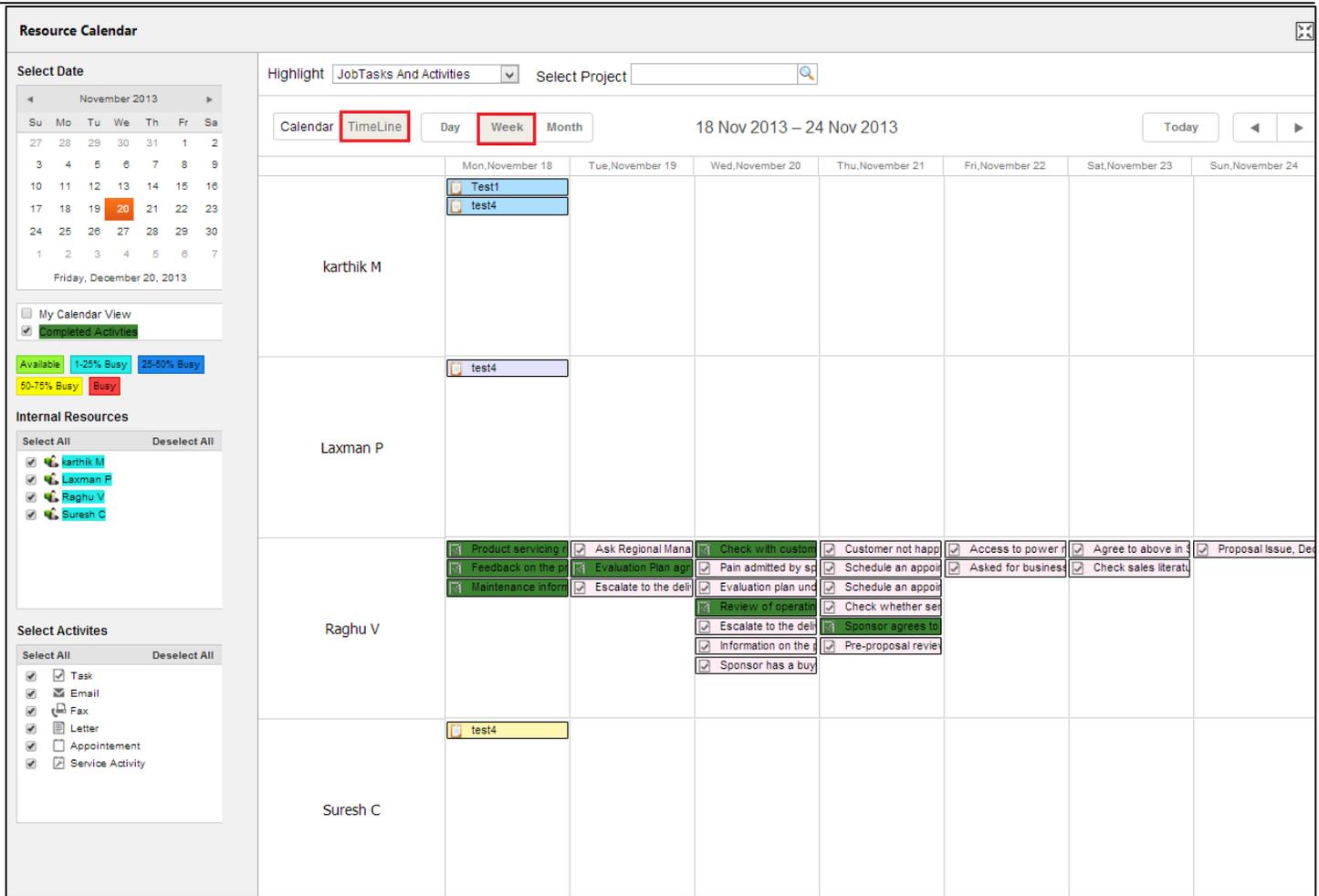


Figure 21: Time Line View - Week

Time Line View – Month view

- To view the activities Month wise click on Month as shown below or select the Month in the calendar as shown below.
- This will display the list of activities of the all users as per Month.
- Double click on any activity will open a CRM window to show details
- Against each user the Month view will show dates from 01 to 31, which enables us to have a clear picture of the resource activities.



Figure 22: Time Line view - Dates (month wise)

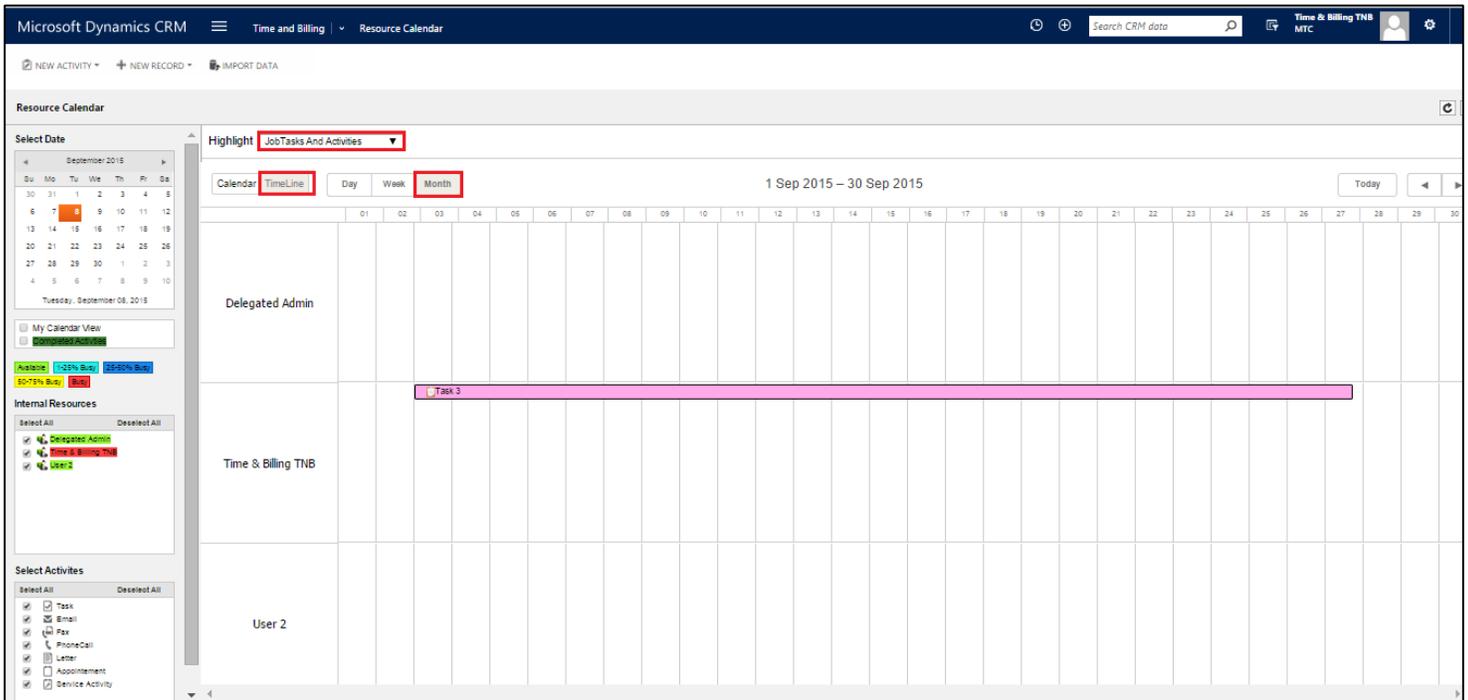
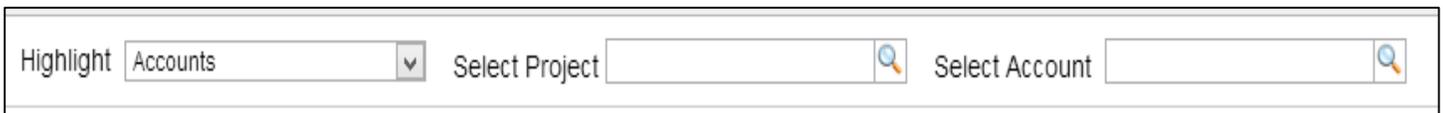


Figure 23: Time Line View - Month

All the above documentation has dealt with Job Task and Activities. In the Similar way the user can do the same for Resource or Account also. For Accounts there is a separate provision for Filtering data to suit your requirements.



Select Project and Select account both have the Look up search facility.

Internal Resources

Internal resource are the ones who are working for the company, in other words employees of the company who are on payrolls. These internal resources will connect to the system through Microsoft Dynamics CRM. Whereas external resources would connect to the system via web based portal.

By default it is Select All. If you want to uncheck all the resources click on Deselect All, it will uncheck the all the resources.

Legend:

Using this Legend colors you can easily find out which resource is available and which resource has been allotted activities.

- Available - This color indicates the Resource Available information.
- 1-25% Busy - This color indicates the Resource busy information with the 1 – 25%.
- 25-50% Busy - This color indicates the Resource busy information with the 25 – 50%.

50-75% Busy

- This color indicates the Resource busy information with the 50 – 75%.

Busy

- This color indicates the Resource busy information with the 100%.

Note: You can see the resource busy time by clicking on Day/Week/Month for all the above.

Note: The top right corner shows the following



- This image indicates the refresh icon. Using this we can refresh the Resource calendar.



- This image indicates the Full screen functionality. By clicking on this button Resource calendar functionality available in full screen mode.



- Today will display the current day and arrows indicates that backward and forward dates for easy navigation.
- On the left pane below the actual calendar, you will notice the following two options:



To view your own details check the My Calendar View (exclusively for the logging credentials only)
By checking the Completed Activities the user can view all completed task of all the resources.

There are two types of Calendar Views. One is Calendar Date/Week/Month wise and other is Time Line Day/Week/Month wise.

External Resource

External resources are the people who are working on on-site projects or the Consultant who are involved in the project but not being on payrolls of the company. All the external resources have the Portal facility to login and connect to the System for updates.

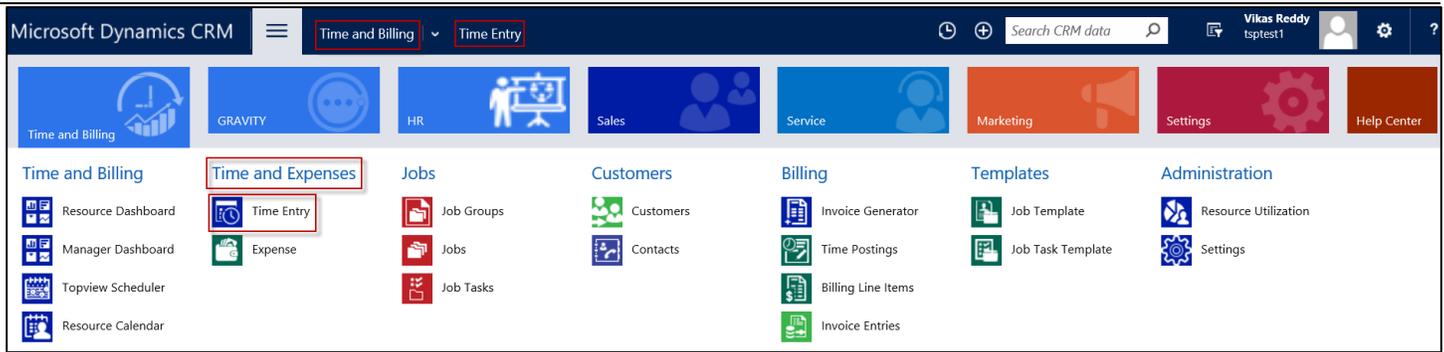
Time and Expenses

Under Time and Expenses, you can view and add time postings, approve time postings (only applicable for project manager/resource manager) and keep a tab on your active expenses.

Time Entry

Time Entry is where you can view and add time postings, and approve time postings (only applicable for project manager/resource manager).

To view and add time postings, follow the navigation: Time & Billing → Time Entry.

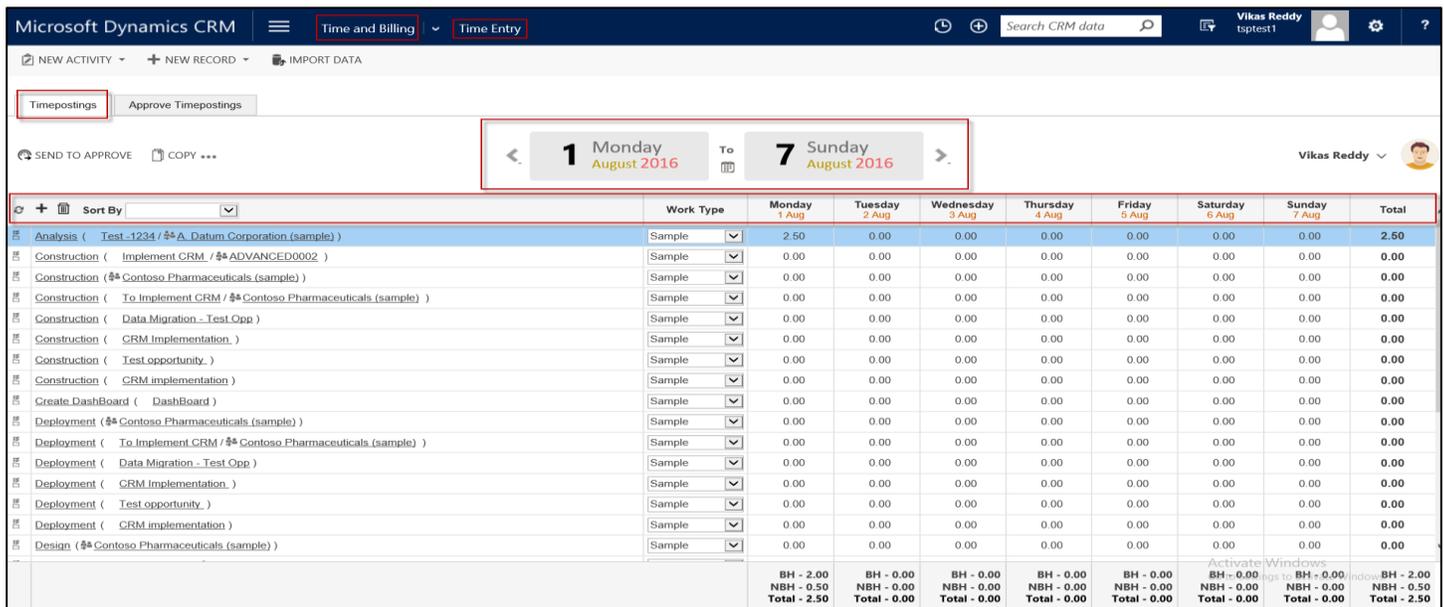


Click on Time Entry. You can see two tabs – Time Postings and Approve Time Postings.

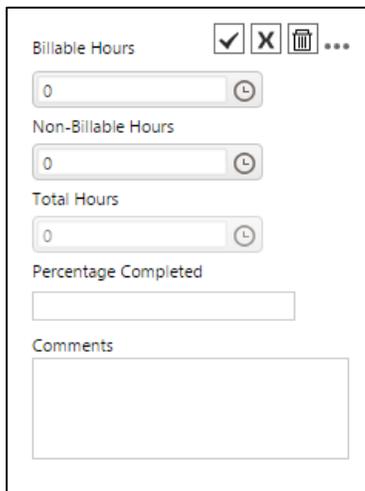
Note: You will be able to see Approve Time Postings tab only if you are assigned with Manager or Resource Manager Security Role.

Time Postings

- Time Postings will show all the tasks assigned to you allowing you to do time postings for the same spread across a week.

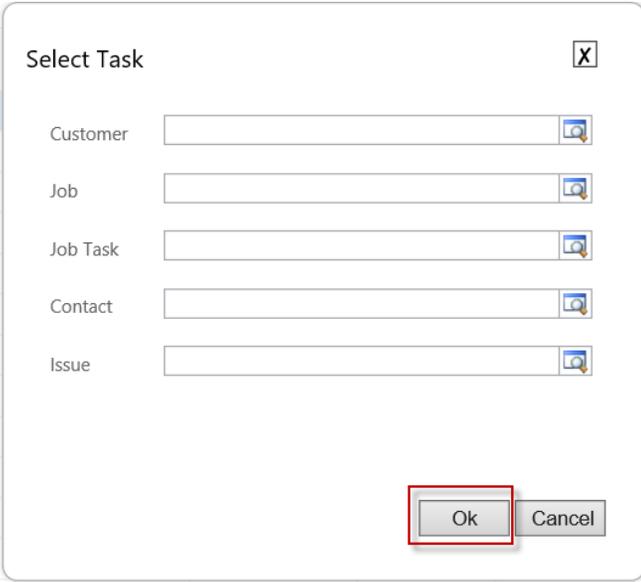


- In the above image, you can see how the solution allows you to do time postings over a week for different tasks.



- For doing time posting for a particular task on a particular day, first set the work type and simply click on the grid cell on which day time has to be posted.
- A box pops up asking details such as Billable Hours, Non-Billable Hours, Total Hours and Comments.
- Provide necessary details and click to save the details.
- Click on to close the pop up box.
- Click on to delete time posting for that particular day and particular task.
- Click on to find copy option. Use this option to copy time postings from already existing tasks and paste them in tasks that require same time postings.
- In case, if you are working on a new task which is not listed in the time postings, you can go ahead and create a new task for time posting by clicking on “+” button.

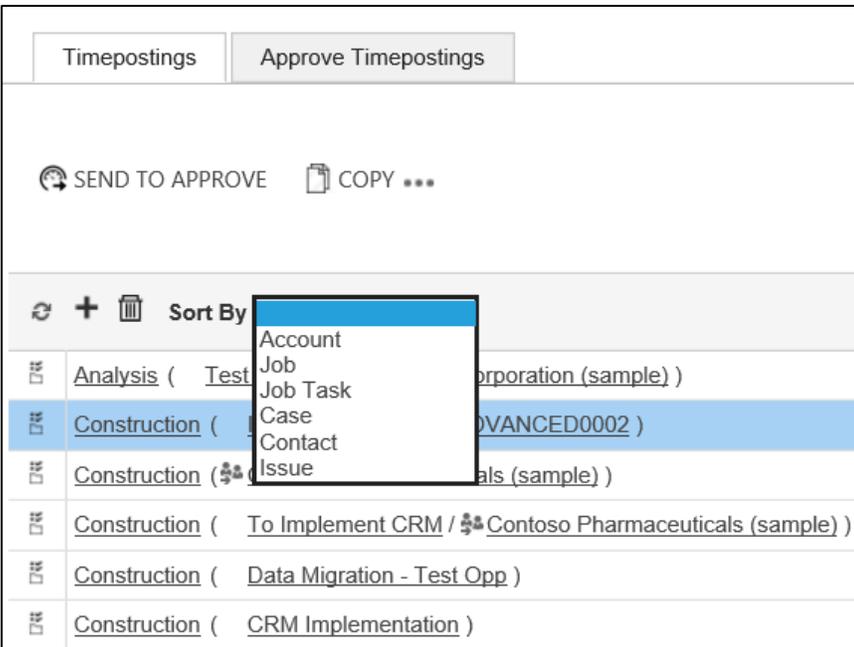
- Following window box pops up with details such as Customer, Job, Job Task, Contact and Issue.



The dialog box titled "Select Task" contains five input fields: Customer, Job, Job Task, Contact, and Issue. Each field has a magnifying glass icon to its right. At the bottom, there are two buttons: "Ok" (highlighted with a red box) and "Cancel".

- Fill the details and click on "OK" button.
- Refresh the page to see the newly created task for time posting.
- To delete any task simply select a task and click on 
- You can also sort view by – Account, Job, Job Task, Case, Contact and Issue

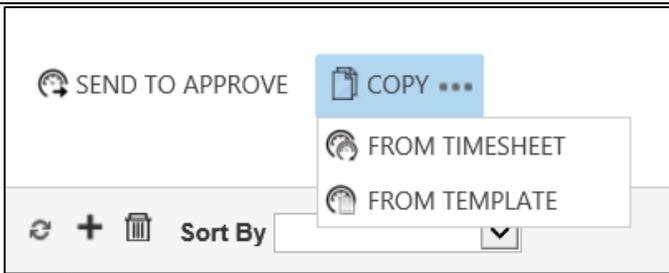
Note: Billable Hours refer to the actual productive hours while Non-Billable Hours refer to the non-productive hours (for e.g. research work, conceptualization and team meetings)



The screenshot shows a table with two tabs: "Timepostings" and "Approve Timepostings". Below the tabs are buttons for "SEND TO APPROVE" and "COPY ...". A "Sort By" dropdown menu is open, showing options: Account, Job, Job Task, Case, Contact, and Issue. The table contains several rows of timeposting data.

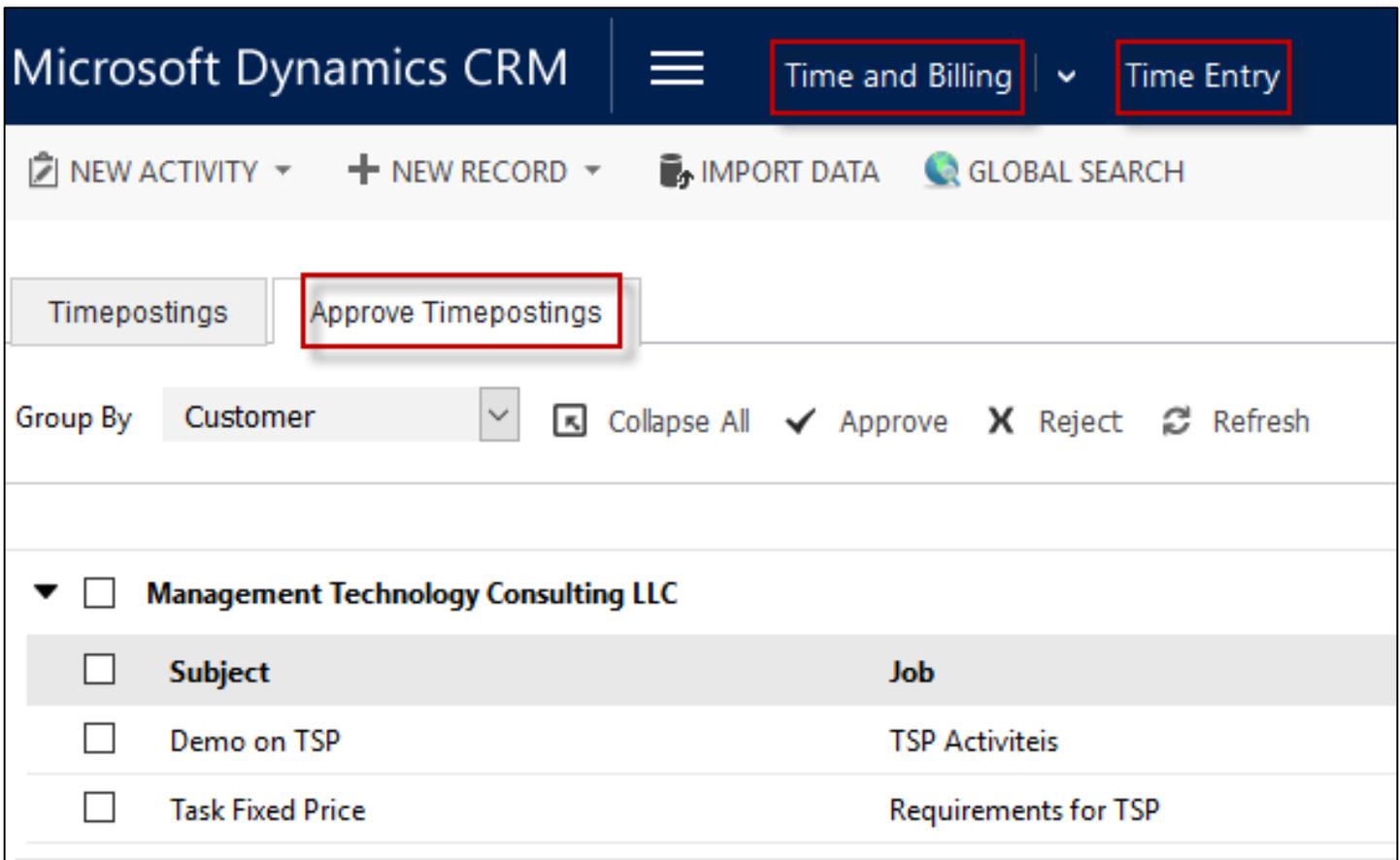
Timeposting	Account	Job	Job Task	Case	Contact	Issue
Analysis (Test)						corporation (sample)
Construction ()						ADVANCED0002)
Construction ()						als (sample)
Construction (To Implement CRM /)						Contoso Pharmaceuticals (sample)
Construction (Data Migration - Test Opp)						
Construction (CRM Implementation)						

- Finally, you can send these recorded time postings for approval by clicking on "SEND TO APPROVE."
- You can also copy these time postings from Time Sheet Or Template.



Approve Time Postings

Herein, you can view and approve the time postings of your customers and resources.



- Click on “Approve Time Postings.” You can see all the time postings that require your approval.
- You can group the entries by Customer/Job/Resource/Work Type to differentiate one entry from another.
- Just below the Approve Time Postings tab you can find options such as Collapse All, Approve, Reject and Refresh.
- Select the checkboxes against the time postings you wish to make a decision and click on either Approve or Reject.
- The responses you give will be reflected across the CRM and respective stakeholders would be notified about it.

			Billable Hours	Non Billable Hours	Total Hours
Management Technology Consulting LLC			0.00	3.50	3.50
Subject	Job	Job Task			
Demo on TSP	TSP Activities	Demo on TSP	0.00	2.00	2.00
Task Fixed Price	Requirements for TSP	Task Fixed Price	0.00	1.50	1.50

Expenses

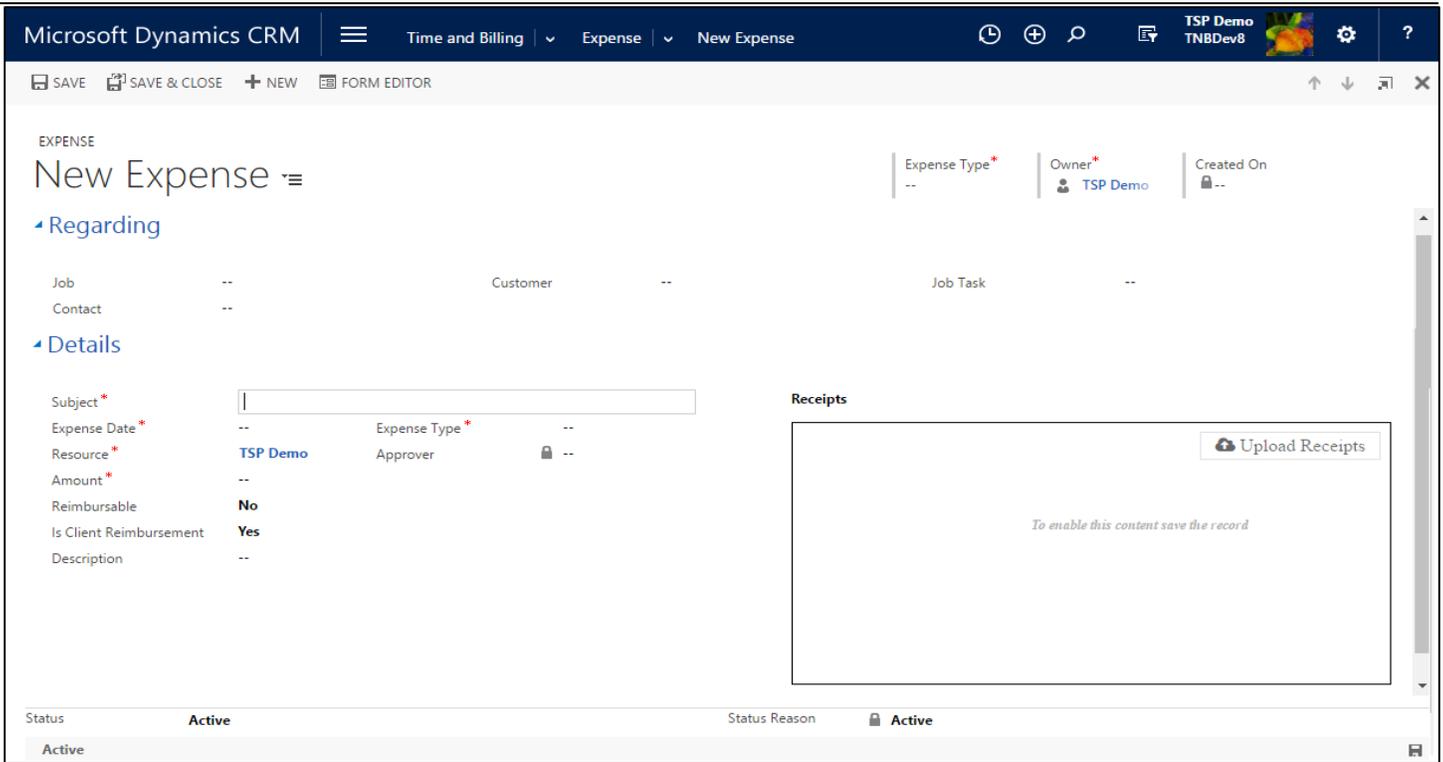
Expenses refer to spends involved while carrying out the job tasks.

To view your active expenses, follow the navigation: Time & Billing → Time Entry.

- Click on Expense. You will see the list of all your active expenses if any.

Subject	Customer	Contact	Expense Type	Amount	Description	Job	Job Task
exp1	BABCO88H		Travel	\$22.00		CRM Migration	Analysis
Expenses			Travel	\$500.00		Data Migration	Task for Migration
Travel to Mumbai	ABC28UU7		Travel	\$200.00	Mumbai travel	Data migration	

- To create a new expense, click on +NEW button from the CRM ribbon.
- New Expense page opens up with a series of fields to be filled up by you.
- All details under sections – Regarding, Details and Receipts must be provided.
- For better understanding, refer to the below images.

