TotalServ PRO

EASY END-TO-END SERVICE PRO MANAGEMENT

Time & Billing

User Guide

On the globally available platform…

Microsoft

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 yours 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.

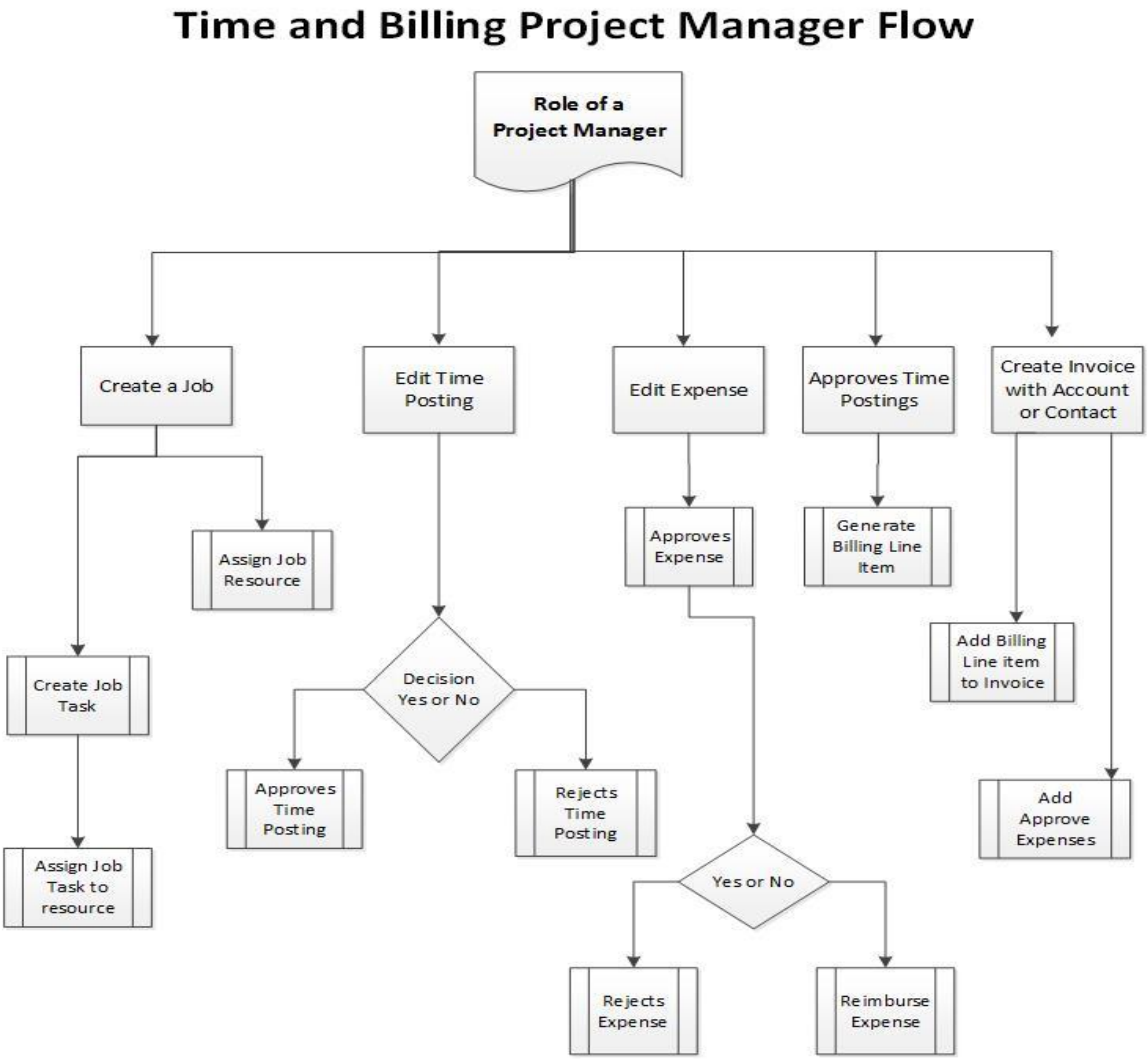


Figure 1: Time and Billing Project Manager's Flow

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

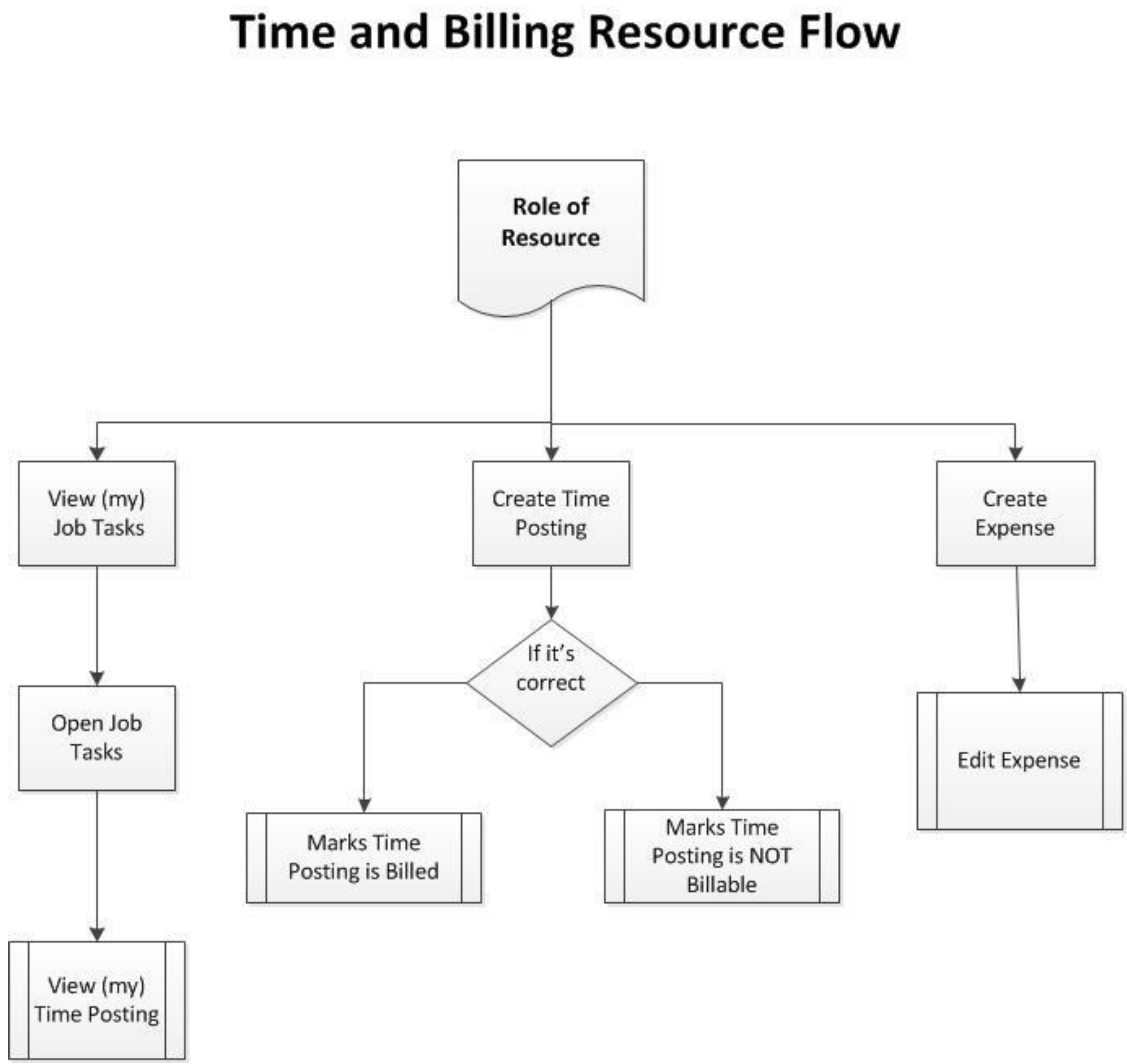


Figure 2: Time and Billing – Resource's Flow

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.

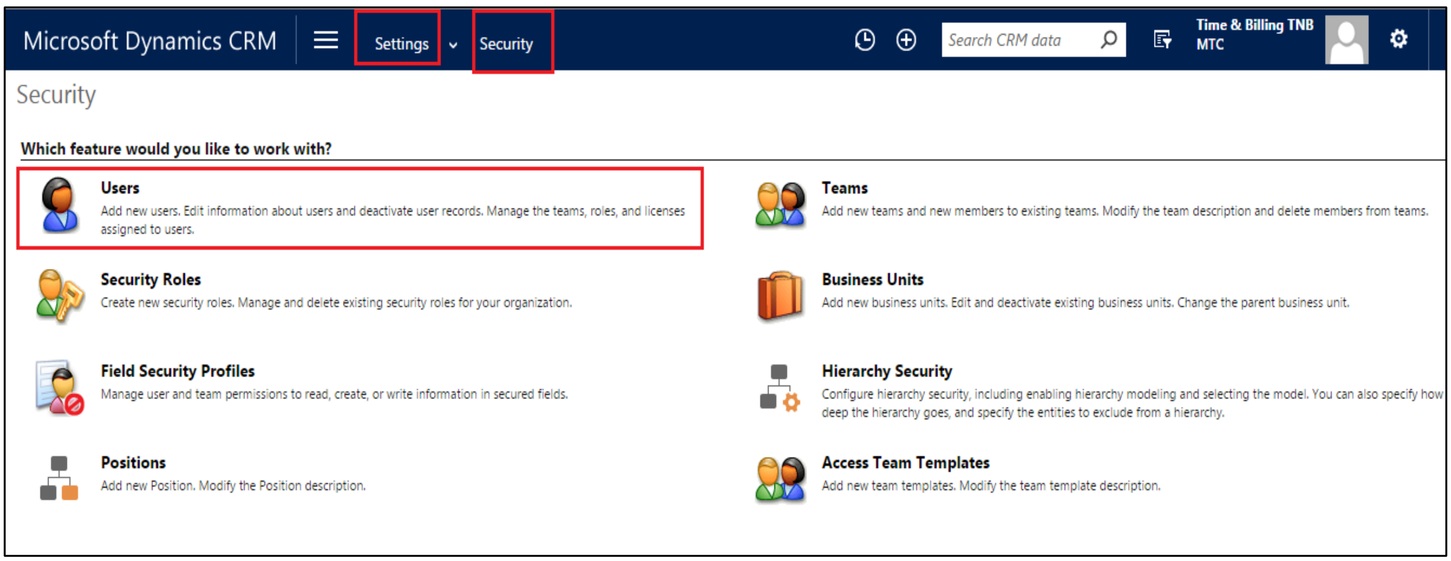


Figure 3: Navigation to Security Roles

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

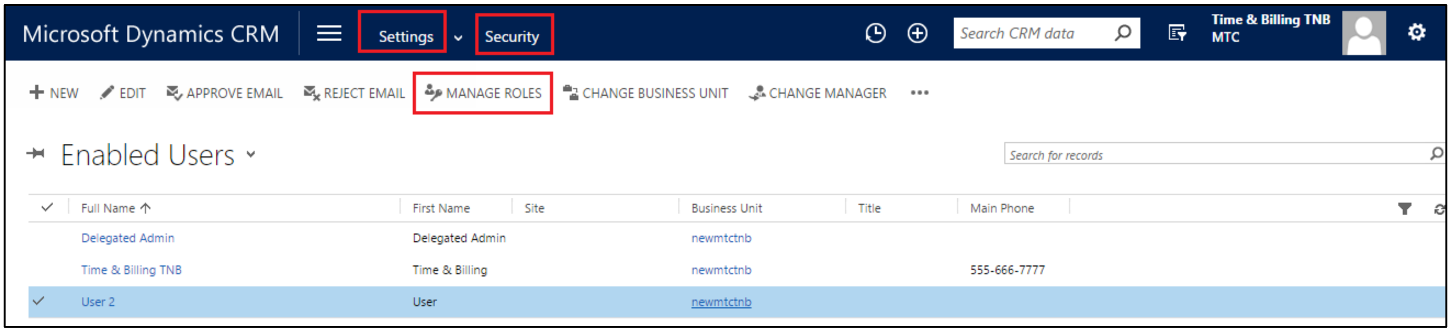


Figure 4: Select the User

- 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.

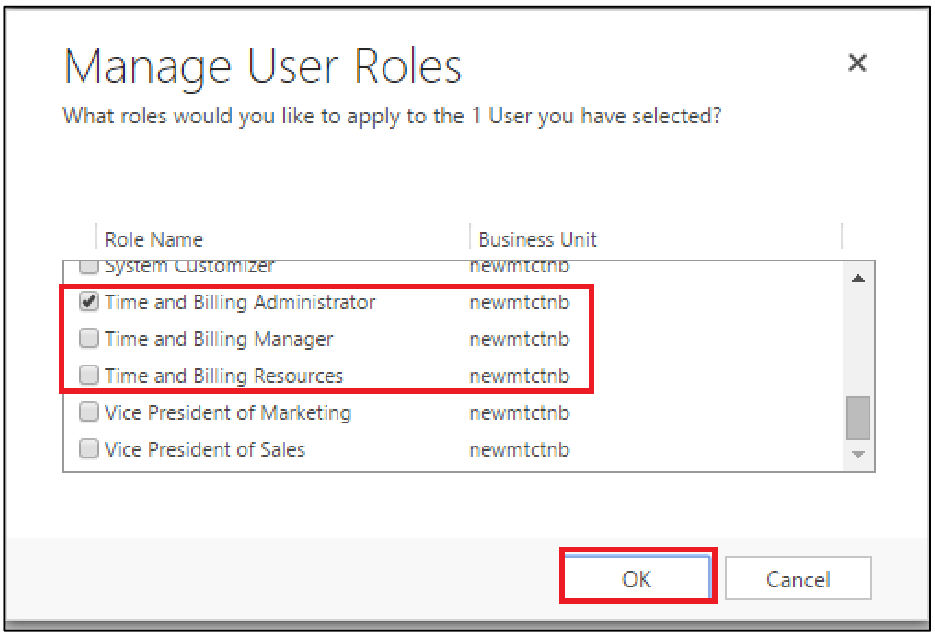


Figure 5: Manage User Roles

- 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

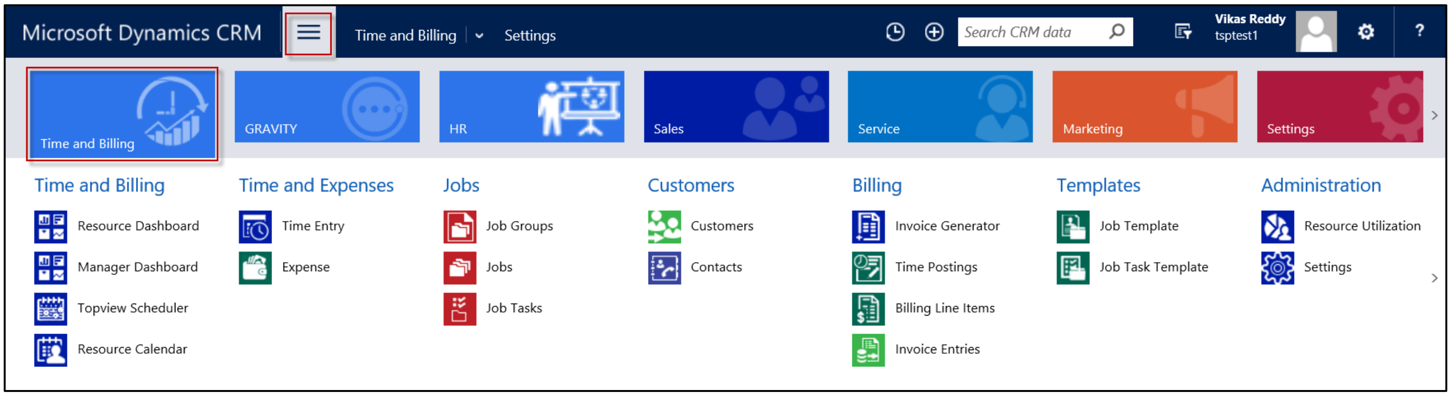


Figure 6: Site Map – Time & Billing

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

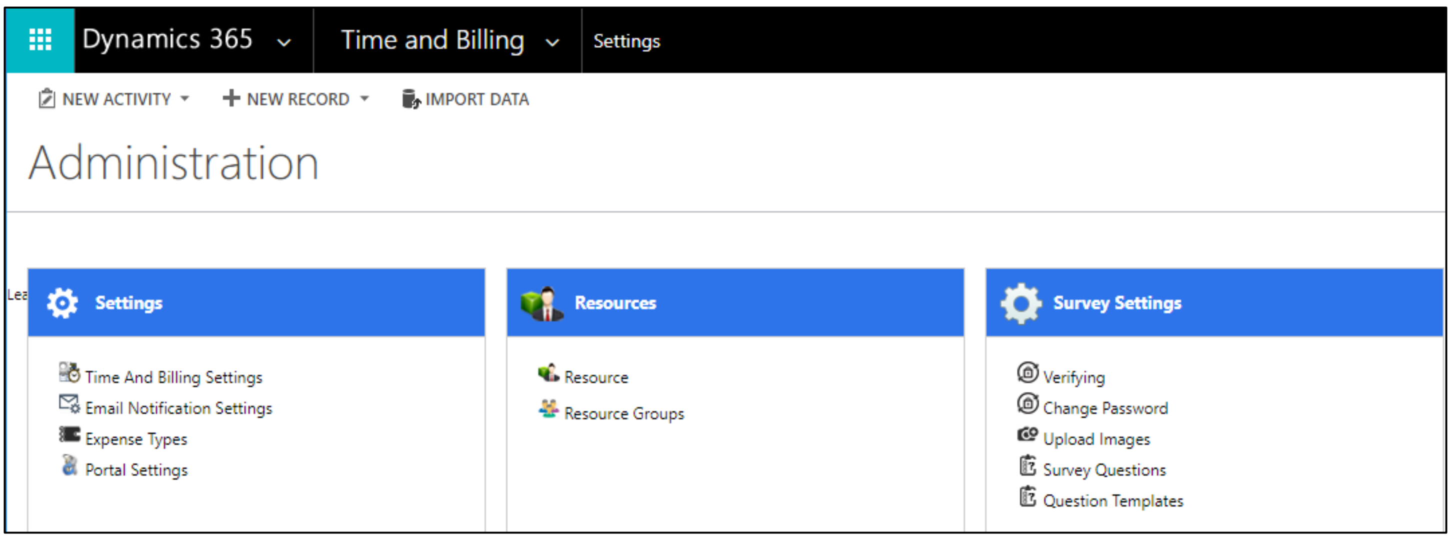


Figure 7: Administration Window

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.

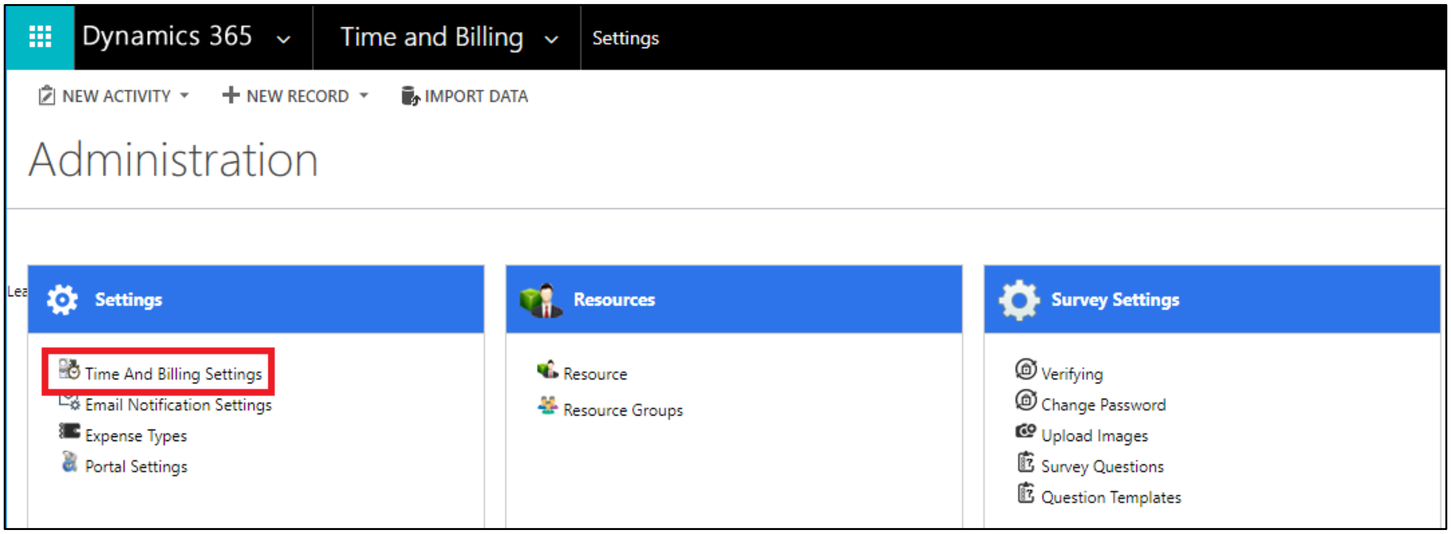


Figure 8: Time and Billing Settings

- 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).

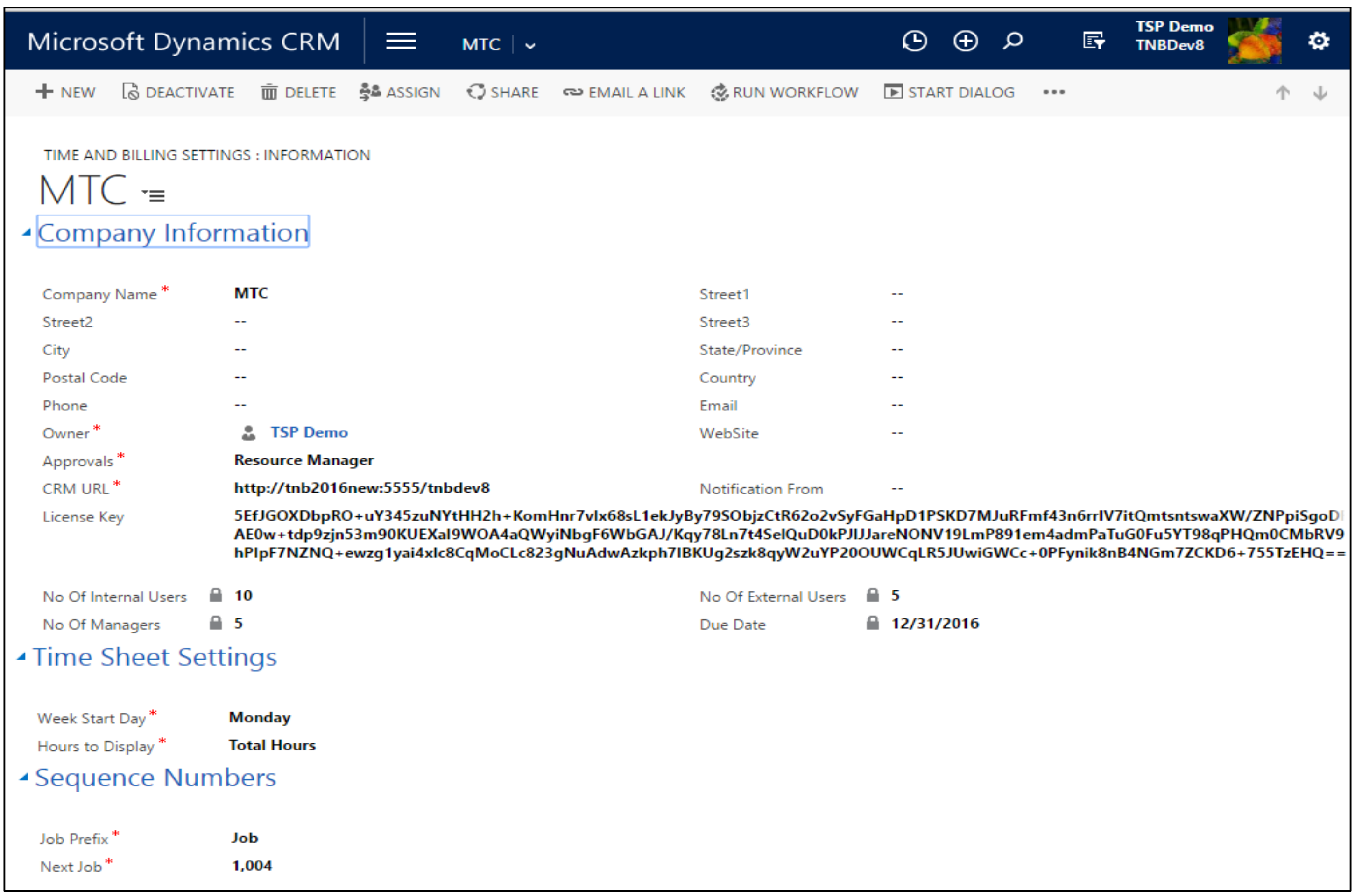


Figure 9: Time and Billing Settings

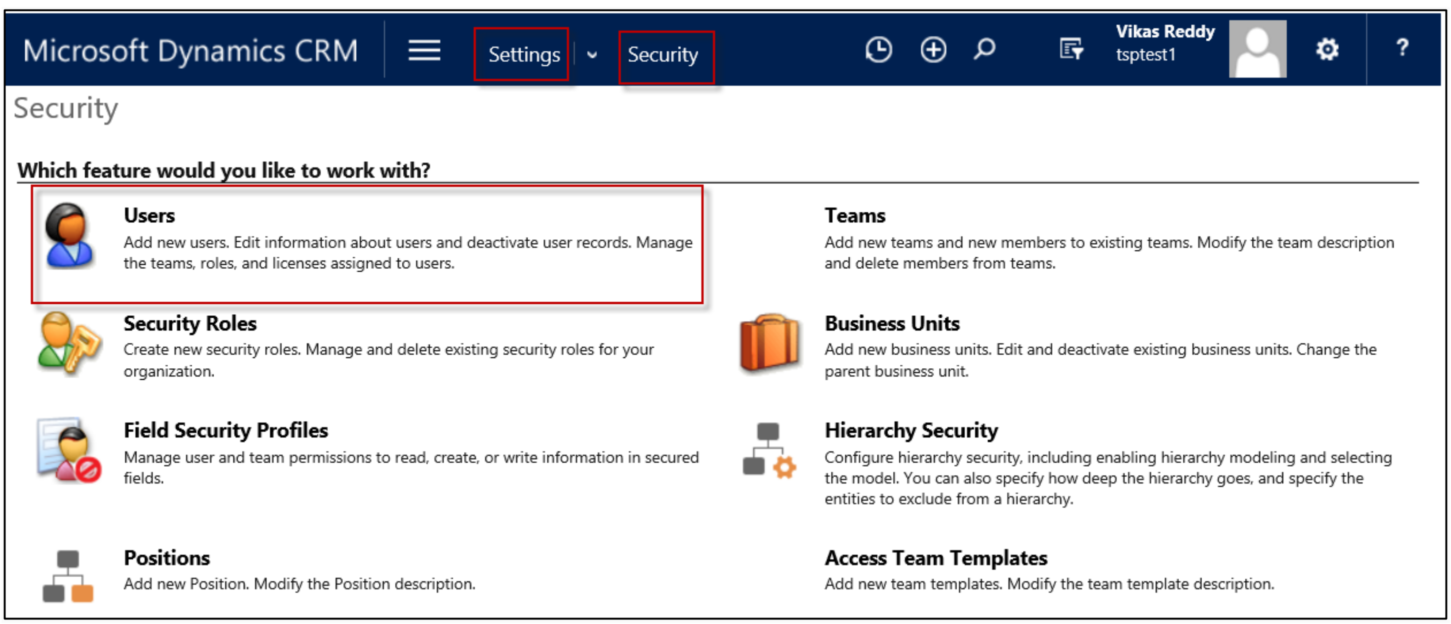
- All Inputs – fields marked with asterisks are mandatory.