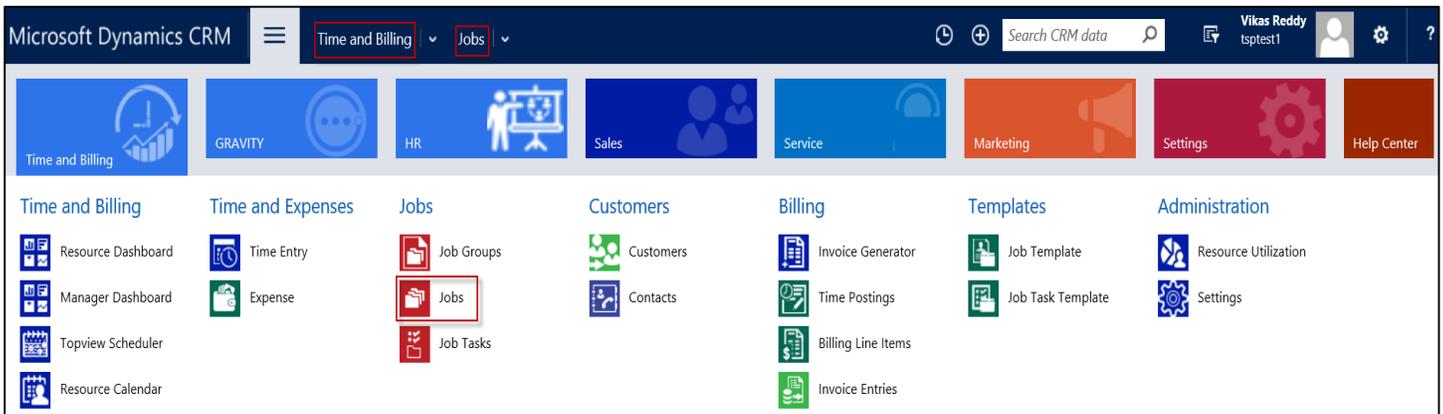


Jobs

Job or Project is a work requirement from business clients. Jobs are further broken down into job tasks and are assigned to resources based on the complexities involved and skillset required for its quicker completion.

Jobs

To view Jobs, follow the navigation: **Time & Billing** → **Jobs**.



- Click on Jobs. You can see the list of already existing Active Jobs if any.

Microsoft Dynamics CRM | Time and Billing | Jobs

Search CRM data

Vikas Reddy tsptest1

Jobs I am Working In

S.No.	Name	Customer	Contact	Start Date	End Date	Billing Type	Fixed Price	Per Hour Price	Description	Created On
10.0.0	Calculate IT and PBX Cost...	ADV		3/4/2016	3/11/2016	Per Hour Price		\$30.00		3/4/2016 10:42 AM
15.0.0	CRM - 1234	ABCO9M32		6/14/2016	6/21/2016	Per Resource Pri...				6/14/2016 4:21 PM
27.0.0	CRM implementation			7/11/2016	7/12/2016	Per Resource Pri...				7/11/2016 8:28 PM
29.0.0	CRM Implementation			7/14/2016	7/21/2016	Per Resource Pri...				7/14/2016 11:25 AM
22.0.0	Dashboard	ASSOCIAT0001		7/11/2016	7/18/2016	Per Resource Pri...				7/11/2016 2:04 PM
6.0.0	Data migration	ABC28UU7		6/13/2016	6/14/2016	Per Resource Pri...				6/13/2016 6:08 AM
23.0.0	Data Migration	A-arvin Tonerst...		7/11/2016	7/18/2016	Per Hour Price		\$49.00		7/11/2016 2:07 PM
28.0.0	Data Migration - Test Opp	Contoso Pharma...		7/14/2016	7/21/2016	Per Resource Pri...				7/14/2016 10:43 AM
8.0.0	Implement CRM	ADVANCED0002		6/13/2016	6/20/2016	Per Resource Pri...				6/13/2016 8:18 AM
25.0.0	Resouce Scheduler	ALTONMAN0001		7/11/2016	7/18/2016	Per Mile Stone				7/11/2016 2:12 PM
13.0.0	Test -1234	A. Datum Corpo...		6/14/2016	6/21/2016	Per Resource Pri...				6/14/2016 9:26 AM
32.0.0	Test opportunity	A. Datum Corpo...		7/28/2016	8/4/2016	Per Resource Pri...				7/28/2016 11:02 AM
20.0.0	Test23	AARONFIT0001		6/24/2016	7/1/2016	Per Resource Pri...				6/24/2016 12:50 PM
16.0.0	To Implement CRM	Contoso Pharma...		6/14/2016	6/21/2016	Per Resource Pri...				6/14/2016 6:34 PM

- To create a new job, click on +NEW button on the CRM ribbon.
- A new window pops up with a series of fields to be filled up by you.

Create Job From Template

New Job
 Existing Template
 Job From Existing Quote.
 Job From Existing Opportunity.

New Job: It allows you to create a new job by selecting that option.

Existing Template: Displays all the existing templates by selecting that option.

Job from existing Quote: Displays all the quotes which has the forecast information.

Job from opportunity: Displays all the opportunities which has the forecast information

Dynamics 365 | Time and Billing | Jobs > CRM Implementation

SAVE NEW SAVE AS TEMPLATE CREATE JOBTASKS FROM ... ON HOLD COMPLETE CLOSE DELETE ASSIGN

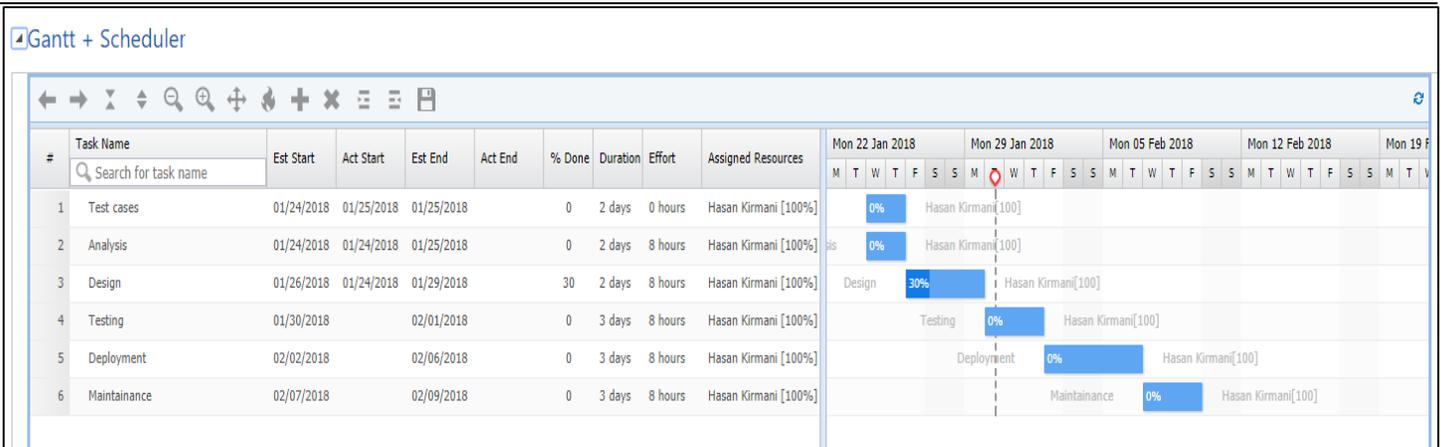
JOB: CRM Implementation | S.No.: Job-14 | Status Reason: In Progress | % Complete: 4.00 | Due Date: 09-02-2018

General

Summary		Billing Details		Budget Notification	
Name	CRM Implementation	Bill To Address	Contoso Pharmaceuticals (sample)-Address1	Send Budget Notification	No
Job Group	-----	Sales Tax on BLI	No	Financial Information	
Customer	Contoso-001	Sales Tax on Expenses	No	Estimates	Actuals
Contact	-----	Sales Tax Schedule	-----	Estimated Total Hours	40.00 Actual Total Hours
Approvals By	Project Manager	Billing Type	Time and Materials	Estimated Total Revenue	3200.00 Actual Billable Revenue
Project Manager	Hasan Kirmani	Rate Structure	Hourly Rate Per Resource	Estimated Total Cost	3600.00 Actual Cost
Est Start Date	24-01-2018				
Est End Date	09-02-2018				
Currency	Dollar				
Owner	Hasan Kirmani				
Job Template	CRM Implementation				

Job Resources / Sponsors

Job Resources			Job Sponsor		
Resource ↑	Role	Resource Utiliz...	Contact	Role ↑	
Hasan Kirmani			Lyon (sample)		
Jamie Redin...					



Dimensions

Dimensions in job provides businesses to tag each transaction with the appropriate dimensions codes that allows you to track projects, events or even repairs to specific activities. Dimensions allows users to maintain each segment separately thereby reducing the overall maintenance on GL accounts and chart of accounts. Dimensions are user-defined & easy to create to manage your chart of accounts.

In the Time and Billing module of TSP, Dimensions can be found as a separate tab as shown below.

Navigation: CRM → Time and Billing→Jobs-> Dimensions

Dynamic 365 | Time and Billing | Jobs > CRM Implementation >

SAVE + NEW SAVE AS TEMPLATE CREATE JOBTASKS FROM ... ON HOLD COMPLETE

JOB
CRM Implementation

S.No.	Status Reason	% Complete	Due Date
Job-14	In Progress	4.00	09-02-2018

Dimensions

*MTC	Test
*MTC!	Test1

- Initially dimensions should be set up in customers and chart of accounts in time and billing settings page.
- Dimensions fields will have three options (Ignore, optional, Required).

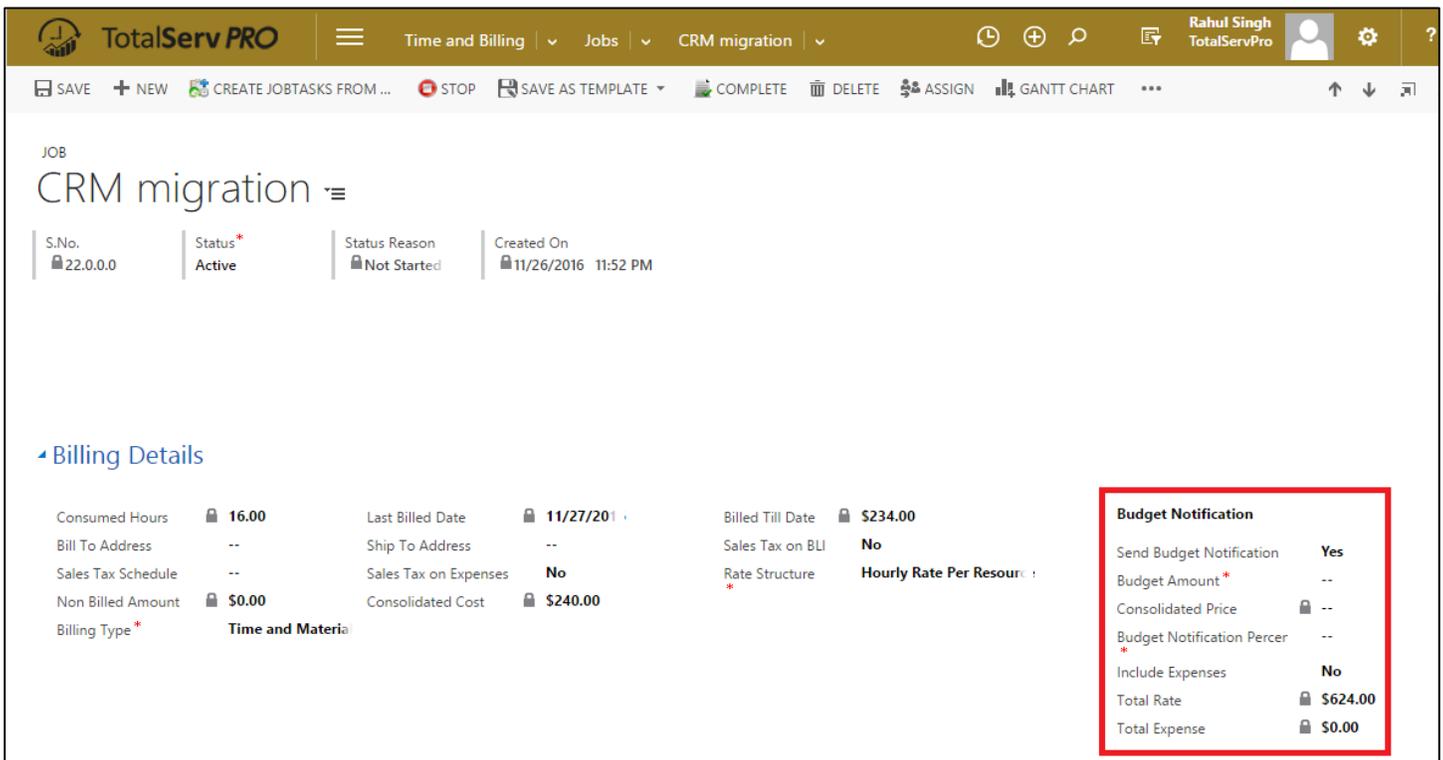
- Depending on the option selected in the customer and chart of account dimensions will be displayed on the job form.
For Ex: if it is set as required in the customer and chart of accounts for any one of the dimension then dimension fields will be displayed on the job form.
If it is set as optional and ignore then dimension fields will not be displayed on the job form.
- Based on the dimensions set in the job same will be displaying in the Time postings, expenses and invoices as well.

Budget Notification

Budget Notification is a handy feature for Project Managers and Resource Managers to stay informed when the billing invoice reaches a particular pre-set limit of the total budget fixed so as to take effective measures – either increase the budget limit or control the unwarranted costs.

In the Time and Billing module of TSP, Budget Notification can be found under Billing Details as shown below.

Navigation: CRM → Time and Billing → Jobs



The screenshot shows the TotalServ PRO interface for a job named "CRM migration". The job status is "Active" and was created on 11/26/2016 at 11:52 PM. The "Billing Details" section is expanded, showing various fields such as Consumed Hours (16.00), Last Billed Date (11/27/2016), Billed Till Date (\$234.00), and Total Expense (\$0.00). A red box highlights the "Budget Notification" section, which includes the following details:

Budget Notification	
Send Budget Notification	Yes
Budget Amount*	--
Consolidated Price	--
Budget Notification Percer*	--
Include Expenses	No
Total Rate	\$624.00
Total Expense	\$0.00

- **Send Budget Notification** – If you set this field as “Yes” then all the people listed in the [Email Notification Settings](#) would receive an email message for the budget notification.
- **Budget Amount** – It is the budget amount set for that particular job.
- **Total Rate** – It is total resource cost calculated based on individual resource price per hour and the no. of hours’ time posted for that particular job.
- **Total Expense** – It is the total expenses incurred on resources for that particular job.
- **Consolidated Price** – It refers to the total amount thus far incurred for that particular job. It includes total resource cost plus total expenses (optional).

- **Budget Notification (%)** – It is the % criterion for triggering the budget. E.g., if a budget amount is set as \$5000 and budget notification (%) is set as 10% then a budget notification would be triggered when the Consolidated Price records \$500.

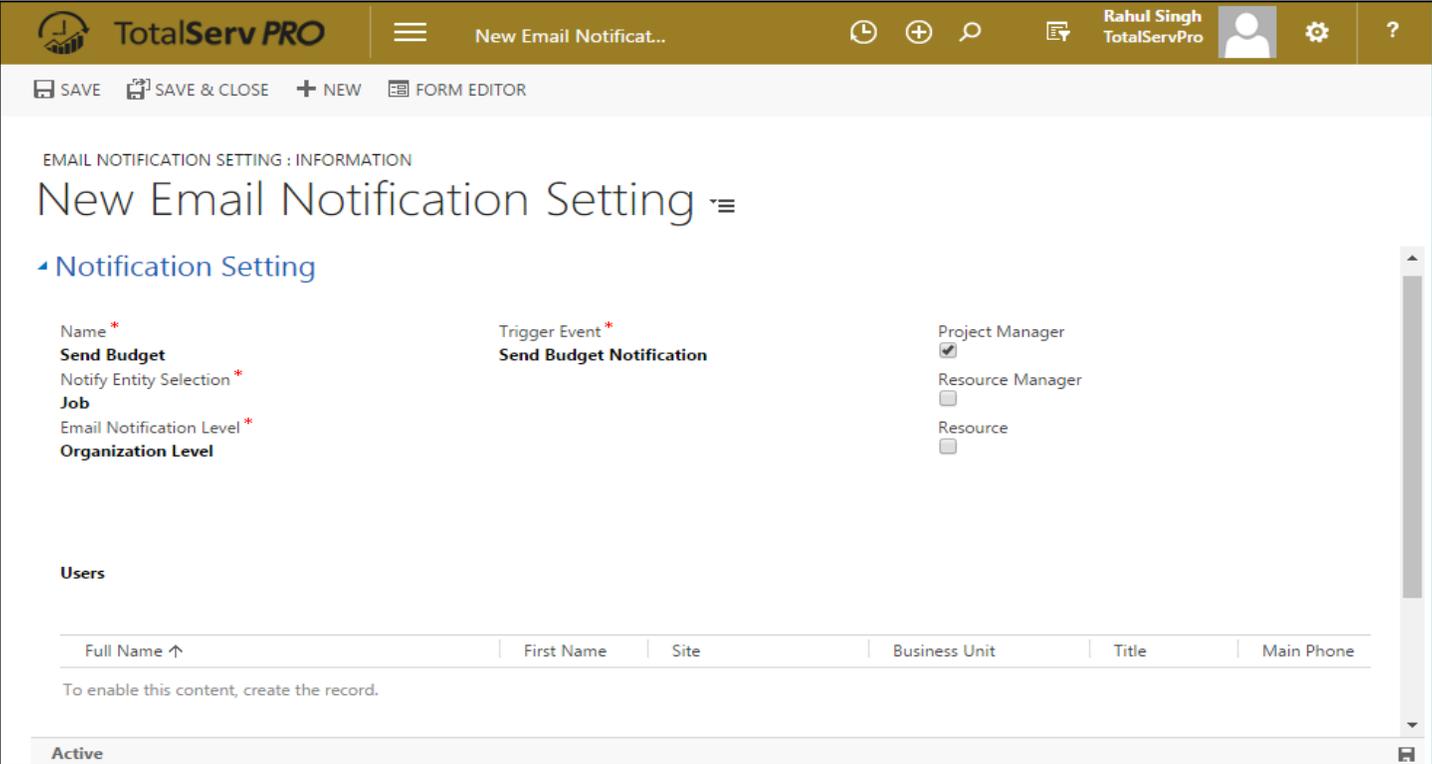
Email Notification Settings

Use Email Notification Settings to configure email notifications with different criteria as discussed below.

Navigation: CRM → Settings → Email Notification Settings

Creating a New Email Notification Setting

1. Click on +New. A new email notification settings window pops up as shown below.

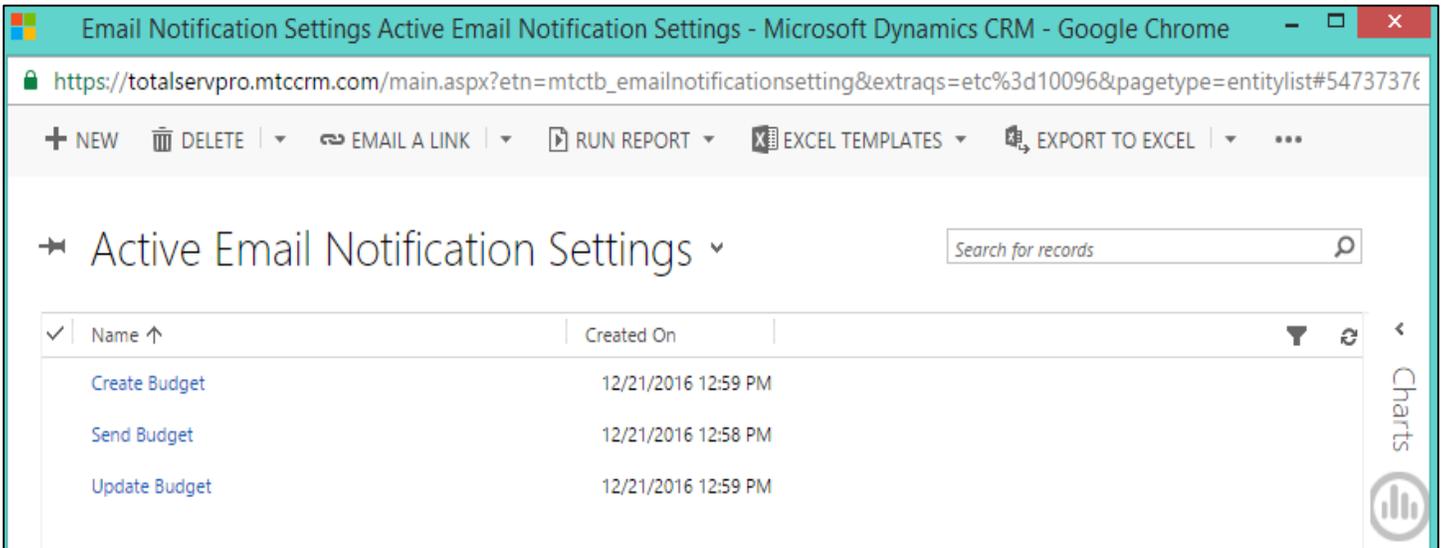


2. Fill the corresponding fields under Notification Settings such as Name, Notify Entity Selection, Email Notification Level, and Trigger Event.

Field Details

- **Name** – It refers to the name of notification that you would like to correspond to. E.g., Update Notification for Project Manager.
- **Notify Entity Selection** – It has a drop down with entities displayed as Job and Job task. Make selection as required.
- **Trigger Event** – It is the criterion based on which an email message would be triggered and sent to the recipients. Trigger events supported are: Create, Update, Status Change, Resource Assign, Delete and Send Budget Notification.
- **Email Notification Level** – It has a drop down with Organization Level and User Level options.

- **Organization Level** – Selecting this option will allow you to configure Email Notifications to Project Manager, Resource Manager and Resource.
 - **User Level** – Selecting this option will allow you to configure Email Notifications to resources of your choice.
3. After filling in the mandatory details and setting the trigger event criterion, you must save the record.
 4. A new email notification setting with the name assigned would be created under **Active Email Notification Setting**.



- Details under sections such as General Information, Job Stockholder, Performance and Forecast, Job Resources, Billing Details, Job Tasks, Expenses & Issues, and Gantt Settings have to be thoroughly filled.
- New Job creation can only be done by Managers or the Authorized personnel having the Security role privileges to do it. General Users only can use the Created Jobs or Job tasks.
- Approvals By can be changed as per your choice though the default value would be the selection you have initially made in the [Time and Billing Settings](#). If Project Manager is selected then Project Manager Name field becomes mandatory. Accordingly, select the appropriate Manager Name. Likewise, Account Manager and Lead Consultant can be assigned to a job if necessary.
- It is important to understand the billing types supported for the job creation so that you can choose the appropriate billing type.

Billing Types

Time and Billing supports the following 6 billing types:

1. **Time and Materials** – Under this billing type, you can set the Rate Structure as Hourly Rate Per Job or Hourly Rate Per Resource or Hourly Rate Per Task as per your business requirements.
 - a. When **Hourly Rate Per Job** is selected, you need to set the Per Hour Price value for billing line item generation. The billing would be calculated as **Per Hour Price * No. of Time Posted Hours**.

Billing Details			
Consumed Hours	0.50	Last Billed Date	--
Bill To Address	--	Ship To Address	--
Sales Tax Schedule	--	Sales Tax on Expenses	No
Non Billed Amount	\$875.00	Consolidated Cost	\$15.00
Billing Type	Time and Materials	Billed Till Date	--
		Sales Tax on BLI	No
		Rate Structure	Hourly Rate Per Job
		Per Hour Price	--
		Budget Notification	
		Send Budget Notification	No
		Total Rate	\$25.00
		Total Expense	\$0.00

- b. When **Hourly Rate Per Resource** is selected, billing line item would be generated based on the resource price pre-configured during resource creation. The billing would be calculated as **Per Hour Price of Resource * No. of Time Posted Hours** (for all resources associated with that Job).

Billing Details

Consumed Hours  0.50	Last Billed Date  --	Billed Till Date  --	Budget Notification
Bill To Address --	Ship To Address --	Sales Tax on BLI No	Send Budget Notification No
Sales Tax Schedule --	Sales Tax on Expenses No	Rate Structure * Hourly Rate Per Resource	Total Rate  \$25.00
Non Billed Amount  \$875.00	Consolidated Cost  \$15.00		Total Expense  \$0.00
Billing Type * Time and Materials			

- c. When Hourly Rate Per Task is selected, the system shows up all the associated tasks with that job with the flexibility of adding Price Per Job Task. The billing would be calculated as the **No. of Time Posted Hours * Price Per Job Task** (for every task).

Billing Details

Consumed Hours  0.50	Last Billed Date  --	Billed Till Date  --	Budget Notification								
Bill To Address --	Ship To Address --	Sales Tax on BLI No	Send Budget Notification No								
Sales Tax Schedule --	Sales Tax on Expenses No	Rate Structure * Hourly Rate Per Task	Total Rate  \$25.00								
Non Billed Amount  \$875.00	Consolidated Cost  \$15.00	Price Per Task	Total Expense  \$0.00								
Billing Type * Time and Materials		<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Name *</th> <th style="text-align: left;">Price Per Job Task</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> New Task</td> <td>\$50.00</td> </tr> <tr> <td><input type="checkbox"/> New Task</td> <td>\$50.00</td> </tr> <tr> <td><input type="checkbox"/> New Task 1111</td> <td>\$50.00</td> </tr> </tbody> </table>	Name *	Price Per Job Task	<input type="checkbox"/> New Task	\$50.00	<input type="checkbox"/> New Task	\$50.00	<input type="checkbox"/> New Task 1111	\$50.00	
Name *	Price Per Job Task										
<input type="checkbox"/> New Task	\$50.00										
<input type="checkbox"/> New Task	\$50.00										
<input type="checkbox"/> New Task 1111	\$50.00										

2. **Fixed Price – Completion of Contract** – As the name suggests, this billing type refers to Fixed Price associated with completion of a contract. That means, billing line item would be generated for the client after the completion of a particular contract. Fixed Price can be set in the associated field.

Billing Details

Consumed Hours  0.50	
Bill To Address --	
Sales Tax Schedule --	
Non Billed Amount  \$875.00	
Billing Type * Fixed Price - Completion of contract	
Fixed Price *	

3. **Fixed Price – Percentage Completion** – In this billing type, billing line item would be generated based on the percentage completion of a Job. All percentages are predefined along with the corresponding price tags. So, when the job is in progress Bill button is enabled in the percentage grid. Based on the completion of these percentages and once the user clicks on the bill button a corresponding billing line item would be generated. If the overall Job Percentage Completion is 100% then the billing line item would be generated for all the percentages predefined with the price tags.

Billing Details

Bill To Address: [Contoso Pharmaceuticals \(sample\)-Address1](#)

Sales Tax on BLI: No

Sales Tax on Expenses: No

Sales Tax Schedule: -----

*Billing Type:  Fixed Price - Percentage Complete

*Fixed Price: ₹5,000.00

Job Complete Percentage + 

Job Percentage ...	Price*	Invoice Status	Invoice Number	Invoice
50	₹2,500.00	Un Billed		
75	₹1,000.00	Un Billed		
100	₹1,500.00	Un Billed		

4. **Milestone** – This billing type refers to billing line item generation based on milestone accomplishment. For example a project may require Analysis, Coding, Testing and Deployment. So, in this case Analysis, Coding, Testing and Deployment could be the milestones on whose accomplishment billing line items could be generated. When the job is in progress Bill button is enabled in the milestone grid. Once the user clicks on the bill button billing line item will be created.

Billing Details

Bill To Address: [Contoso Pharmaceuticals \(sample\)-Address1](#)

Sales Tax on BLI: No

Sales Tax on Expenses: No

Sales Tax Schedule: -----

*Billing Type:  Milestone

Milestone Tasks + 

Task Name	Milestone price*	Invoice Status	Invoice Number	In
Analysis	₹1,000.00	Un Billed		
Design	₹1,000.00	Un Billed		
Testing	₹1,000.00	Un Billed		

5. **Cost Plus** – This billing type would allow you to generate billing line item for the job that takes into account: Cost Per Hour (each resource) and the Cost Plus Percentage that you want add extra. The billing would be calculated as **(Cost Per Hour (each resource)* No. of Time Posted Hours) + Cost Plus Percentage**.

◀ Billing Details

Consumed Hours	🔒	0.50
Bill To Address		--
Sales Tax Schedule		--
Non Billed Amount	🔒	\$875.00
Billing Type *		Cost Plus
Cost Plus Percentage *		--

6. **Internal Use** – This billing type is for internal use meaning it wouldn't require billing line item generation for internal purposes.

◀ Billing Details

Consumed Hours	🔒	0.50
Bill To Address		--
Sales Tax Schedule		--
Non Billed Amount	🔒	\$875.00
Billing Type *		Internal Use

Charts

Charts give you the graphical representation of the data for easy understanding and monitoring of jobs/job tasks.

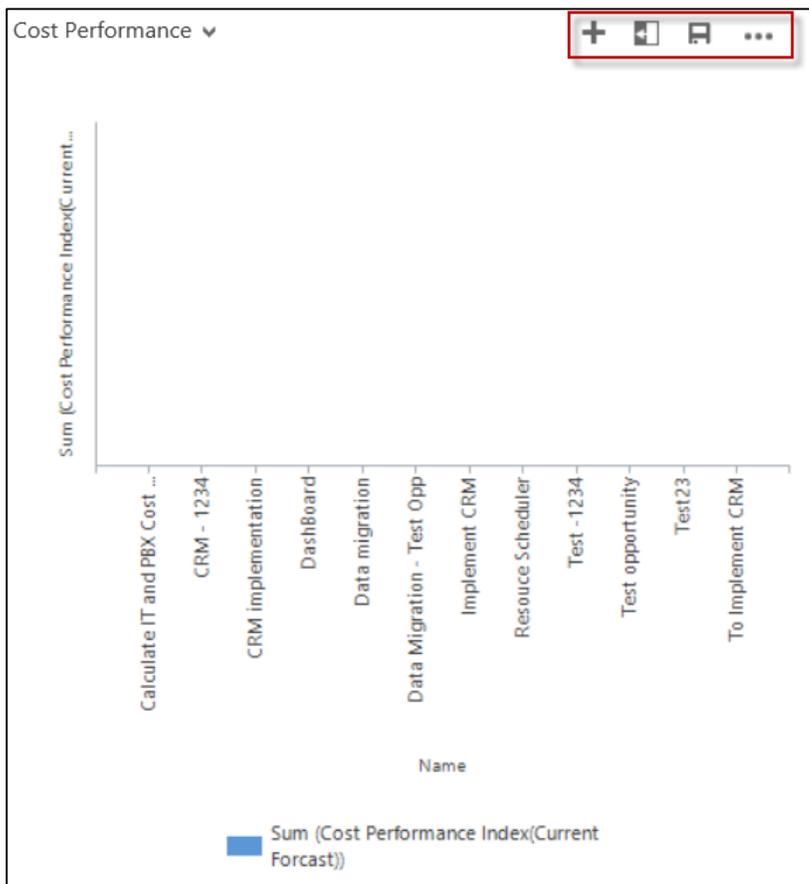
- Unless the data is saved the charts cannot be displayed.
- To view charts for the jobs at hand, simply click on the charts pane on the extreme right hand side of the window.

Jobs I am Working In Search for records

S.No.	Name ↑	Customer	Contact	Start Date	End Date	Billing Type	Fixed Price	Per Hour Price	Description	Created On
1.0.0.0	Calculate IT and PBX Cost...	ADV		3/4/2016	3/11/2016	Per Hour Price		\$30.00		3/4/2016 10:42 AM
15.0.0.0	CRM - 1234	ABCO9M32		6/14/2016	6/21/2016	Per Resource Pri...				6/14/2016 4:21 PM
27.0.0.0	CRM implementation			7/11/2016	7/12/2016	Per Resource Pri...				7/11/2016 8:28 PM
29.0.0.0	CRM Implementation			7/14/2016	7/21/2016	Per Resource Pri...				7/14/2016 11:25 AM
22.0.0.0	DashBoard	ASSOCIAT0001		7/11/2016	7/18/2016	Per Resource Pri...				7/11/2016 2:04 PM
6.0.0.0	Data migration	ABC28UU7		6/13/2016	6/14/2016	Per Resource Pri...				6/13/2016 6:08 AM
23.0.0.0	Data Migration	A-arvin Tonerst...		7/11/2016	7/18/2016	Per Hour Price		\$49.00		7/11/2016 2:07 PM
28.0.0.0	Data Migration - Test Opp	Contoso Pharma...		7/14/2016	7/21/2016	Per Resource Pri...				7/14/2016 10:43 AM

Charts 

- You can as well add a new chart, save a chart, and import/export a chart with the options provided as shown in the below image.



- A typical chart for a job would look something like below:

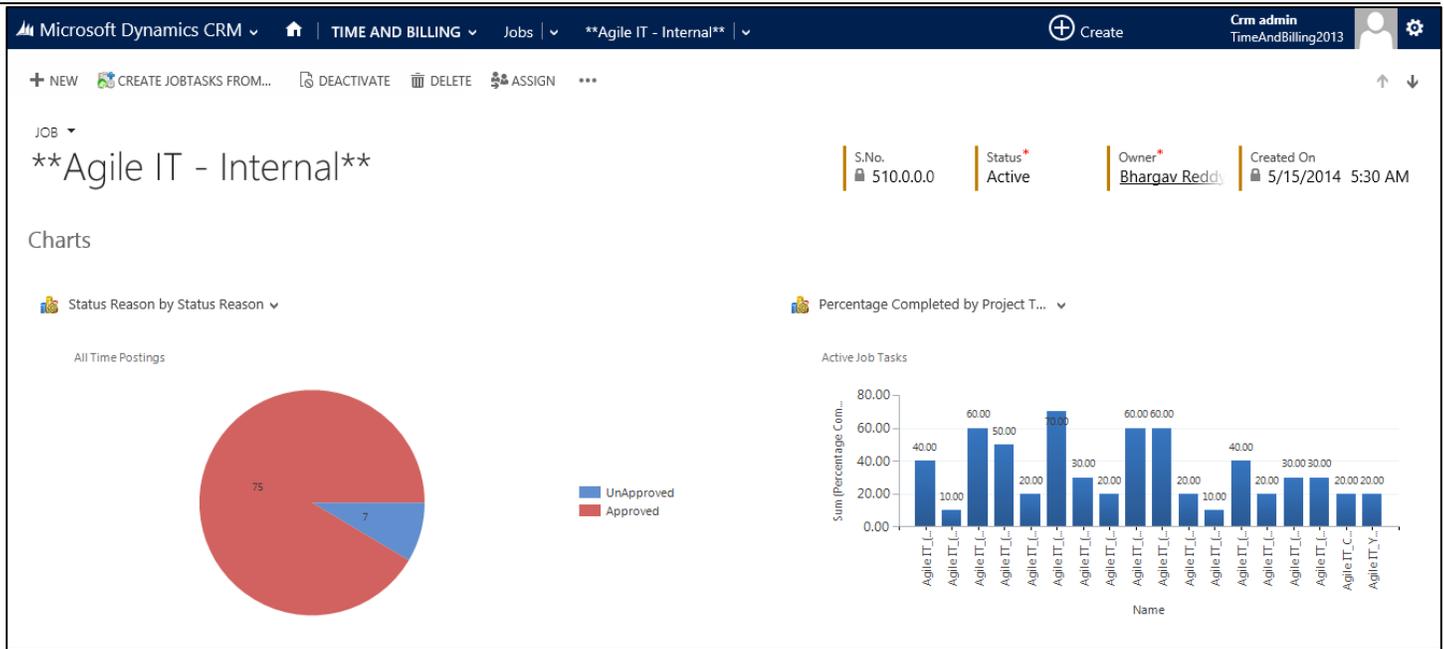


Figure 24: Creation of Jobs - Charts

Gantt + Scheduler

Gantt + Scheduler is a third party tool embedded in Time and Billing module to help Top Management, Managers and other decision makers get an overview of the details of the job tasks, associated resources, percentage completion for increasing operational efficiency and resource utilization.

Gantt + Scheduler also enables you to add/edit tasks and attributes, assign/de-assign resources, and schedule/re-schedule tasks with drag and drop functionality. You can also track the percentage completion of job tasks using the Gantt + Scheduler. Lastly, it serves as a Dashboard at one glance.

Gantt + Scheduler lists all the resources involved in the job tasks of that particular job while also displaying the job tasks with start and end dates and total no. of hours. Thus, Gantt + Scheduler gives a complete picture about resource occupancy for the job tasks and their availability for future requirements.

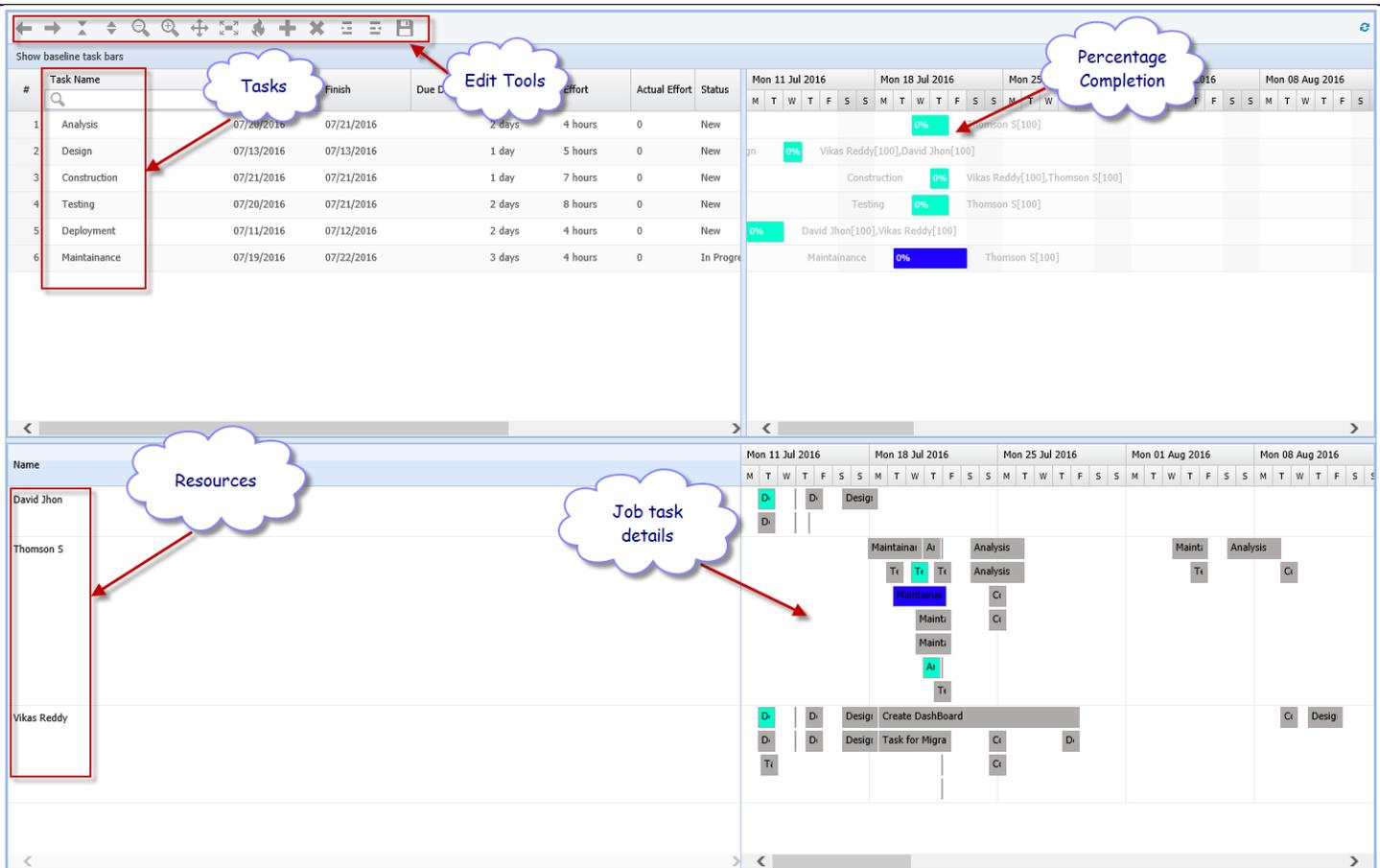


Figure 25: Gantt chart display

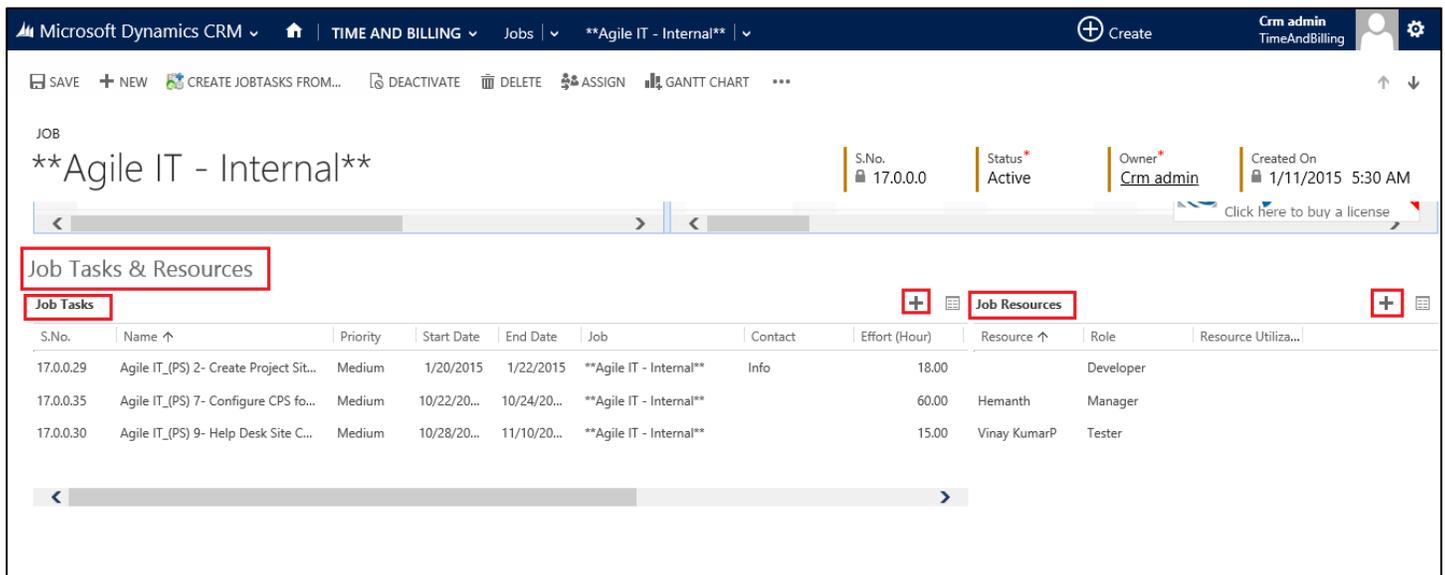
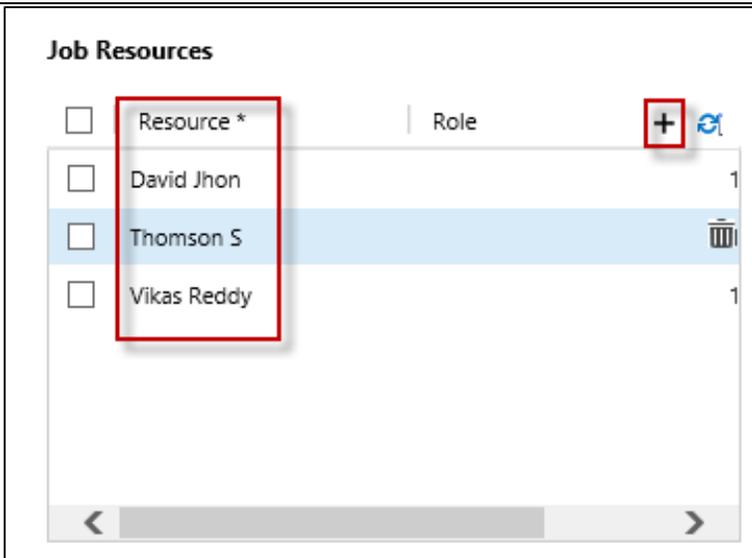


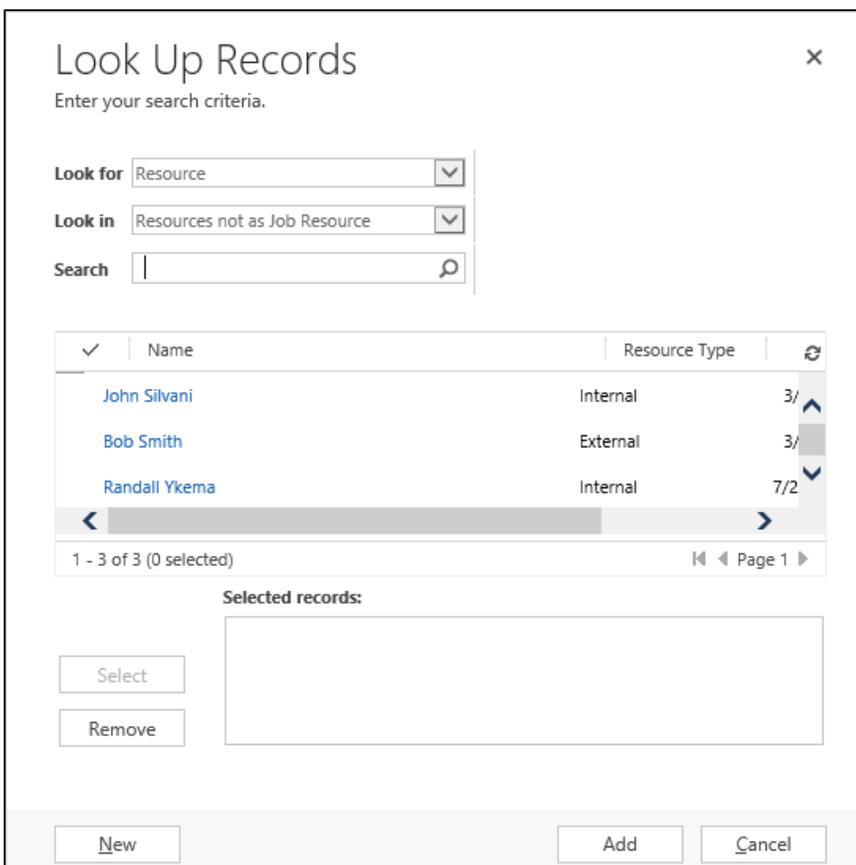
Figure 26: Job Task & Resource – in Job

Job Resources

Job Resources refer to the resources for whom you wish to assign the job tasks of a particular job.



- To add a new job resource, click on “+” as shown in the above image.
- Look Up Records window pops up. Search for required resources and add them.



- Save the changes and refresh the CRM page for the changes to get reflected.
- The newly created Job Resources will be available in the Gantt + Scheduler for you to assign the job tasks.

Issues

Issues are also recorded and captured here in Jobs. Any issues raised against any Job or Job task are displayed (existing ones) here in this connected Job. Issues can also be created new from this screen itself by clicking on “+” as shown below.

Microsoft Dynamics CRM | Time and Billing | Jobs | 6 orders of Product...

SAVE NEW CREATE JOBTASKS FROM... DEACTIVATE DELETE ASSIGN GANTT CHART

JOB: 6 orders of Product SKU JJ202 (sample) | S.No: 32.0.0.0 | Status: Active | Owner: Time & Billing | Created On: 8/20/2015 7:40 PM

Title	Job	Issue Type	Assigned To	Job Task	Total Hours	Billable Hours	Non
Issue Title No 1	6 orders of Prod...	Bug	Time & Billing T...				
Issue Title No 2	6 orders of Prod...	Improvement	Time & Billing T...				
Issue Title No 3	6 orders of Prod...	Bug	Time & Billing T...				

Expenses

Subject	Expense Type	Amount	Description	Job Task	Is Billed	Resource	Status	Created On
mtc test expense		₹25.00			No	Time & Billing T...	Active	10/2/2015 2:35 ...
Test expenses no 1		₹100.00			No	Time & Billing T...	Active	10/2/2015 3:47 ...
Test Expenses No 2		₹50.00			No	Time & Billing T...	Active	10/2/2015 3:48 ...

Figure 27: Issue – in Job

Microsoft Dynamics CRM | Time and Billing | Jobs | 6 orders of Product...

Issue

Title: Issue Title No 3 | Job: 6 orders of Product SKU JJ202 (sample) | Issue Type: Bug | Assigned To: -- | Owner: Time & Billing TNB | Description: --

Save Cancel

Figure 28: New Issue creation in Job

All fields marked with Astriex are mandatory and finally save the Issue to get recorded.

Expenses

Scroll down further to get Expenses.

All expenses related to the Job or project can be recorded here. Expenses like Maintenance, Mileage, Food Expenses, Travelling Expenses and other miscellaneous expenses are stored here. The forecast system also helps the management to monitor and overview the expenses.

Microsoft Dynamics CRM | Time and Billing | Jobs | 6 orders of Product...

6 orders of Product SKU JJ202 (sample)

S.No. 32.0.0.0 | Status Active | Owner Time & Billing | Created On 8/20/2015 7:40 PM

Title	Job	Issue Type	Assigned To	Job Task	Total Hours	Billable Hours	Non
Issue Title No 1	6 orders of Prod...	Bug	Time & Billing T...				
Issue Title No 2	6 orders of Prod...	Improvement	Time & Billing T...				
Issue Title No 3	6 orders of Prod...	Bug	Time & Billing T...				

Expenses

Subject	Expense Type	Amount	Description	Job Task	Is Billed	Resource	Status	Created On
mtc test expense		₹25.00			No	Time & Billing T...	Active	10/2/2015 2:35 ...
Test expenses no 1		₹100.00			No	Time & Billing T...	Active	10/2/2015 3:47 ...
Test Expenses No 2		₹50.00			No	Time & Billing T...	Active	10/2/2015 3:48 ...

Status: Active | Billed Till Date: ₹1,500.00 | Last Billed: 9/10/2015 | No Billed Amount: ₹0.00

- Click on + against Expenses tab on the screen to add New Expenses

Microsoft Dynamics CRM | Time and Billing | Jobs | 6 orders of Product...

Expense

Subject: Travelling Expenses | Resource: Time & Billing TNB | Account: Fabrikam, Inc. (sample)

Amount: ₹375.00 | Job: 6 orders of Product SKU JJ202 (sample) | Contact: Maria Campbell (sample)

Description: | Expense Type: --

Save | Cancel

Figure 29: Job Task - Add New Expense

- Enter Subject, Expense Type for Expense
- Finally enter the Amount of expense and click on "Save"

Advantage of creating a Resource, Job task, Expense, under Creating a Job

- Anything created under this tab of JOB will en-route proper billing method procedure
- Any omissions in creating under these heads may lead to non-billing of activity.
- All of them be created under the individual tabs but, there the Job has to be mentioned manually

Task Board

Manage all your tasks in a single board display. You get information such as (these columns are not mandatory, but as per your process whatever status you are using is shown here)

- Task New
- Task in Progress
- Task Completed and
- Task Stopped

- CRM->Time and Billing->Jobs -> click on more (...)

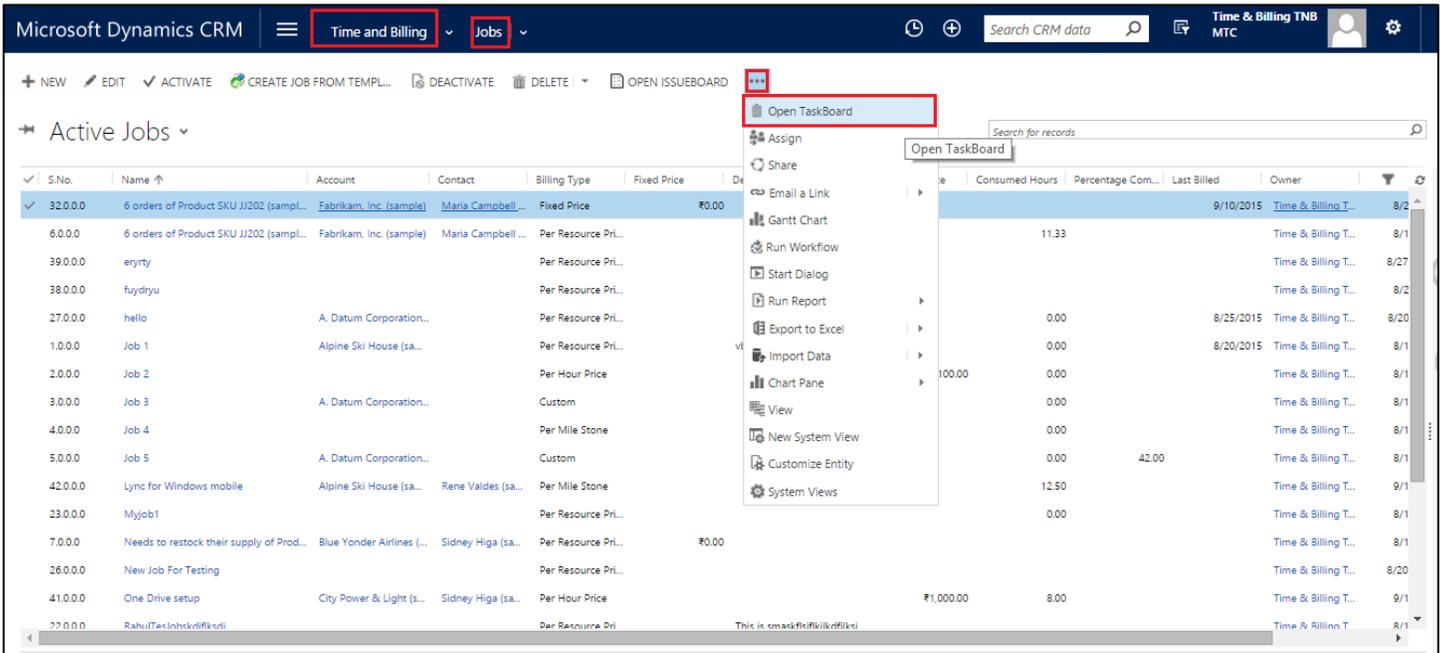


Figure 30: Navigation for Task Board

- Select a Job and click on (...) more for Options and select to open Task Board as shown above.

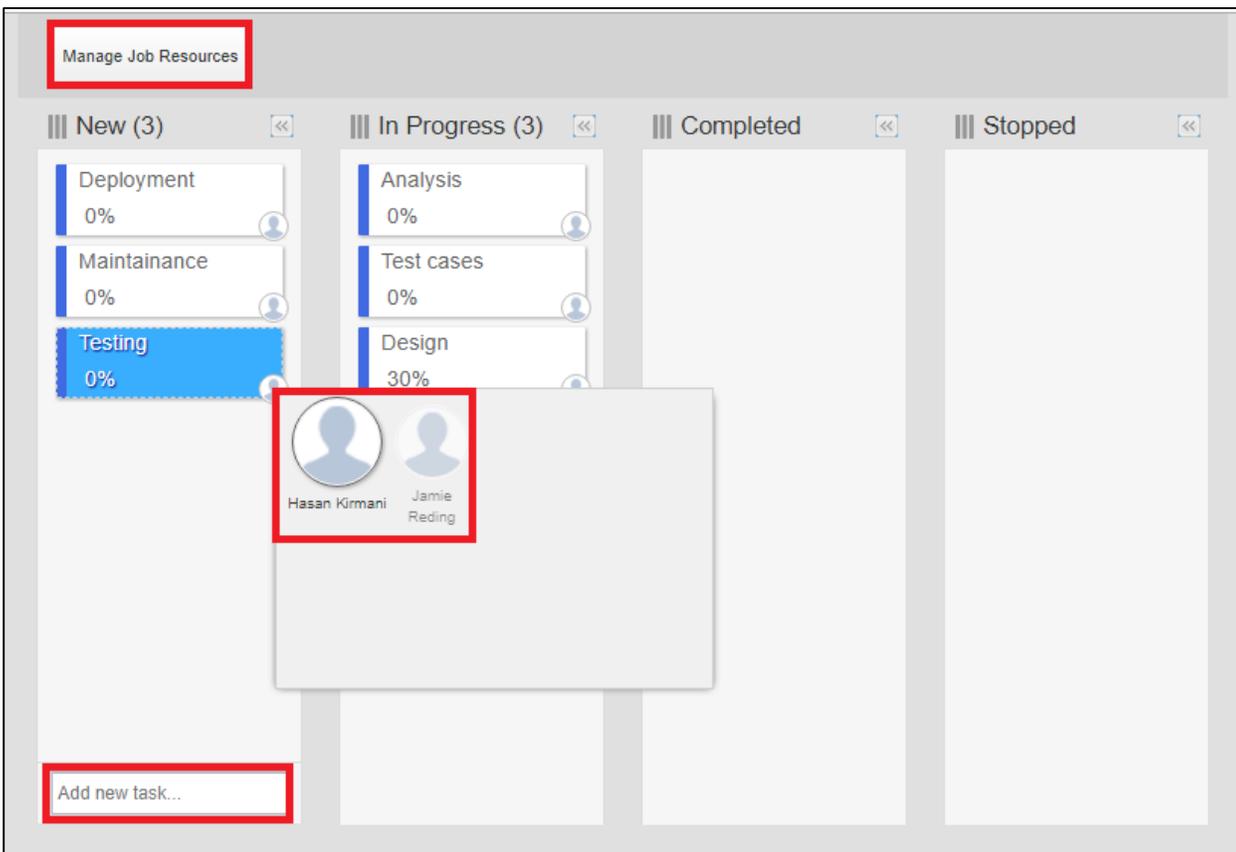
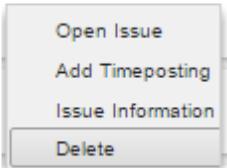
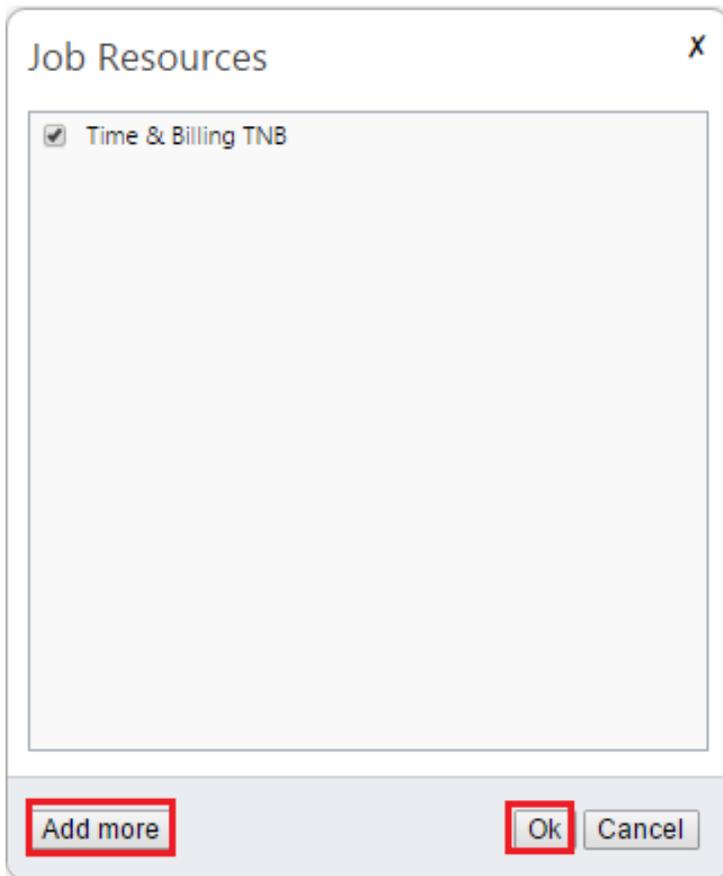


Figure 31: Task Board

- The Task board display all the columns mentioned above to display information respectively.
- If user wants to create a New Task he has to enter in the space provided at the bottom under Not Started column.
- Select the Task and Right click to get



- ✓ You Open the Issue record from here itself for any corrections or Modifications
 - ✓ Add Time posting to the Task from here itself
 - ✓ Get Information of the Task (also the Percentage of Work Completed)
 - ✓ Delete a Task from the Task board
- Once the task is created you can click on Manage resource button on Top of the form to assign Resources to the particular task. A pop up window opens with resource Details
 - Uncheck the box to remove resource or Select from the List to add resource
 - Click on add more button to get full list of resources available
 - Finally click on Ok to Save changes and continue



- Bottom of each task you will find Small circle, click on it to view all assigned resources to this particular Issue with their picture or create a new resource for the issue.
- These task tabs which are created have the **Drag and Drop facility**. Once the Job is started you can drag and leave the task in Progress Column or Leave it in Pending column. Similarly Once Job is completed can drag and Move to Done or Inactive or Completed etc. as per your requirement.