- 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.

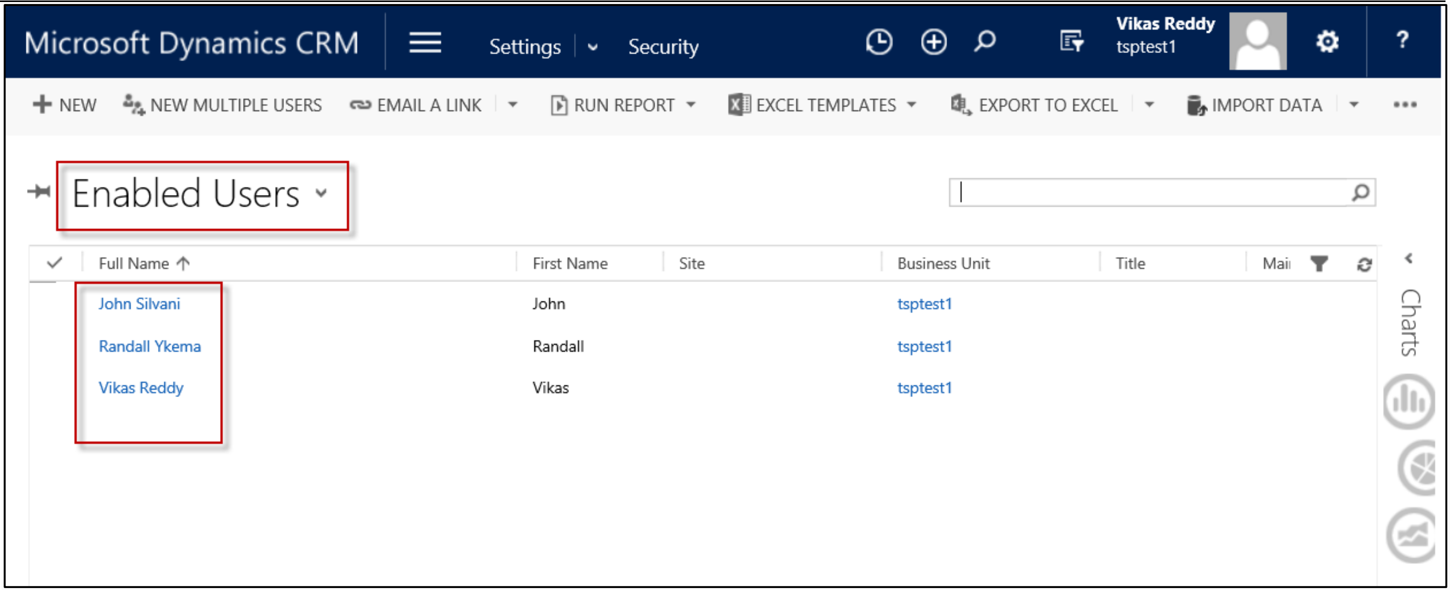
Users

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**



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

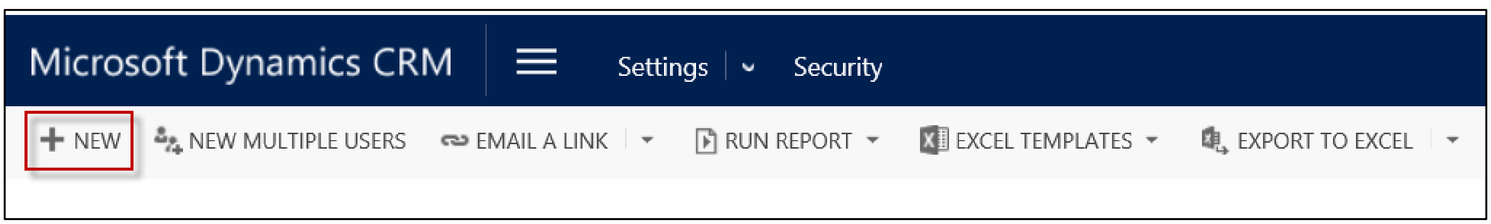


You can manage roles of each user by selecting that user and clicking on **Manage Roles** and follow the process as explained under [Security Role Privileges](#).

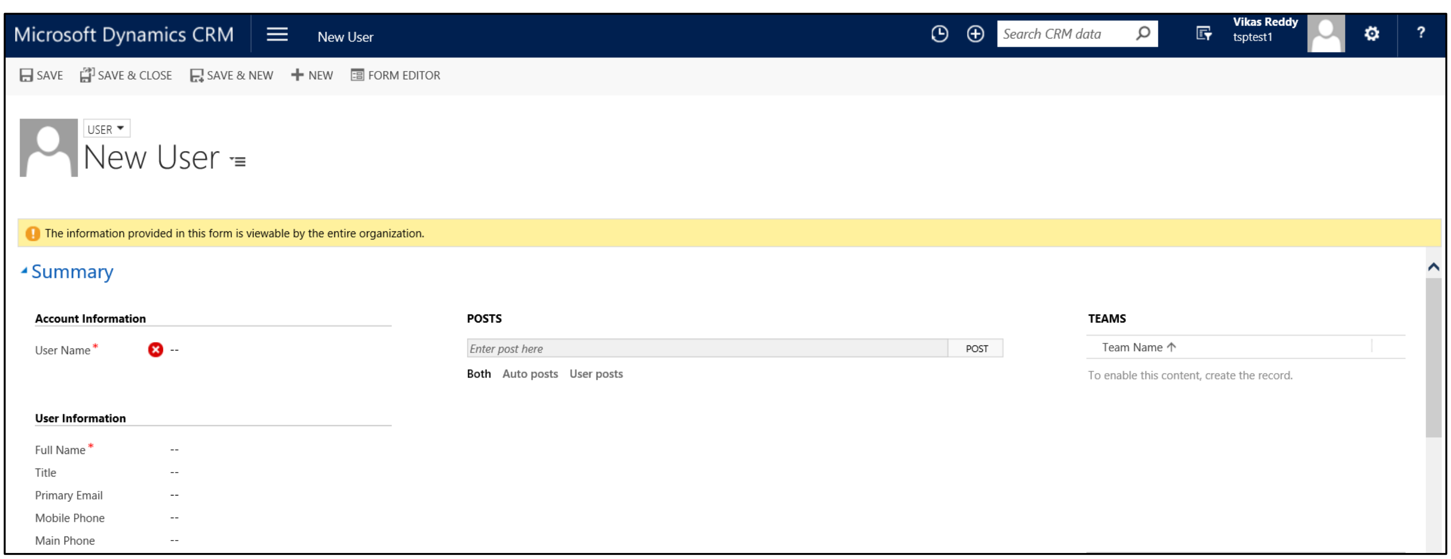
Creating a New User (On-Premise)

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.



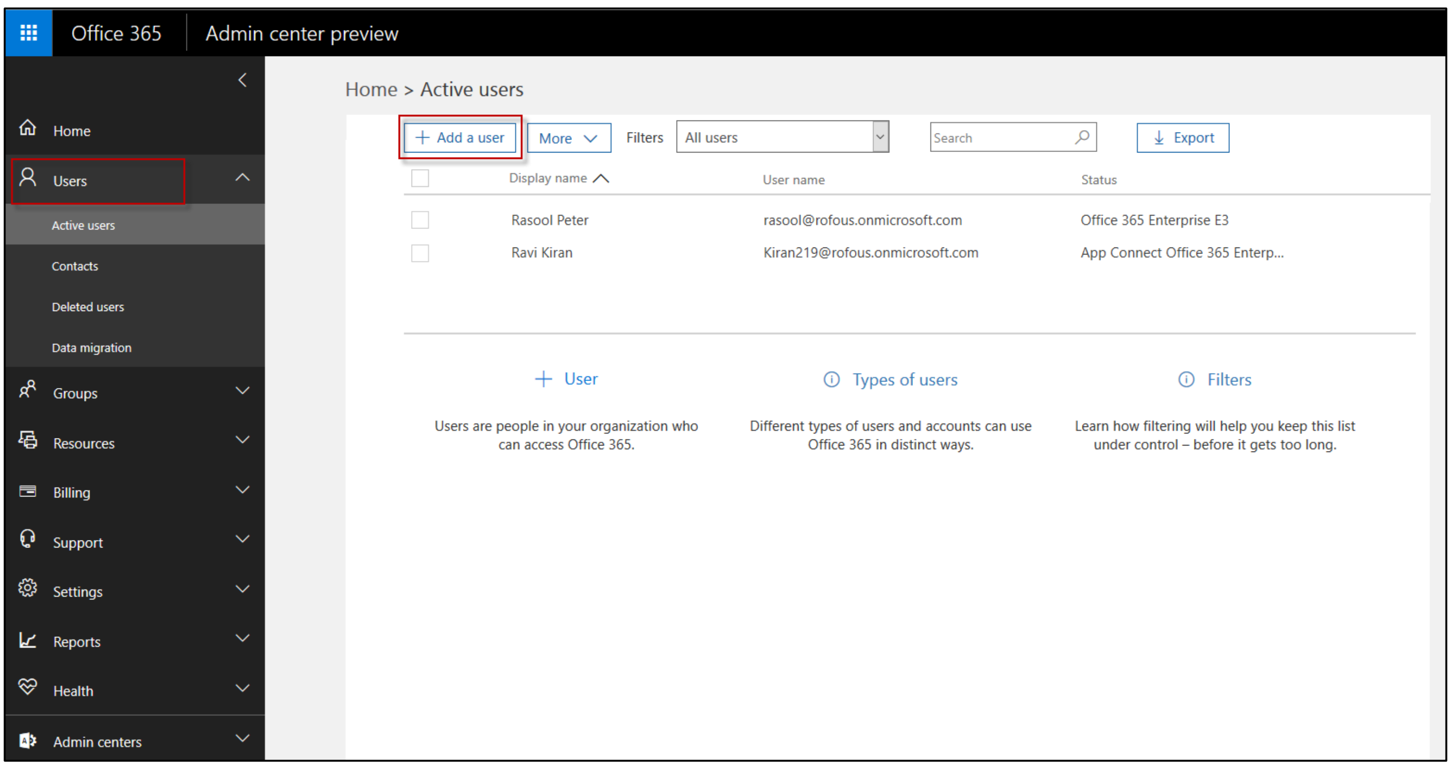
- Input all fields with the right data. Fields marked with asterisk are mandatory.
- Finally, click on Save to reflect the changes.

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.

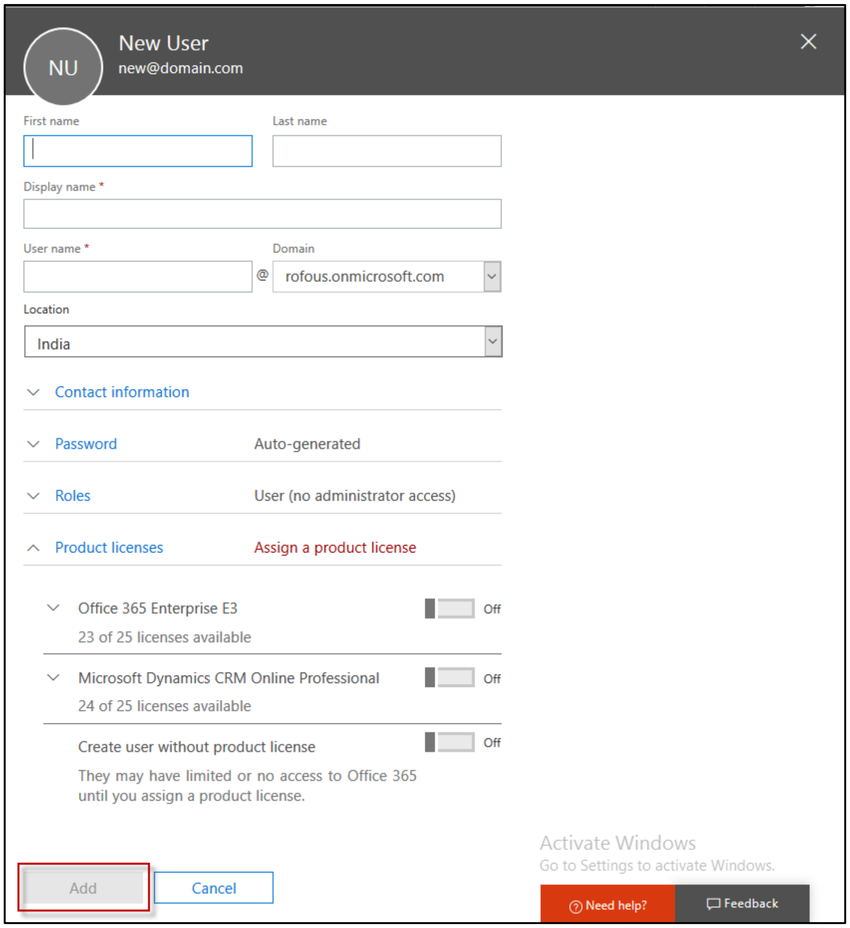
Creating a New User (Online)

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.



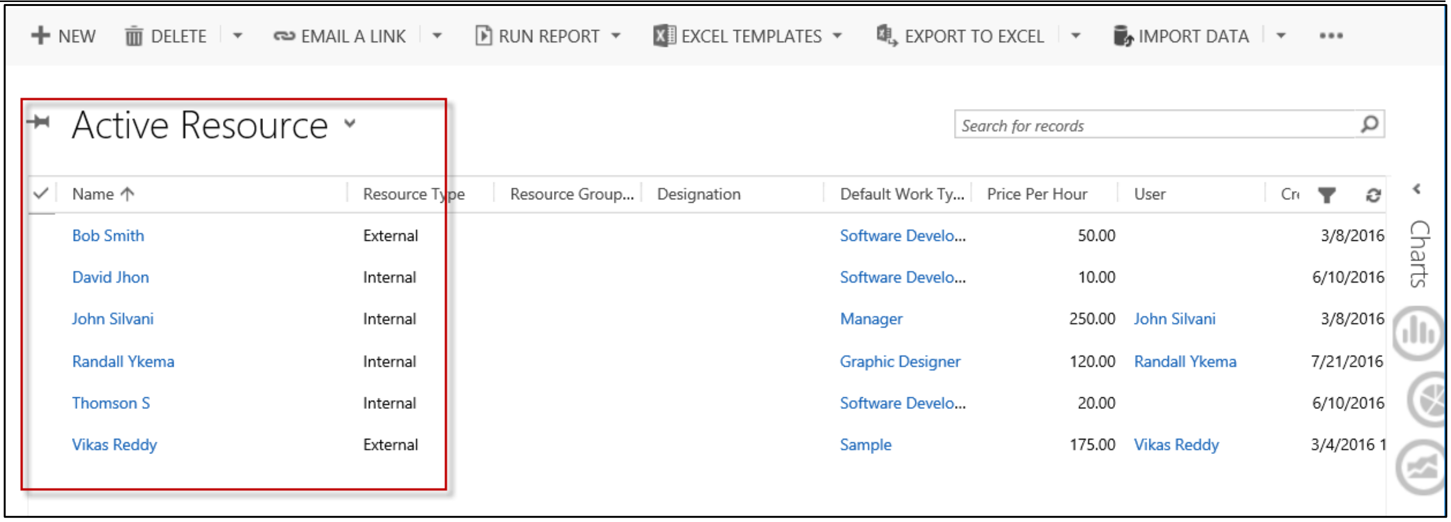
- Fill all the fields required and click on **Add button** to create a new user.



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.



- 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.

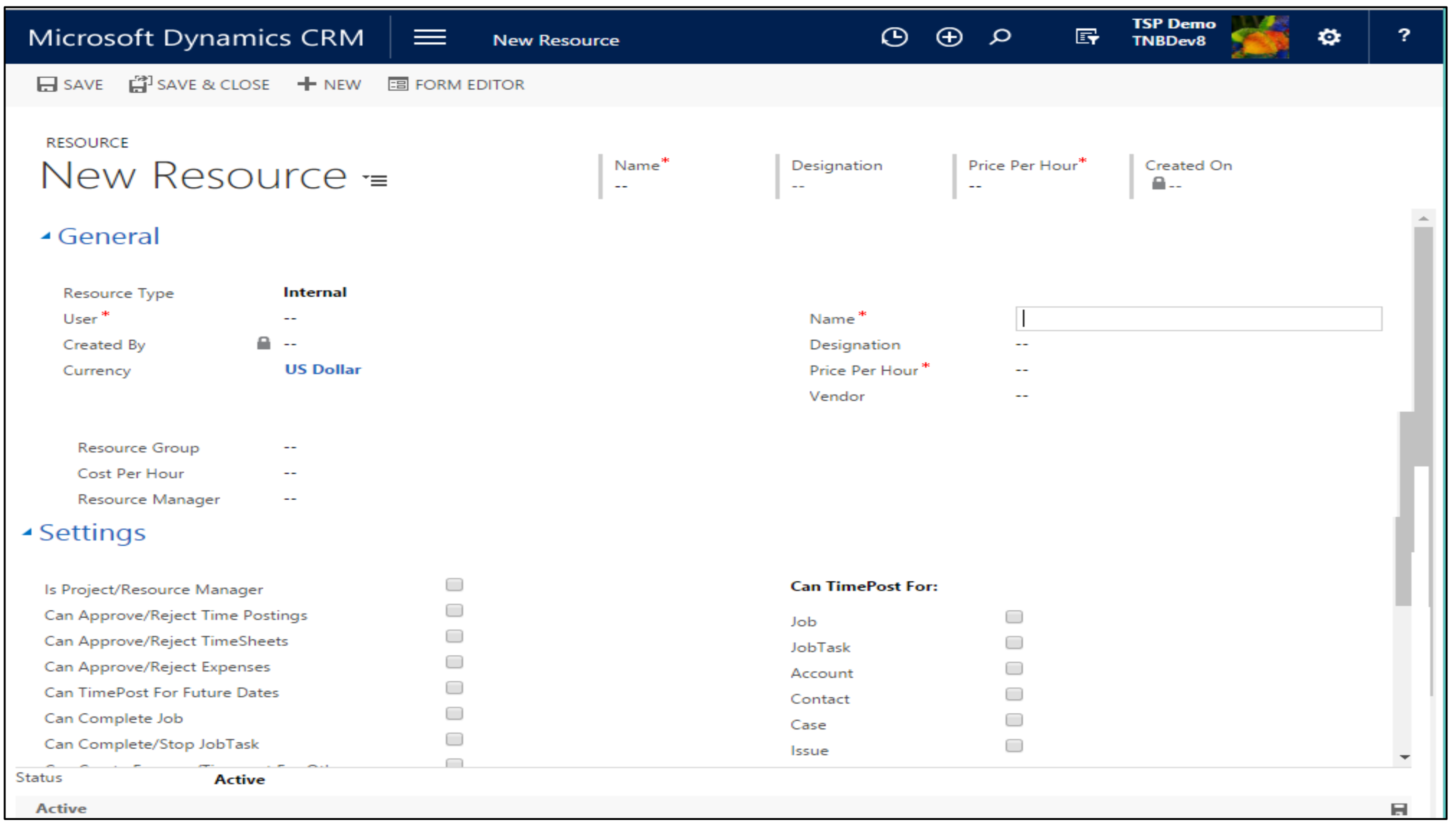


Figure 10: Active Resources form

Fields to be filled while creating a new resource:

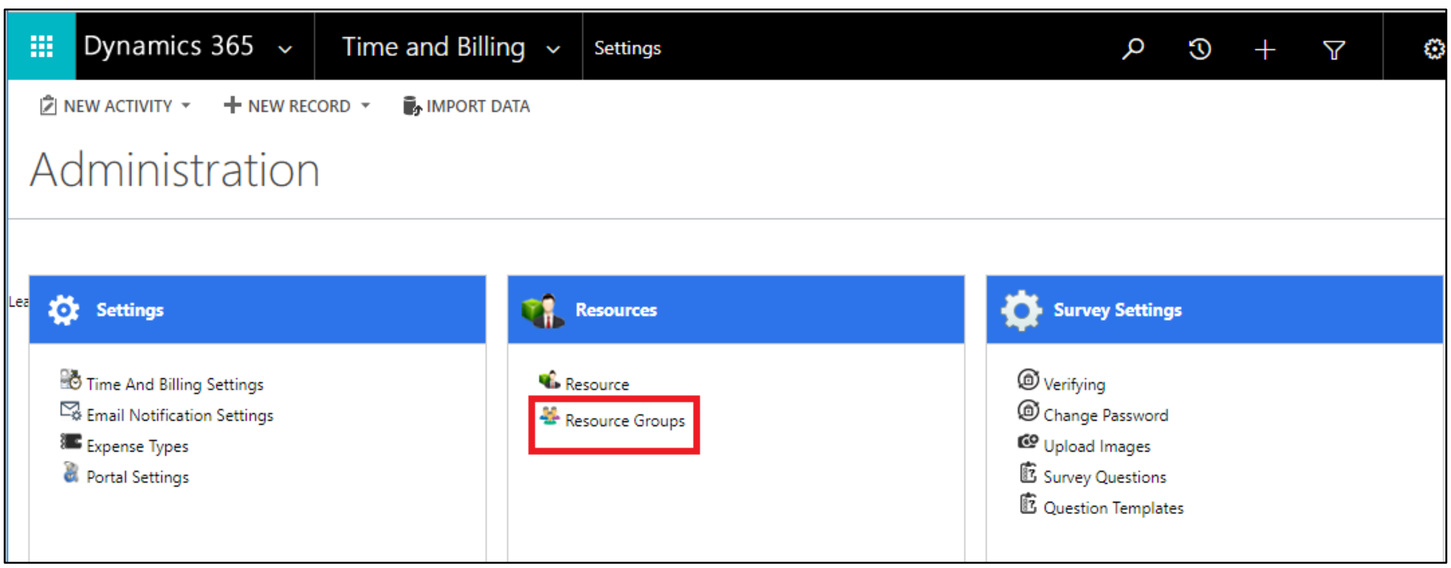
- Resource type has to be set either as Internal or External.
- User has to be picked from the look up search
- Name, Contact, Designation, Price Per Hour and Vendor has to be filled.
- Default Work Type, Resource Group, Cost Per Hour and Resource Manager has to be set.
- Resource can be selected as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