Issue Board

All issues can be managed under one simple board easily. This board has three columns such as (these columns are not mandatory, but as per your process whatever status you are using is shown here)

- New Issue
 - Issue in Progress
 - Issue Done (Completed)
- **CRM->Time and Billing->Jobs -> click on more (...)**

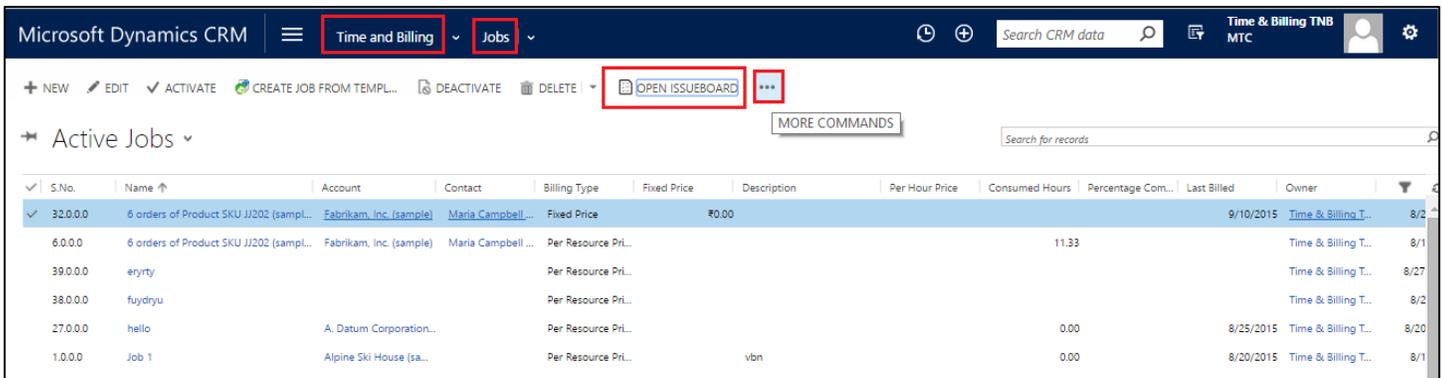


Figure 32: Navigation for Issue Board

- On selection of a job you can see Open Issue Board button. Click to open or Open a Job and click on More to get Open issue board button, click here to open the Issue Board.

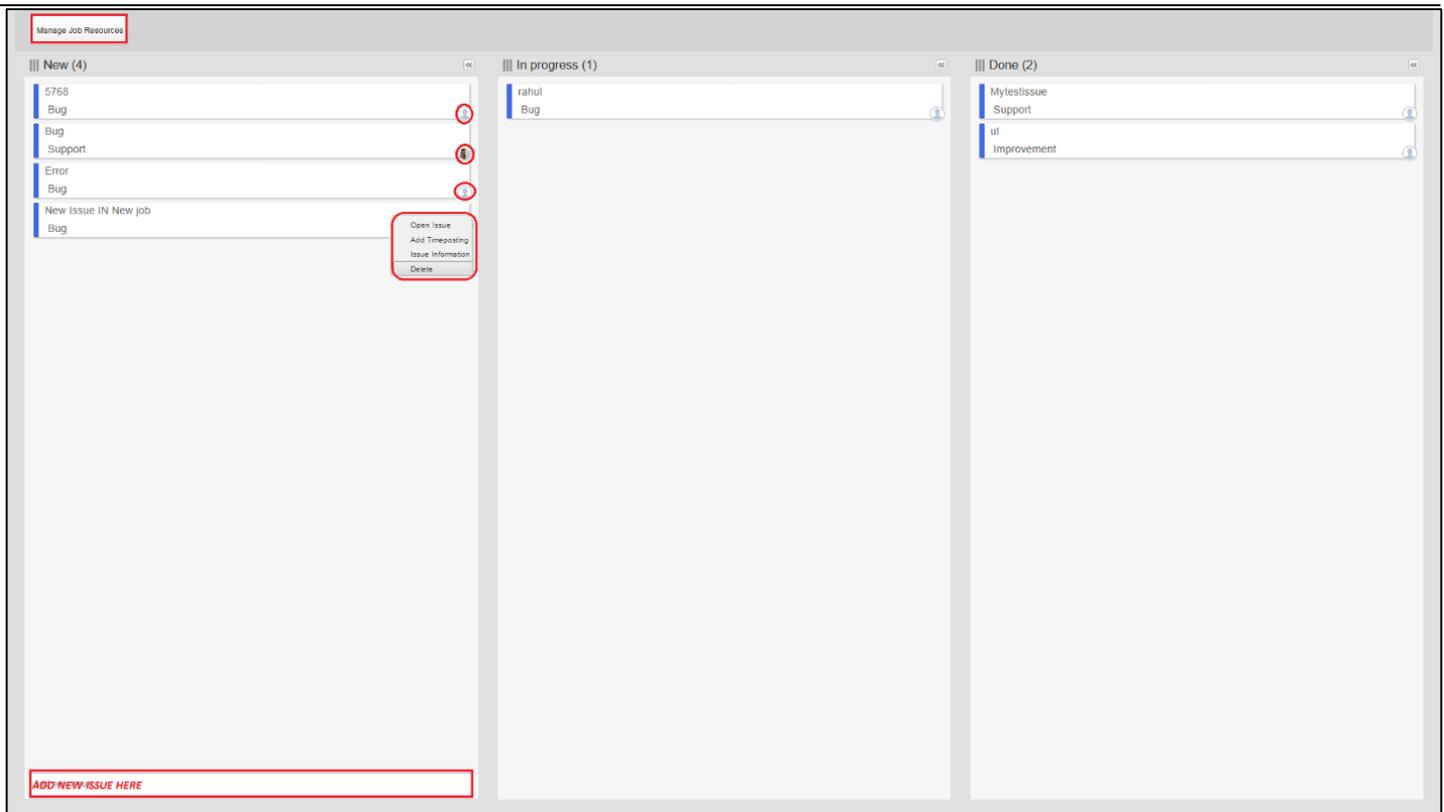
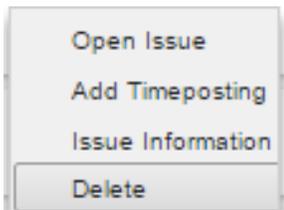


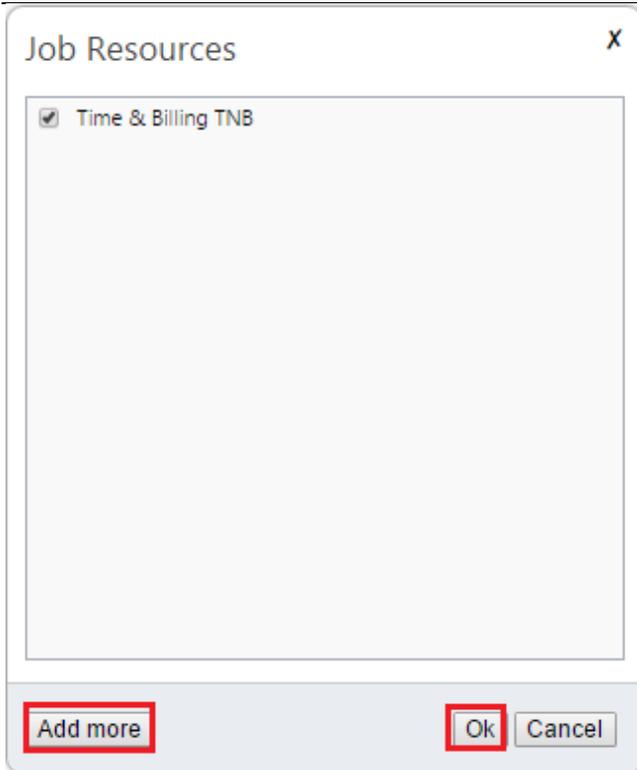
Figure 33: Issue Board

- The issue board display all the columns mentioned above to display information respectively.
- User can create a New issue by entering in the space provided at the bottom under New column.
- Select the Issue and Right click to get



- ✓ You Open the Issue record from here itself for any corrections or Modifications
- ✓ Add Time posting to the Issue from here itself
- ✓ Get Information of the issue (also the Percentage of Work Completed)
- ✓ Delete a Issue from the Issue board

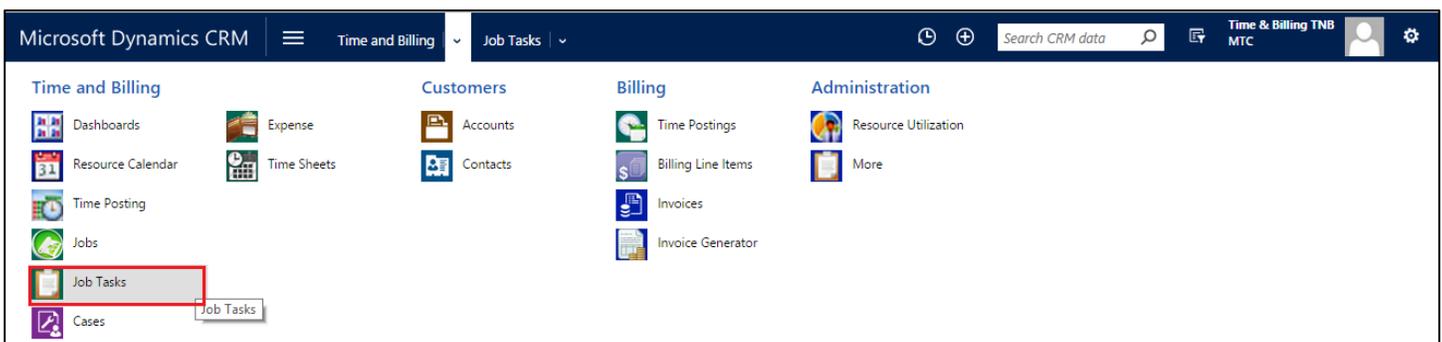
- Once the task is created you can click on Manage resource button on Top of the form to assign Resources to the particular task. A pop up window opens with resource Details
- Un check the box to remove resource or Select from the List to add resource
- Click on add more button to get full list of resources available.
- Finally click on Ok to Save changes and continue



- Bottom of each task you will find Small circle, click on it to view all assigned resources to this particular Issue with their picture or create a new resource for the issue.
- These issue tabs which are created have the **Drag and Drop facility**. Once the Issue is started you can drag and leave the task in Progress Column or Leave it in done column as per your requirement.

Job Task

- Navigate CRM->Time and Billing->Job Tasks



- Now Click on Job Task Tab as shown in the screen.
- New Job creation can only be done by Managers or the Authorized person having the Security roll privileges to do it. General Users only can use the Created Jobs or Job task.

S.No.	Name	Priority	Start Date	End Date	Job	Effort (Hour)	Consumed Hours	Description	Percentage Com...	Created On
5.0.0.5	123	Medium	8/21/2015	8/22/2015	Job 3	20.00				8/21/2015 4:52 ...
5.0.0.9	AAAAAA	Medium			Job 5					8/20/2015 11:01 ...
23.0.0.1	DevTaskTemplate	Medium	9/1/2015	9/11/2015	Myjob1	30.00				8/19/2015 3:02 ...
23.0.0.2	DevTaskTemplate	Medium	8/29/2015	9/9/2015	Myjob1	30.00		hkcky		8/19/2015 3:04 ...
AD-HOC	DevTaskTemplate	Medium	8/20/2015	8/21/2015		30.00				8/20/2015 7:35 ...
5.0.0.10	DevTaskTemplate	Medium	8/20/2015	8/21/2015	Job 5	30.00				8/20/2015 11:07 ...
AD-HOC	DevTaskTemplate	Medium	8/19/2015	8/20/2015		30.00				8/19/2015 7:00 ...
AD-HOC	DevTaskTemplate	Medium	8/25/2015	8/26/2015		30.00				8/25/2015 10:46 ...
3.0.0.2	DevTaskTemplate	Medium	8/21/2015	8/22/2015	Job 3	30.00				8/21/2015 4:52 ...
AD-HOC	DevTaskTemplate	Medium	8/19/2015	8/20/2015		30.00				8/19/2015 7:07 ...
23.0.0.3	DevTaskTemplate	Medium	9/12/2015	9/13/2015	hello	30.00	0.00			8/19/2015 3:08 ...
1.0.0.1	Task 1	Medium	8/17/2015	8/18/2015	Job 1	10.00	0.00			8/17/2015 1:10 ...
2.0.0.1	Task 2	Medium	8/17/2015	8/18/2015	Job 2		0.00			8/17/2015 1:11 ...
3.0.0.1	Task 3	Medium	9/3/2015	9/27/2015	Job 3					8/17/2015 1:52 ...

Figure 34: Job Task screen

- All the Existing Job Tasks are shown with a Serial No.
- The Serial Number can be viewed either Ascending or Descending wise as per convenience
- To add new job task to Job click on **new icon** on the top left corner of the screen. A new Job Task window will pop up. Give general information for task as shown below.

Microsoft Dynamics CRM | TIME AND BILLING | Job Tasks | New Job Task | Create

SAVE | NEW | FORM EDITOR

JOB TASK

New Job Task

S.No. | Status* | Owner*

Task Name* | Job | --

Account | Contact | --

Start Date* | 11/13/2014 | End Date* | 11/14/2014 | Percentage Completed | --

Priority | Medium | Estimated Hours | --

Description | --

Consumed Hours | -- | Phase | -- | Mile Stone | --

Billing Preferences

Billing Type | Fixed Cost | -- | Per Hour Cost | --

Per Resource Price
Per Hour Price
Fixed Price
Per Mile Stone
Custom

Status | Active | Status Reason | Active | Created By

Priority | Medium

Active

Figure 35: Add new job task general information

- Enter **Task Name, Start Date, and End Date** and select the Job with the help of icons provided next to the column. Once entered click on save icon which is on the top left corner of this pop up screen.
- Click on Save icon on top left corner of the screen
- In the Job Task Screen you will notice a Warning message “Warning: No Job task Resource have been added” as shown below inside. This is due to you have not assigned any resource to the job task before saving. A resource is a must for any job task

Manage Resource

- While you are in Jobs, Job Task creation Add or edit mode, you will able see the Manage Resource button on the CRM screen.
- It’s unique and very easy to use feature to Manage resource. You can manage your resources or allocate the task to any resources from the Active Job Task List
- User can also select and open any record and then in the record also he can select the manage recourse button and select the Resource.

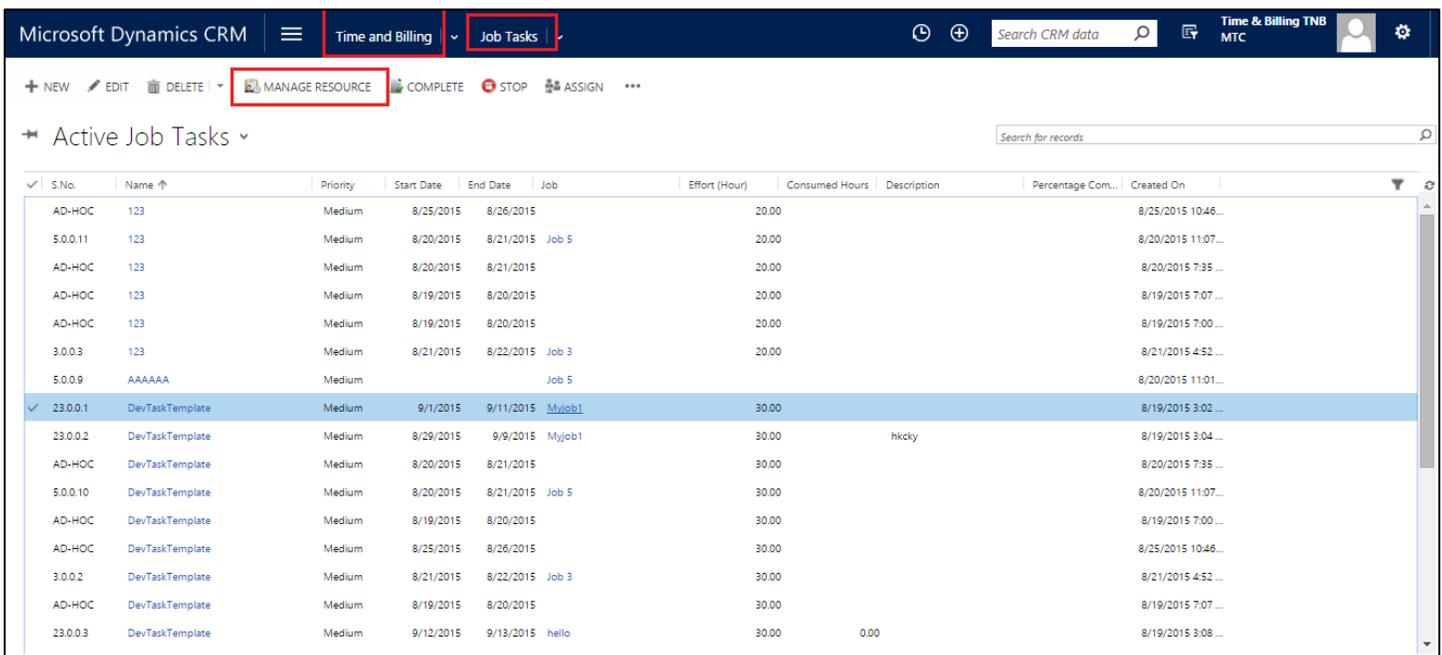


Figure 36: CRM showing Manage Resource icon

- Simply click on the Icon to get a pop up menu (Manage Job Resources) as shown here
- Enter Start Date and End Date
- Select from Drop down list the resource type (Active / Inactive)
- Click on Search go get listed all resources as per your choice.

Resource Name

- Once the List of Resources is listed, select the check box against each individual resource name
- Can select one or More resource at a time
- Click on ADD button to display them under Assigned Resources.

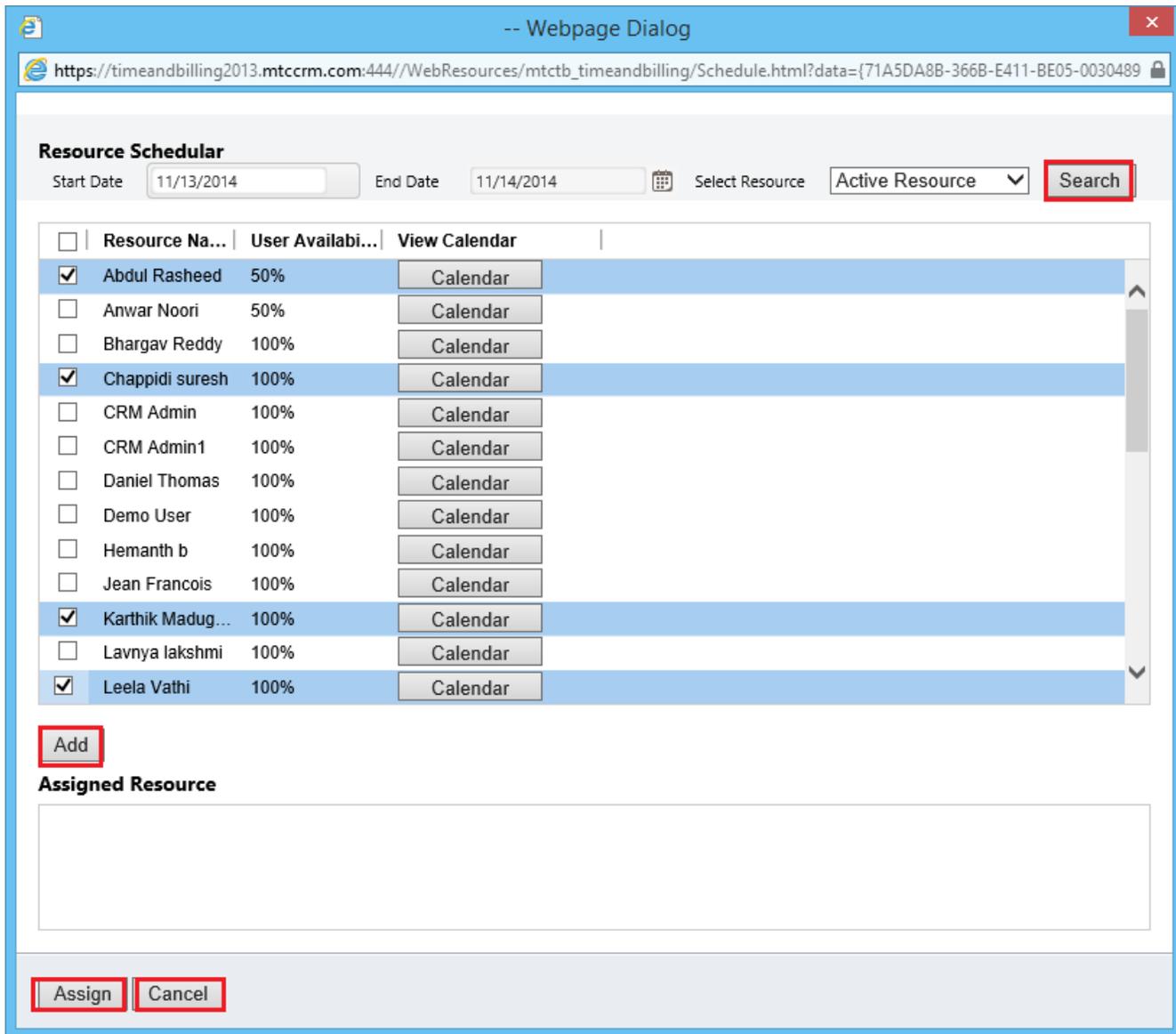


Figure 37: Pop up - Manage Job Resource

User Availability

- Against each Resource name User availability is displayed
- For Example the first record shows as 50%. Which mean this particular resource is only available for 50% of this total working time. He has been already assigned in other projects where he is involved.
- If it shows as 0%, this indicated that the resource is already busy and there is no time for him to spare for any projects.
- The others are shown as 100%, which denotes that the resource is free and can be assigned to a job or job task.

View Calendar

- Against each Resource name under View Calendar, a Calendar button is displayed
- On click of this button, the user can see the resource work schedule that he has been assigned.
- Like in any other calendar function, the details are displayed as shown below

The screenshot shows a web browser window with the URL https://timeandbilling.mtccrm.com:444//WebResources/mtctb_timeandbilling/Calender.html?data=53f97753-dcc7-e411-9b77-000c29a1bec2. The page title is "March 2015".

Resources List:

- My Calendar
- My Calendar
- Leela Vathi
- Nidhi Agarwal
- Sandeep Ponugoti
- Sandeep Aaleti
- Rakesh Agarwal
- Thanuja Rekha
- Bhargav Reddy
- Vinay Kumar
- Nikhil Kumar
- Vikas Reddy
- Abdul Rasheed
- Hemanth b
- Sai Chaitanya
- swathi
- Vinay KumarP
- Raghavendar V
- Chappidi suresh
- Lavnya lakshmi
- Karthik Madugula

Calendar Grid (March 2015):

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
		AWC_Data Migration_Form Layouts				
		Building Contract				
		Transporting				
15	16	17	18	19	20	21
AWC_Data Migration_Form Layouts						
Building Contract		AWC_Data Migration_Database layout				
22	23	24	25	26	27	28
AWC_Data Migration_Form Layouts						
29	30	31	1	2	3	4
AWC_Data Migration_Form Layouts						
5	6	7	8	9	10	11
AWC_Data Migration_Form Layouts						

Figure 38: Resource calendar from Manage resource

- All navigational facilities are provided to drill down any kind of resource information
- You can Check for the Month, Week, Today, Change the month by clicking on the Arrow buttons
- For example you click on Tes1 which is shown under Tuesday 10th date, it displays your CRM in respect to Transporting. (CRM screen shown below)

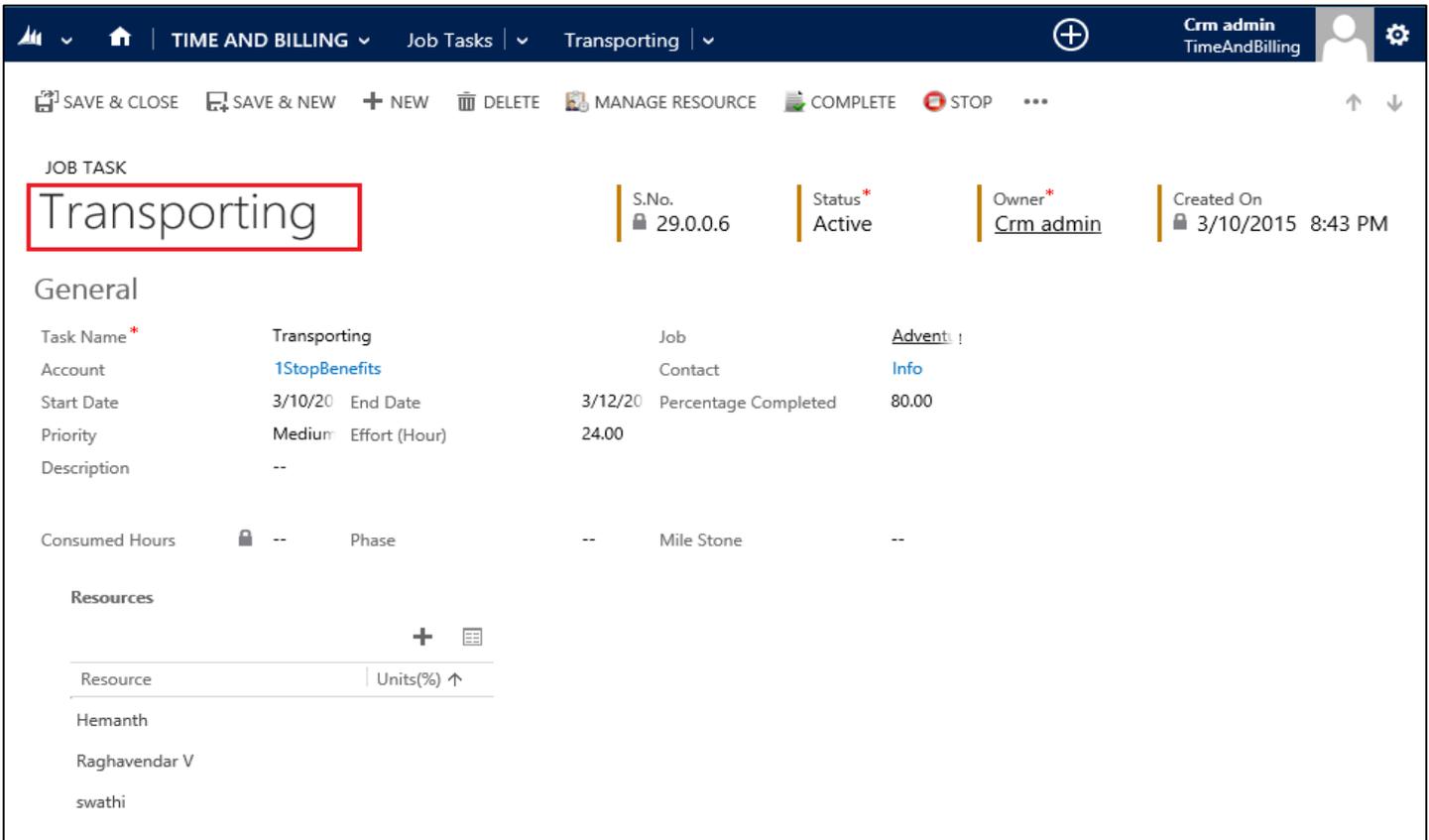


Figure 39: CRM screen navigating thru Calendar

Resource

- If the Resources are already added after saving the information you may skip this section else add New Job Task resource as shown below.

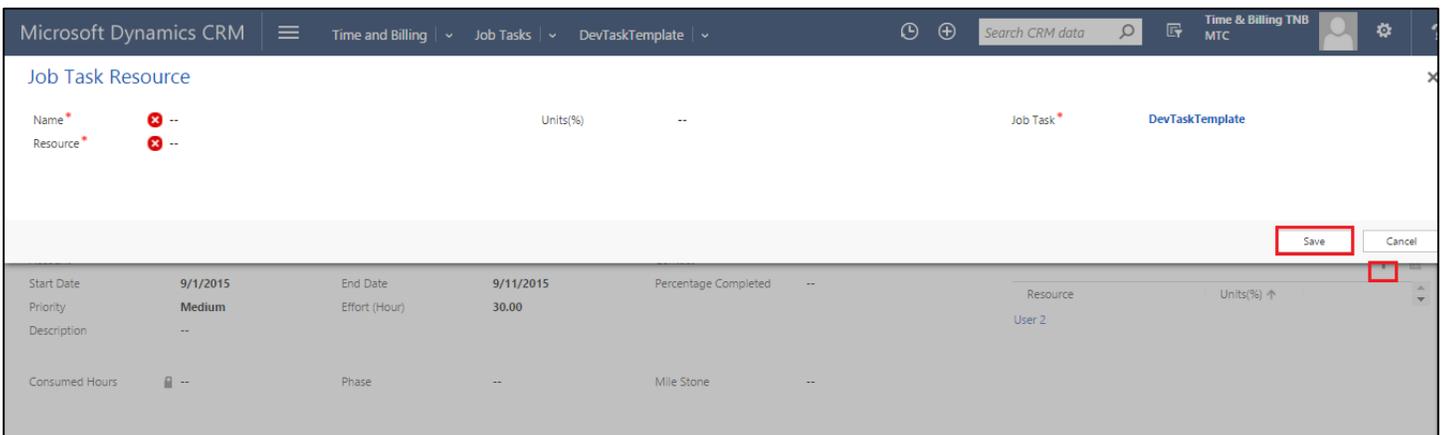


Figure 40: Add new Job Task resource

Time Posting

- Scroll down to get Time Posting & Expenses shown below in brief. The detail time posting has been described in below pages separately.