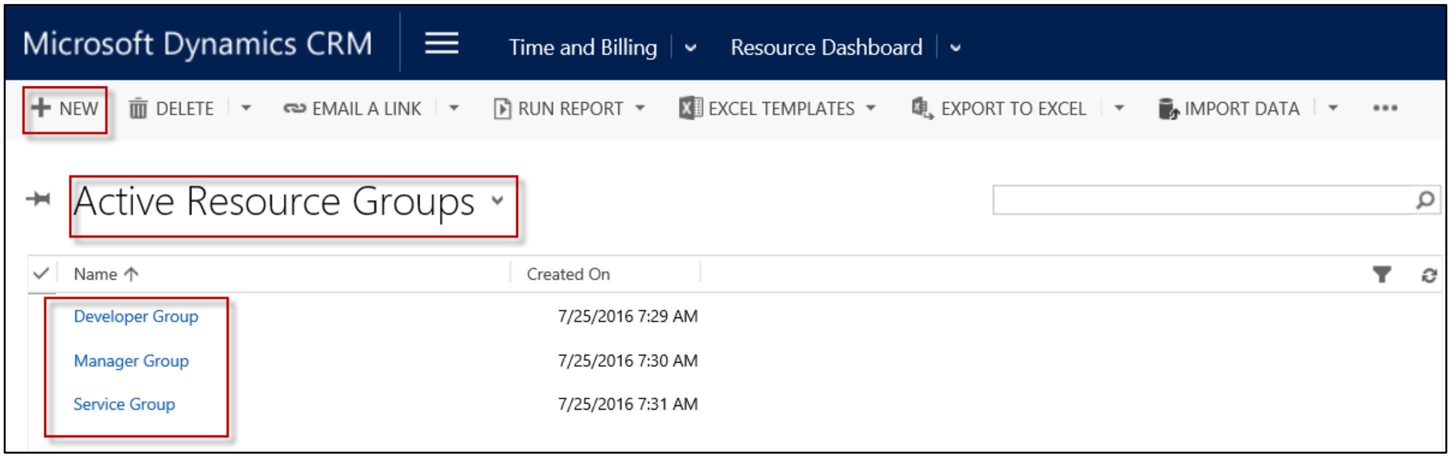


Figure 11: Resource Group showing active groups

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

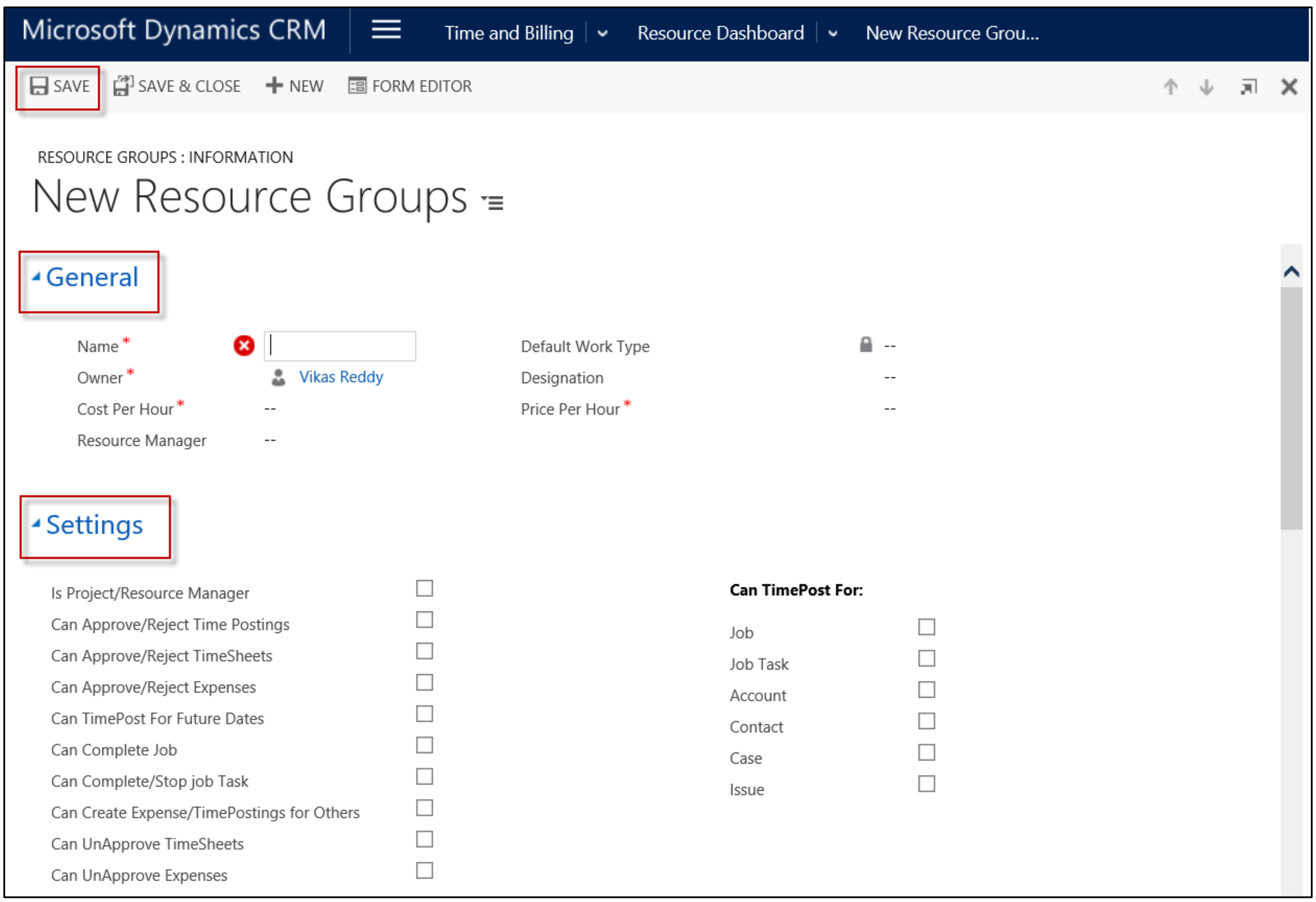


Figure 12: Resource Group Form

- 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

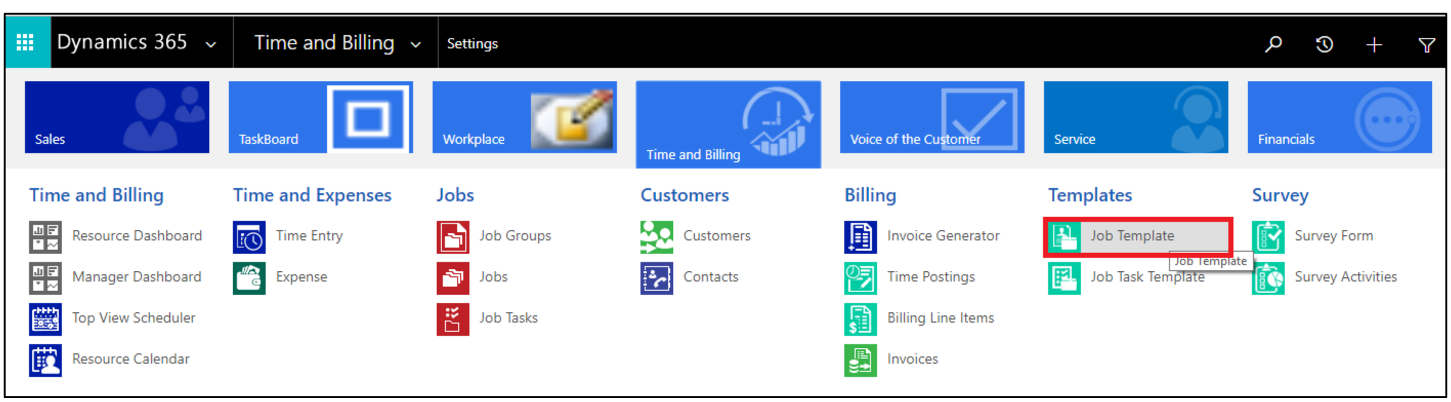
  Can Time Post for:

    - 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.

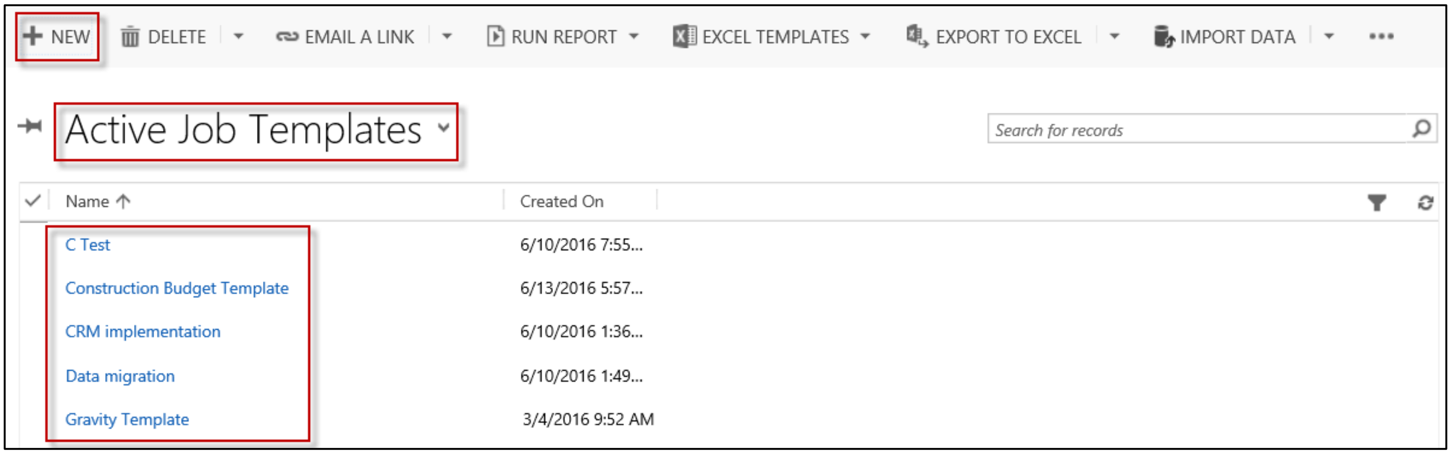
Job Template

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**

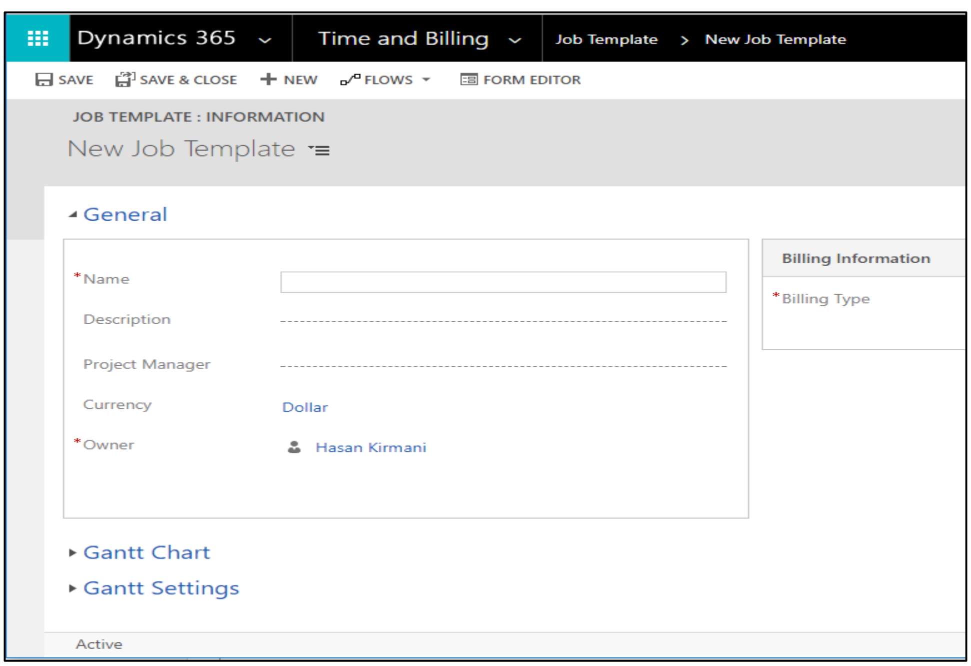


- Click on Job Template. You can see the list of Active Job Templates if there are any.
- To create a new Job Template, click on +NEW button on the ribbon.



- 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.**



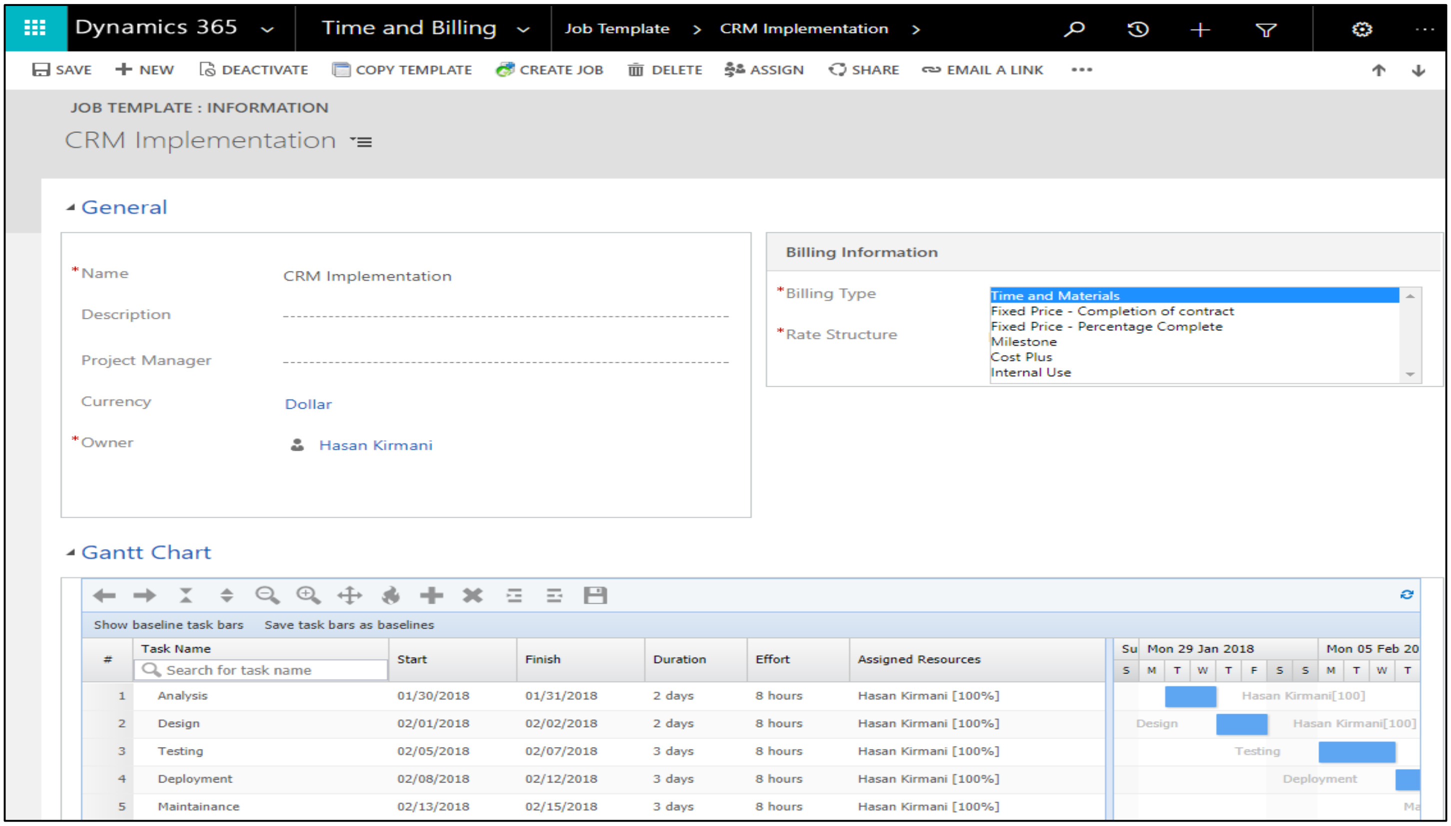


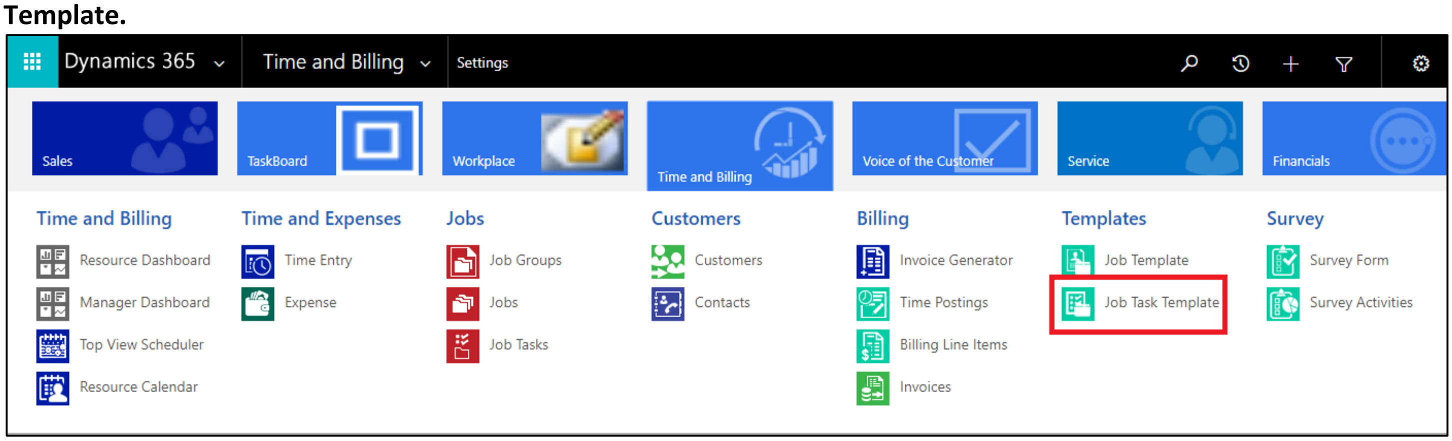
Figure 13: Job Template entry form

Job Task Template

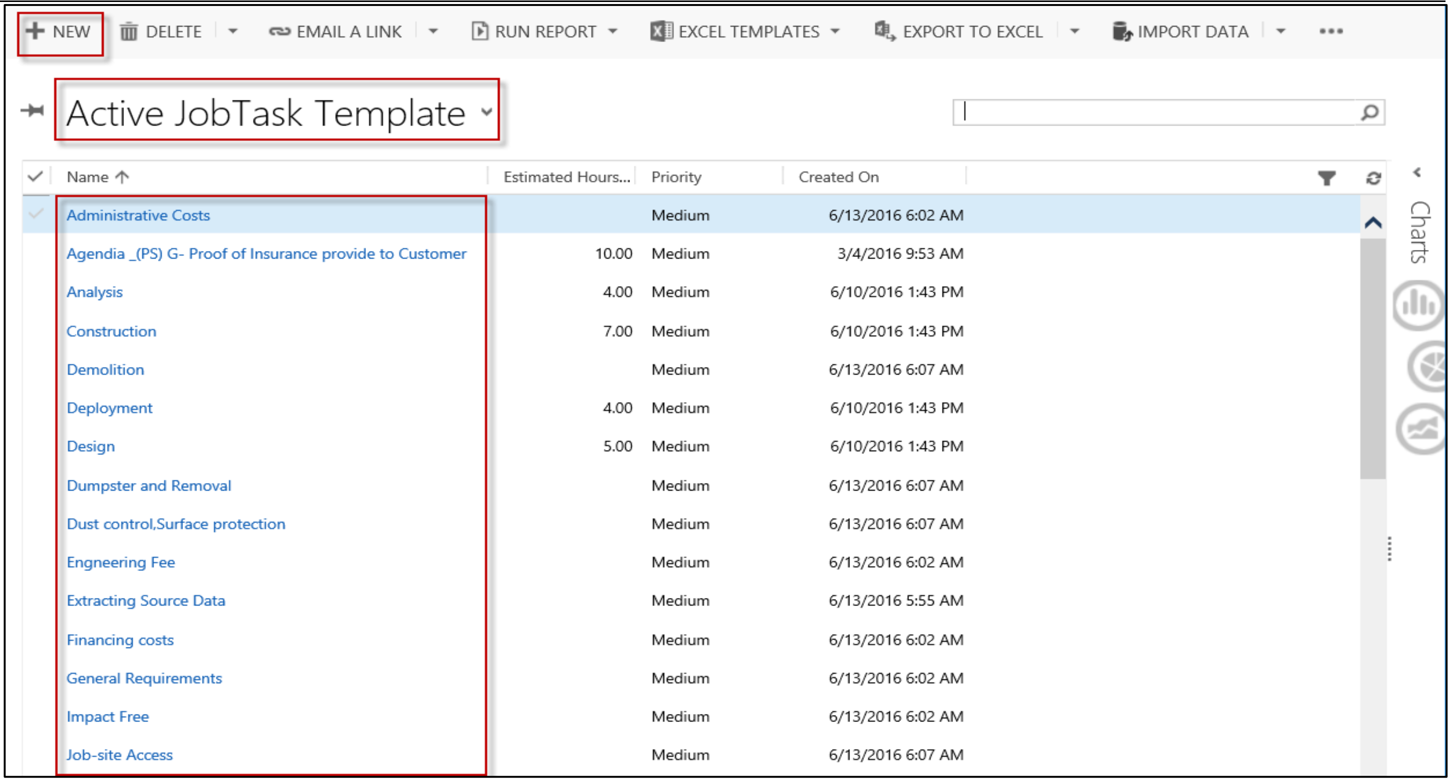
A Job Task Template is a form which bears important information such as Task Name, Owner Name, Job Template to which it is linked, Priority and Estimated Hours among others. Like Job Template, Job Task Template is also created with the view to eliminate the process of creating additional job task templates 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.**

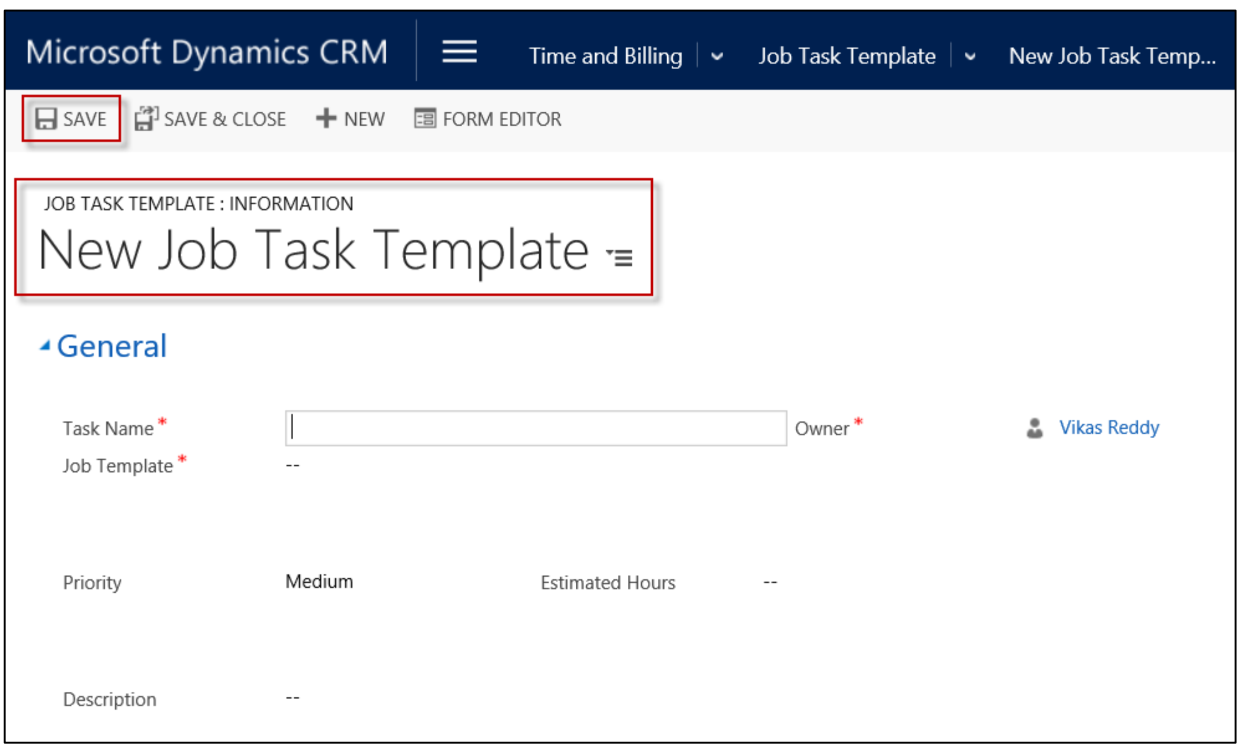
Alternatively, you can also view Job Task Template by following the navigation: **Time & Billing →Templates→Job Task Template.**



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



- 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.



- 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.