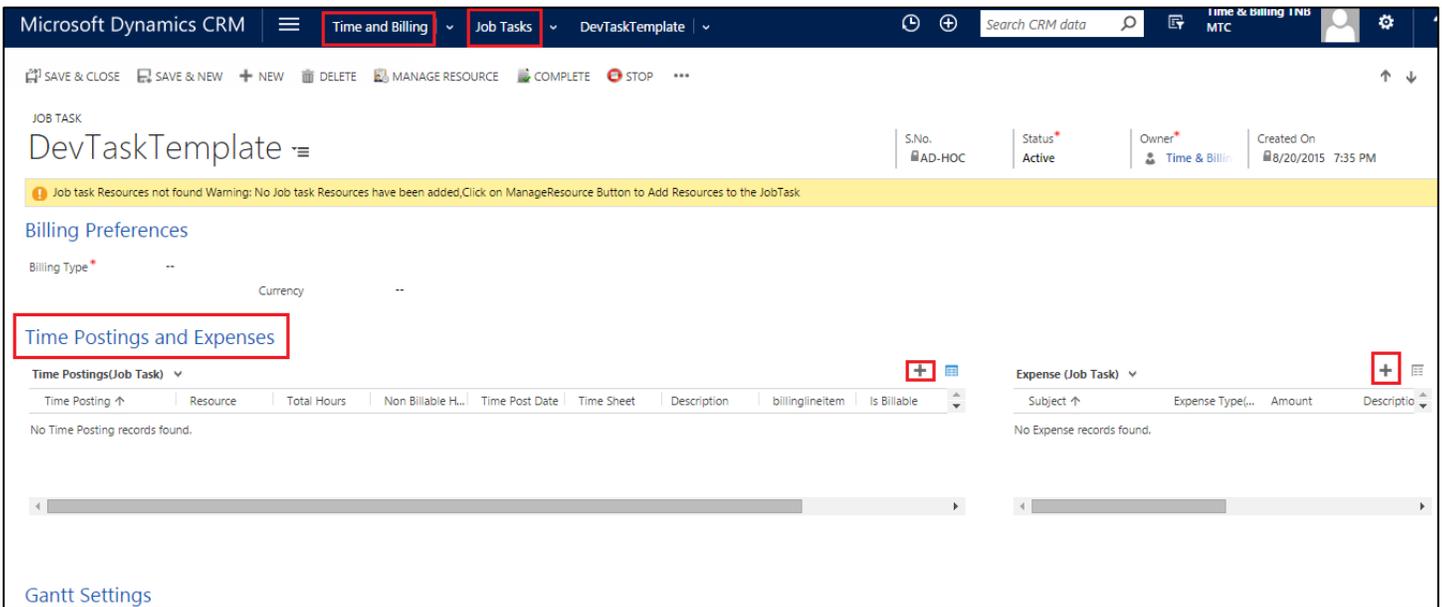


Figure 41: Job Task showing Time Posting

Expenses

- Scroll down Job task form to get all details in Expenses,
- Functionality of this mode has been already described in the previous module JOBS. Similarly all the expenses pertaining to a Job Task has to be recorded here.

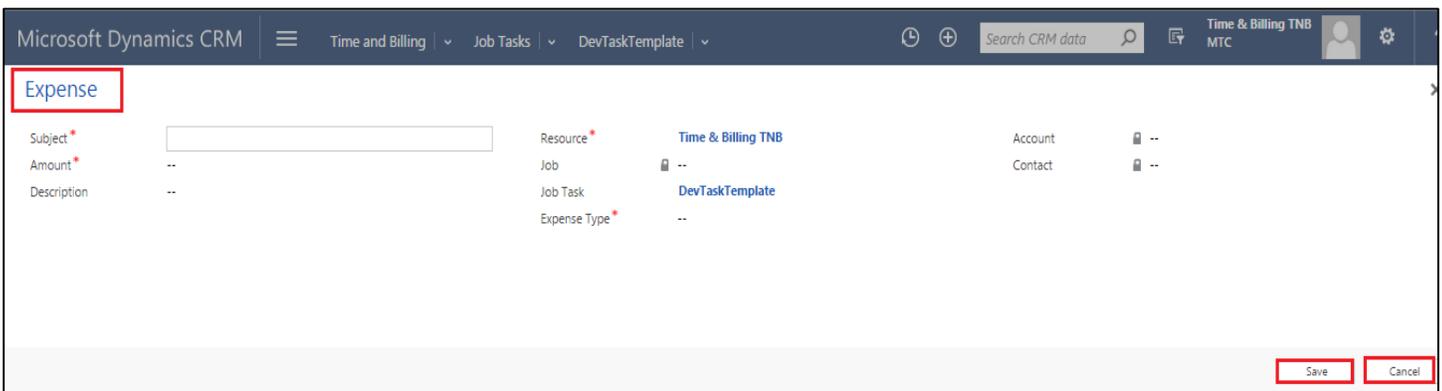


Figure 42: Adding New Expense in Job Task

Gantt Settings

- Scroll down Job task form to get Gantt Settings.

The screenshot shows the 'TIME AND BILLING' section with a 'Job Tasks' dropdown set to 'Transporting'. The main area displays details for the 'Transporting' job task, including S.No. (29.0.0.6), Status (Active), Owner (Crm admin), and Created On (3/10/2015 8:43 PM). Below this, the 'Gantt Settings' section is visible, containing various configuration options like Baseline Start/End Date, Parent Job Task, Constraint Date, Duration (Days), Scheduling Mode, Segments, Baseline End Date, Constraint Type, Expanded, Rollup, and Leaf. At the bottom, a summary table shows the job task's status as 'Active', status reason as 'Active', priority as 'Medium', and created by 'Crm admin'.

Field	Value
S.No.	29.0.0.6
Status*	Active
Owner*	Crm admin
Created On	3/10/2015 8:43 PM

Baseline Start Date	--	Baseline End Date	--
Parent Job Task	--	Constraint Type	--
Constraint Date	--	Expanded	No
Duration (Days)	--	Rollup	No
Scheduling Mode	--	Leaf	No
Segments	--		

Status	Active	Status Reason	Active	Created By	Crm admin
		Priority	Medium		

Figure 43; Gantt Settings in Job Task

- All Gantt Settings can be done with the help of look up menu
- All these will help to generate the actual Gantt chart for the Job.

Billing

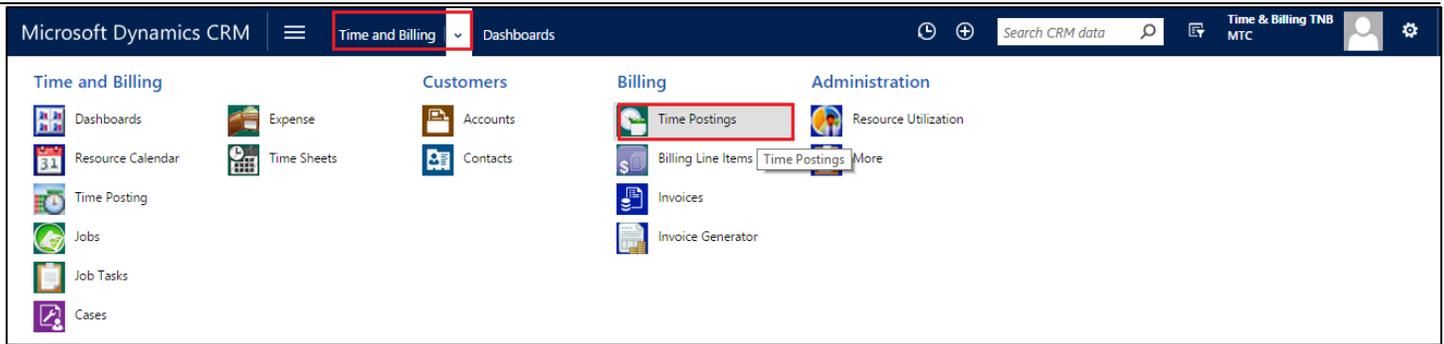
This section deals with Time posting, Billing Line items and Invoices and Invoice generator

Time Posting

Time posting made very easy to operate for the Administrators and Managers. Time Posting gives the working time details. Resources can post the working details like when they actually started working on the activity, the time when they have completed the activity, resources Break Duration which comes under Non Billable Hours, to which extent the resource have completed the activity assigned to him/her. These details help in billing process and Payroll process, saving time of an organization. Resources can also post the risks associated with task.

A resource who has logged in to the system with his credentials only will be able to do time posting pertaining to him. In other words this user cannot do time postings for any other user

Time Posting Process from Time Posting entity



- This will give you the details of Time Postings of all resources from the Job, Job task, cases, account and Contact.
- You need to approve the time posting records for the billing purpose.
- Select the records and click on Approve button to approve the Time Postings.

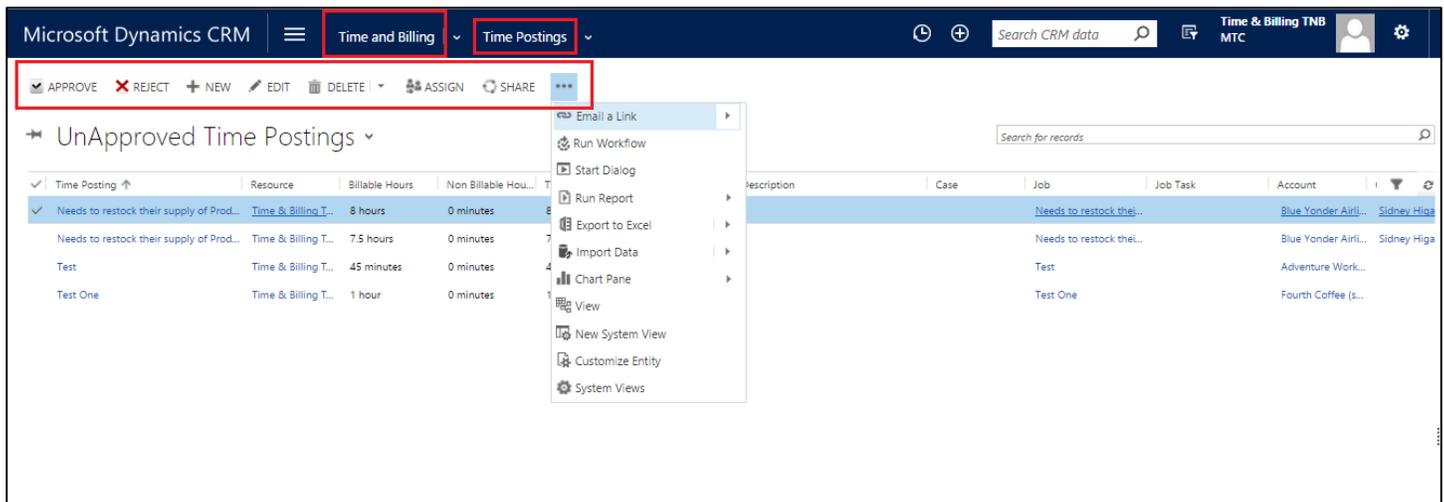
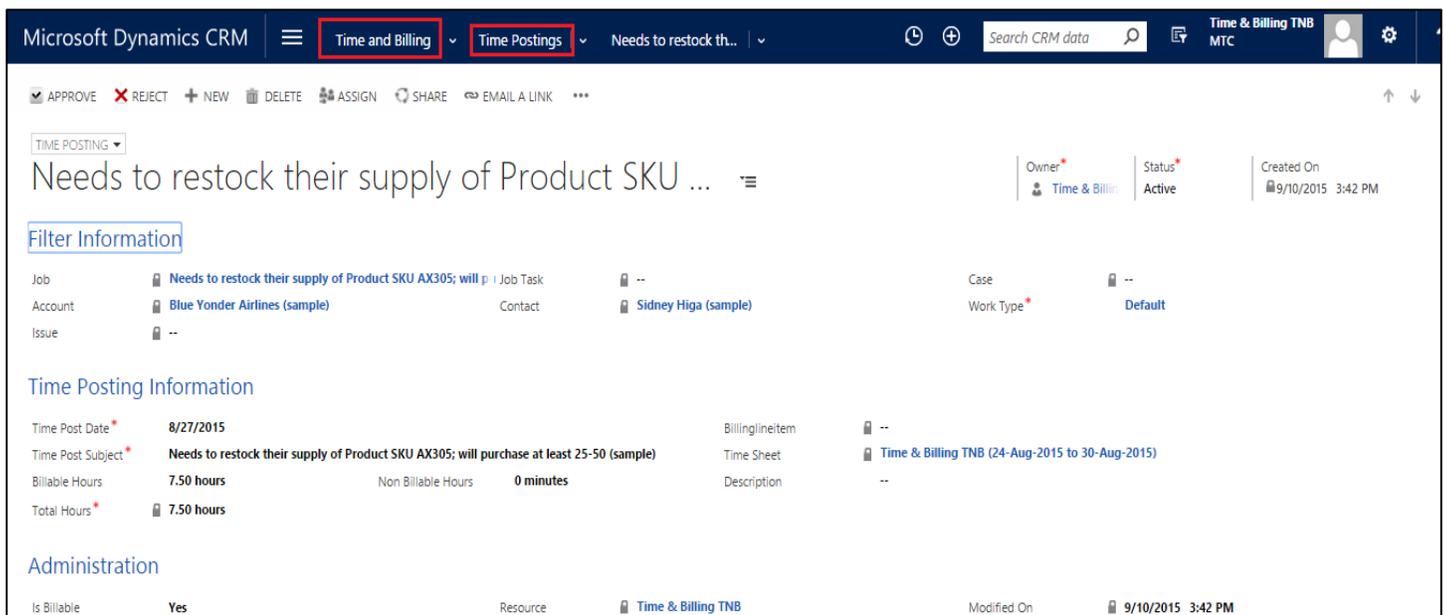


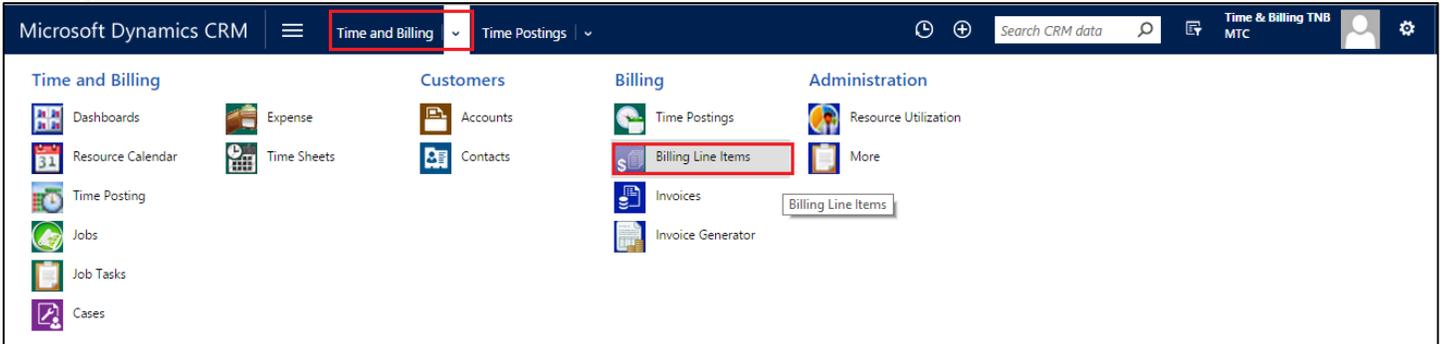
Figure 44: CRM Time posting (unapproved) list

- All unapproved time Postings are listed
- Can Approve, reject, Edit, Delete, Assign or Share
- Also Create a New Time Post from here by clicking of New Tab



- If you want to add one more task for time posting click on the  icon displays the list and selects any one of them and enters the duration. Time posting will be done automatically by entering the hours.
- You need to follow the above process for doing time posting for Job Task, Account, Contact and Case.

Billing Line Items



- Billing line items are created for jobs when time posting is approved.
- Billing type is “Fixed Cost” create a New Billing by clicking New icon on top left corner

Subject	Job	Job Task	Account	Case	Description	Billing Type	Override	Total Hours	Fixed Cost
Addivant_(PS) 1- Initiate Project in C...	Addivant AgileAscen...	Addivant_(PS) 1- Initi...	Integrated Time...		Initiate Project in CRM	Per Hour Price	Use Default	9.50	
Addivant_(PS) 1- Initiate Project in C...	Addivant AgileAscen...	Addivant_(PS) 1- Initi...	Integrated Time...		Initiate Project in CRM	Per Hour Price	Use Default	2.50	
Addivant_(PS) 5- Create Scope & Pre...	Addivant AgileAscen...	Addivant_(PS) 5- Crea...	Integrated Time...		Create Scope & Presentation	Per Hour Price	Use Default	10.00	
Addivant_(PS) 5- Create Scope & Pre...	Addivant AgileAscen...	Addivant_(PS) 5- Crea...	Integrated Time...		Create Scope & Presentation	Per Hour Price	Use Default	2.00	
Addivant_(PS) 8- Customize CRM Tas...	Addivant AgileAscen...	Addivant_(PS) 8- Cust...	Integrated Time...		Customize CRM Tasks to Reflect Proj...	Per Hour Price	Use Default	9.00	
Addivant_(PS) 8- Customize CRM Tas...	Addivant AgileAscen...	Addivant_(PS) 8- Cust...	Integrated Time...		Customize CRM Tasks to Reflect Proj...	Per Hour Price	Use Default	1.50	
Addivant_(PS) A- Is Project ADFS/Sha...	Addivant AgileAscen...	Addivant_(PS) A- Is Pr...	Integrated Time...		Is Project ADFS/SharePoint	Per Hour Price	Use Default	16.00	
Addivant_(PS) A- Is Project ADFS/Sha...	Addivant AgileAscen...	Addivant_(PS) A- Is Pr...	Integrated Time...		Is Project ADFS/SharePoint	Per Hour Price	Use Default	2.00	

Figure 45: Billing line items

BILLING LINE ITEMS
New Billing Line Items

Billing Type: Fixed Price | Total Amount: ₹0.00 | Resource: -- | Created On: --

Project Information

Subject: --
 Job: --
 Account: --
 Case: --
 Issue: --
 Description: --

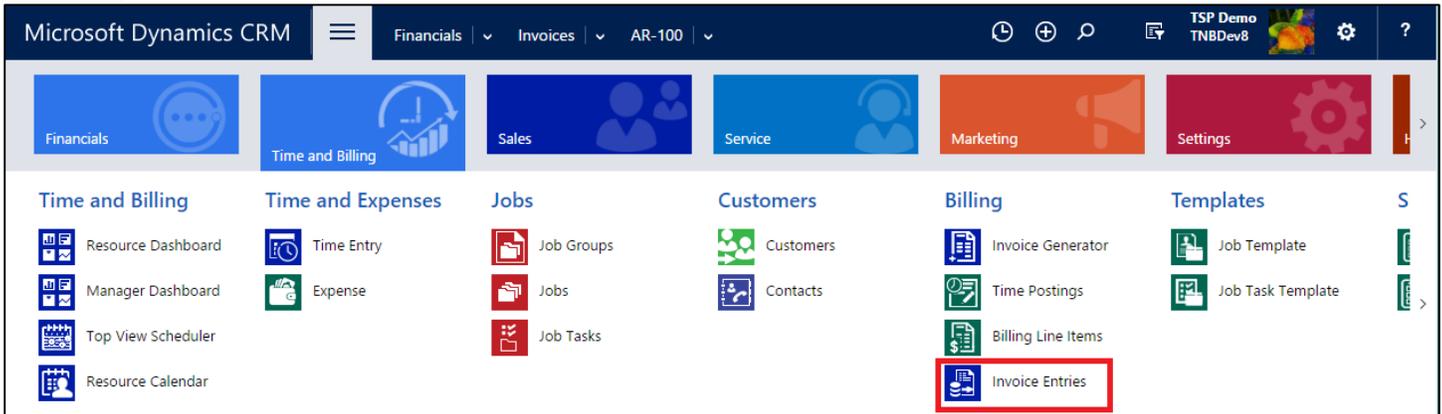
Billing Information

Billing Type: Fixed Price | Fixed Cost: --
 Total Amount: ₹0.00 | Resource: --

Figure 46: Billing line items new

- Once you get the above screen opened Input the Subject Description
- Enter Detailed description
- Select Job, Job Task and case, Account, or Contact with the help of Look up icon
- Once done, it navigates to Billing Line Details for the Total Amount to be inputted
- Click on **Save** or **Save & Close** or **Save & New** icon on top left corner as desired

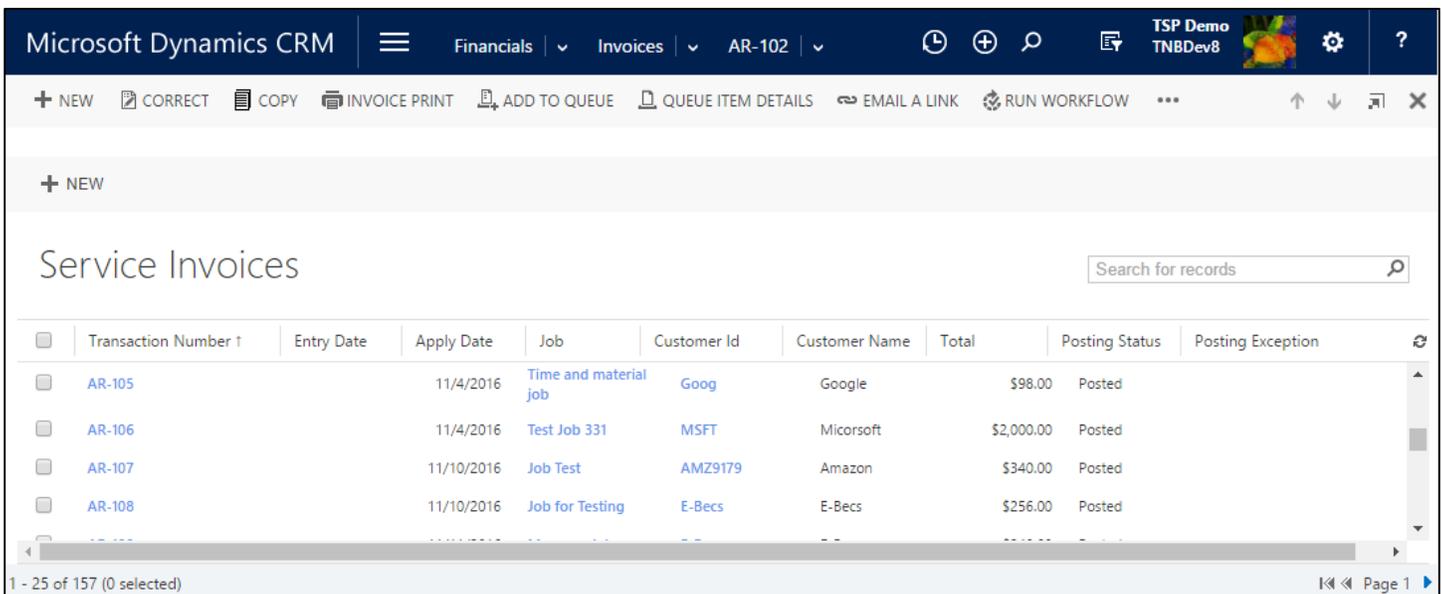
Invoices



The screenshot shows the Microsoft Dynamics CRM navigation pane. The breadcrumb trail is Financials > Invoices > AR-100. The main navigation area includes sections for Time and Billing, Time and Expenses, Jobs, Customers, Billing, and Templates. Under the Billing section, the 'Invoice Entries' tile is highlighted with a red box.

This is the last stage in this Time and Billing functionality. Till now whatever jobs / Projects have been created earlier along with relevant Job task or tasks are now processed to generate Invoice (commercial billing / revenue for the company).

- To navigate Invoices click on left panel **Time and Billing**→**Billing**→**Invoices Entries**→
- The blow screen is opened in the working area. Existing Invoices are displayed if a



The screenshot shows the 'Service Invoices' list in Microsoft Dynamics CRM. The breadcrumb trail is Financials > Invoices > AR-102. The list contains the following data:

Transaction Number	Entry Date	Apply Date	Job	Customer Id	Customer Name	Total	Posting Status	Posting Exception
AR-105		11/4/2016	Time and material job	Goog	Google	\$98.00	Posted	
AR-106		11/4/2016	Test Job 331	MSFT	Micorsoft	\$2,000.00	Posted	
AR-107		11/10/2016	Job Test	AMZ9179	Amazon	\$340.00	Posted	
AR-108		11/10/2016	Job for Testing	E-Becs	E-Becs	\$256.00	Posted	

At the bottom of the screen, it shows '1 - 25 of 157 (0 selected)' and 'Page 1'.

Microsoft Dynamics CRM | Financials | Invoices | AR-100

TSP Demo TNBDev8

INVOICE ENTRY : SERVICE FORM

AR-100

Transaction ID	Posting Status	Customer ID*	Customer Name
AR-100	Posted	MSFT	Micosoft

INVOICE INFORMATION

Transaction Mode* **Invoice**

Customer ID* **MSFT**

Customer Name **Micosoft**

Pre Bill Invoice **No**

Job **Job for Cost plus**

Invoice Date **11/2/2016**

ADDRESSES

Bill To Address --

▶ Default Values

▶ Invoice Lines

+ Add more lines Delete

Inventory Master	Line Description	Site Id	Service Date	Unit of Measure	Quantity	Rz
<input type="checkbox"/>	Job for Cost plus		11/1/2016		3.00	
<input type="checkbox"/>	Job for Cost plus		11/4/2016		2.50	
<input type="checkbox"/>	Job for Cost plus		11/2/2016		3.00	

TOTALS	
Total Cost	\$0.00
Subtotal	\$3.00
Discount	\$0.00
Taxes	\$0.00
Total	\$3.00

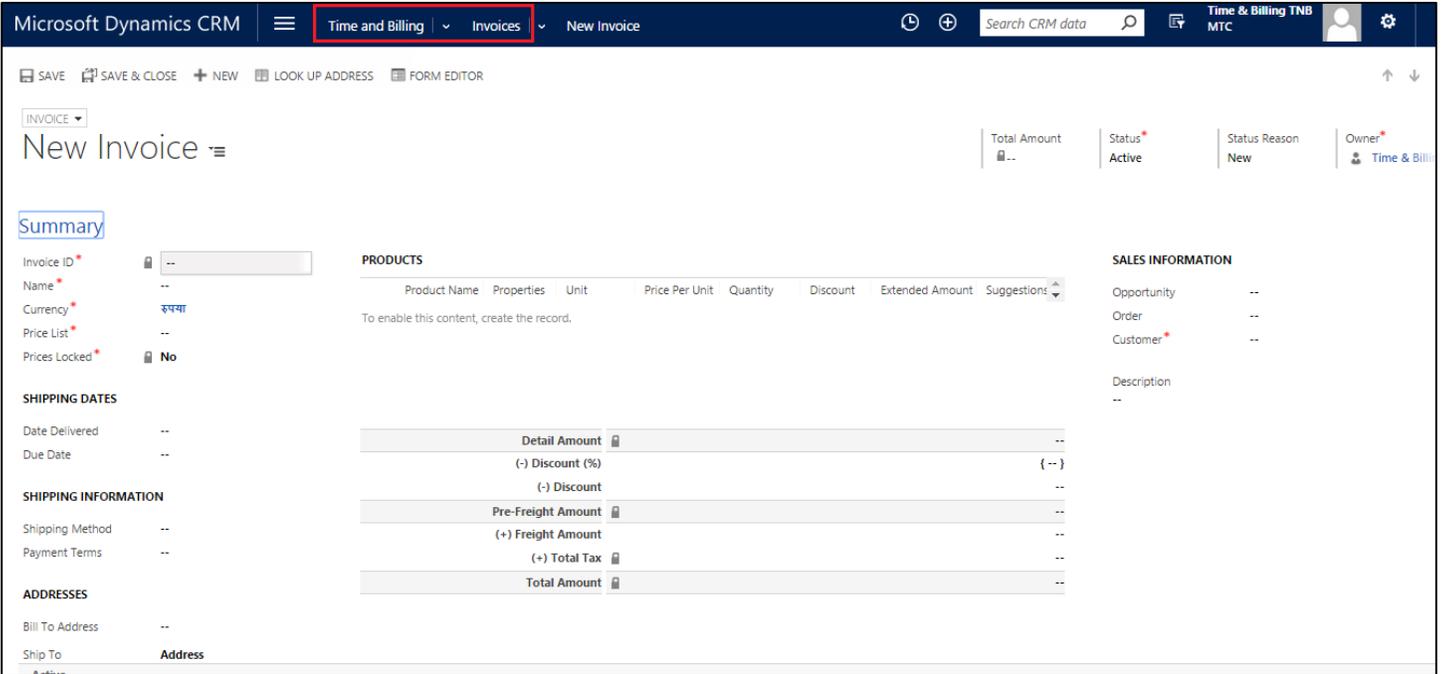
Figure 47: Invoice(s) list

- Select an Invoice and click to view

Figure 48: Invoice

- User has an option to mark it as Invoice paid, or Cancel this Invoice or Recalculate the Invoice
- User can create a New Invoice or Delete this Invoice.
- More options are shown under (...)

- To create a new Invoice click on new



Microsoft Dynamics CRM | Time and Billing | Invoices | New Invoice

SAVE | SAVE & CLOSE | NEW | LOOK UP ADDRESS | FORM EDITOR

INVOICE | New Invoice

Total Amount: ₹5,495.00 | Status: Active | Status Reason: New | Owner: Time & Billing

Summary

Invoice ID: -- | Name: -- | Currency: रुपया | Price List: -- | Prices Locked: No

SHIPPING DATES

Date Delivered: -- | Due Date: --

SHIPPING INFORMATION

Shipping Method: -- | Payment Terms: --

ADDRESSES

Bill To Address: -- | Ship To: Address

PRODUCTS

To enable this content, create the record.

Product Name	Properties	Unit	Price Per Unit	Quantity	Discount	Extended Amount	Suggestions
To enable this content, create the record.							

SALES INFORMATION

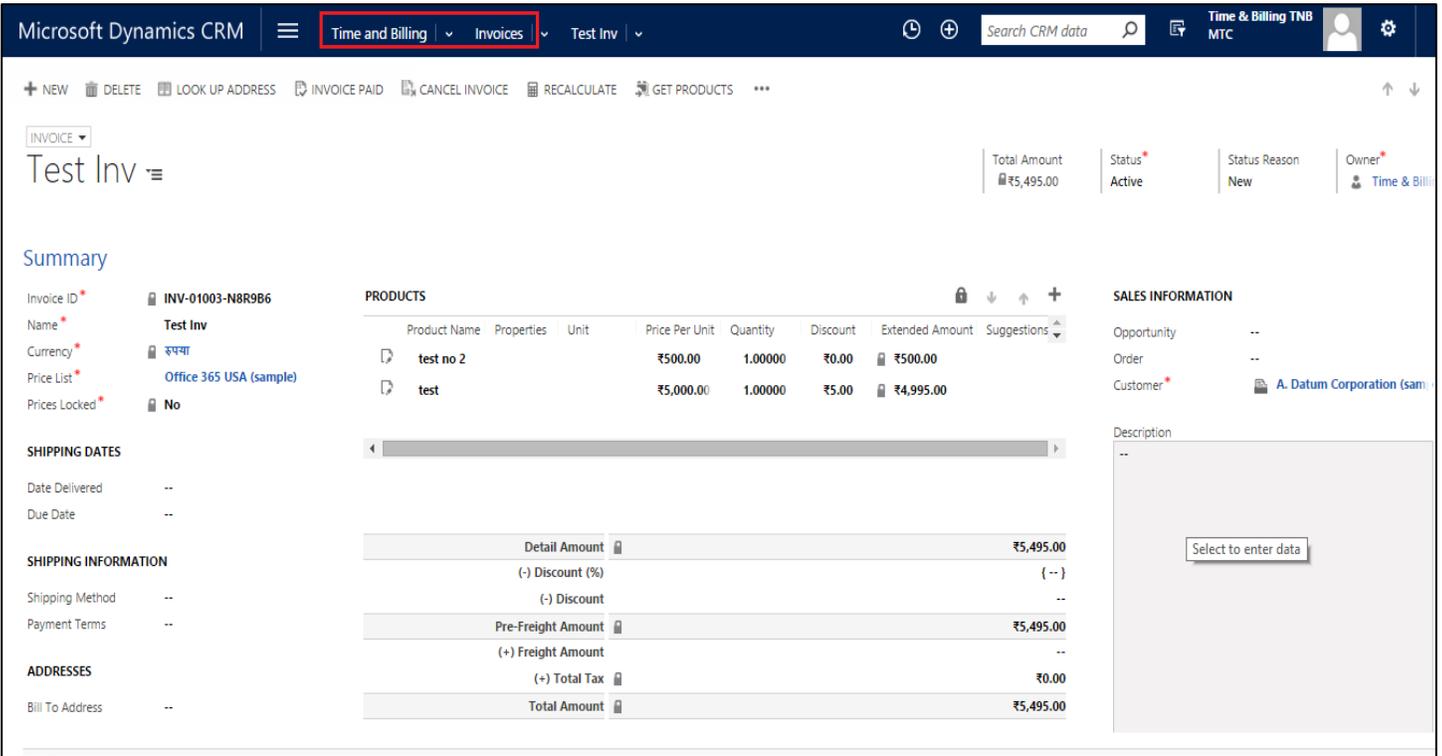
Opportunity: -- | Order: -- | Customer: -- | Description: --

Summary Statistics:

Detail Amount	₹5,495.00
(-) Discount (%)	{ -- }
(-) Discount	--
Pre-Freight Amount	₹5,495.00
(+) Freight Amount	--
(+) Total Tax	₹0.00
Total Amount	₹5,495.00

Figure 49: Invoice creation – New

- Fields marked with Astriex are mandatory.



Microsoft Dynamics CRM | Time and Billing | Invoices | Test Inv

NEW | DELETE | LOOK UP ADDRESS | INVOICE PAID | CANCEL INVOICE | RECALCULATE | GET PRODUCTS

INVOICE | Test Inv

Total Amount: ₹5,495.00 | Status: Active | Status Reason: New | Owner: Time & Billing

Summary

Invoice ID: INV-01003-N8R9B6 | Name: Test Inv | Currency: रुपया | Price List: Office 365 USA (sample) | Prices Locked: No

SHIPPING DATES

Date Delivered: -- | Due Date: --

SHIPPING INFORMATION

Shipping Method: -- | Payment Terms: --

ADDRESSES

Bill To Address: --

PRODUCTS

Product Name	Properties	Unit	Price Per Unit	Quantity	Discount	Extended Amount	Suggestions
test no 2			₹500.00	1.00000	₹0.00	₹500.00	
test			₹5,000.00	1.00000	₹5.00	₹4,995.00	

SALES INFORMATION

Opportunity: -- | Order: -- | Customer: A. Datum Corporation (sam) | Description: Select to enter data

Summary Statistics:

Detail Amount	₹5,495.00
(-) Discount (%)	{ -- }
(-) Discount	--
Pre-Freight Amount	₹5,495.00
(+) Freight Amount	--
(+) Total Tax	₹0.00
Total Amount	₹5,495.00

Figure 50: New Invoice Created

Once you click Save, on the left Panel, Related menu gets activated

- Click either on Products under Common to **Add Billing Line items** or **Add existing Expenses**
- The following screen is displayed after clicking products

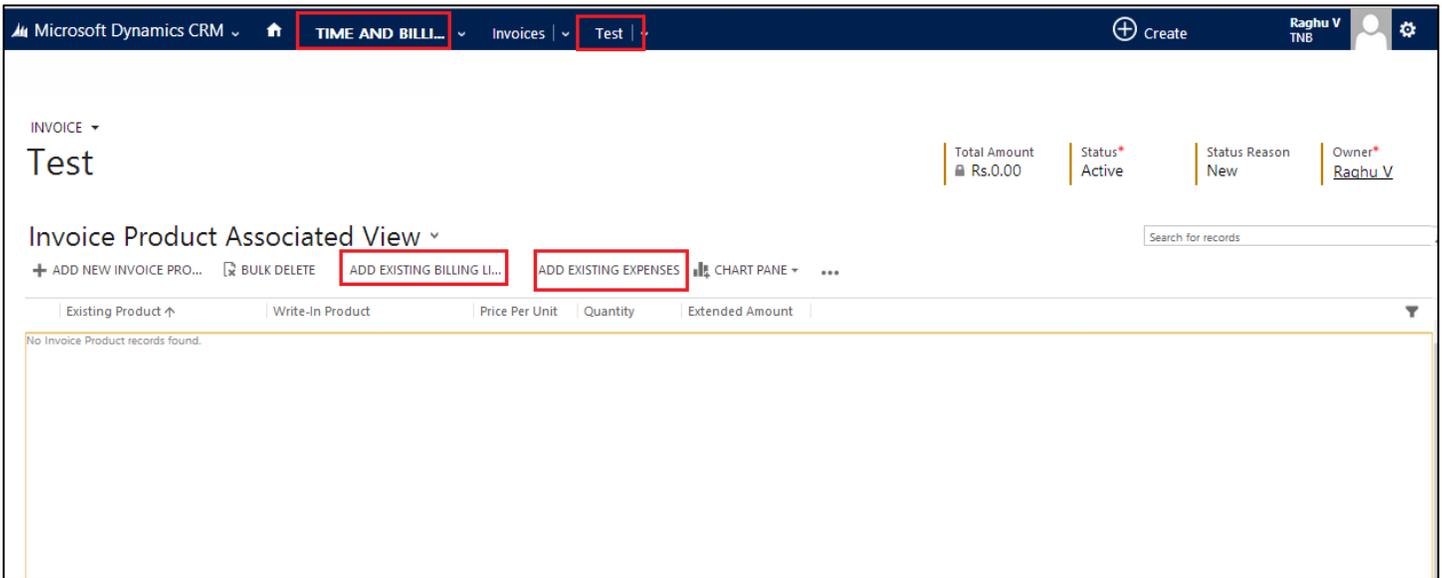


Figure 51: Add existing Billing Line Items

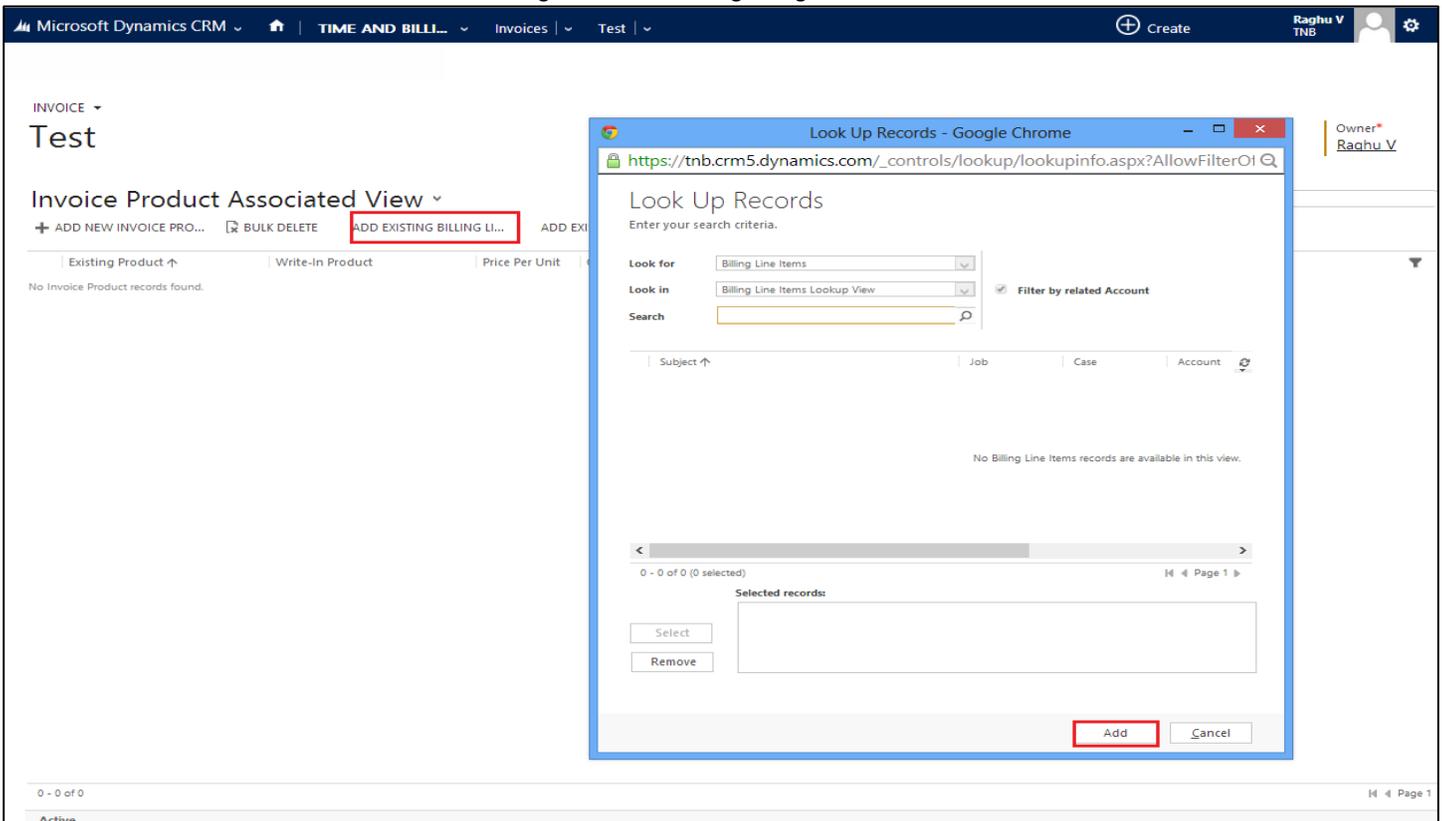


Figure 52: Invoice Products

- Select any of the icons shown in the top ribbon “Add Existing Billing Line items” to “Add Existing Expenses”
- Only the relevant records pertaining to the selected Customer field (Account or Contact) are displayed in pop up screen.
- Select the item(s) if any and say **Ok**. As shown in the below screen.

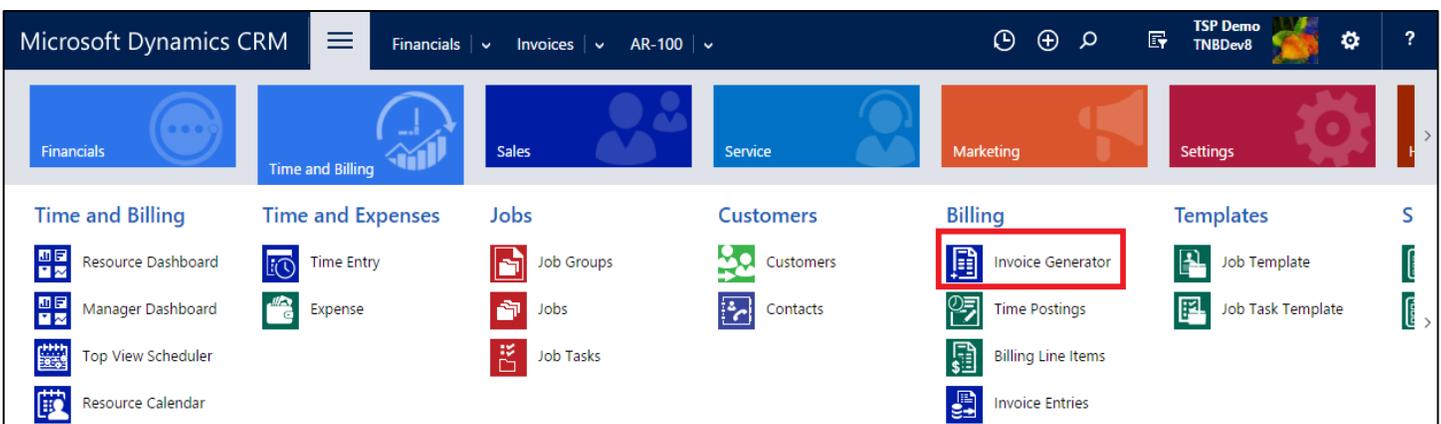
- If finished with Billing line items, then select **Add existing expenses** now
- Follow the same procedure to select from the pop up list for expenses
- Only the Approved expenses will be displayed in the list
- Complete all details like Bill to Address, Ship to Address Notes etc. and save to exit
- Close the screen to go back to Invoice screen
- In the main screen top ribbon you will have various icons as shown below.
- You can select any of the icons and to a specific operation as mentioned like **Cancel Invoice, Recalculate, Lock Pricing, and Get products** etc.
- Once the invoice is paid click on **“Invoice Paid”** icon and select the Status reason from the drop down menu
- Click on **Ok** to continue. Once this operation is completed this particular Invoice is marked as Inactive mode and will not be further seen in the active mode selection.



Figure 53: Invoice Paid / Cancel Invoice

Invoice Generator

To navigate click on **Time and Billing->Billing->Invoice Generator** as shown



- Click on  to Expand as shown below

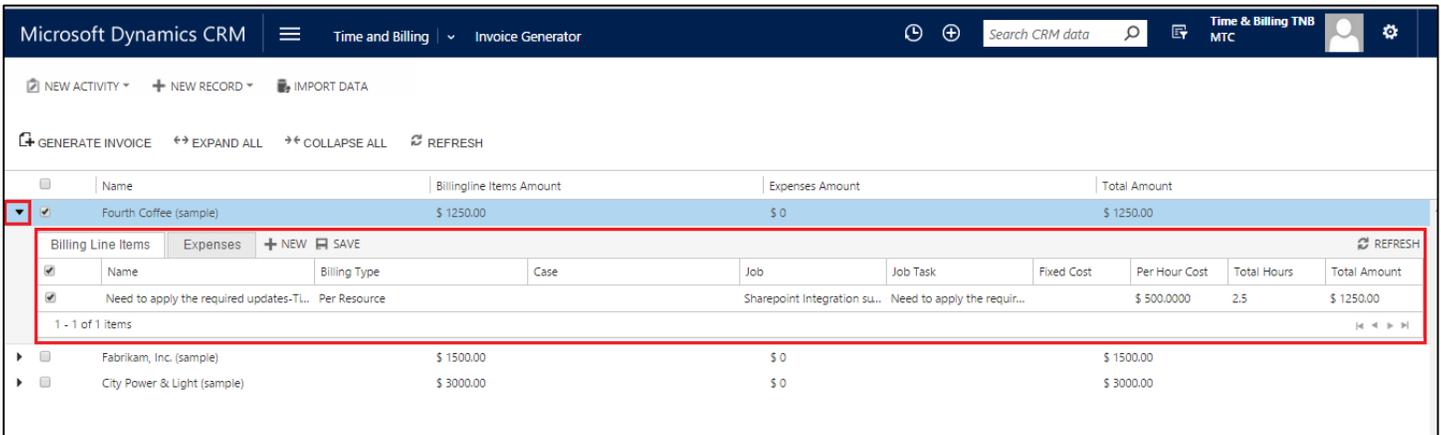
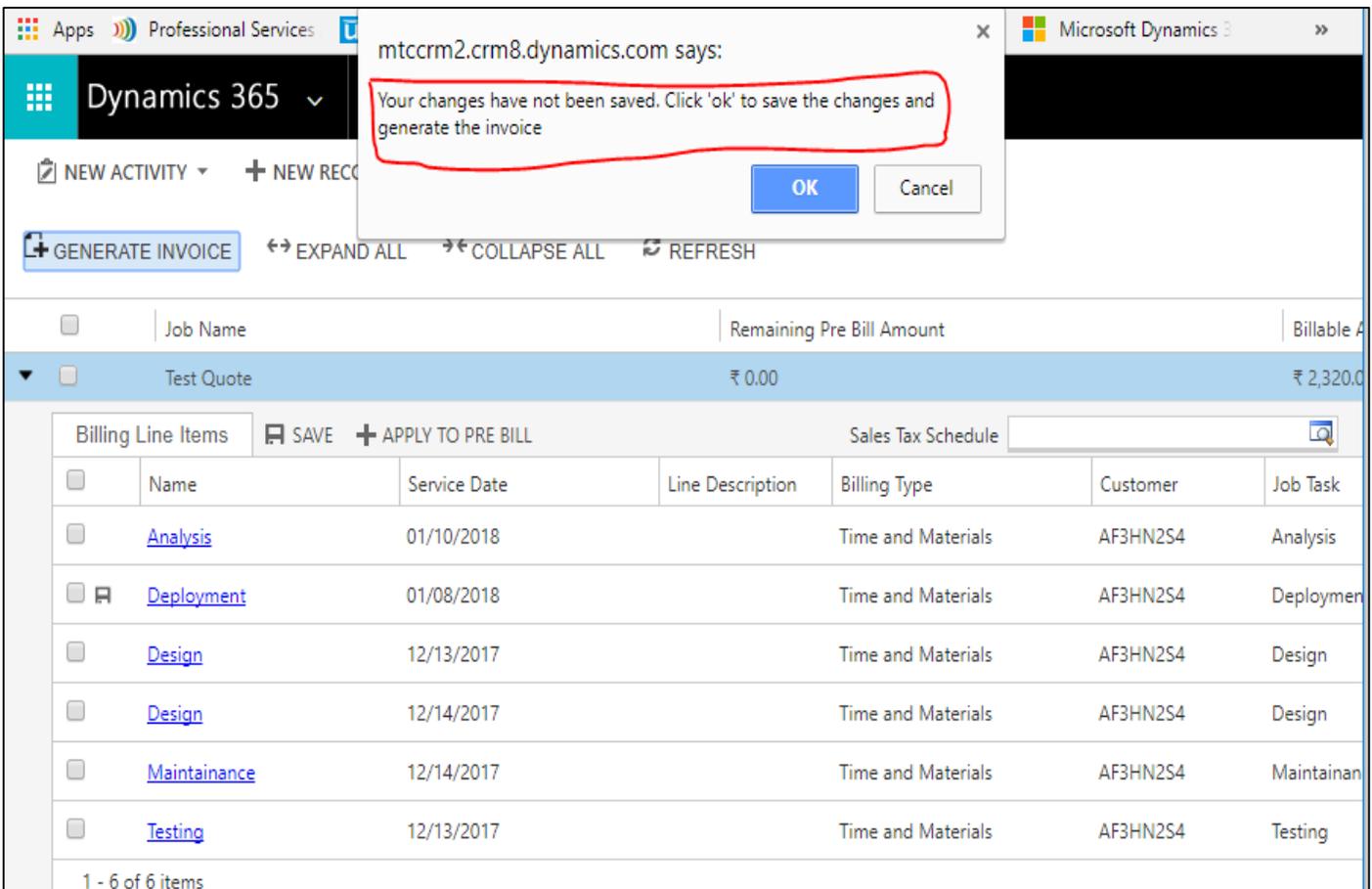


Figure 54: Invoice Generator

- All the Billing Line times or the Expenses pertaining to the selected Account or Contact are displayed
- You can toggle between Billing Line Item and Expenses
- Select the record(s) or Click on new to create a new record by giving details as Project Information for Billing Line item or Expense details for Expenses.
- Click Save to record the information.
- Select an Account and click Generate Invoice button, which is placed on top left corner of the screen
- Proceed to generate New Invoice.
- If any time user makes any changes to the fields in the existing record save button is enabled for that particular record. If the user clicks on generate invoice button without saving the changes a warning message pops up.



Cases

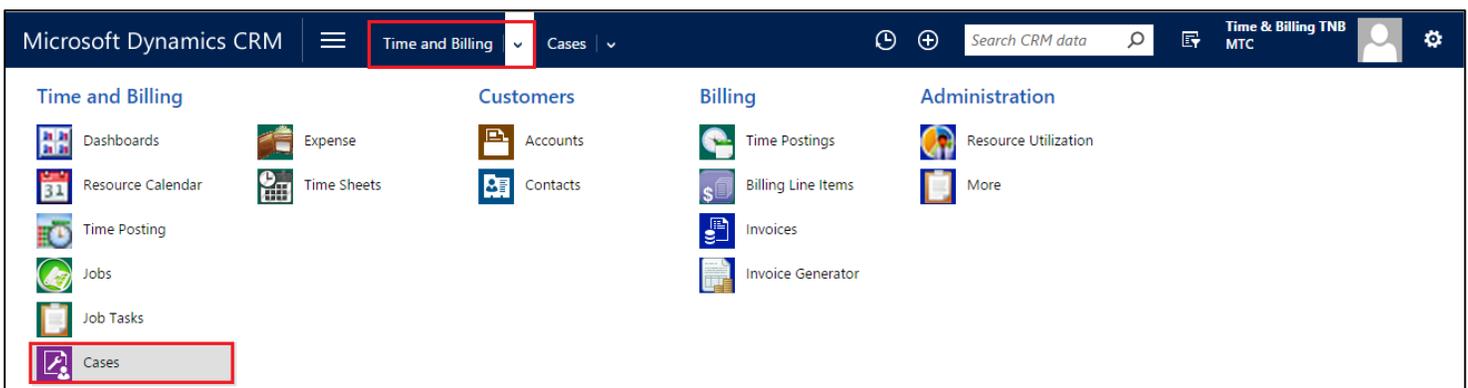
Generally Cases are not seen in the Time and Billing Site map. If a user wants to use cases in Time and Billing, the User has to initially configure as discussed Under Time and Billing Settings in the previous pages.

Under the Customer Settings, The Customer Type has to be **“Use CRM Accounts, Contacts and Invoices”** in Settings area.

Cases are similar to Jobs or projects but the main difference in both of these are as follows:

- In cases nature of job is very simple and small compared to project.
- Cases will not have job tasks within. Cases are directly billed and goes to billing line items
- Unlike Job tasks where time posting is done, here the time posting is done directly from cases
- The method of operations is very much similar to Jobs

To navigate click on **Time and Billing-> Cases**



Once the Cases screen is displayed you can view them by selecting any one from the drop down list provided. As shown below

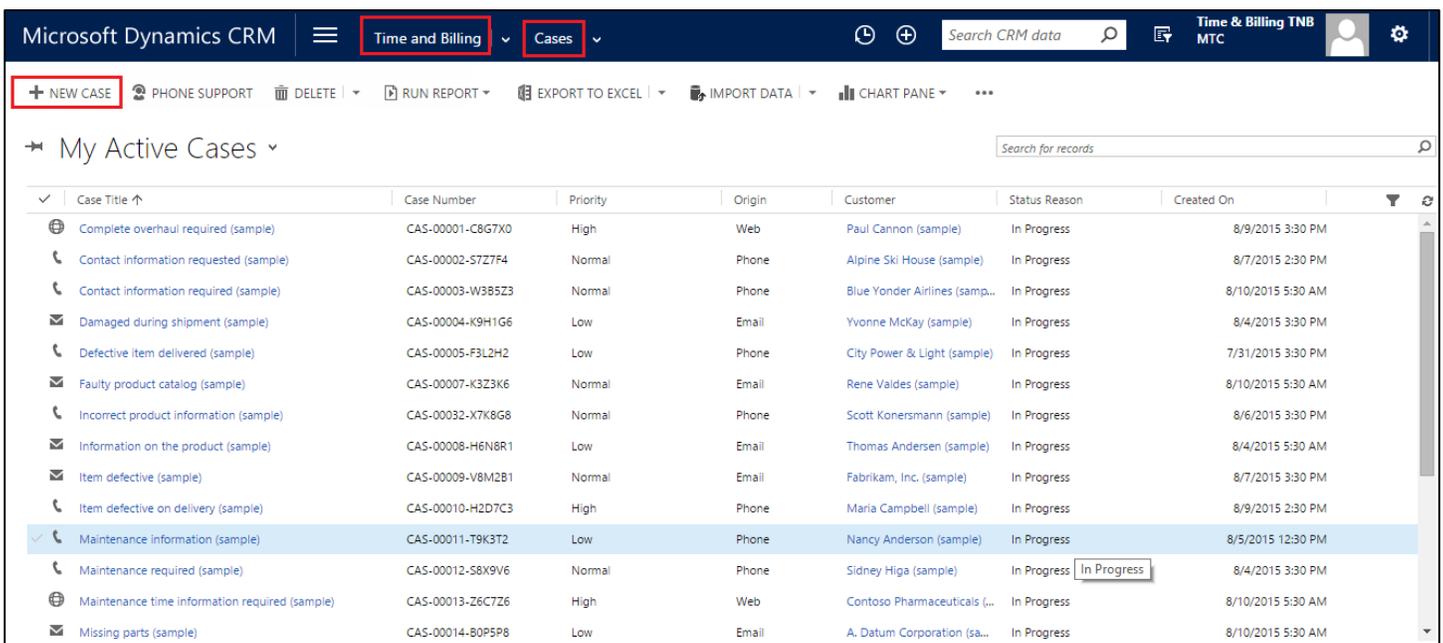


Figure 55: Types of cases displayed

- To create a new case click on **NEW** icon on the top left corner

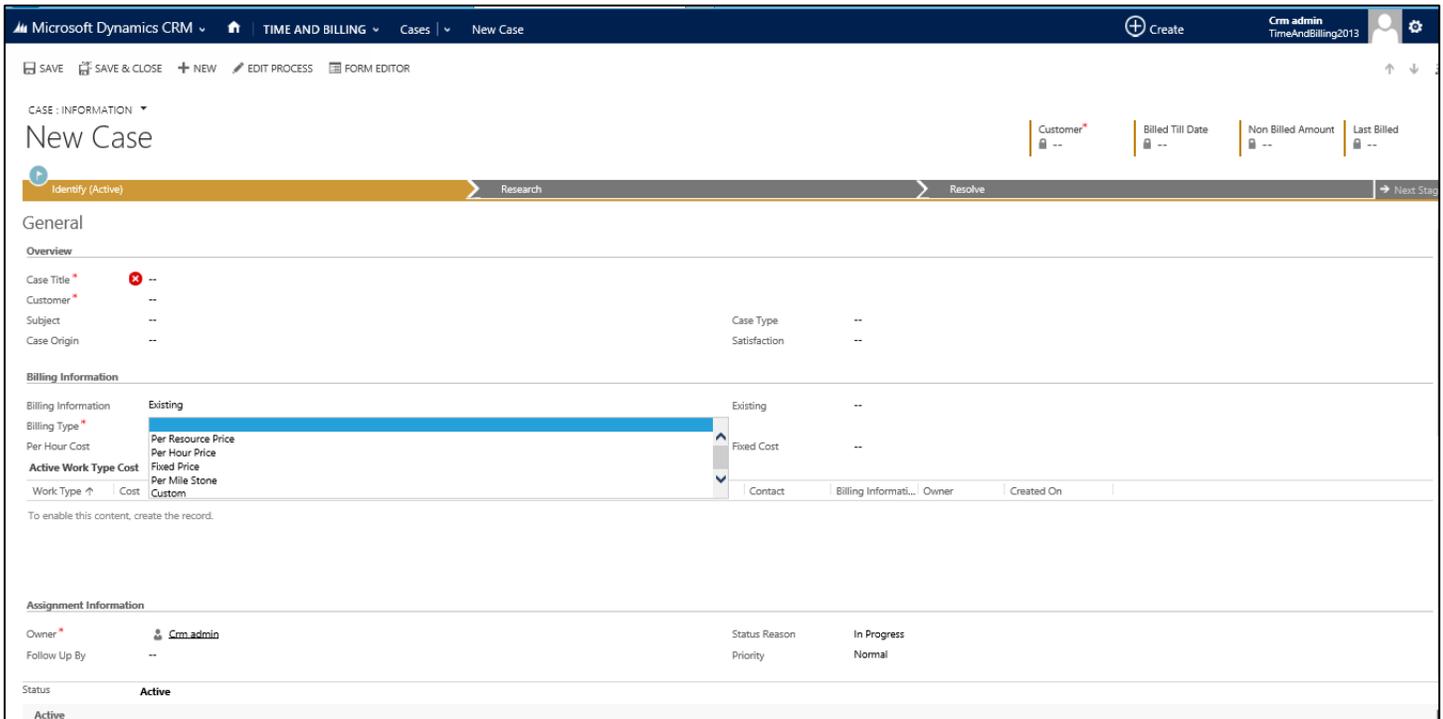
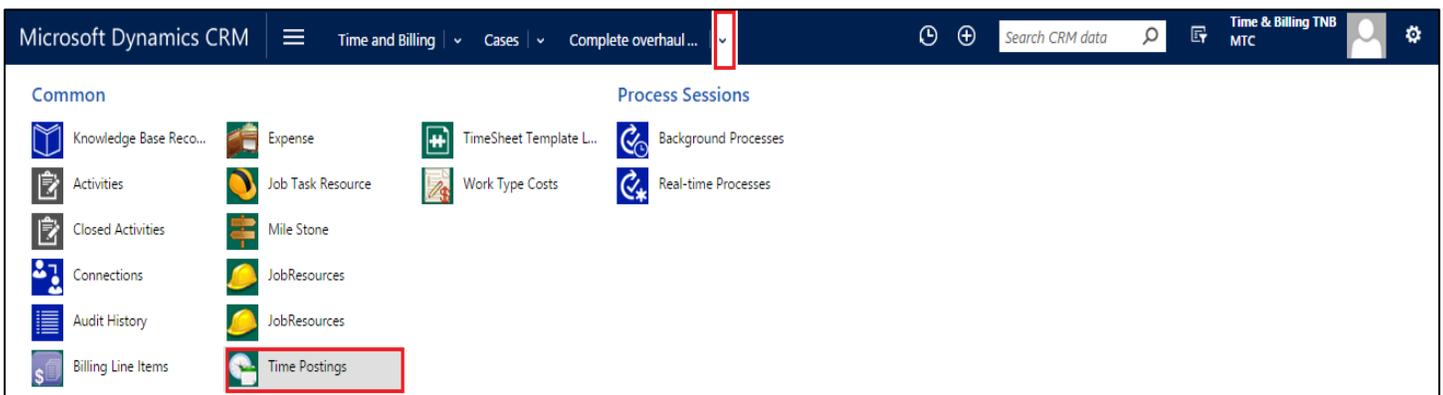


Figure 56: Cases - Create a New case

- Enter **Title** – Give name for the case
- Select Customer with the help of Look up icon
- In Case Origin you have Phone, E-Mail or Web to select from the drop down list
- In Case type you have 3 options to select from drop down list – Question, Problem or Request
- Satisfaction you have Very Satisfied, Satisfied, Neutral, Dissatisfied and Very Dissatisfied to select
- Under Status Reasons you have In Process, On Hold, Waiting for Details or Researching
- Priority you have Normal, High or Low
- Service Level you have Gold, Silver or Bronze.
- Select any one Subject from the list “**Default Subject**”, “**Query**”, or “**Service**”
- Select from the drop down list provided for **Case Type**, **Case Origin**, and **Satisfaction**
- Select **Billing type** from the drop down list. (This is very much similar to Job task or Job as explained earlier in Billing Information topic)
- Click on the top left corner “**SAVE**” icon to save the record. At this stage the a Automatic Case Number is generated by the CRM
- Click on **Case Resources** on the left panel and add new resources to this case. (similar to Job tasks)