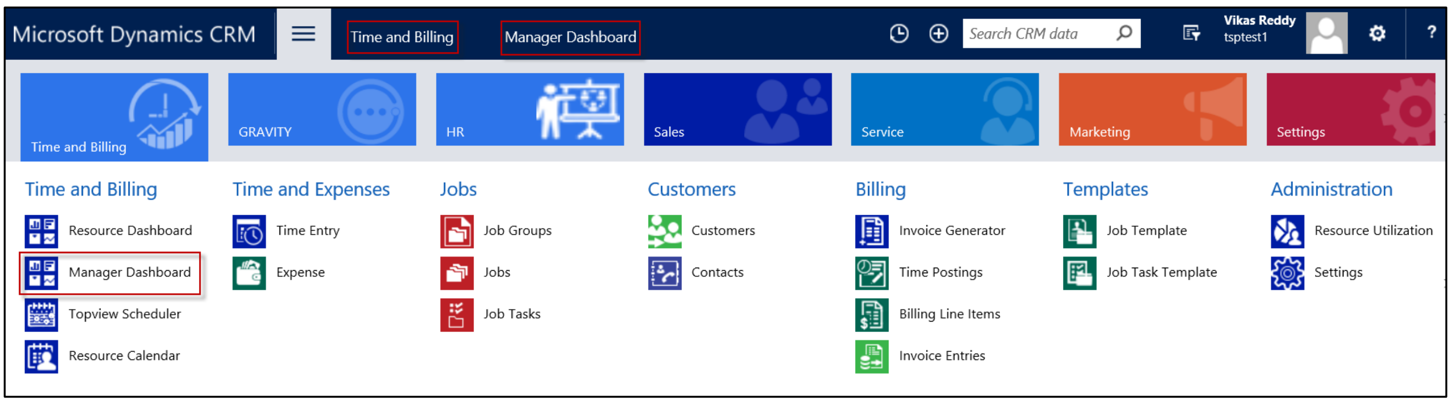
Dashboards

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.**

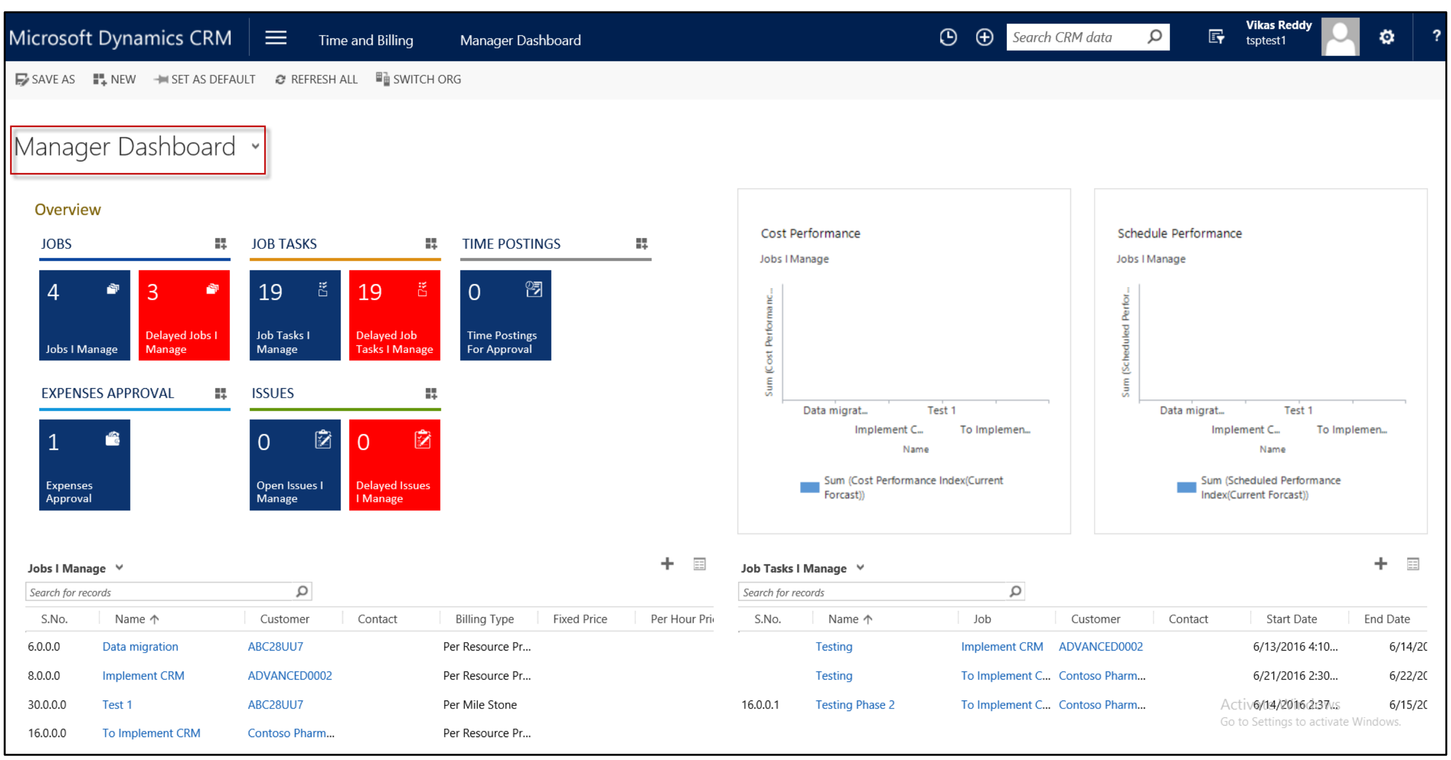
Manager Dashboard

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.”

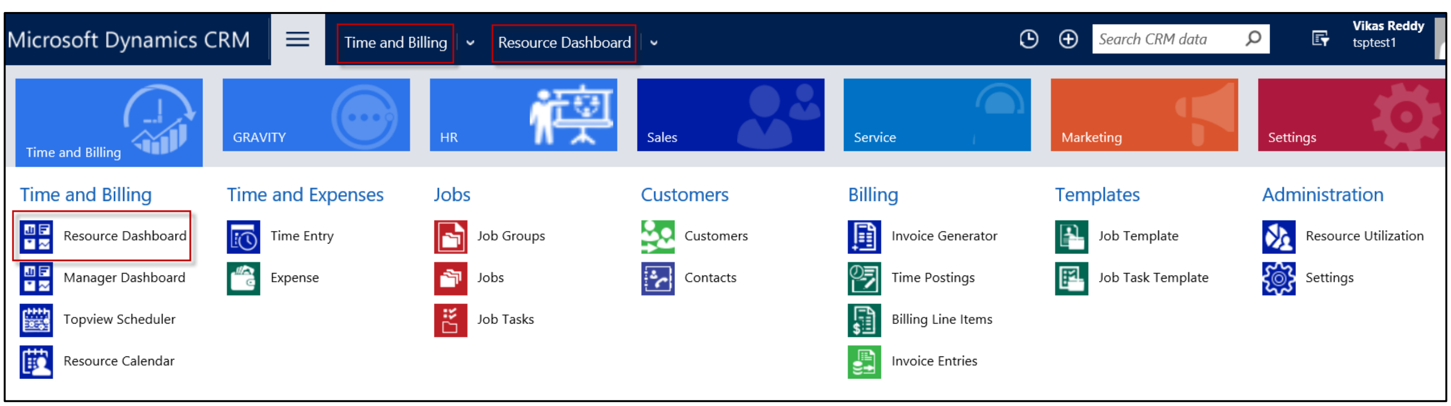
- **Open Issues I Manage** refers to the ongoing issues that a Manager is involved in and the number on it gives the idea of the total number of such issues.
- **Delayed Issues I Manage** refers to the issues that are overdue and which needs Manager’s immediate attention. The number on it gives the idea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

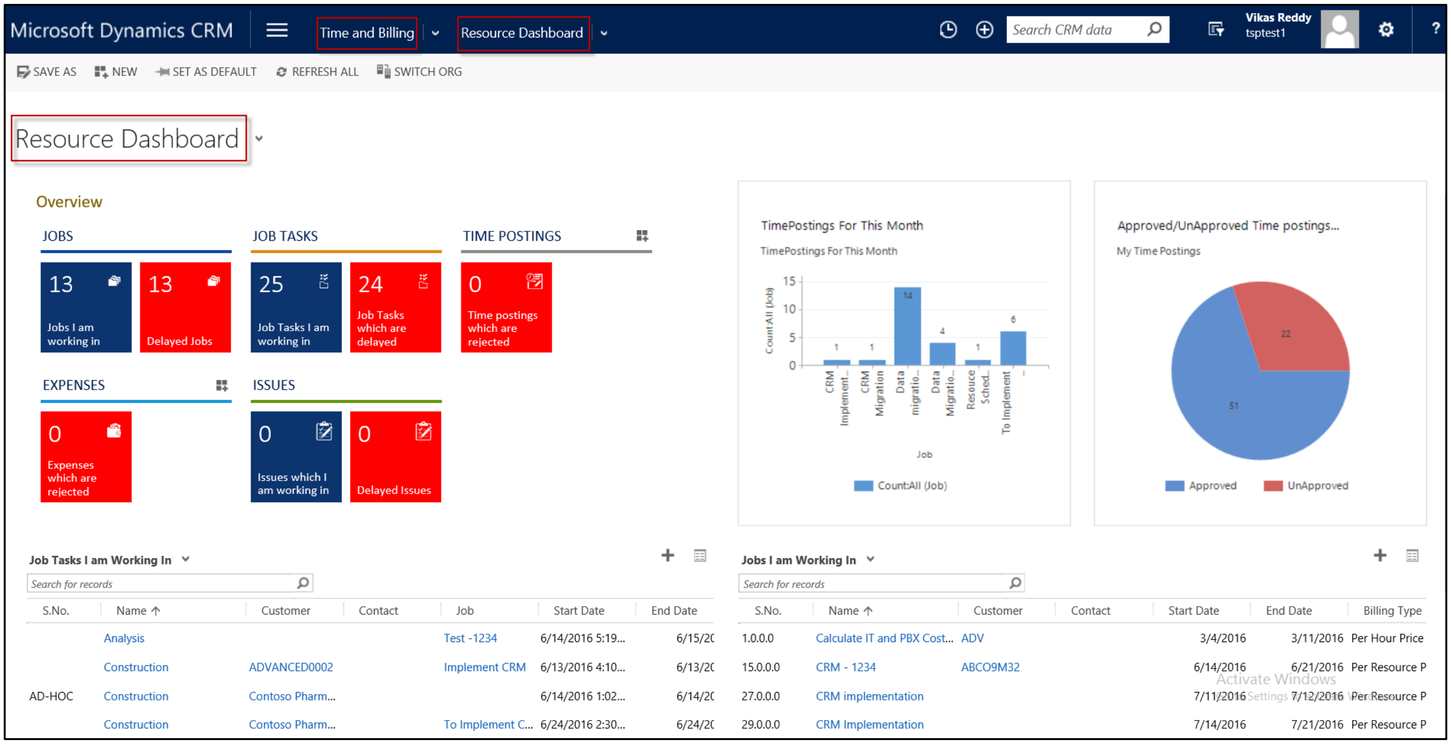
Resource Dashboard

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.**



- 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.



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.

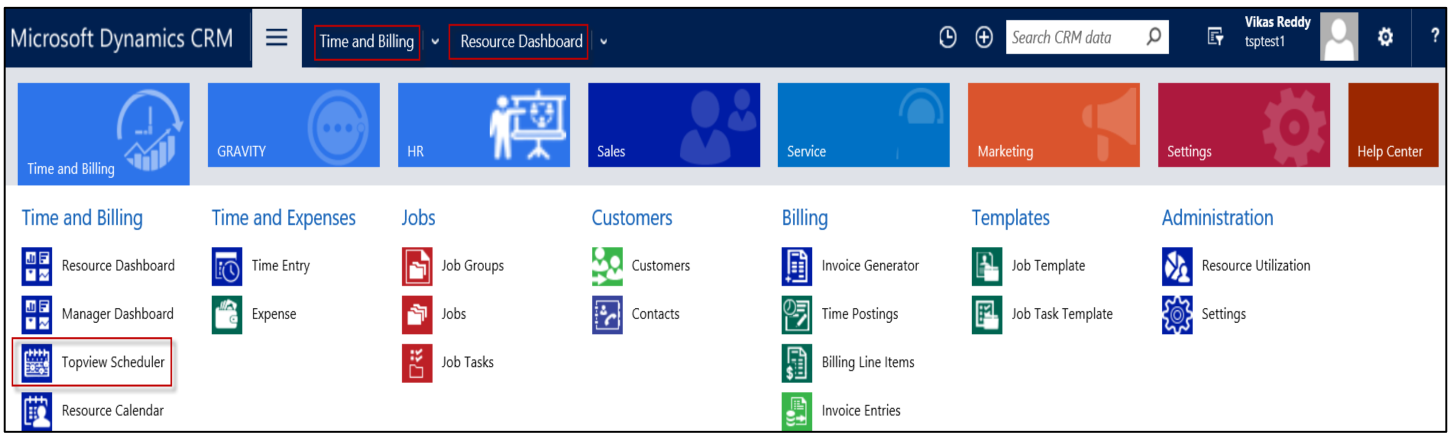
- **Delayed Issues** refers to the issues that are overdue and which needs resource's immediate attention. The number on it gives the idea of total number of such issues.

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.

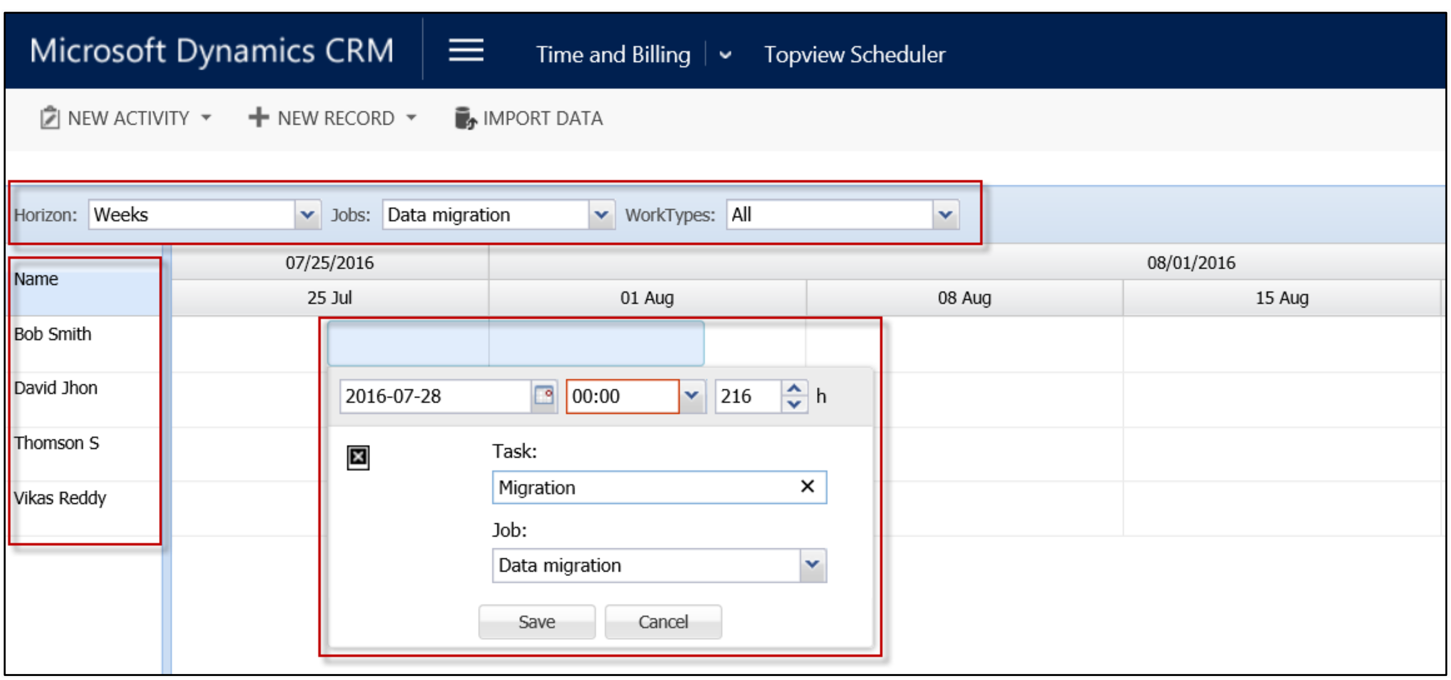
Top View Scheduler

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.

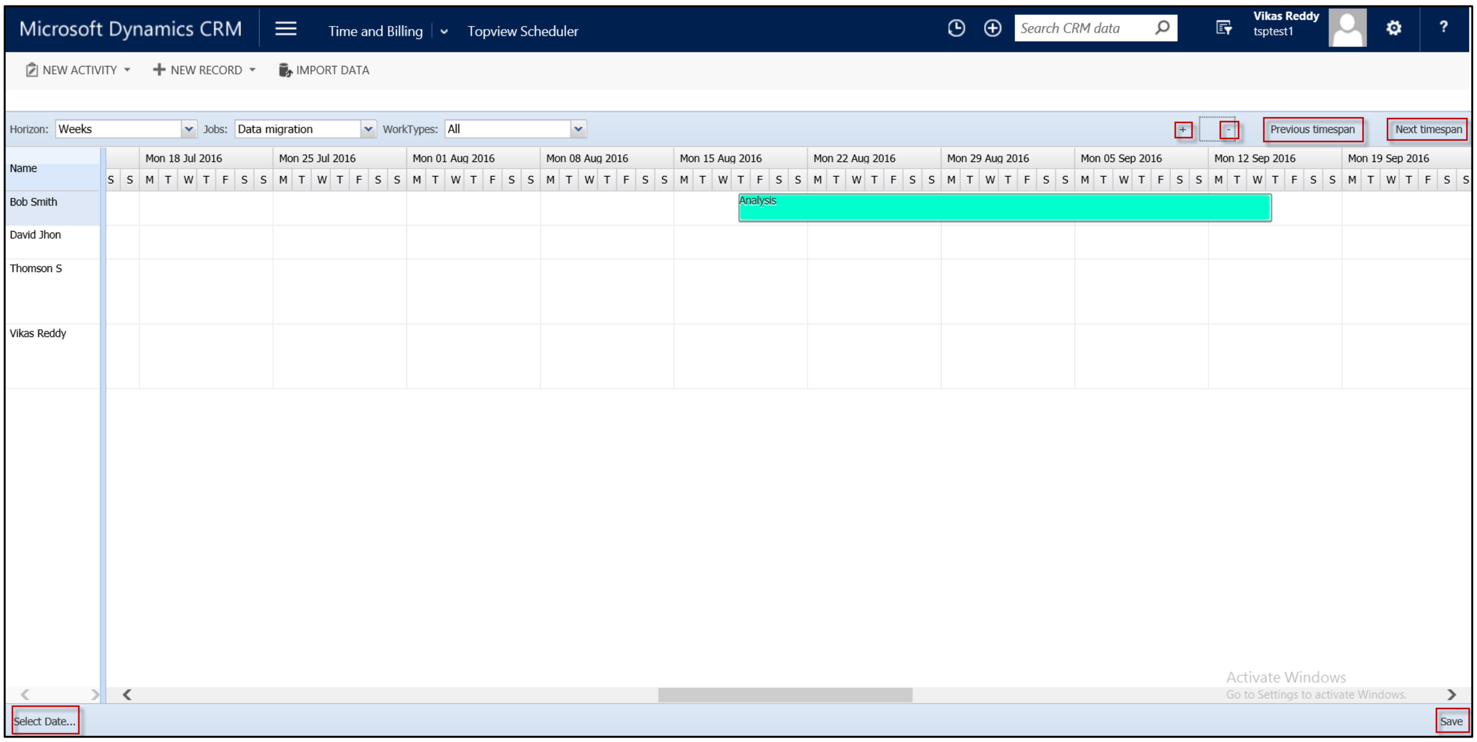
To view Top View Scheduler, follow the navigation: **Time & Billing → Top View Scheduler.**



- 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.



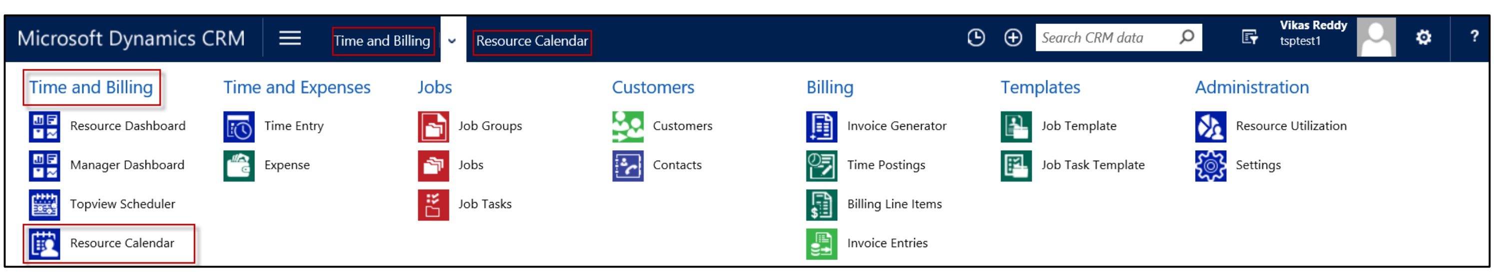
- Finally, click on Save button to register the edits. There is also a Select Date button on the bottom left side of the screen which allows you to navigate to a particular date.

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.



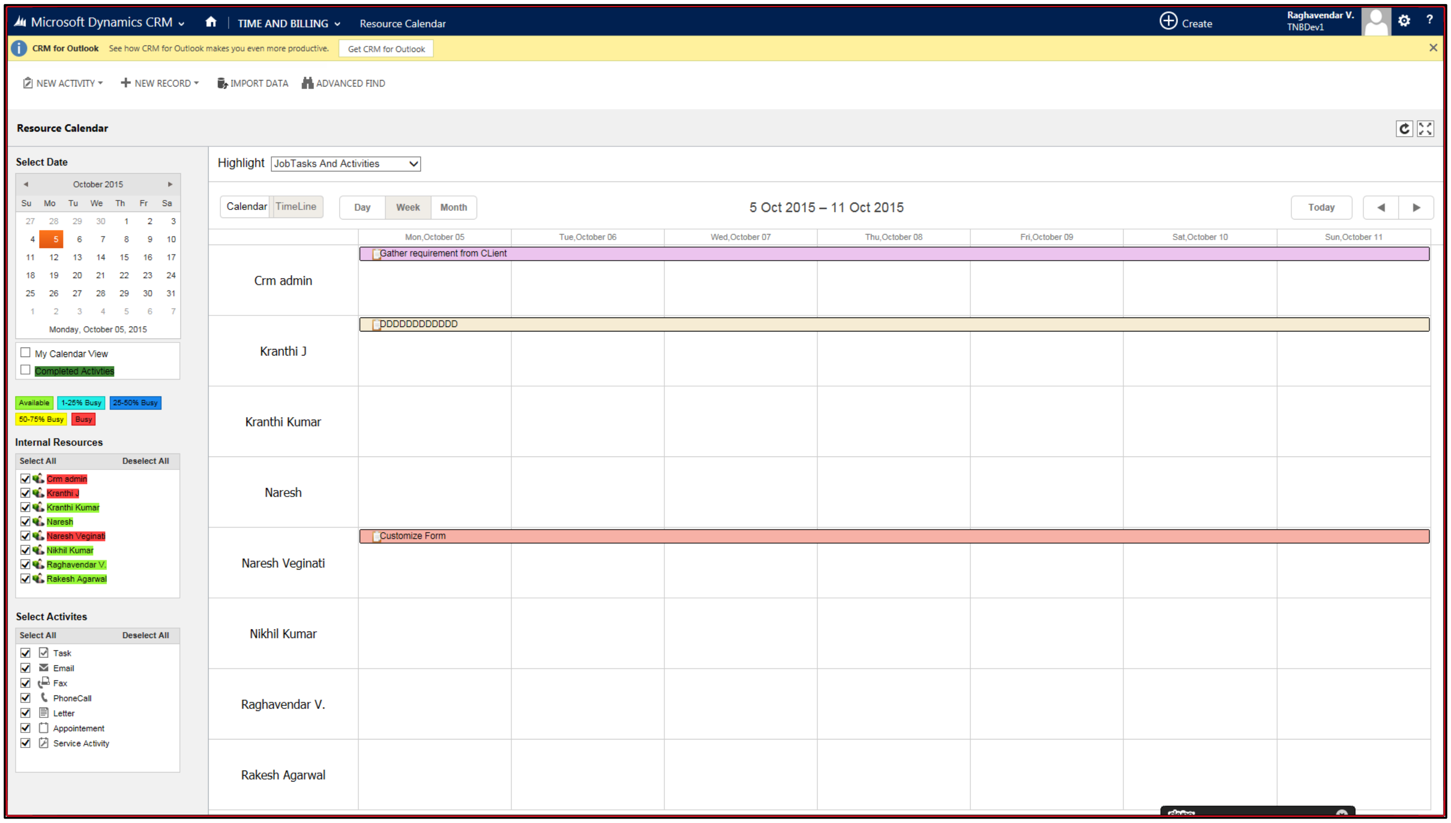


Figure 14: Calendar View

- 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

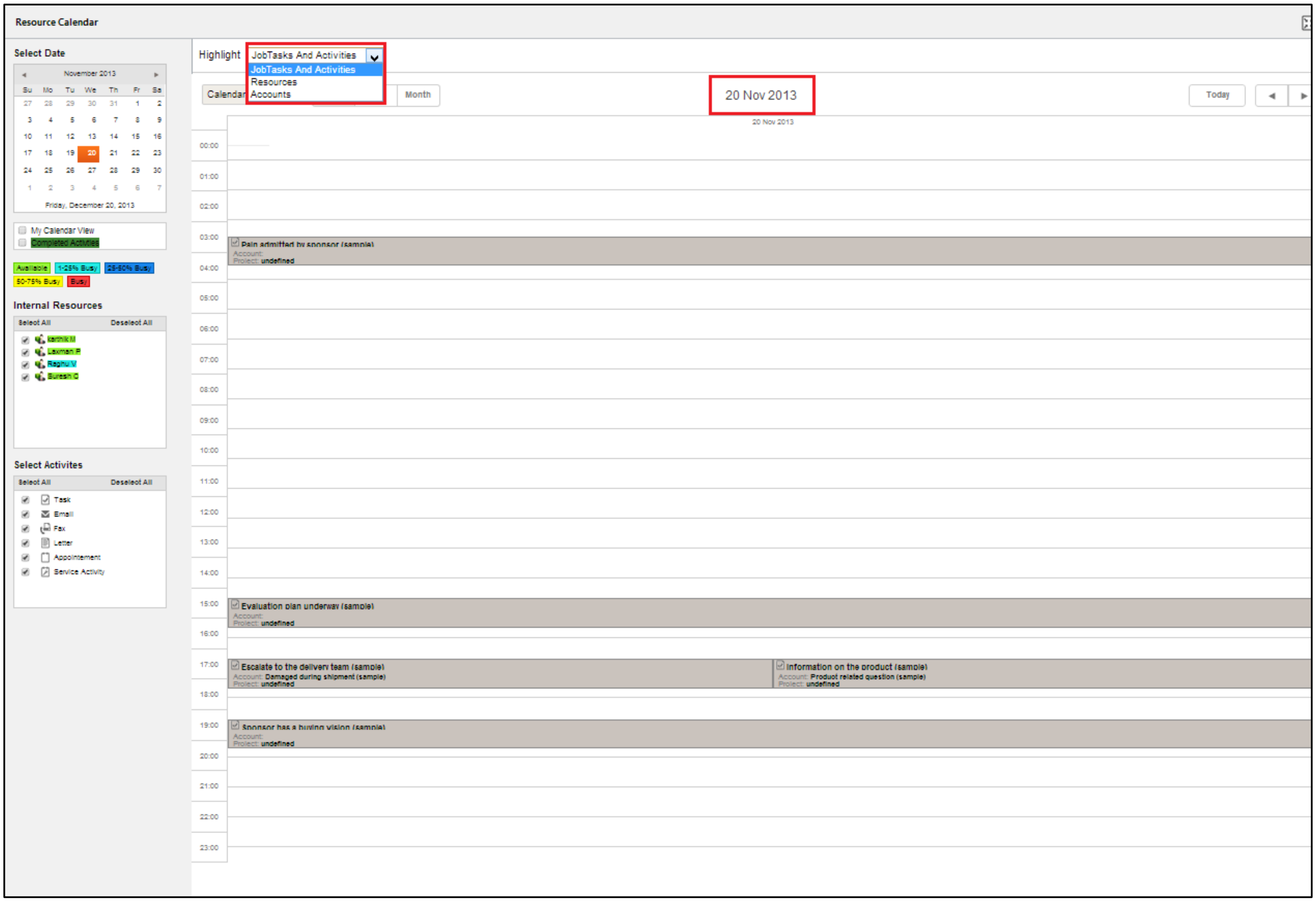


Figure 15: Calendar View - Day Wise

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

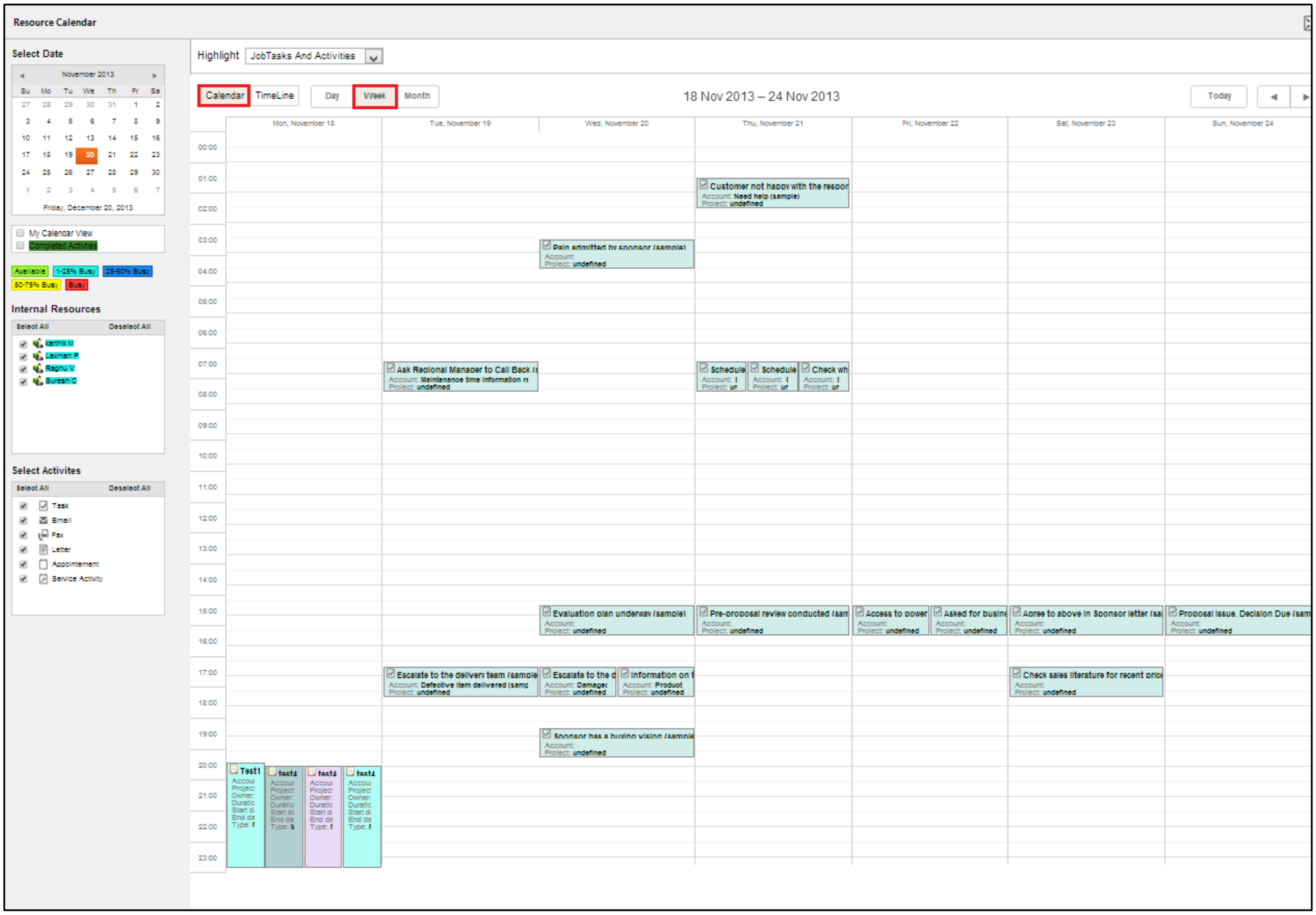


Figure 16: Calendar View - Week Wise

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

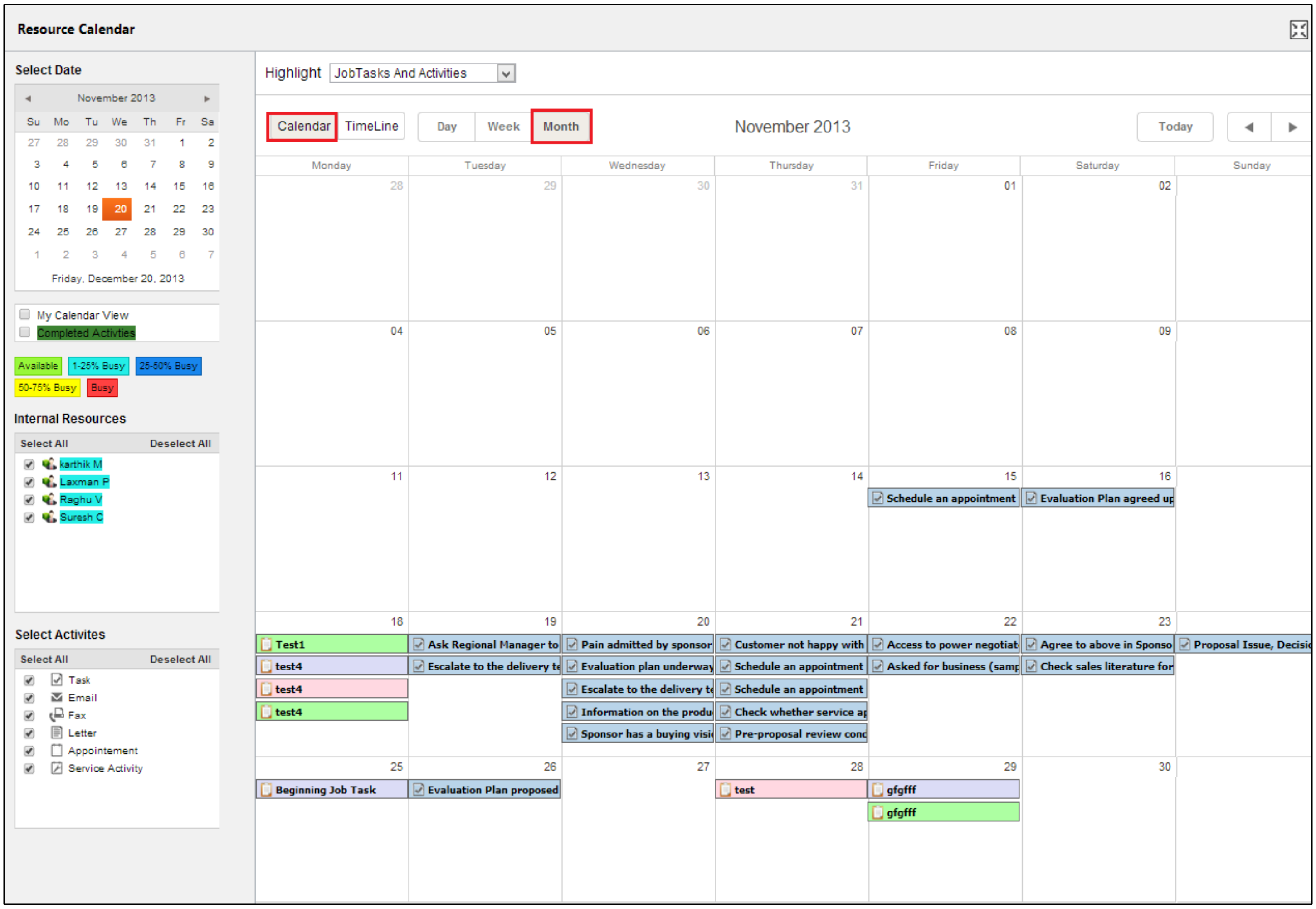


Figure 17: Calendar View - Month Wise

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.

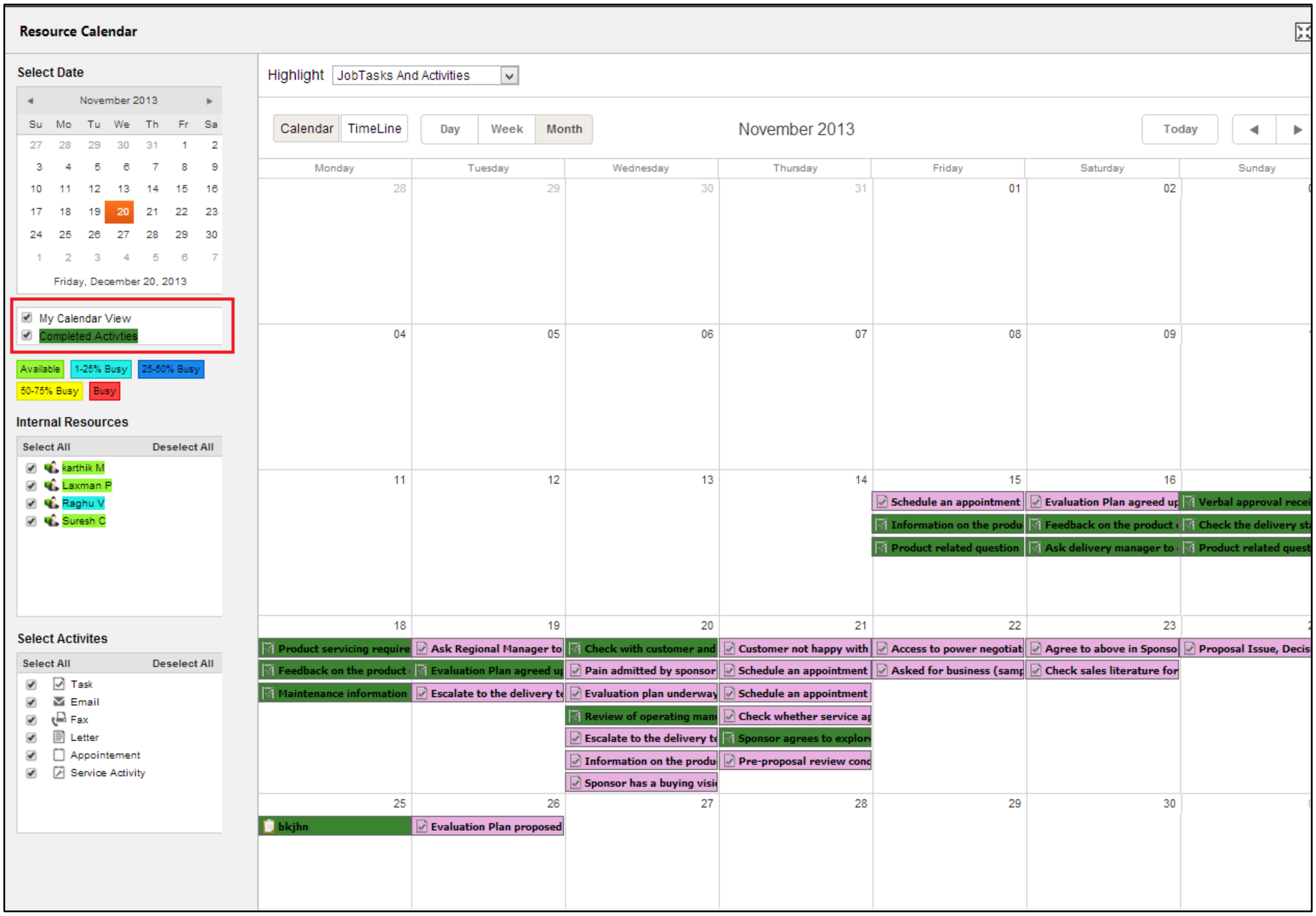


Figure 18: My Calendar & Completed View

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.

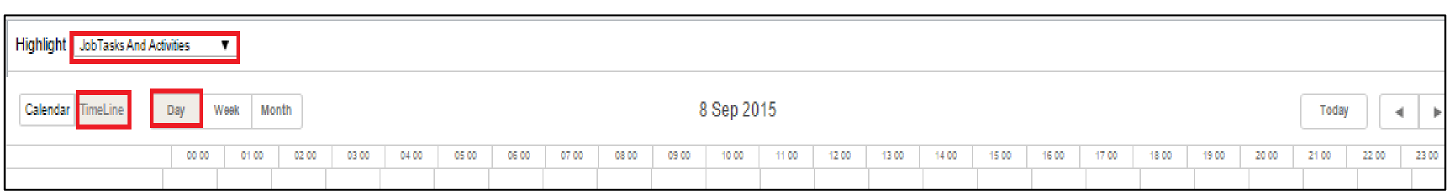


Figure 19: Time Line View - Hourly display

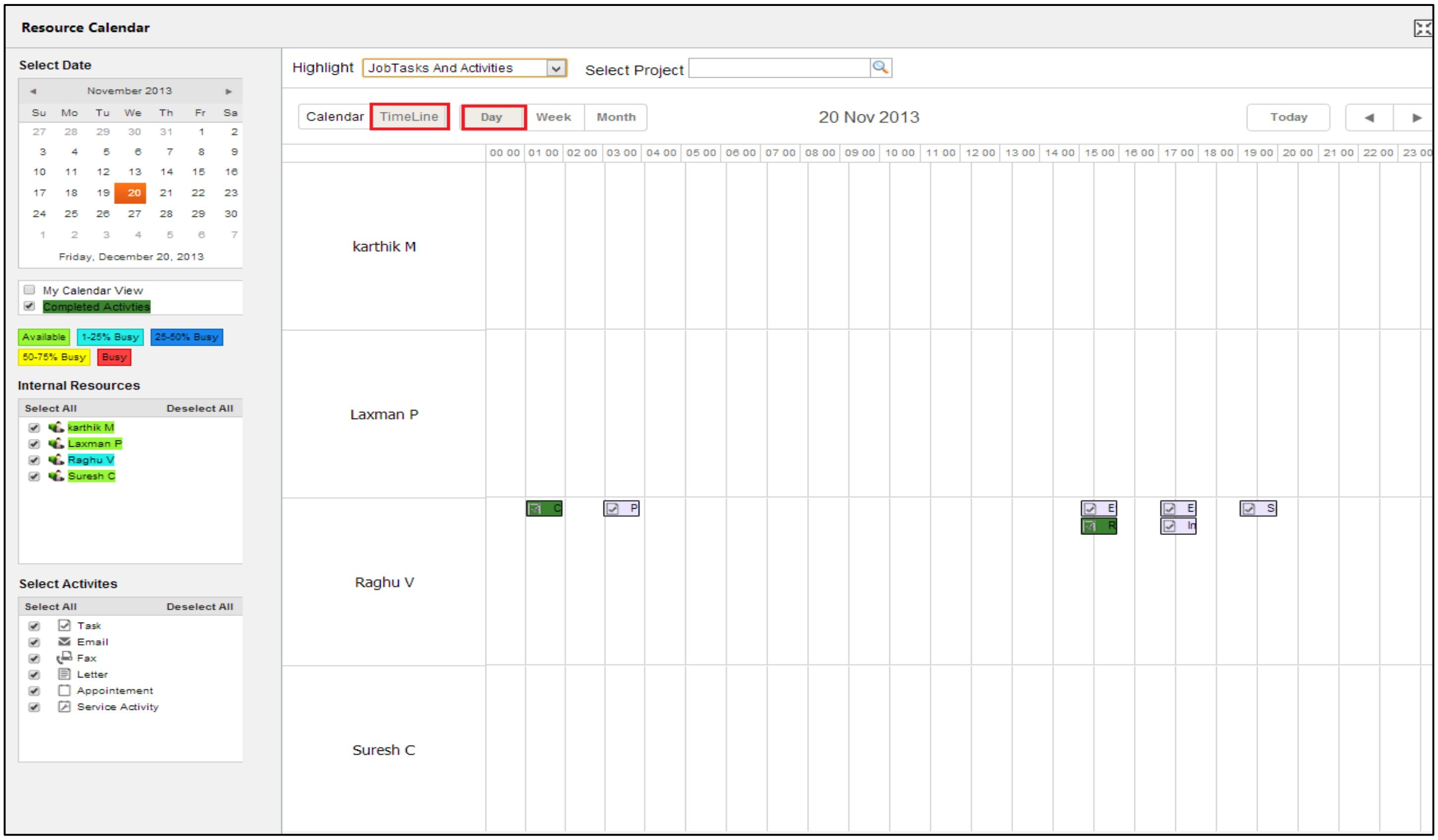


Figure 20: Time Line View - Day

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.

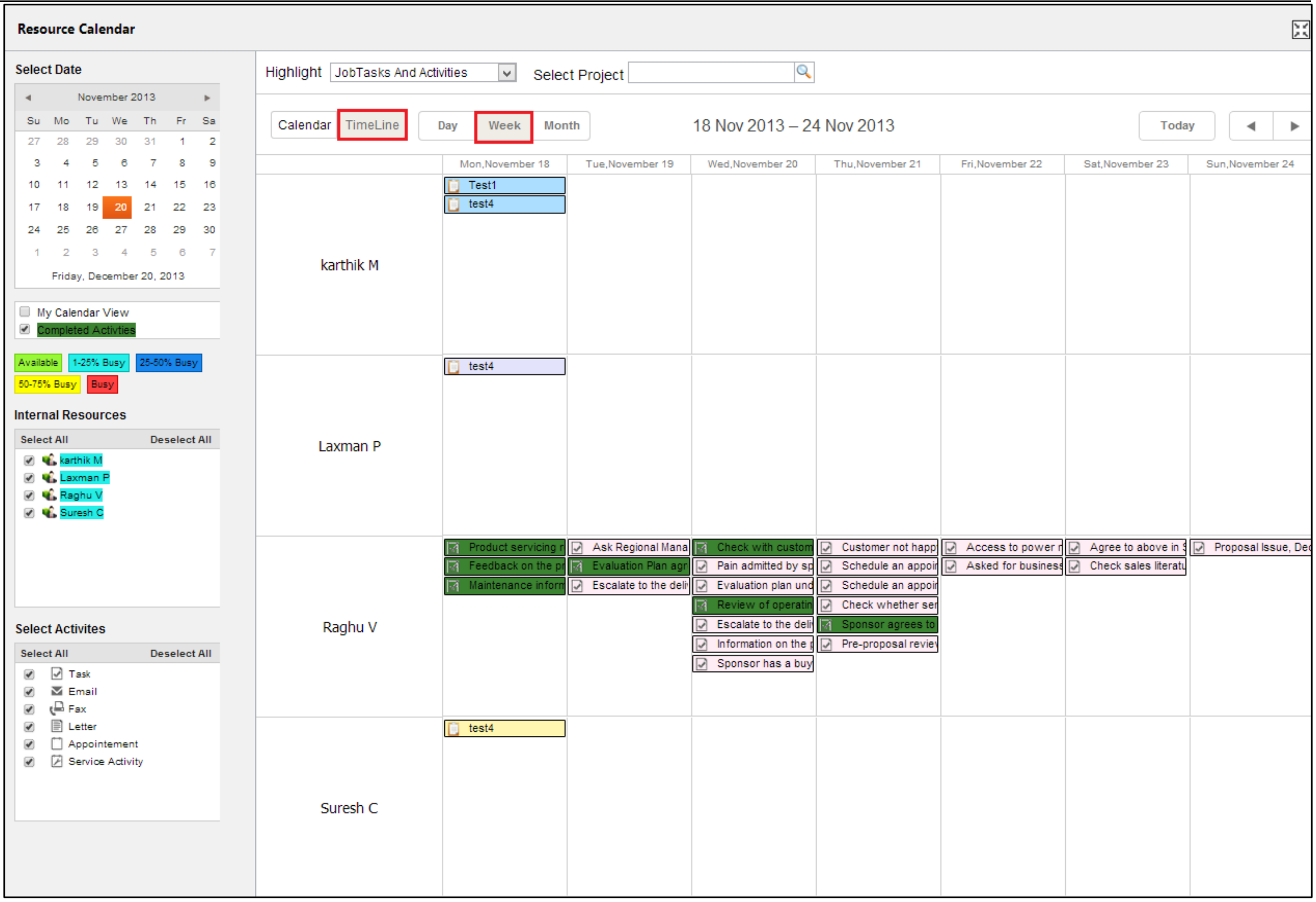


Figure 21: Time Line View - Week

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.

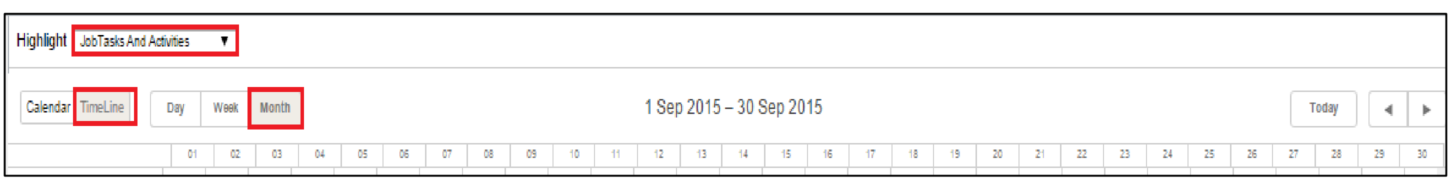


Figure 22: Time Line view - Dates (month wise)

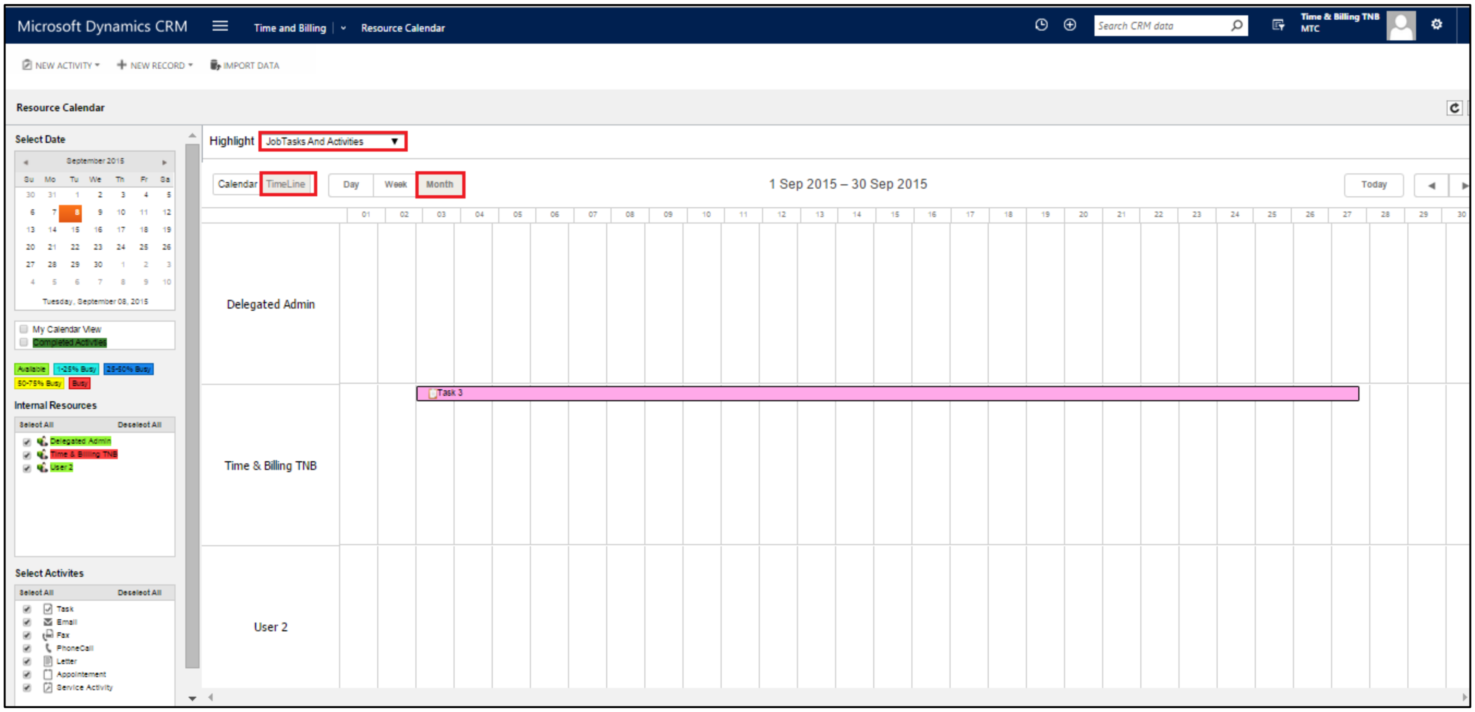
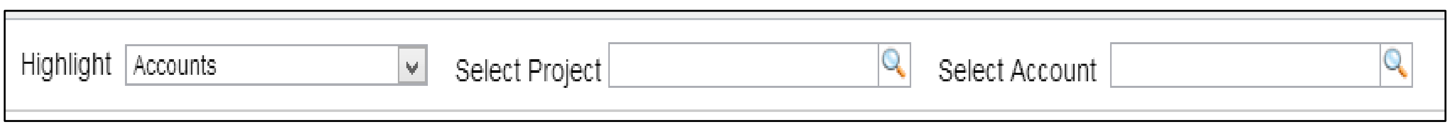


Figure 23: Time Line View - Month

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%.