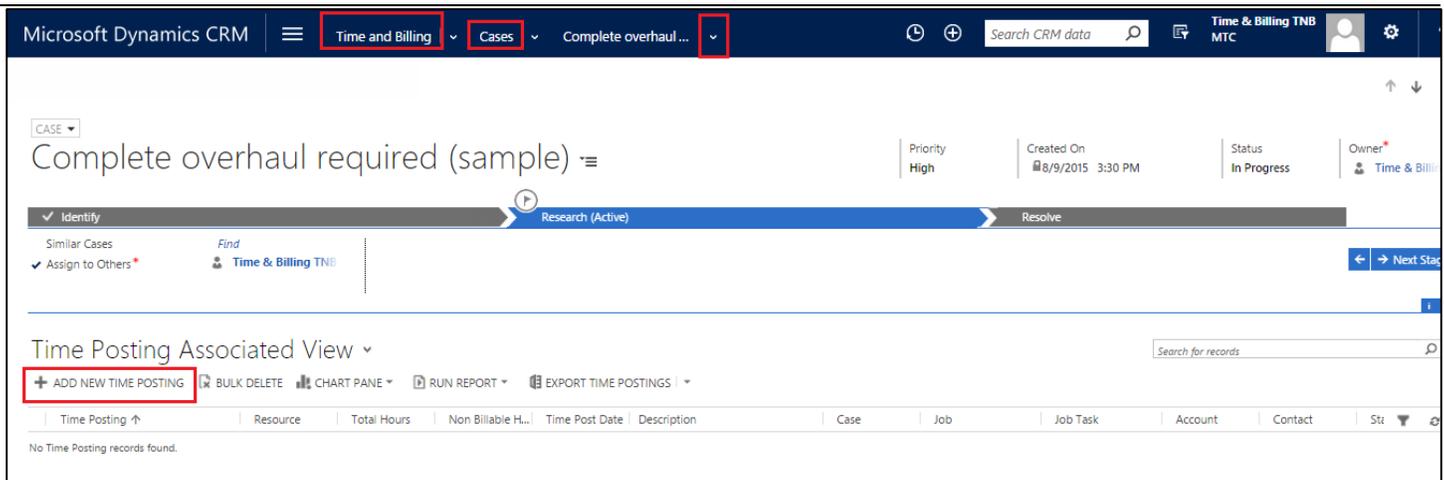


Figure 57: Time Posting Associated View

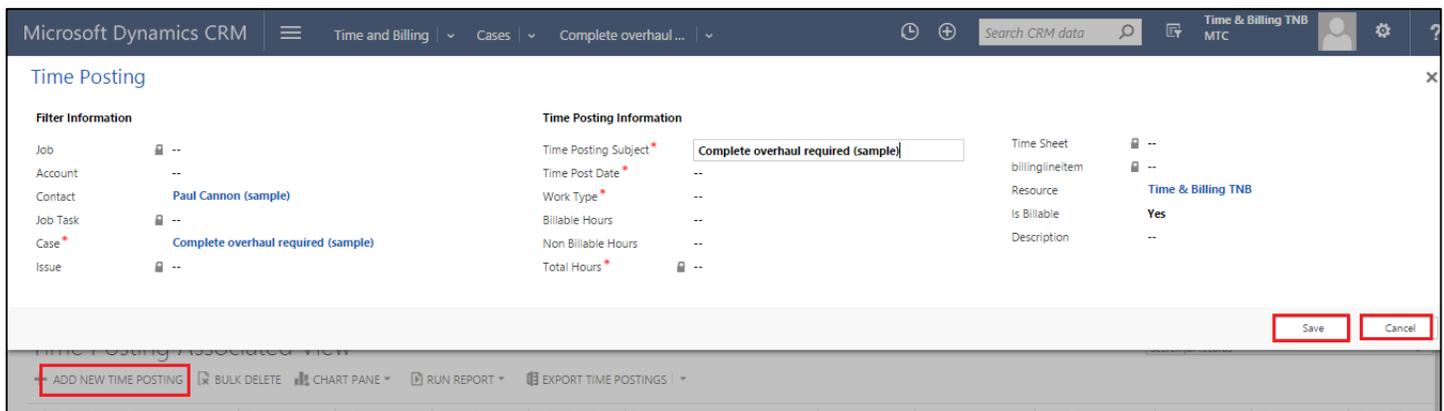
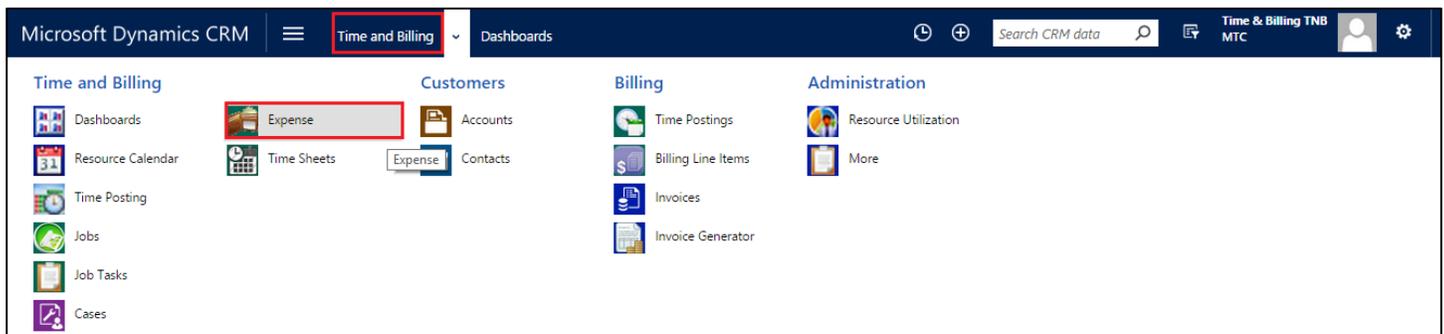


Figure 58: Cases - Time Posting

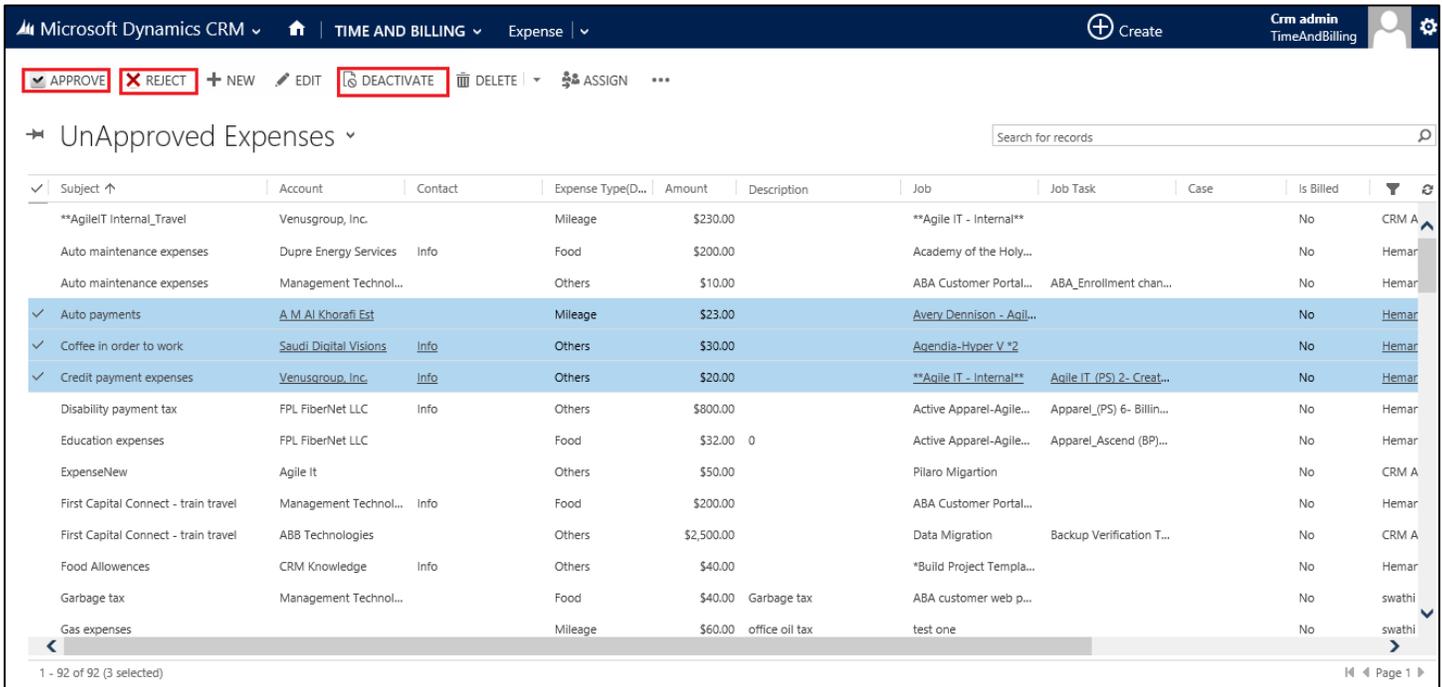
- Finally click on **Save** or **Cancel** to push the data to Billing line items
- All the operation are similar to Job Task, please refer previous topics to get full detailed information
- Go back to main screen, refresh by clicking < F5 > key.
- The Time post data is now shown in Billing Line item and Invoice can be created from Invoices (both the operations and using this module has been explains in the previous sheets . Please refer for any more details)
- Once the Invoice is generated the total Invoice amount generated is shown in the blue box as shown in the above figure against the column Billed till Date

Expenses

- Click on **Expenses** tab as shown below
- One should have proper Security Roles defined to use this module "Expenses".



- This module is available only to the manager designate to use
- All the Expenses entered during the process are displayed (can be sorted list also)
- Select an expense in the check box and click Approve or Reject.
- Once this is done these records are processed for billing
- Double click on the selected record to view details



The screenshot shows the 'UnApproved Expenses' table in Microsoft Dynamics CRM. The table has columns for Subject, Account, Contact, Expense Type(D..., Amount, Description, Job, Job Task, Case, Is Billed, and a user icon. Several rows are selected, and the 'APPROVE', 'REJECT', and 'DEACTIVATE' buttons in the top toolbar are highlighted with red boxes.

Subject	Account	Contact	Expense Type(D...	Amount	Description	Job	Job Task	Case	Is Billed	User
AgileIT Internal_Travel	Venusgroup, Inc.		Mileage	\$230.00		**Agile IT - Internal			No	CRM A
Auto maintenance expenses	Dupre Energy Services	Info	Food	\$200.00		Academy of the Holy...			No	Hemar
Auto maintenance expenses	Management Technol...		Others	\$10.00		ABA Customer Portal...	ABA_Enrollment chan...		No	Hemar
Auto payments	A M Al Khorafi Est		Mileage	\$23.00		Avery Dennison - Agil...			No	Hemar
Coffee in order to work	Saudi Digital Visions	Info	Others	\$30.00		Agendia-Hyper V *2			No	Hemar
Credit payment expenses	Venusgroup, Inc.	Info	Others	\$20.00		**Agile IT - Internal**	Agile IT (PS) 2- Creat...		No	Hemar
Disability payment tax	FPL FiberNet LLC	Info	Others	\$800.00		Active Apparel-Agile...	Apparel_(PS) 6- Billin...		No	Hemar
Education expenses	FPL FiberNet LLC		Food	\$32.00	0	Active Apparel-Agile...	Apparel_Ascend (BP)...		No	Hemar
ExpenseNew	Agile It		Others	\$50.00		Pilaro Migartion			No	CRM A
First Capital Connect - train travel	Management Technol...	Info	Food	\$200.00		ABA Customer Portal...			No	Hemar
First Capital Connect - train travel	ABB Technologies		Others	\$2,500.00		Data Migration	Backup Verification T...		No	CRM A
Food Allowences	CRM Knowledge	Info	Others	\$40.00		*Build Project Templa...			No	Hemar
Garbage tax	Management Technol...		Food	\$40.00	Garbage tax	ABA customer web p...			No	swathi
Gas expenses			Mileage	\$60.00	office oil tax	test one			No	swathi

Figure 59: Expenses - Approve / Reject

- The Icons related to Expenses gets activated only if any of the Expense records are selected
- Also all the expense scan be selected on single click on the check box next to Subject
- Now you can either Approve, Delete, Deactivate, Reimburse or Reject an Expense(s)
- Expenses are created for Job, Job Task, Cases, Account and Contact also. On all these entities you can create an expense in this Time and Billing module. (Same is shown below)

Microsoft Dynamics CRM | Time and Billing | Expense | Travelling Expenses

EXPENSE

Travelling Expenses

Expense Type/Period: .. | Owner: Time & Billing | Created On: 8/19/2015 3:07 PM

Regarding

Job: Myjob1 | Account: MTC | Contact: ..

Details

Subject: Travelling Expenses | Resource: Time & Billing TNB | Expense Type: Maintenance | Amount: ₹800.00 | Reimbursable: No | Has Receipts Attached:

Description: Description of the expenses

Receipts

No Receipts were found. Drag And Drop the Receipts

Status: Active | Status Reason: Active

Figure 60: Expenses form

- **Receipts:** This receipt area works as storage of receipt details. Any form of .JPG, JPEG, PDF format files can be placed here with Drag and Drop facility.

Microsoft Dynamics CRM | TIME AND BILLING | Expense | Travelling Expenses

EXPENSE

Travelling Expenses

Expense Type: Mileage | Owner: Raghavendar V. TNBdev | Created On: 1/29/2015 6:21 PM

Details

Subject: Travelling Expenses | Resource: Raghavendar V. | Expense Type: Mileage | Amount: \$50.00

Description: Being amount spent for travelling for the period from 19h jan 2015 to 29th January 2015

Has Receipts Attached:

Receipts

Two image thumbnails are shown in the Receipts section.

Status: Active | Status Reason: Active

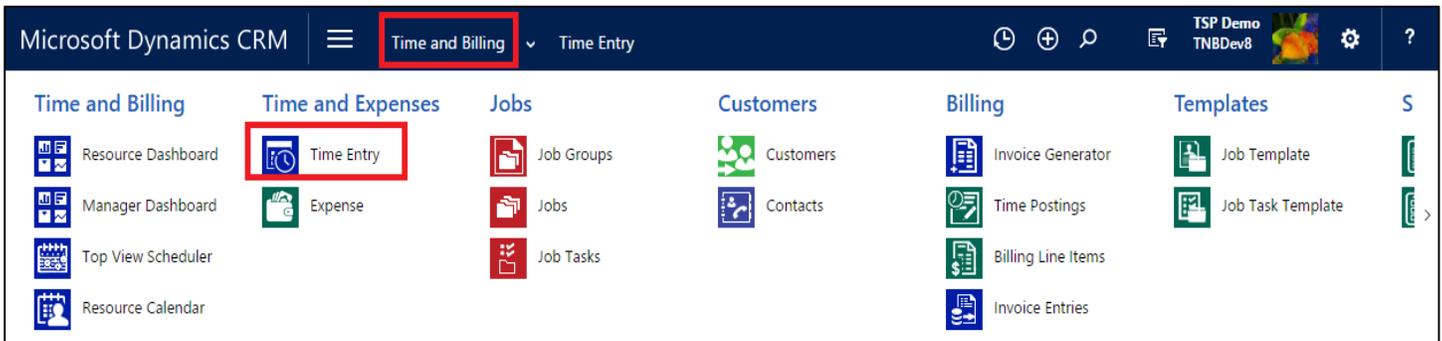
Figure 61: Expense Form showing Receipts stored

- This Receipts will help in keeping copies of receipts, or any other relevant details pertaining to this expenses.
- Select the Image and Right click on it to delete the image if needed.
- Save the form to record information

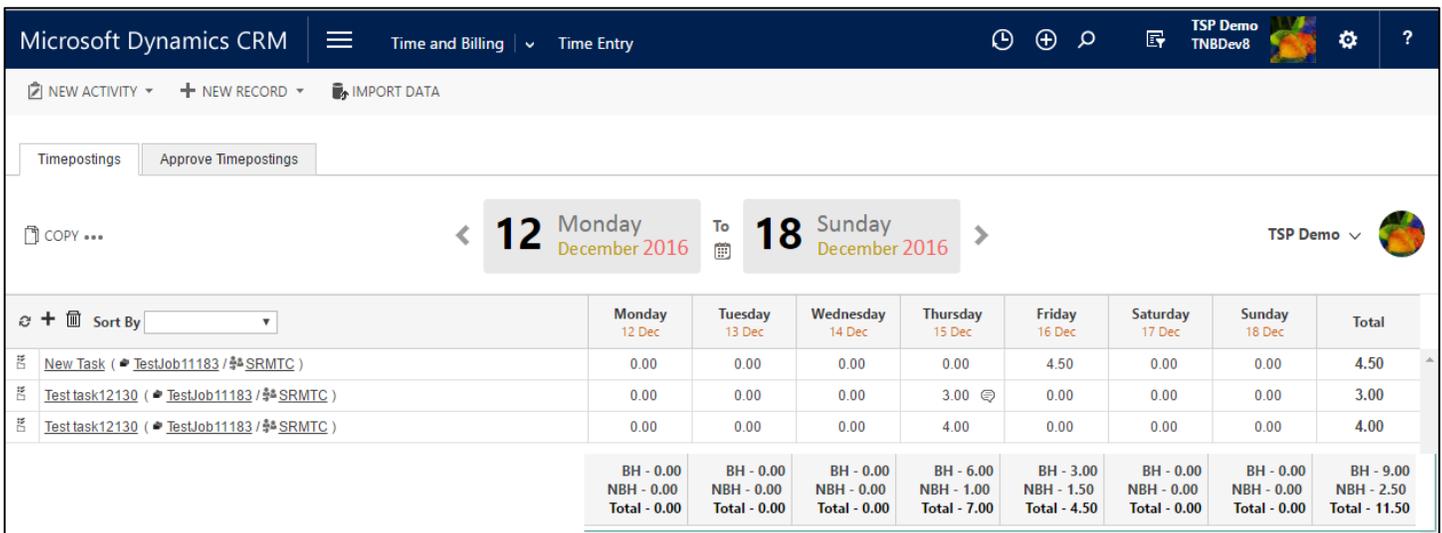
Time Sheets

Time Sheets have made the time posting earlier and convenient to use. The user can directly post time for a period of one week for any number of tasks at a time.

- CRM->Time and Billing->Time Entry->
- This helps to view all the Time sheets which are in pending state for Approval.



- Click on Time Entry to display all Time Sheets as shown below



	Monday 12 Dec	Tuesday 13 Dec	Wednesday 14 Dec	Thursday 15 Dec	Friday 16 Dec	Saturday 17 Dec	Sunday 18 Dec	Total
New Task (TestJob11183 / SRMTC)	0.00	0.00	0.00	0.00	4.50	0.00	0.00	4.50
Test task12130 (TestJob11183 / SRMTC)	0.00	0.00	0.00	3.00	0.00	0.00	0.00	3.00
Test task12130 (TestJob11183 / SRMTC)	0.00	0.00	0.00	4.00	0.00	0.00	0.00	4.00
	BH - 0.00 NBH - 0.00 Total - 0.00	BH - 0.00 NBH - 0.00 Total - 0.00	BH - 0.00 NBH - 0.00 Total - 0.00	BH - 6.00 NBH - 1.00 Total - 7.00	BH - 3.00 NBH - 1.50 Total - 4.50	BH - 0.00 NBH - 0.00 Total - 0.00	BH - 0.00 NBH - 0.00 Total - 0.00	BH - 9.00 NBH - 2.50 Total - 11.50

Figure 62: List of all Times sheets

Select a time sheet to

- Send to approve time sheet
- Create a New Time Sheet
- Email a link
- Export data to Excel
- Import data
- Run Workflow
- Run reports etc.
- Click on New tab to create a New Time Sheet
The details of time Sheet, how to enter, process, edit, How to select task are discussed below in Time posting.

Time Posting

- You can directly input the Hours with the help of a drop down list provided as shown below

The screenshot shows the Microsoft Dynamics CRM interface for a Time Sheet. The main window displays a table with columns for Work Type, days of the week (Monday to Sunday), and Total. A row for 'Test_Case3' is selected, and a pop-up form is open over it. The pop-up form contains input fields for Billable Hours, Non-Billable Hours, and Total Hours, each with a dropdown arrow. A 'Comments' text area is also present. A small menu is visible over the 'Billable Hours' field, showing options like 'Copy' and 'Paste'.

Work Type	Monday 15 Dec	Tuesday 16 Dec	Wednesday 17 Dec	Thursday 18 Dec	Friday 19 Dec	Saturday 20 Dec	Sunday 21 Dec	Total
Account1	0.00	0.00	0.00	0.00	1.00	0.00	0.00	1.00
JT_1 (@Account1)	0.00	0.00	0.00	0.00	0.00	0.00	0.50	0.50
Test_Case3 (@Test_Contact3)	0.00	0.00	0.00	1.00	0.00	0.75	0.00	1.00
Test_Job1 (@Test_Account2)	0.00	0.00				0.00	0.00	2.00

Figure 64: Time Sheet - Information

- You can also write any comments that you wish against the time post in this sheet for your reference.
- Click on to save the entry
- User can also copy the Time post data from One day to another day. Such as When you click on (...) which is in the window a drop down is provided as shown below
- Select Copy for data to get stored in,

This close-up screenshot shows the 'Billable Hours' section of the pop-up form. It features three input fields: 'Billable Hours' (value 0), 'Non-Billable Hours' (value 0), and 'Total Hours' (value 0). A context menu is open over the 'Billable Hours' field, showing a 'Copy' button and a 'Paste' button. The 'Copy' button is highlighted, indicating it has been selected.

Figure 65: Pop up for Billable Hours

- Select the appropriate time sheet and Add to get the Time sheet copied.
- **Copy from template:** Click on the Button, Select the desired record from the Look up Record and press Add to add data to existing from.

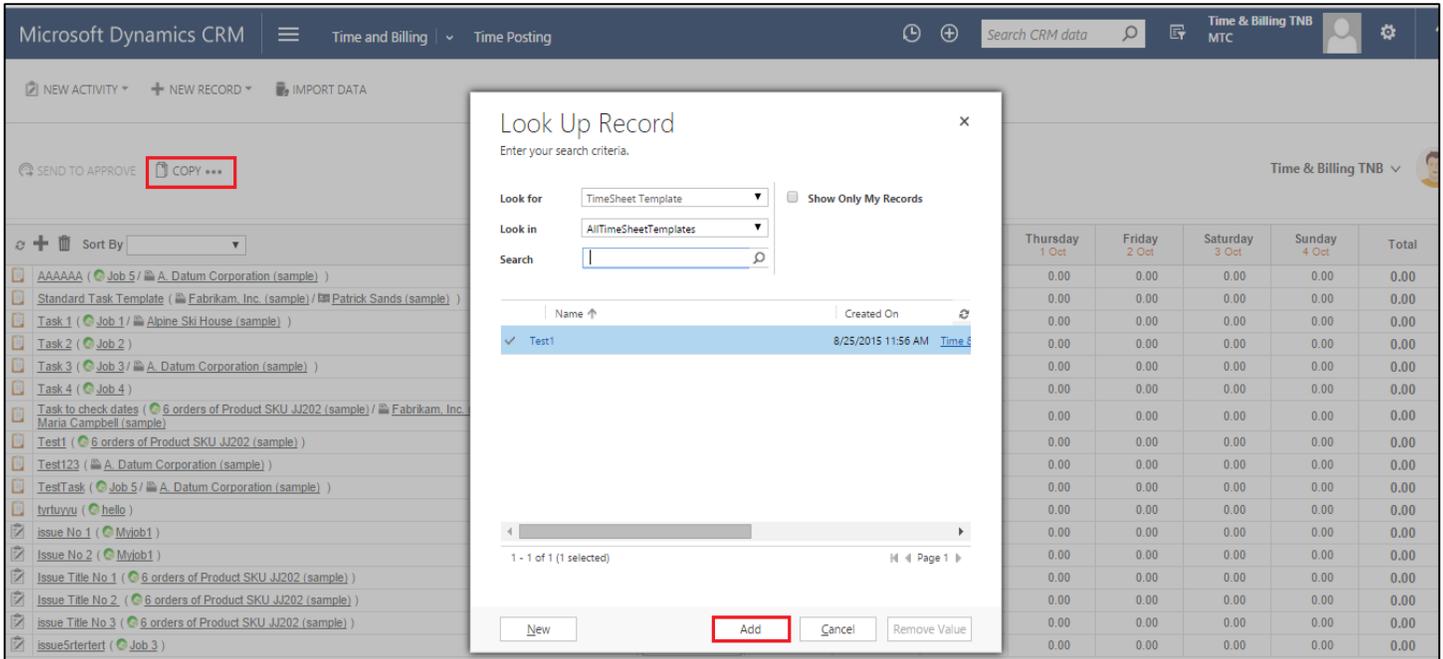


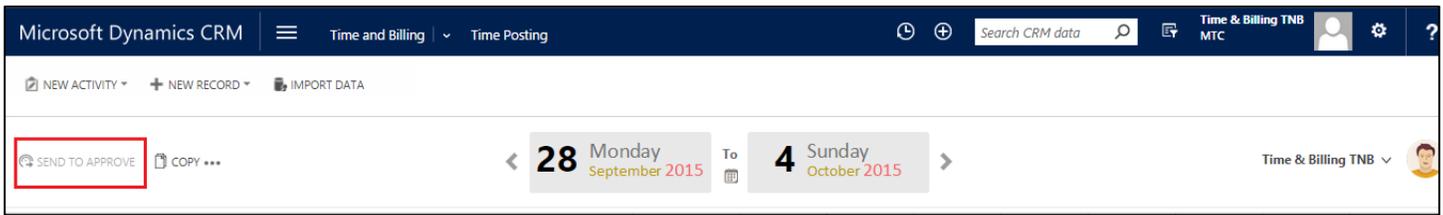
Figure 68: Time Sheet with Look up Screen

- After adding the data the form will be as shown below.
- When template is added to the existing time sheet, the Values will be Zeros.

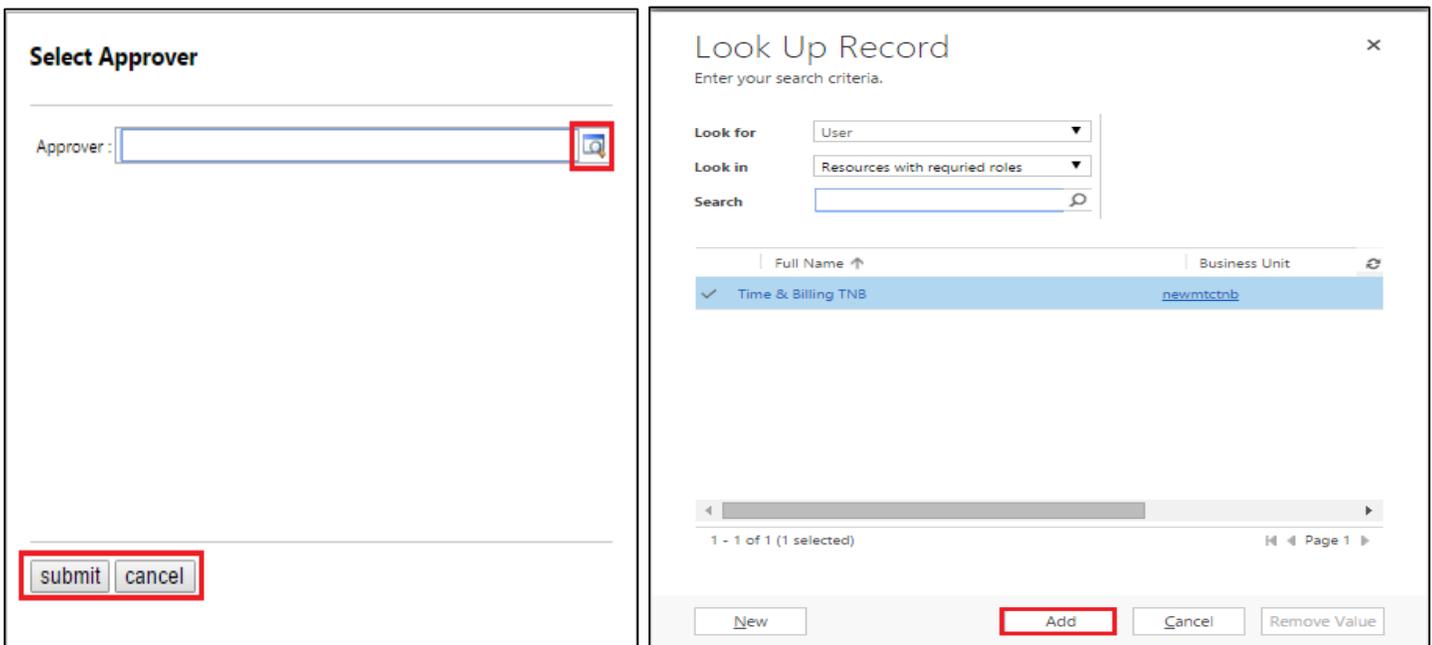
	Monday 28 Sep	Tuesday 29 Sep	Wednesday 30 Sep	Thursday 1 Oct	Friday 2 Oct	Saturday 3 Oct	Sunday 4 Oct	Total
AAAAAA	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Standard Task Template	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Task 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Task 2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Task 3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Task 4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Task to check dates	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Test1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Test123	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TestTask	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
tyrtuyru	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
issue No.1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Issue No.2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Issue Title No.1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Issue Title No.2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
issue Title No.3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
issue5rterter	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	TH - 0.00 NBH - 0.00 Billable - 0.00							

Figure 69: Time Sheet with Template data

- Once the time sheet is ready, you can send this sheet to Approver for approval by clicking on SEND TO APPROVE tab which is placed on top of the sheet



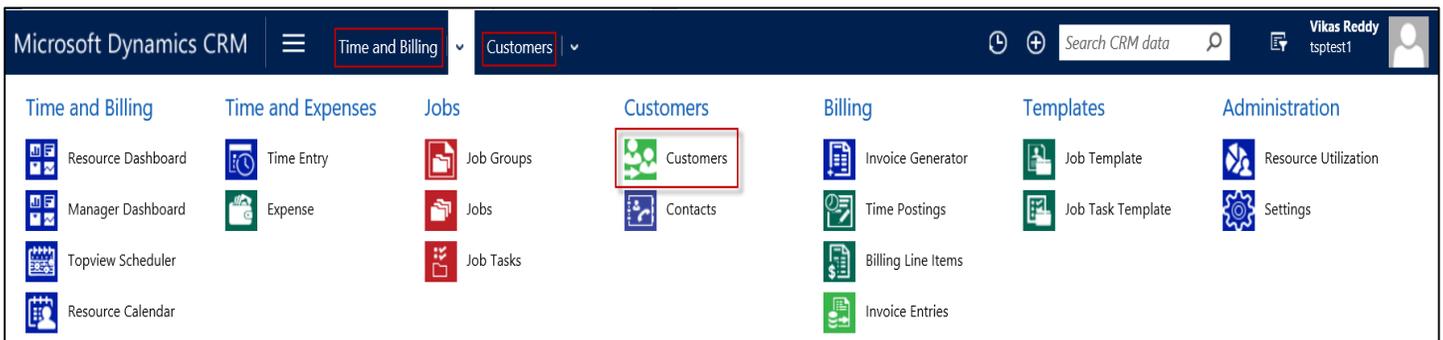
- When the Approver approves the time sheet it creates Billing line items which enables you to easily make the Invoice. The Approver can also reject the Time sheet.