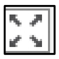
- This color indicates the Resource busy information with the 50 – 75%.

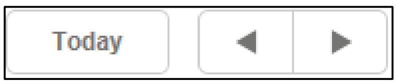
- This color indicates the Resource busy information with the 100%.

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.

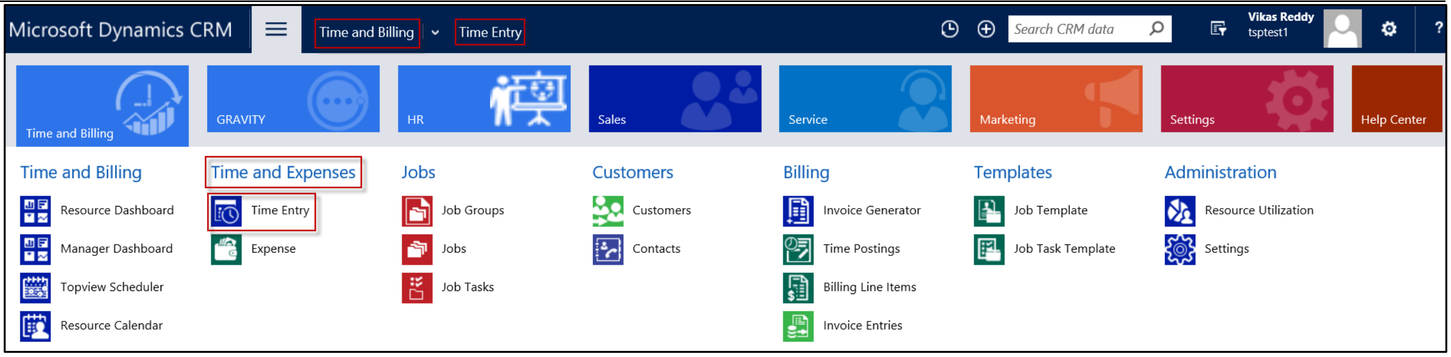
Time and Expenses

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.

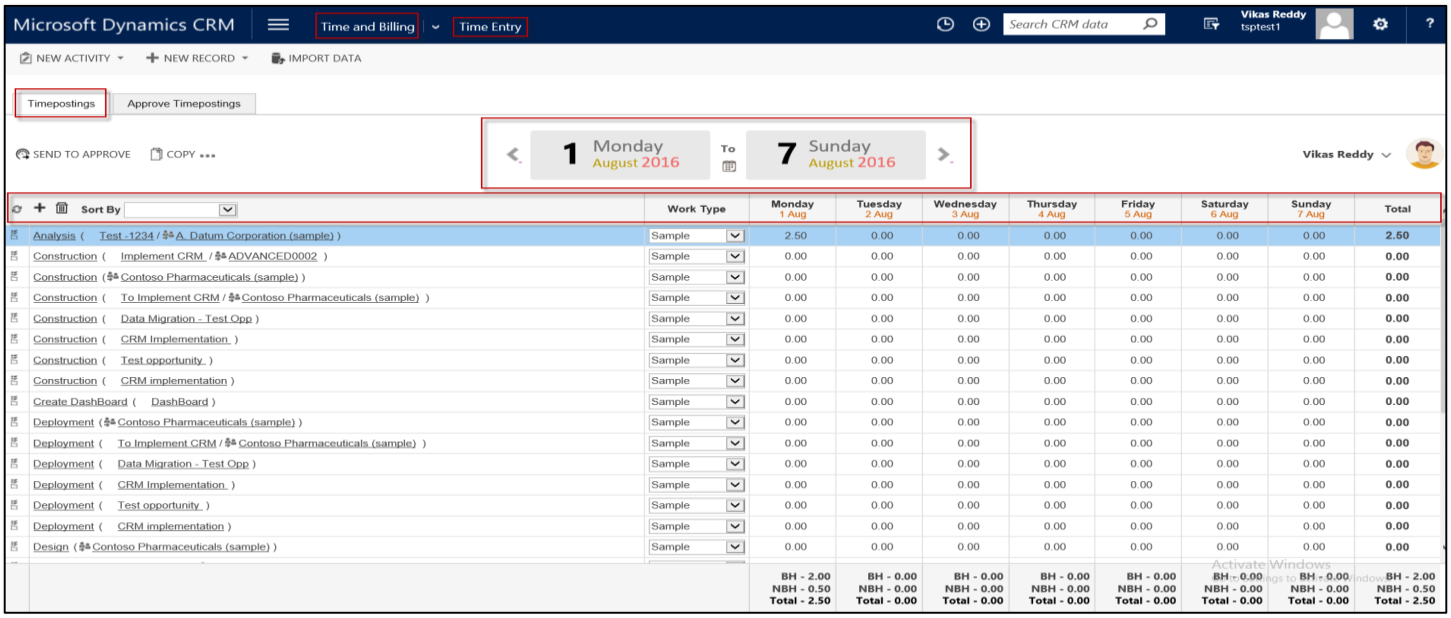


Click on Time Entry. You can see two tabs – Time Postings and Approve Time Postings.

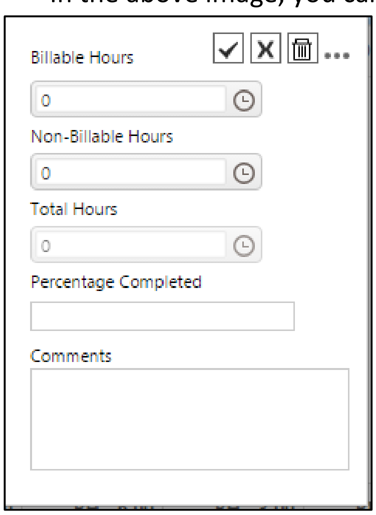
Note: You will be able to see Approve Time Postings tab only if you are assigned with Manager or Resource Manager Security Role.

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.

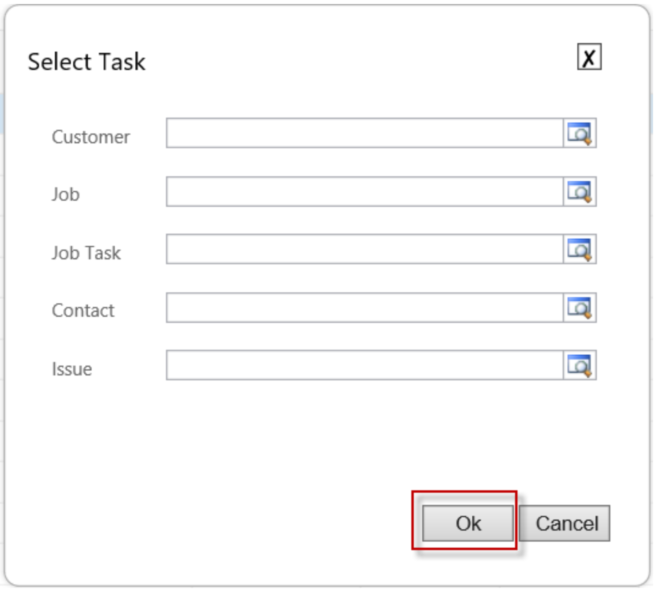


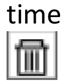
- In the above image, you can see how the solution allows you to do time postings over a week for different tasks.



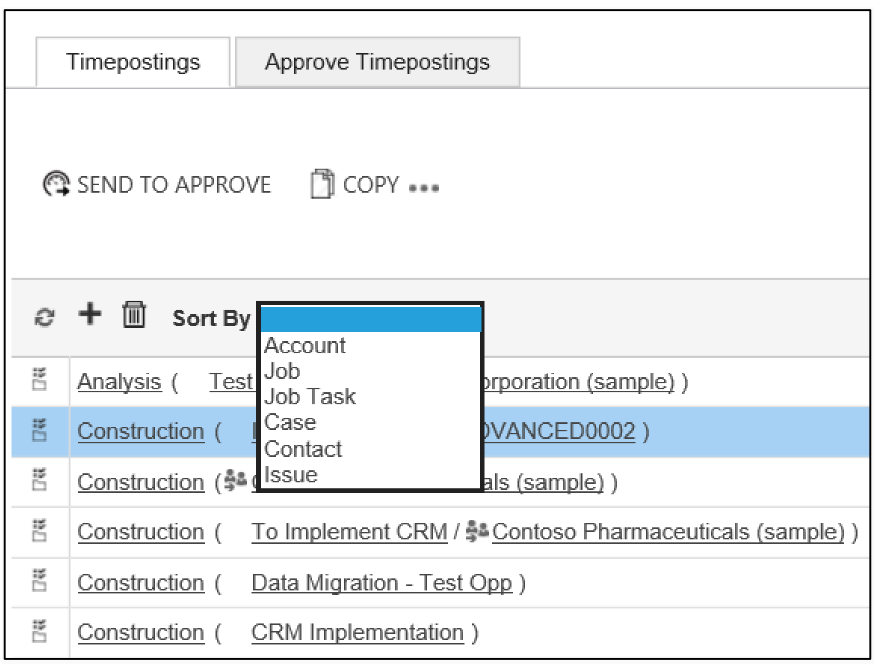
- For doing time posting for a particular task on a particular day, first set the work type and simply click on the grid cell on which day time has to be posted.
- A box pops up asking details such as Billable Hours, Non-Billable Hours, Total Hours and Comments.
- Provide necessary details and click 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.

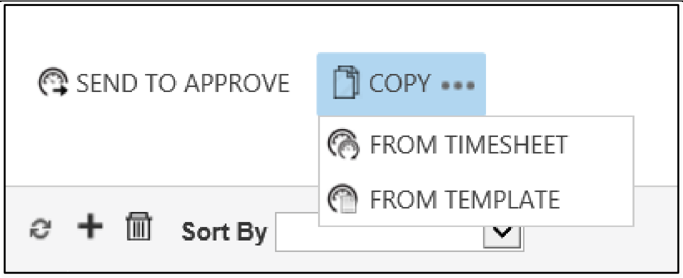


- Fill the details and click on "OK" button.
- Refresh the page to see the newly created task for time posting.
- To delete any task simply select a task and click on 
- You can also sort view by – Account, Job, Job Task, Case, Contact and Issue

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)

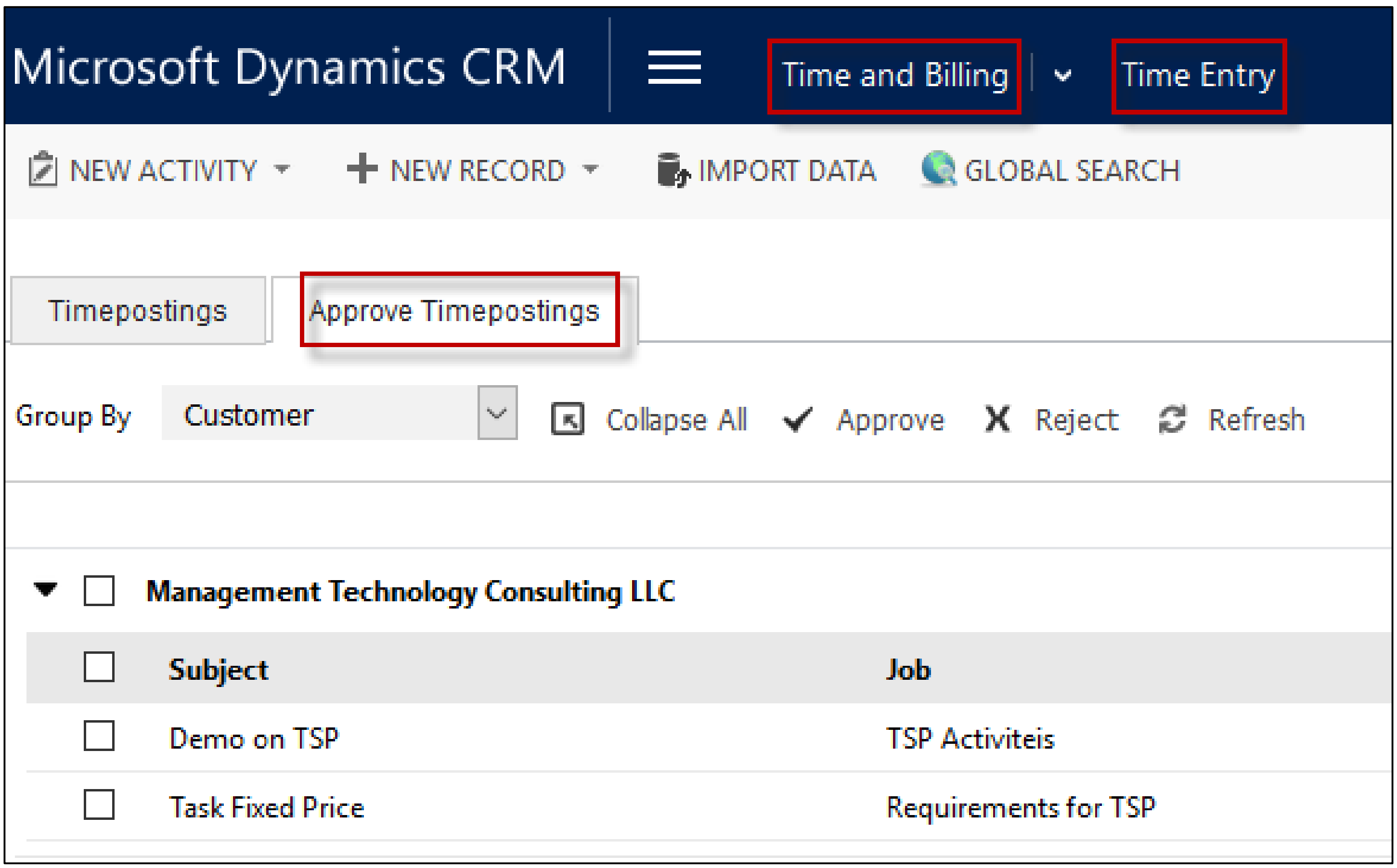


- Finally, you can send these recorded time postings for approval by clicking on "SEND TO APPROVE."
- You can also copy these time postings from Time Sheet Or Template.



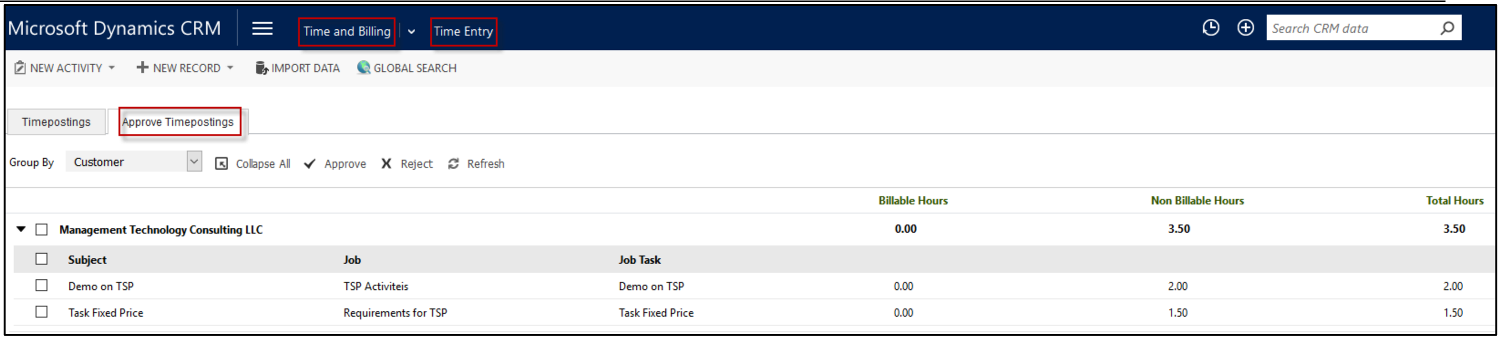
Approve Time Postings

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.

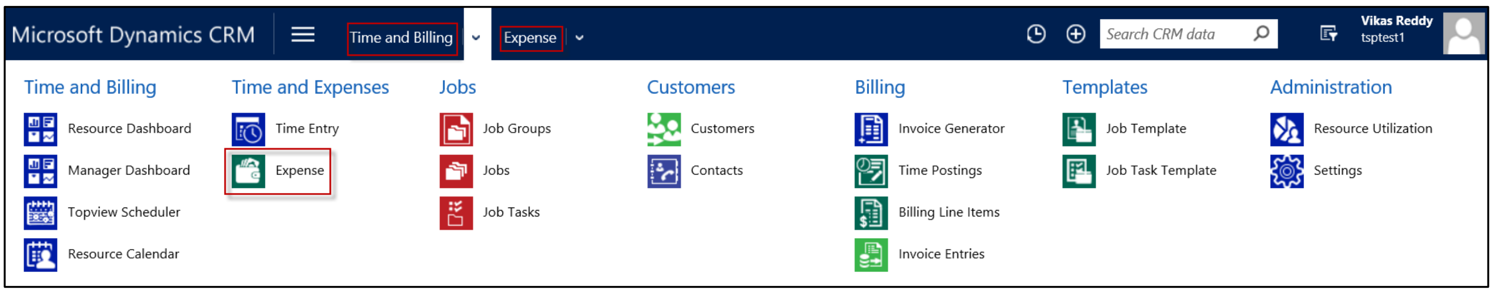
- Just below the Approve Time Postings tab you can find options such as Collapse All, Approve, Reject and Refresh.
- Select the checkboxes against the time postings you wish to make a decision and click on either Approve or Reject.
- The responses you give will be reflected across the CRM and respective stakeholders would be notified about it.



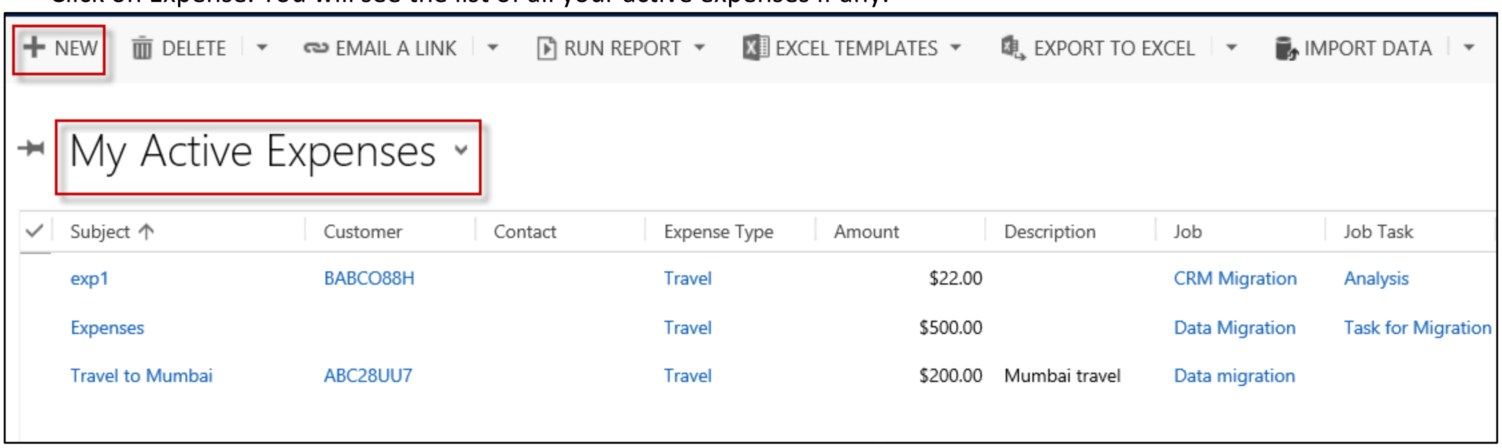
Expenses

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

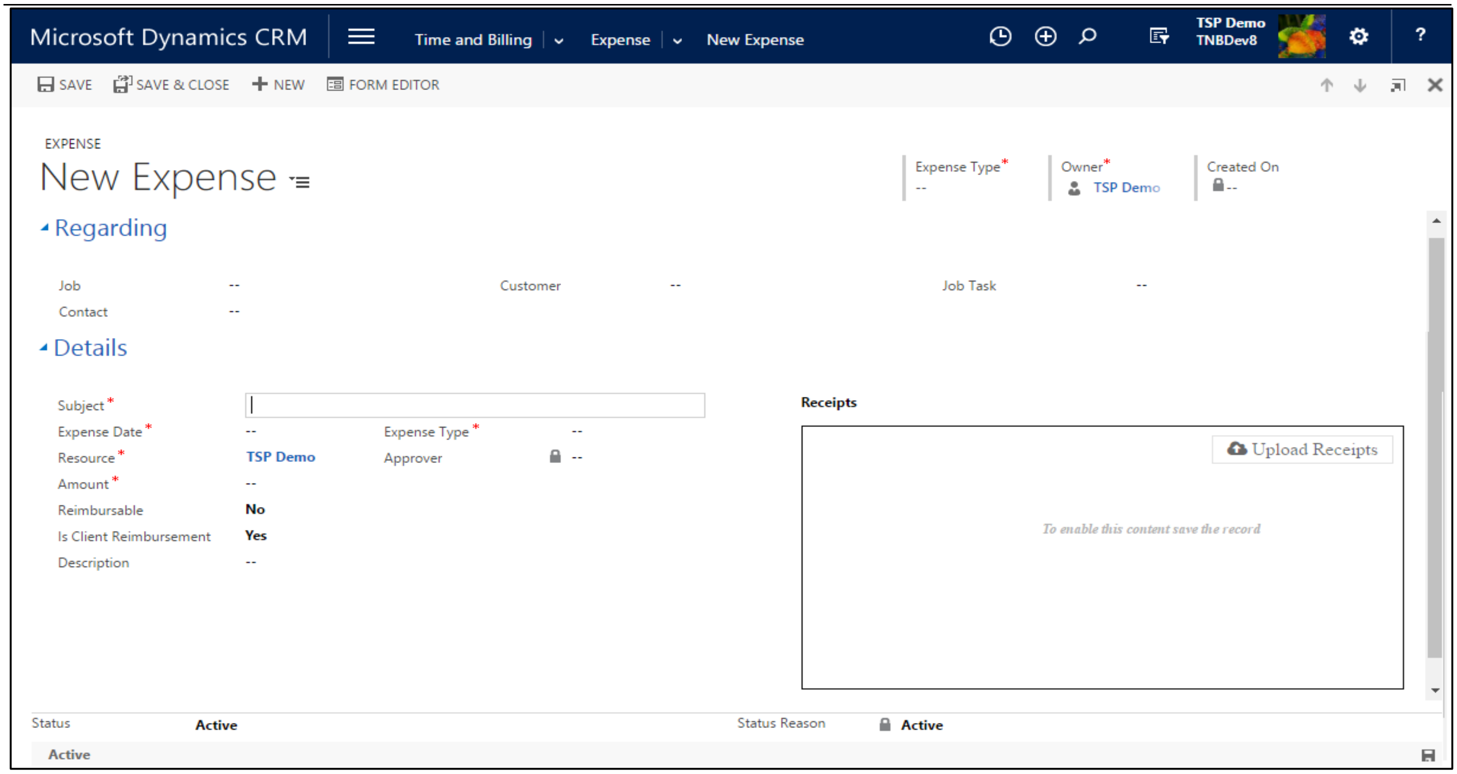
To view your active expenses, follow the navigation: Time & Billing →Time Entry.