Customers

Customers are the business givers/owners whose complete data including contacts would be maintained here.

To view Customers, follow the navigation: Time and Billing → Customers.

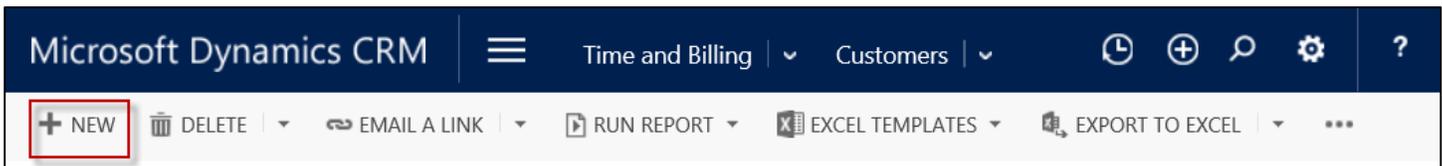


- Click on Customers. You can see the already existing customers list if there is any.

Active Customers Search for records

Customer ID ↑	Customer Name	Phone	Price Class	Sales Tax	Salesperson	Territo
A. Datum Corporatio...	A. Datum Corporatio...	555-0158				
AARONFIT0001	Aaron Fitz Electrical		Default			North
A-arvin Tonerstore						
ABC28UU7	Adventure Works (sa...	555-0152				
ABCO9M32	Alpine Ski House (sa...	555-0157				
ADV	Advance Tech					South
ADVANCED0002	Advanced Tech Satelli...		Retail			Midwest
AFFSE9IK	Fabrikam, Inc. (sample)	555-0153				
ALTONMAN0001	Alton Manufacturing		Default			West
ASSOCIAT0001	Associated Insurance...		Retail			East

- To create a new customer, simply click on +NEW button from the CRM ribbon.



- New Customer Window page pops up. Fill the necessary fields under Customer Information, Default Details, Payment Options, Addresses & Contacts, and Credit Cards.
- Details under Addresses & Contacts, and Credit Cards can only be entered after creating the record with necessary details.
- Please refer to the below image for quick guidance.

Microsoft Dynamics CRM | Time and Billing | Customers | New Customer

SAVE | SAVE & CLOSE | NEW | FORM EDITOR

CUSTOMER : INFORMATION
New Customer

Customer ID*	Customer Name*	Active
--	--	Active

Summary

CUSTOMER INFORMATION	DEFAULTS
Customer ID* --	Default Terms --
Customer Name+ --	Default Site --
DBA Name --	Credit Limit --
Active Active	Sales Tax --
	Ship Complete No
	Price Class --
	Finance Charge --
	Salesperson --
	Territory --
	Invoice Comment --

DETAILS

Phone --	
Phone 2 --	
Phone 3 --	

Fax --	Project Ignore
Email --	Account ID --
Website --	

PAYMENT OPTIONS

Invoice Delivery --
Payment Method --

DEFAULT ADDRESSES

Bill To --
Ship To --
Statement To --

Addresses & Contacts

ADDRESSES		CONTACTS	
Name ↑	Address Street 1	Last Name ↑	First Name
To enable this content, create the record.		To enable this content, create the record.	

Credit Cards

Name ↑	Created On
--------	------------

To enable this content, create the record.

ACTIVITIES NOTES

All Entities ▾ | Add Phone Call Add Task ...



We didn't find any activity records.

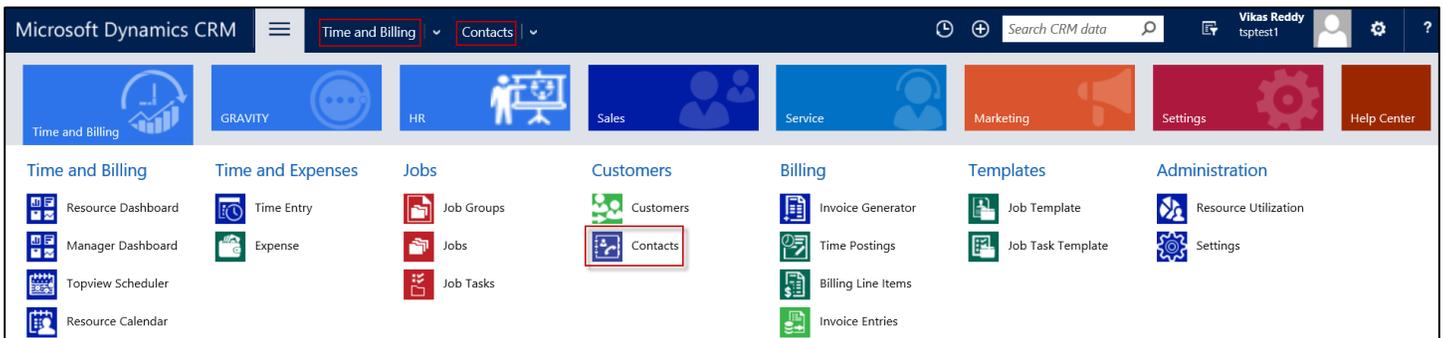
Active

- After filling the necessary details, don't forget to click on the **Save** button.

Contacts

Contacts give required information about persons/companies for direct communication. You can create and save as many contacts as possible.

To view Contacts, follow the navigation: Time and Billing → Customers → Contacts



- Click on Contacts. You can see the already existing contacts if there are any.

Microsoft Dynamics CRM | Time and Billing | Contacts

NEW | DELETE | EMAIL A LINK | RUN REPORT | EXCEL TEMPLATES | EXPORT TO EXCEL

Active Contacts | Search for records

Last Name ↑	First Name	Email	Business Phone
Ambani	Anil		
Ambani	Mukesh		
Andersen (sample)	Thomas	someone_m@example.com	555-0112
Anderson (sample)	Nancy	someone_c@example.com	555-0102
Burk (sample)	Susan	someone_l@example.com	555-0111
Campbell (sample)	Maria	someone_d@example.com	555-0103
Cannon (sample)	Paul	someone_h@example.com	555-0107
Carrter	James	jcarter@gmail.com	
Glynn (sample)	Jim	someone_j@example.com	555-0109
Lyon (sample)	Robert	someone_g@example.com	555-0106

Charts

- To create a new contact, click on +NEW button from the CRM ribbon.
- New Contact Window page opens up.
- Fill all the necessary fields under Contact Information and Contact Address as shown below.

Microsoft Dynamics CRM | Time and Billing | Contacts | New Gravity Contact

SAVE | SAVE & CLOSE | NEW | FORM EDITOR

GRAVITY CONTACT : INFORMATION

New Gravity Contact

CONTACT INFORMATION

First Name --

Last Name * ✖ --

Job Title --

Company Name (Custor)* 🔒 --

Company Name (Vendc)* 🔒 --

Email --

Business Phone --

Mobile Phone --

Fax --

Send Invoice No

CONTACT ADDRESS

Street 1 --

Street 2 --

Street 3 --

City --

State / Province --

Country / Region --

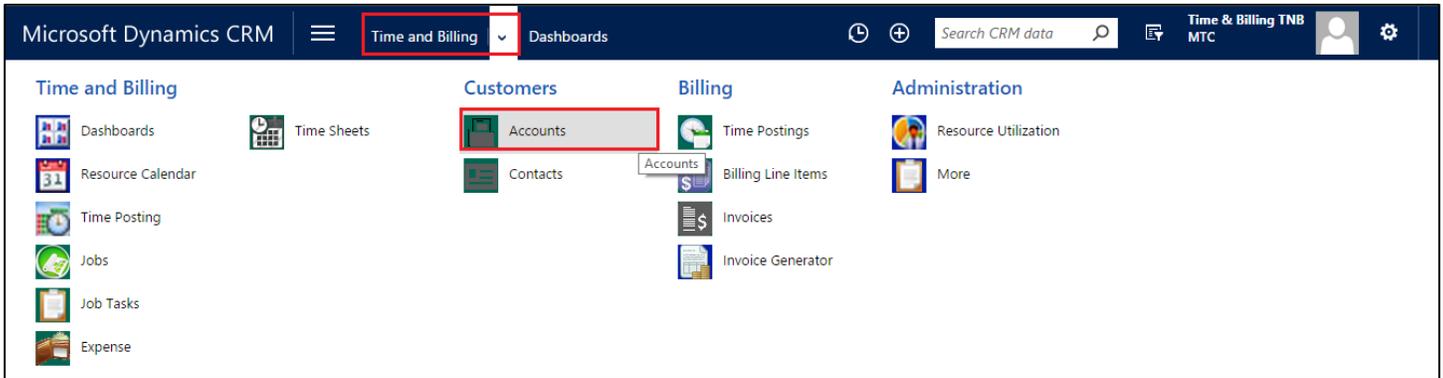
ZIP / Postal Code --

Active

- Finally, click on **Save** button.

Accounts

To navigate click on **Time and Billing-> Accounts (Customers)**



Create an Account. This Account form also consists of Billing Preference section. This is very important since while billing is done if there is no information provided for the Job task or Job about the billing type, the same matches with this account/contact and creates a new bill with this billing preferences.

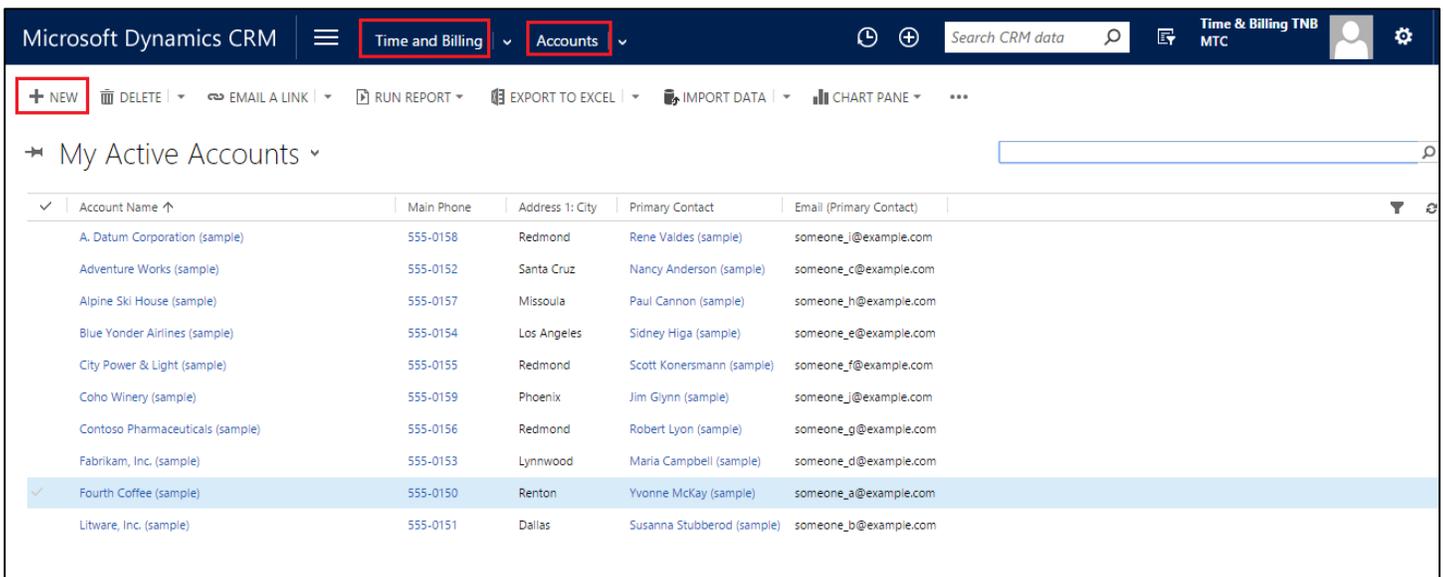


Figure 70: CRM Accounts form

On the form select Information as shown below



Figure 71: Account Form showing options

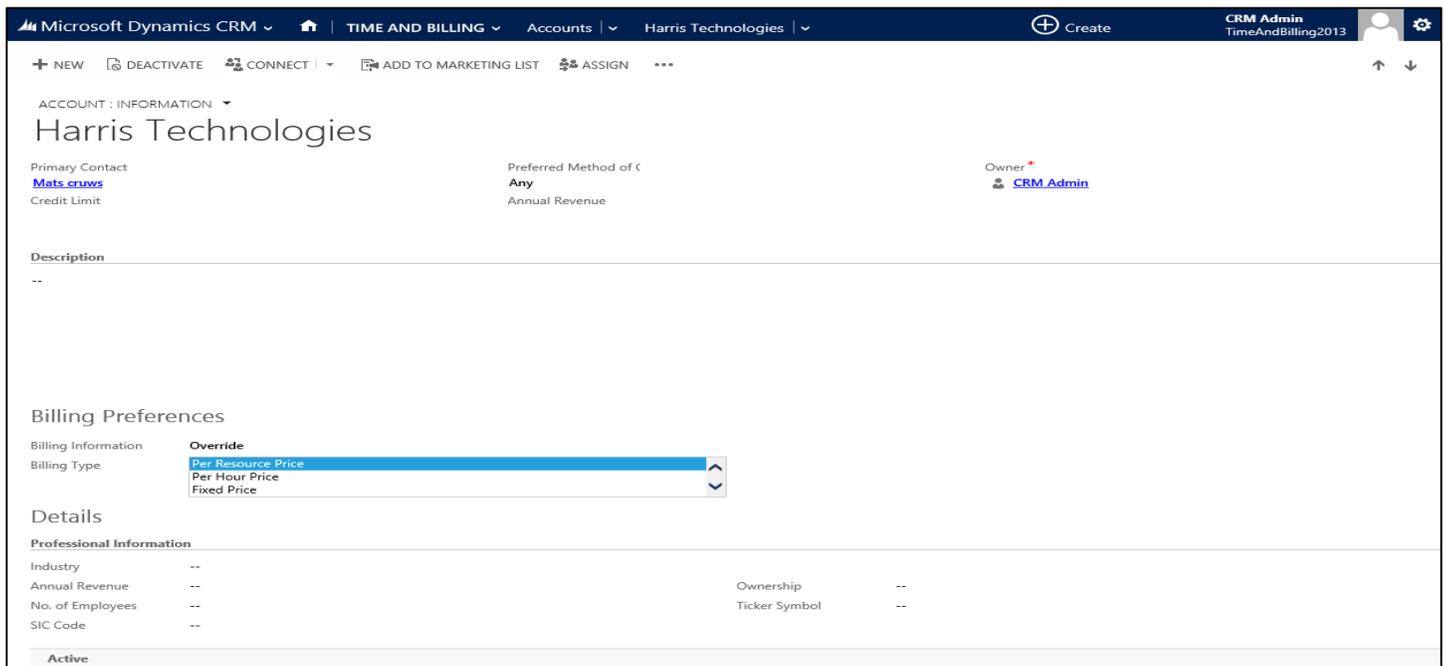
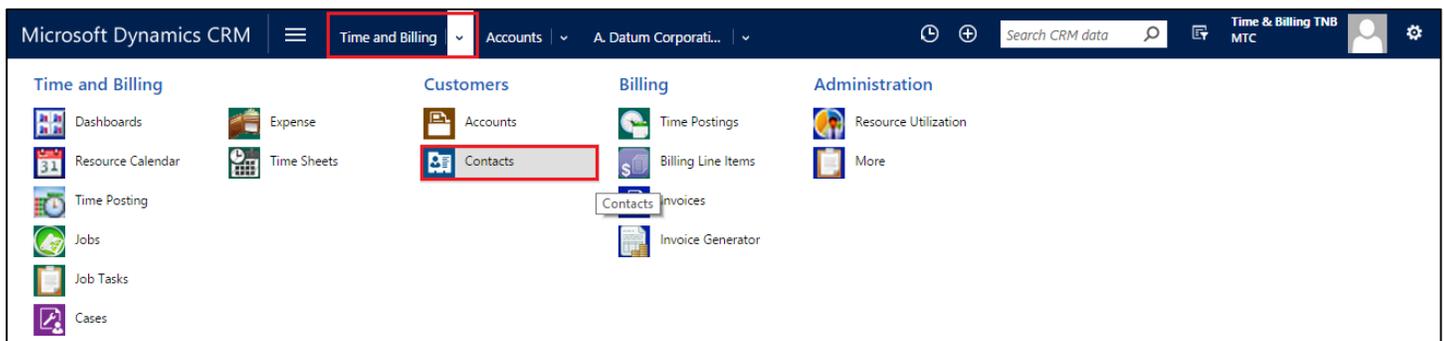


Figure 72: Account - Billing Preference

Contacts

To navigate click on **Time and Billing-> Customers->Contacts**



Create a Contact. This Contact form also consists of Billing Preference section. This is very important since while billing is done if there is no information provided for the Job task or Job about the billing type, the same matches with this contact/account and creates a new bill with this billing preferences.

Microsoft Dynamics CRM | Time and Billing | Contacts | Search CRM data | Time & Billing TNB MTC

My Active Contacts

Full Name	Email	Company Name	Business Phone
Jim Glynn (sample)	someone_j@example.com	Coho Winery (sample)	555-0109
Maria Campbell (sample)	someone_d@example.com	Fabrikam, Inc. (sample)	555-0103
Nancy Anderson (sample)	someone_c@example.com	Adventure Works (sample)	555-0102
Patrick Sands (sample)	someone_e@example.com	Alpine Ski House (sample)	555-0110
Paul Cannon (sample)	someone_h@example.com	Alpine Ski House (sample)	555-0107
Rene Valdes (sample)	someone_i@example.com	A. Datum Corporation (sa...	555-0108
Robert Lyon (sample)	someone_g@example.com	Contoso Pharmaceuticals (...)	555-0106
Scott Konersmann (sample)	someone_f@example.com	City Power & Light (sample)	555-0105
Sidney Higa (sample)	someone_e@example.com	Blue Yonder Airlines (samp...	555-0104
Susan Burk (sample)	someone_j@example.com	A. Datum Corporation (sa...	555-0111
Susanna Stubberod (sample)	someone_b@example.com	Litware, Inc. (sample)	555-0101
Thomas Andersen (sample)	someone_m@example.com	Coho Winery (sample)	555-0112
Yvonne McKay (sample)	someone_a@example.com	Fourth Coffee (sample)	555-0100

Figure 73: CRM Contact form

Microsoft Dynamics CRM | Time and Billing | Contacts | Nancy Anderson (sa... | Search CRM data | Time & Billing TNB MTC

CONTACT | Contact | Information

Anderson (sample)

Owner | Time & Billing

Microsoft Dynamics CRM | Time and Billing | Contacts | Nancy Anderson (sa... | Search CRM data | Time & Billing TNB MTC

CONTACT: INFORMATION

Nancy Anderson (sample)

E-mail: someone_c@e... | Preferred Method of: Any | Owner: Time & Billing

Billing Preferences

Billing Type: Per Mile Stone Custom

Details

Professional Information

Department	--	Role	--
Manager	--	Assistant	--
Manager Phone	--	Assistant Phone	--

Personal Information

Gender	Female	Birthday	4/22/1960
Marital Status	Married	Anniversary	1/1/2007
Spouse/Partner Name	Harris, Phyllis		

Notes & Activities

Preferences Status: Active

Figure 74: New Contact Billing Preferences

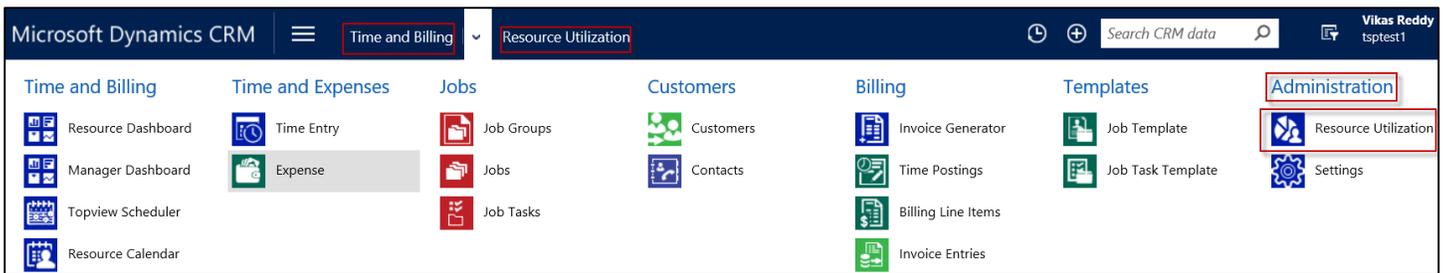
Administration

This section covers Resource Utilization and Settings of Time and Billing module of TSP solution. They are explained in detail in the following sections.

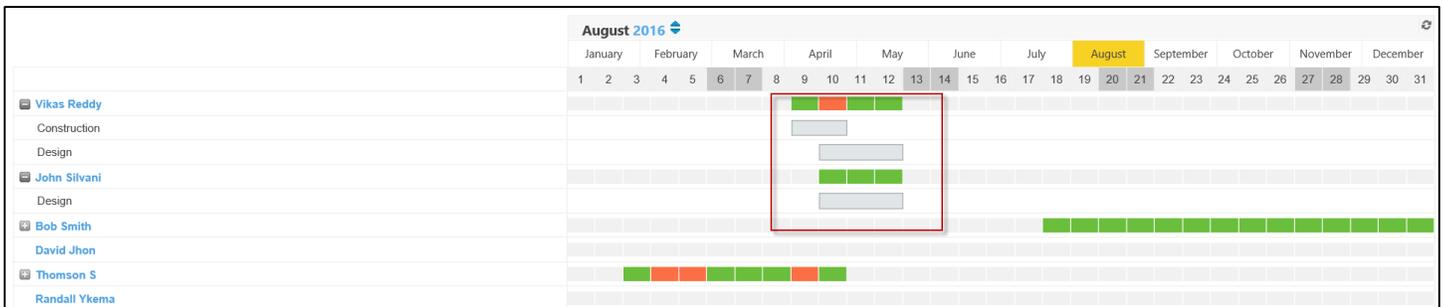
Resource Utilization

Resource Utilization gives you an overview about resources and their activities along with percentage completion so that you can optimally utilize your resources.

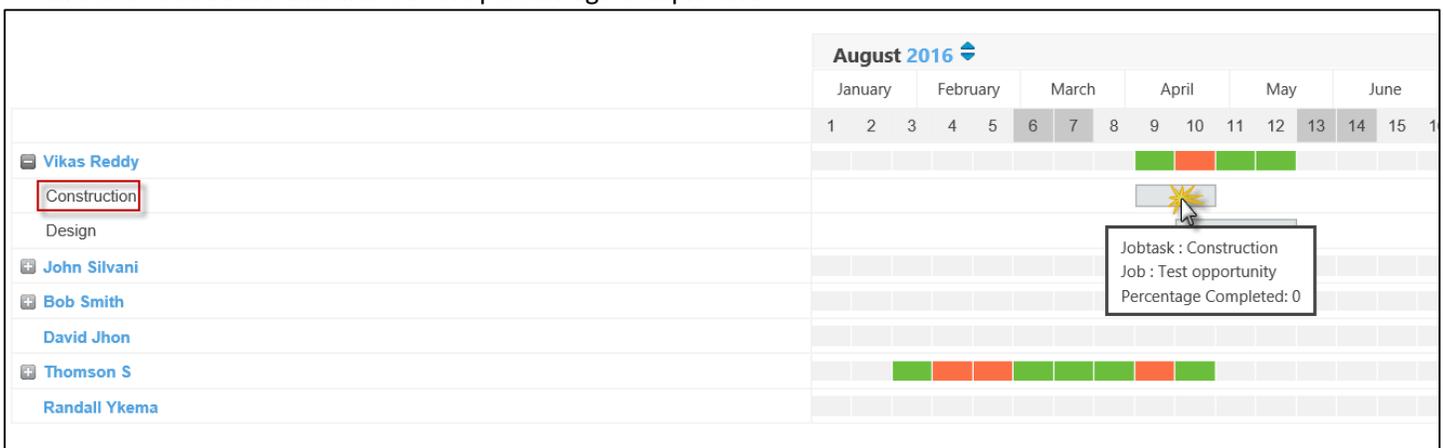
To view Resource Utilization, follow the navigation: Time and Billing → Administration → Resource Utilization.



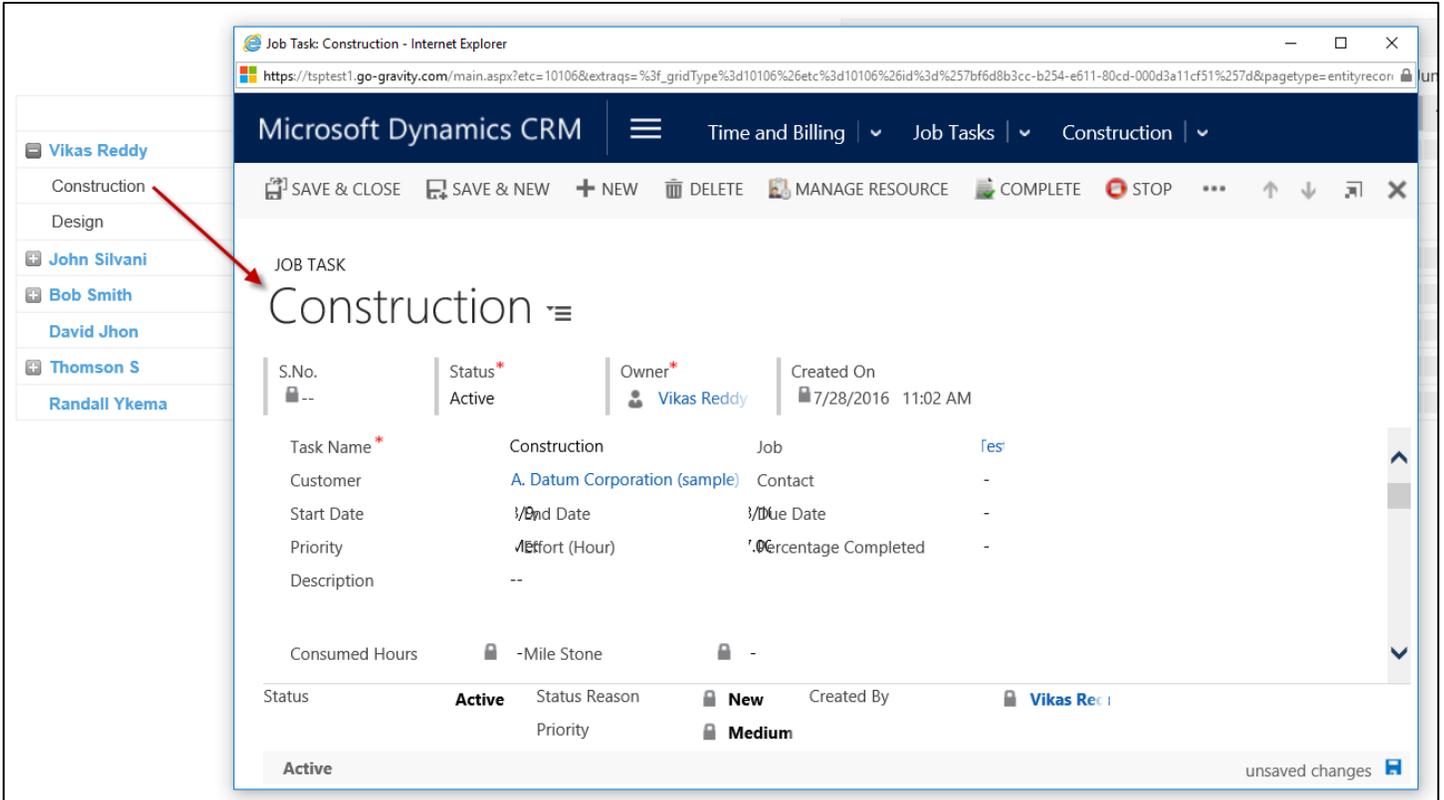
- Click on Resource Utilization.
- You can see resources along with their activities/job tasks. On the right hand side, the calendar gives you the availability status of resources through color coding references. Green color indicates that a particular resource is available while orange color indicates that a resource is fully engaged.



- At any point of time, you can click on the calendar where the individual activity/job task of a resource is represented in color coded bars and find out the percentage completion.



- Also, you can visit the job task page by simply clicking on the listing under a particular resource.



The screenshot shows the Microsoft Dynamics CRM interface. On the left sidebar, a list of resources is shown: Vikas Reddy, John Silvani, Bob Smith, David Jhon, Thomson S, and Randall Ykema. Under Vikas Reddy, two job tasks are listed: 'Construction' and 'Design'. A red arrow points from the 'Construction' menu item to the 'Construction' job task title in the main content area. The main content area displays the details for the 'Construction' job task, including its status (Active), owner (Vikas Reddy), and creation date (7/28/2016 11:02 AM). Below this, there is a table of fields and their values, and a summary section at the bottom.

S.No.	Status*	Owner*	Created On
--	Active	Vikas Reddy	7/28/2016 11:02 AM

Task Name*	Construction	Job	tes
Customer	A. Datum Corporation (sample)	Contact	-
Start Date	1/1/2016	1/1/2016	-
Priority	Medium	Percentage Completed	-
Description	--		

Consumed Hours	- Mile Stone	-
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Status	Active	Status Reason	New	Created By	Vikas Reddy
		Priority	Medium		

Active unsaved changes

Note: You can view resources and their activities across different timelines. A Refresh button is also available to refresh the calendar page.