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



- 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.

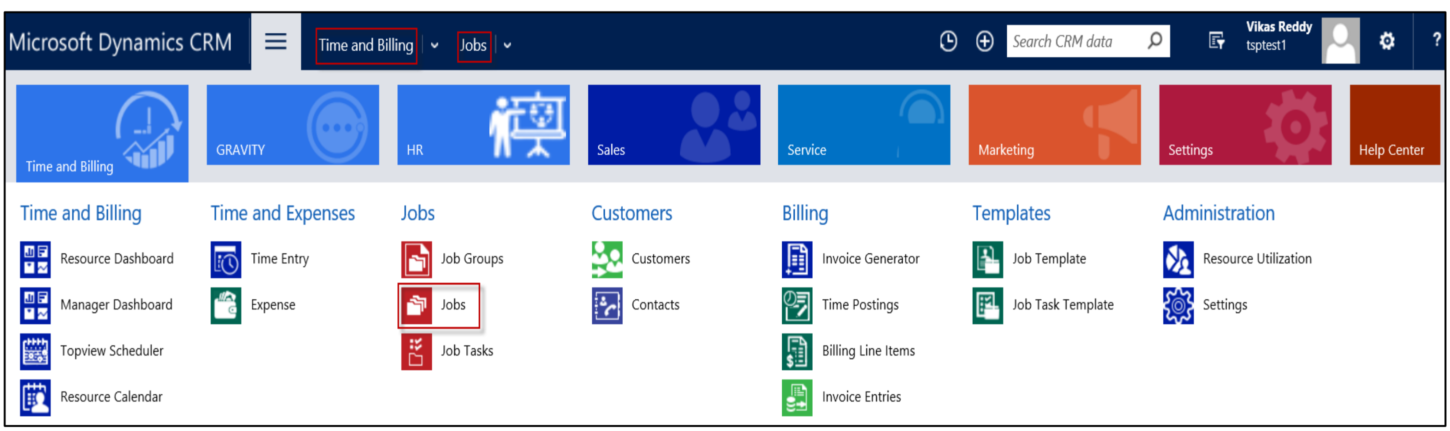


Jobs

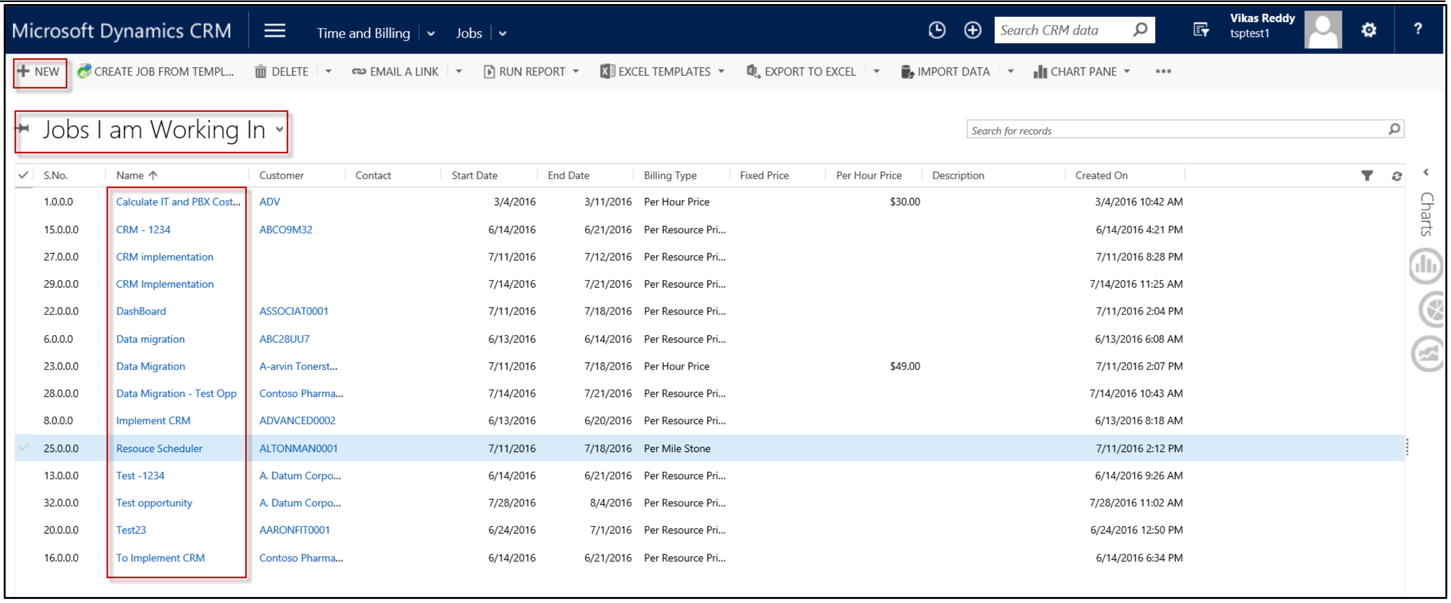
Job or Project is a work requirement from business clients. Jobs are further broken down into job tasks and are assigned to resources based on the complexities involved and skillset required for its quicker completion.

Jobs

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

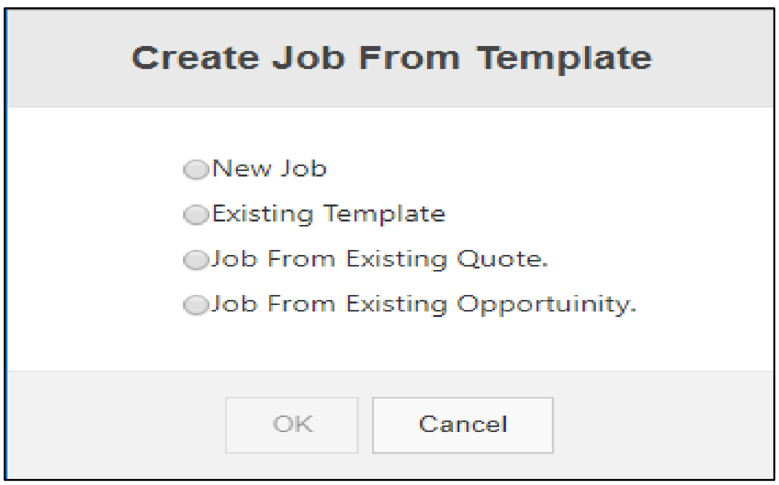


- Click on Jobs. You can see the list of already existing Active Jobs if any.



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
8.0.0.0	Implement CRM	ADVANCED0002		6/13/2016	6/20/2016	Per Resource Pri...				6/13/2016 8:18 AM
25.0.0.0	Resouce Scheduler	ALTONMAN0001		7/11/2016	7/18/2016	Per Mile Stone				7/11/2016 2:12 PM
13.0.0.0	Test -1234	A. Datum Corpo...		6/14/2016	6/21/2016	Per Resource Pri...				6/14/2016 9:26 AM
32.0.0.0	Test opportunity	A. Datum Corpo...		7/28/2016	8/4/2016	Per Resource Pri...				7/28/2016 11:02 AM
20.0.0.0	Test23	AARONFIT0001		6/24/2016	7/1/2016	Per Resource Pri...				6/24/2016 12:50 PM
16.0.0.0	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.

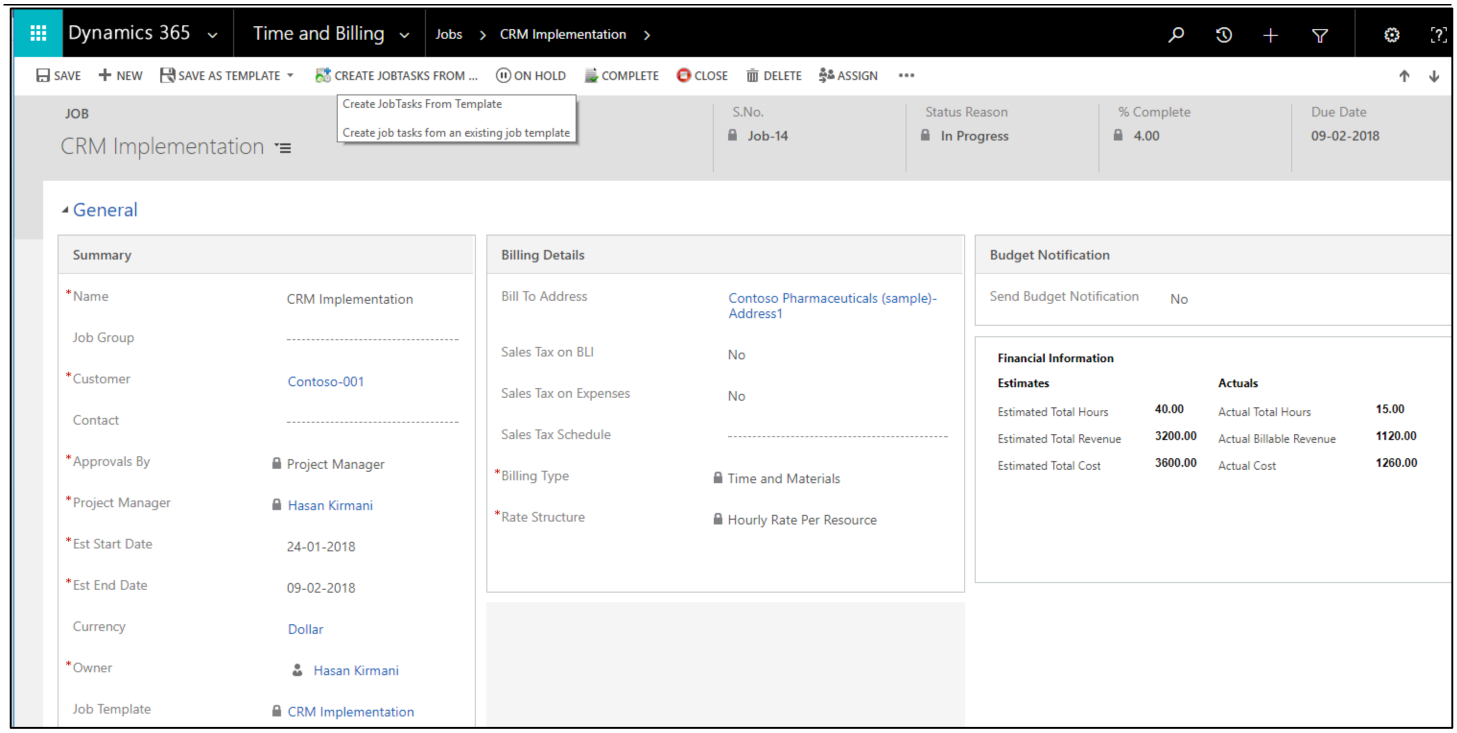


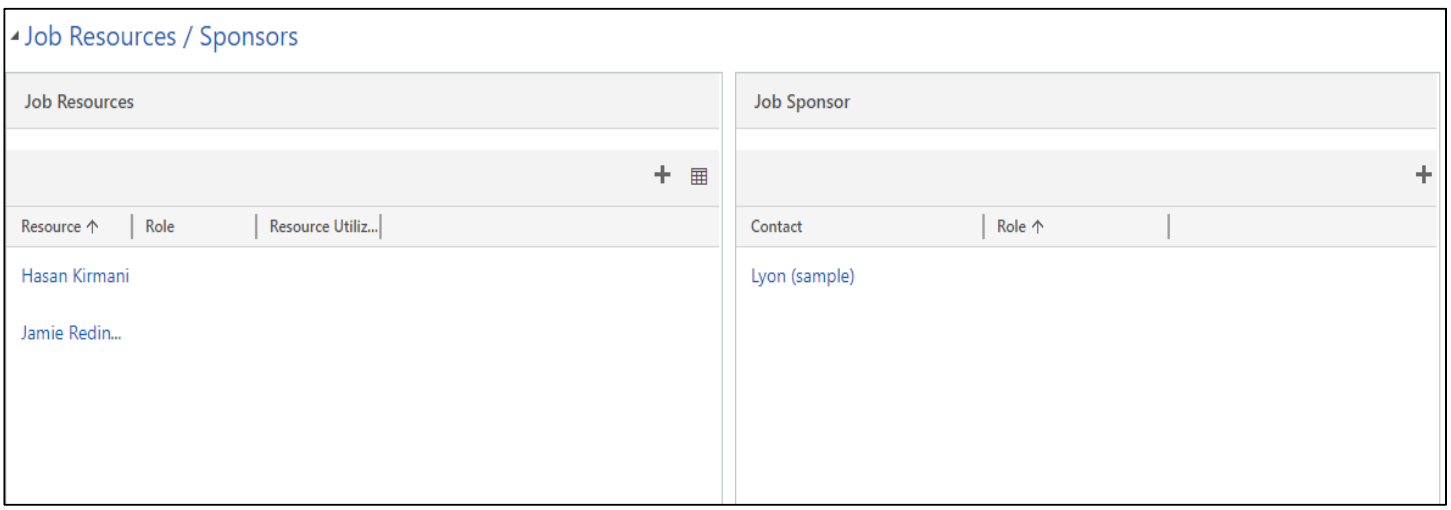
New Job: It allows you to create a new job by selecting that option.

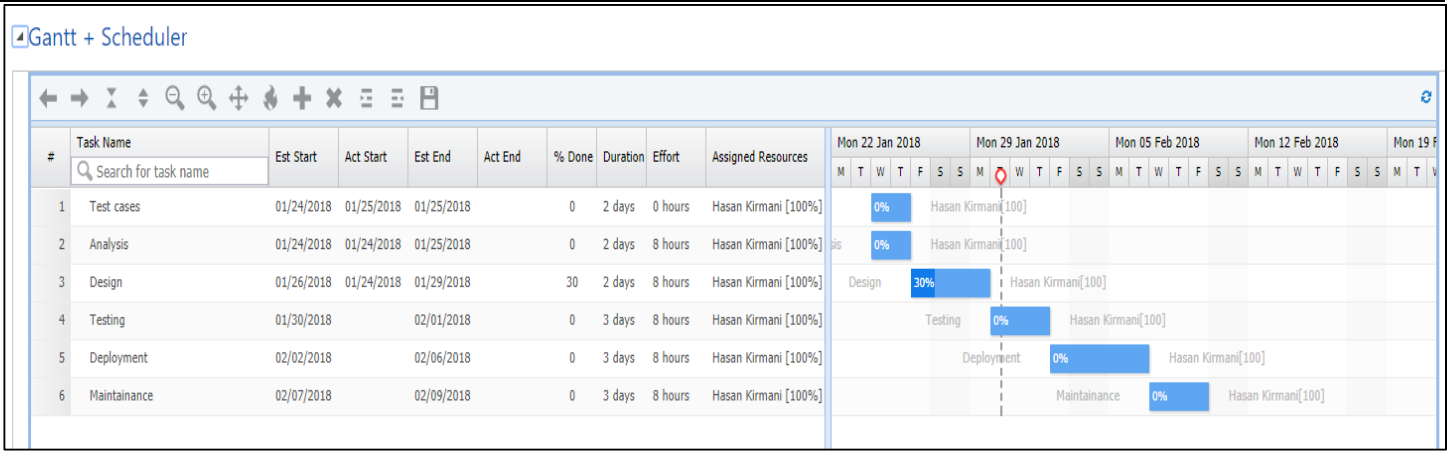
Existing Template: Displays all the existing templates by selecting that option.

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
Create JobTasks From Template
Create job tasks fom an existing job template
JOB
CRM Implementation
S.No.
Job-14
Status Reason
In Progress
% Complete
4.00
Due Date
09-02-2018
General
Summary
*Name CRM Implementation
Job Group
*Customer Contoso-001
Contact
*Approvals By Project Manager
*Project Manager Hasan Kirmani
*Est Start Date 24-01-2018
*Est End Date 09-02-2018
Currency Dollar
*Owner Hasan Kirmani
Job Template CRM Implementation
Billing Details
Bill To Address Contoso Pharmaceuticals (sample)-Address1
Sales Tax on BLI No
Sales Tax on Expenses No
Sales Tax Schedule
*Billing Type Time and Materials
*Rate Structure Hourly Rate Per Resource
Budget Notification
Send Budget Notification No
Financial Information
Estimates
Estimated Total Hours 40.00
Estimated Total Revenue 3200.00
Estimated Total Cost 3600.00
Actuals
Actual Total Hours 15.00
Actual Billable Revenue 1120.00
Actual Cost 1260.00


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

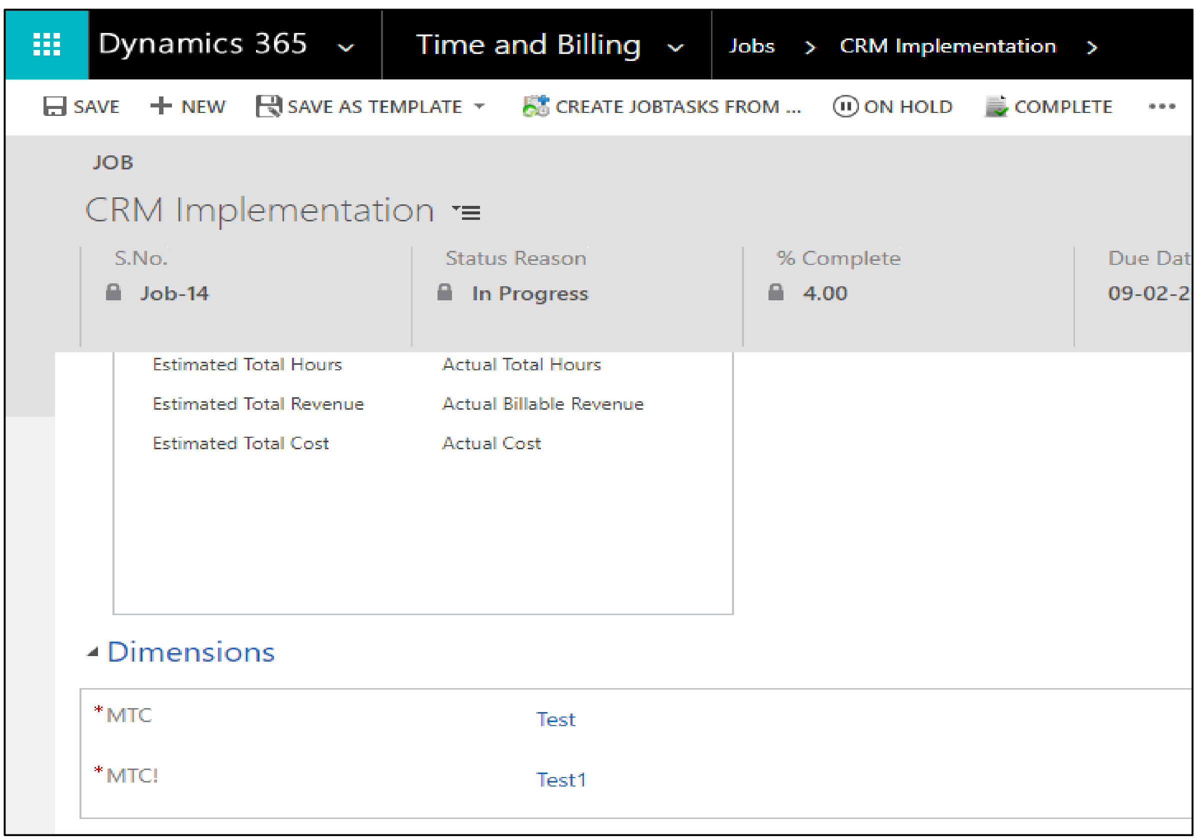


Dimensions

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



- 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).

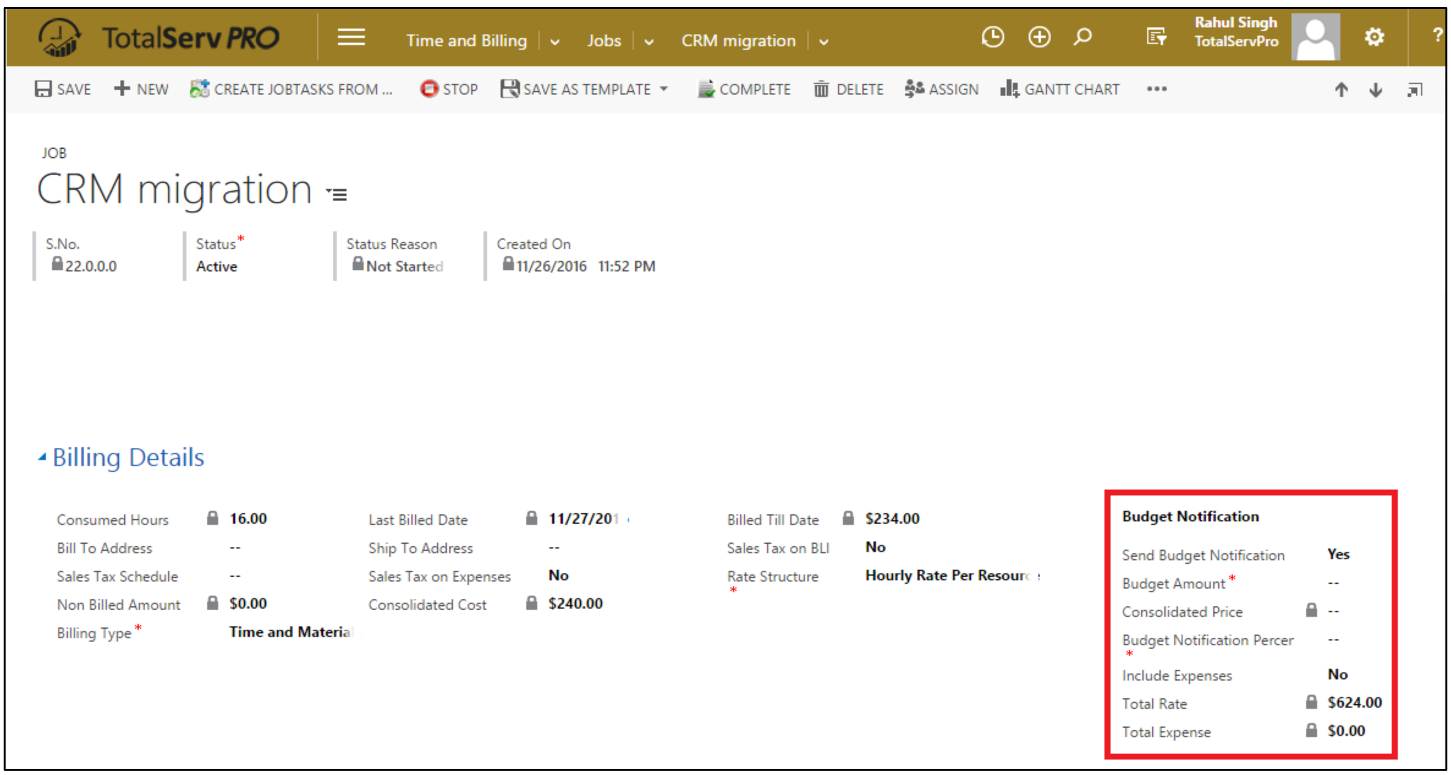
- Depending on the option selected in the customer and chart of account dimensions will be displayed on the job form.
  For Ex: if it is set as required in the customer and chart of accounts for any one of the dimension then dimension fields will be displayed on the job form.
  If it is set as optional 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



- **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.

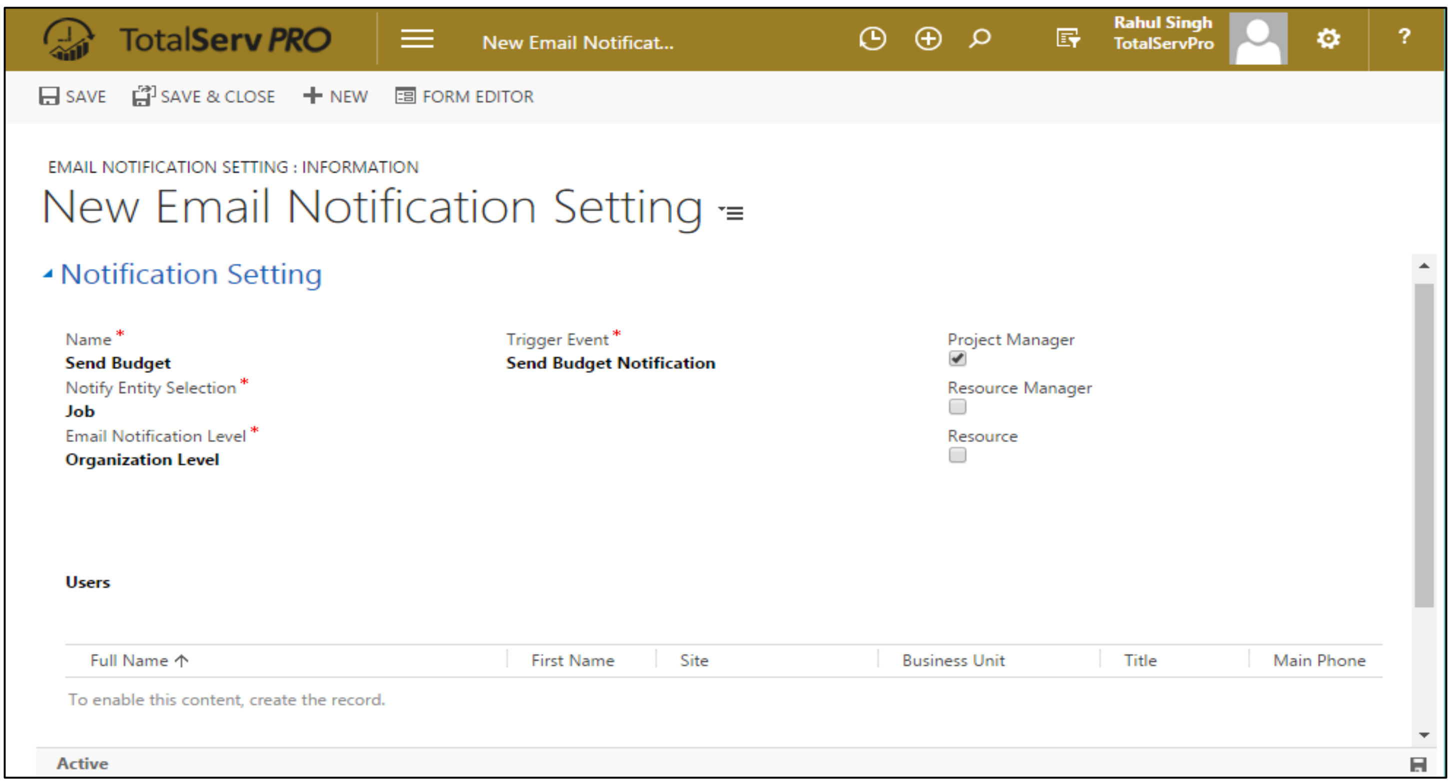
Email Notification Settings

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

Navigation: CRM → Settings → Email Notification Settings

<u>Creating a New Email Notification Setting</u>

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



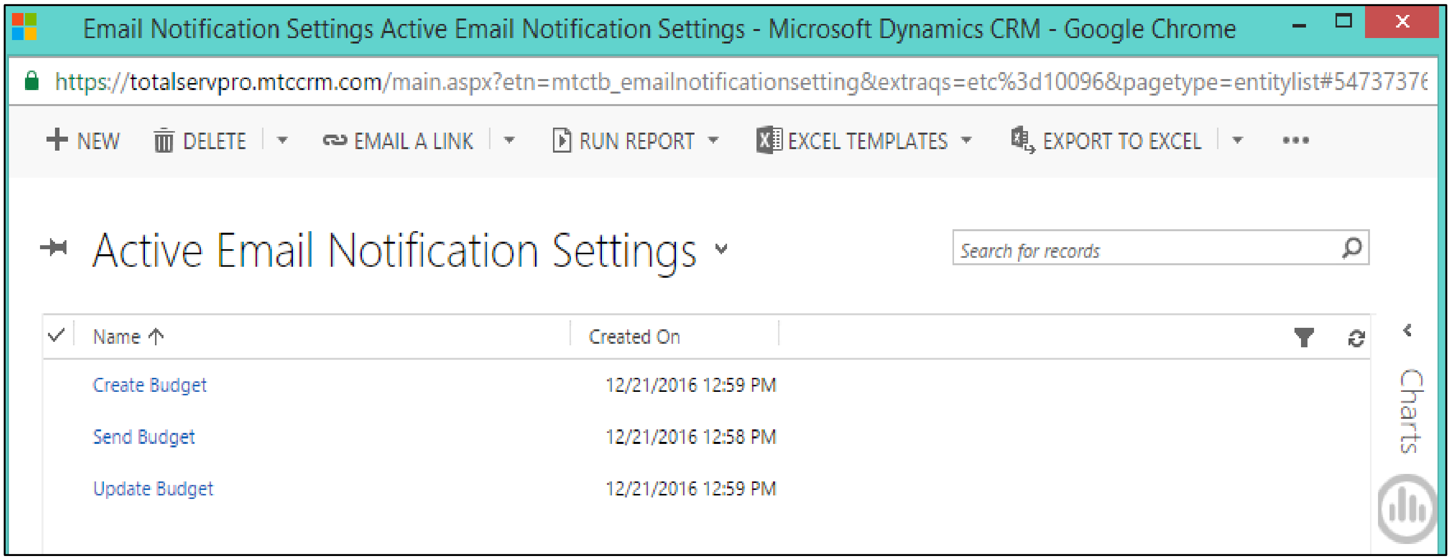
2. Fill the corresponding fields under Notification Settings such as Name, Notify Entity Selection, Email Notification Level, and Trigger Event.

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.**

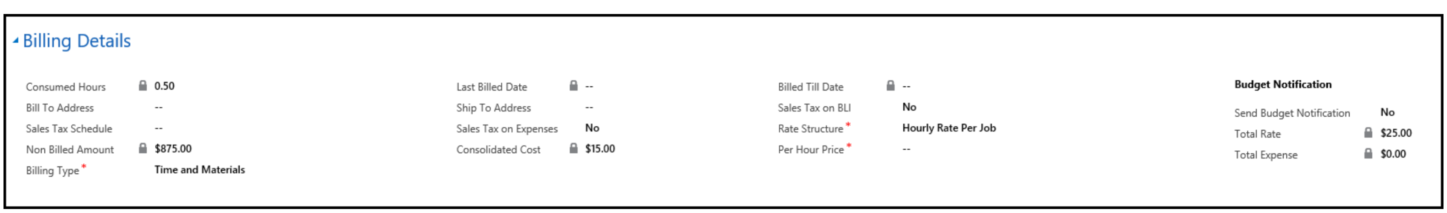


- Details under sections such as General Information, Job Stockholder, Performance and Forecast, Job Resources, Billing Details, Job Tasks, Expenses & Issues, and Gantt Settings have to be thoroughly filled.
- New Job creation can only be done by Managers or the Authorized personnel having the Security 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

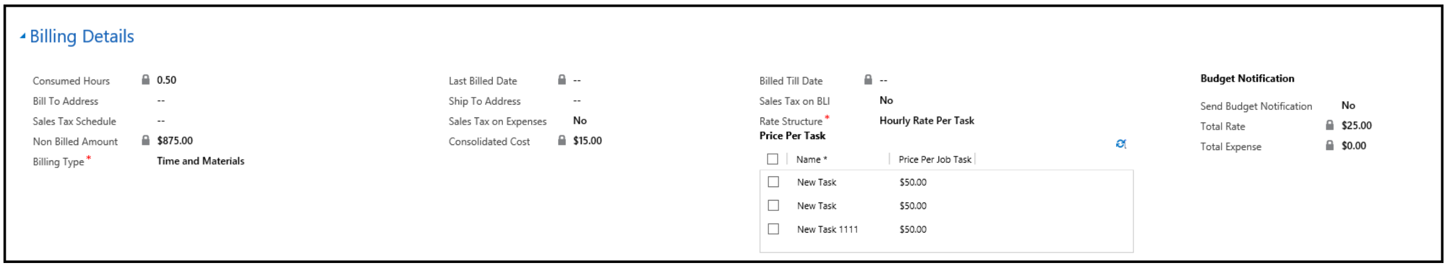
Time and Billing supports the following 6 billing types:

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**.

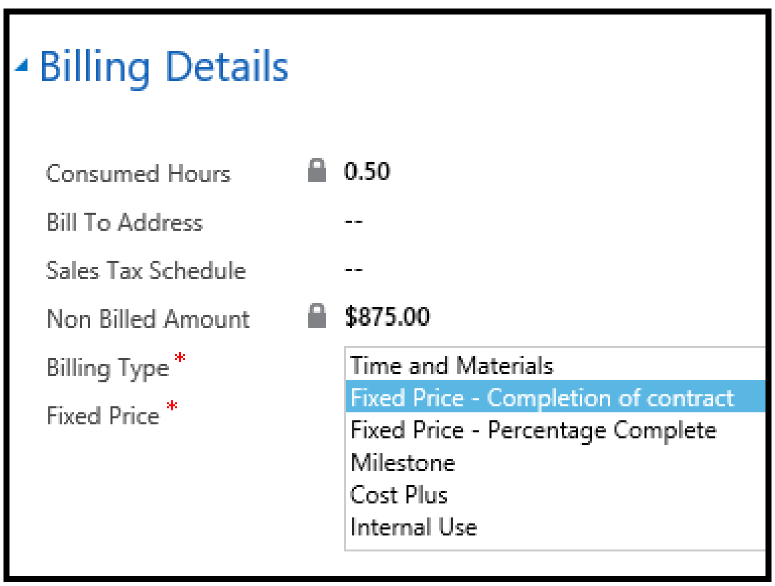


b. When **Hourly Rate Per Resource** is selected, billing line item would be generated based on the resource price pre-configured during resource creation. The billing would be calculated as **Per Hour Price of Resource * No. of Time Posted Hours** (for all resources associated with that Job).

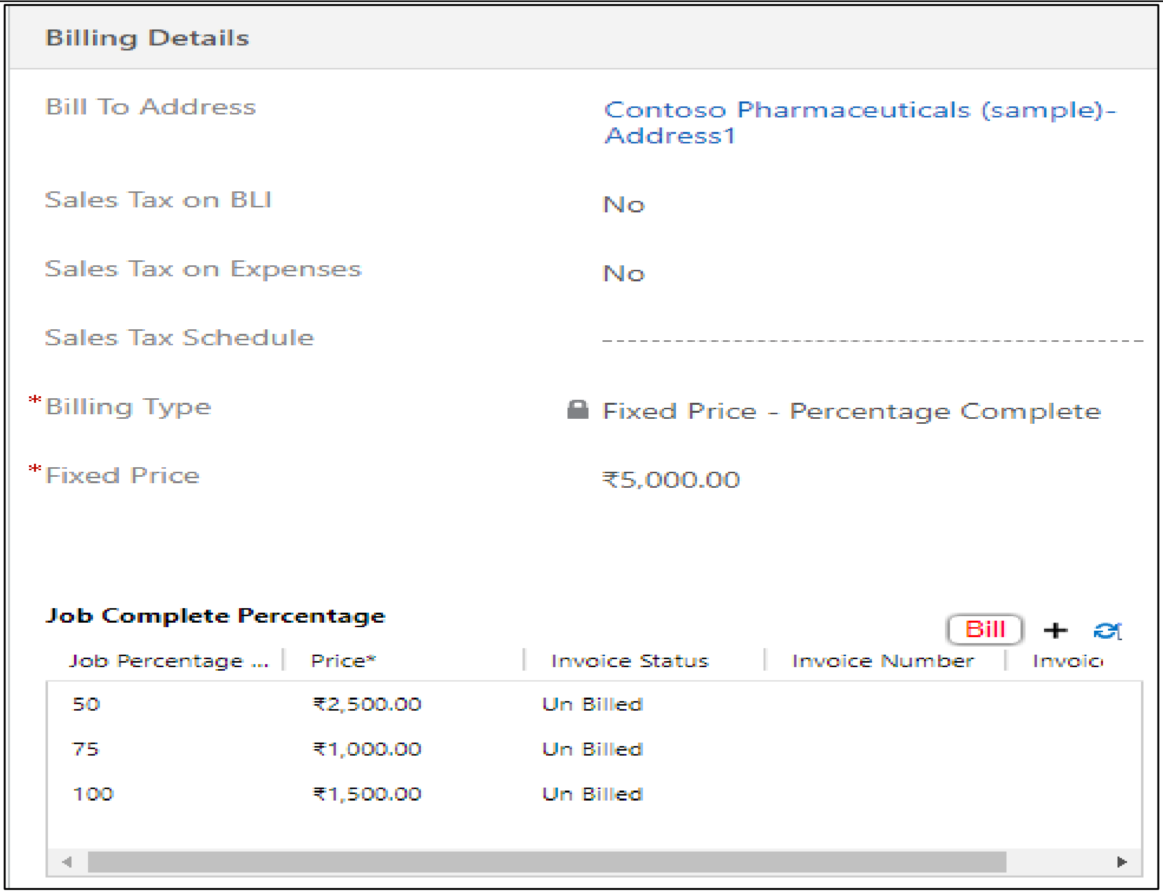
c. When Hourly Rate Per Task is selected, the system shows up all the associated tasks with that job with the flexibility of adding Price Per Job Task. The billing would be calculated as the **No. of Time Posted Hours * Price Per Job Task** (for every task).



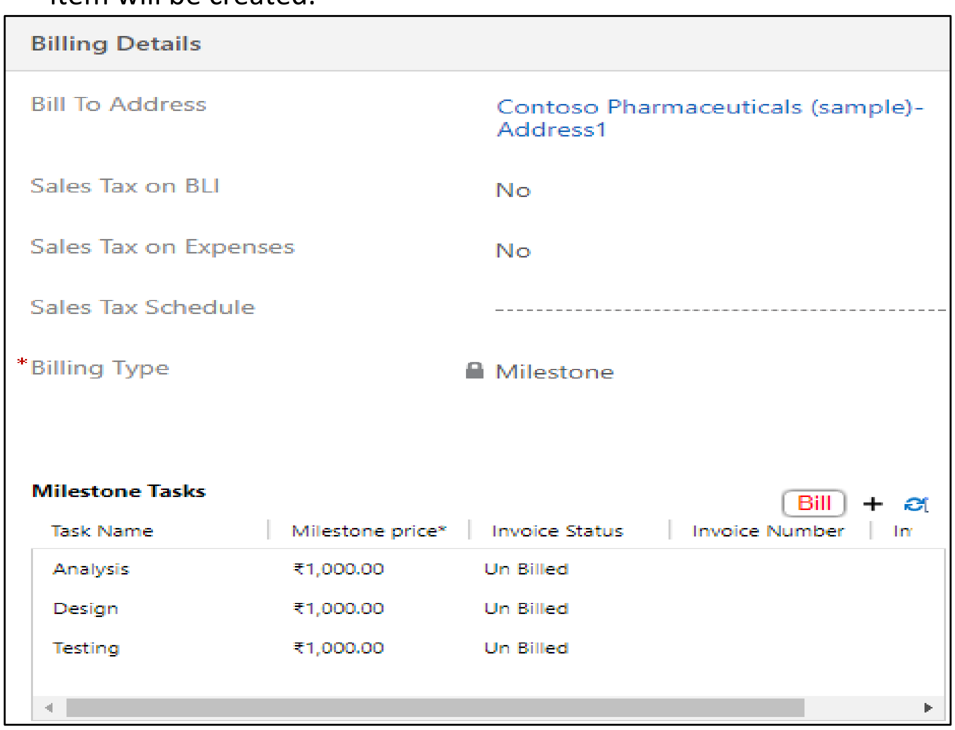
2. **Fixed Price – Completion of Contract** – As the name suggests, this billing type refers to Fixed Price associated with completion of a contract. That means, billing line item would be generated for the client after the completion of a particular contract. Fixed Price can be set in the associated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



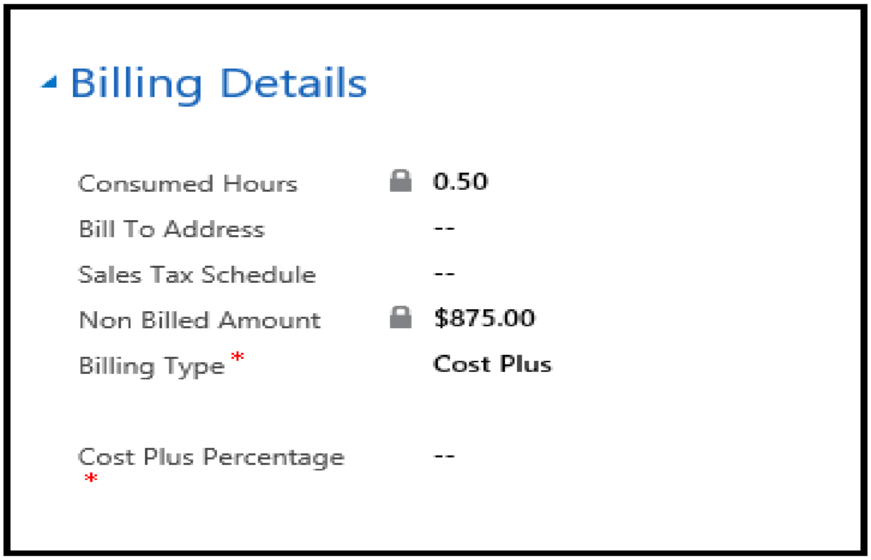
3. **Fixed Price – Percentage Completion** – In this billing type, billing line item would be generated based on the percentage completion of a Job. All percentages are predefined along with the corresponding price tags. So, when the job is in progress Bill button is enabled in the percentage grid. Based 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.



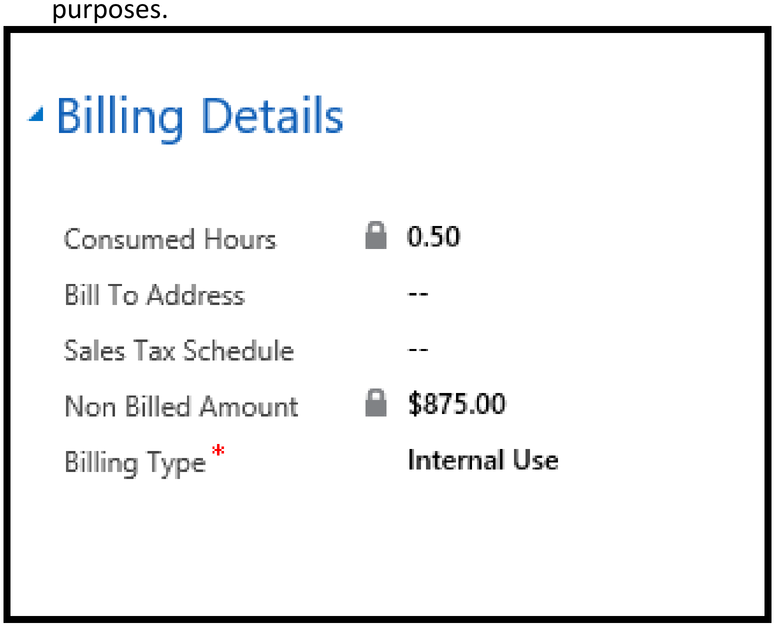
4. **Milestone –** This billing type refers to billing line item generation based on milestone accomplishment. For example a project may require Analysis, Coding, Testing and Deployment. So, in this case Analysis, Coding, Testing and Deployment could be the milestones on whose accomplishment billing 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.



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.**



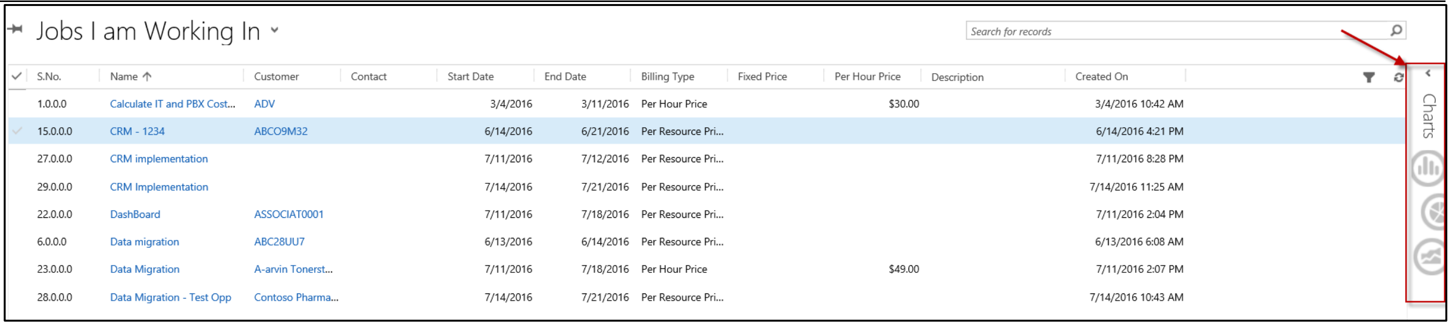
6. **Internal Use –** This billing type is for internal use meaning it wouldn't require billing line item generation for internal purposes.



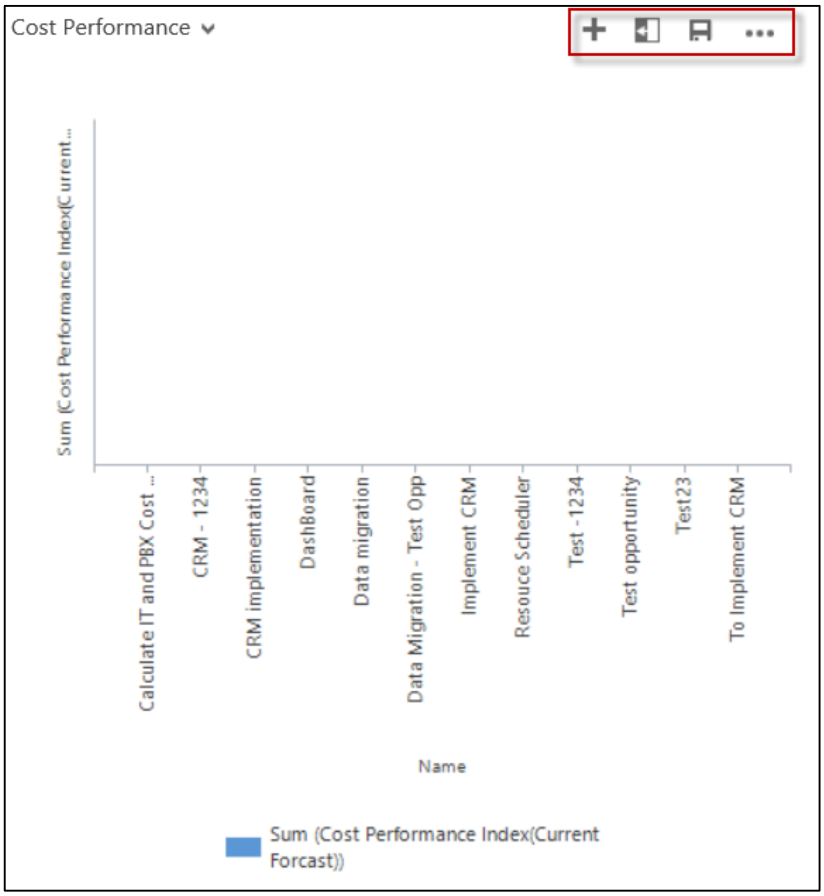
Charts

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.



- 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:

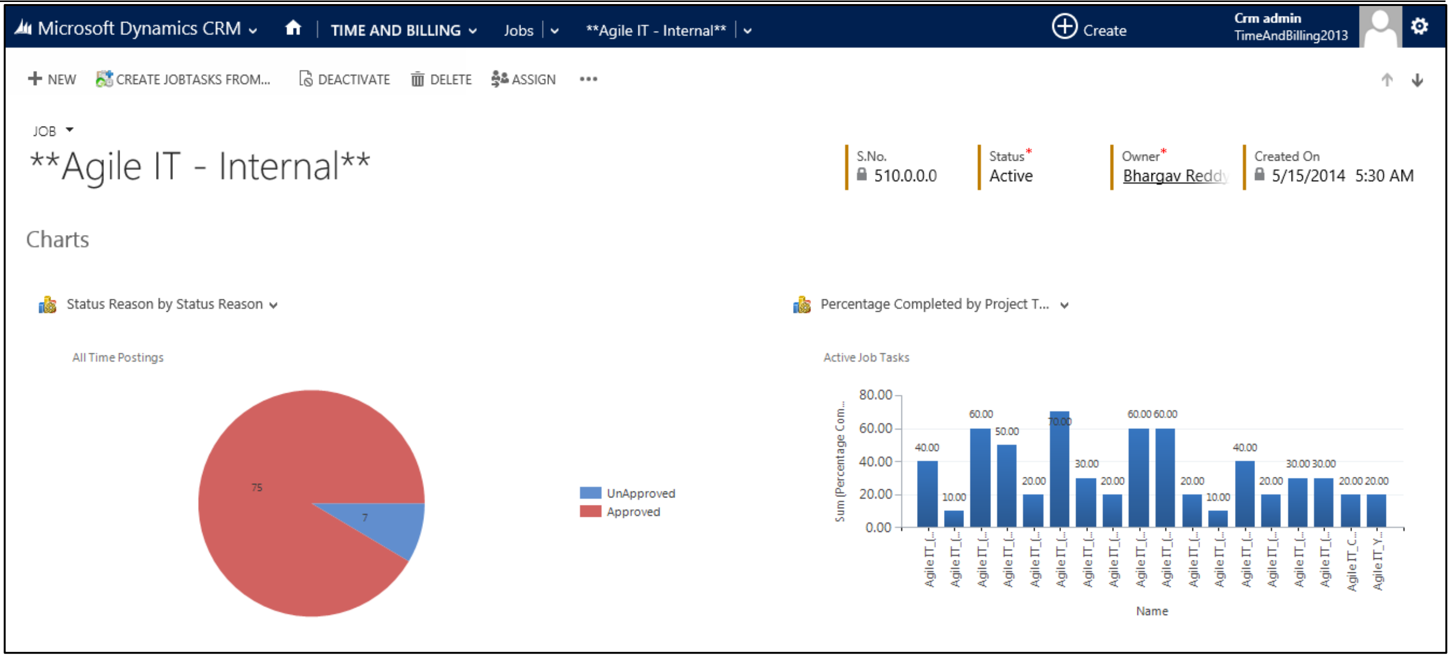


Figure 24: Creation of Jobs - Charts

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.

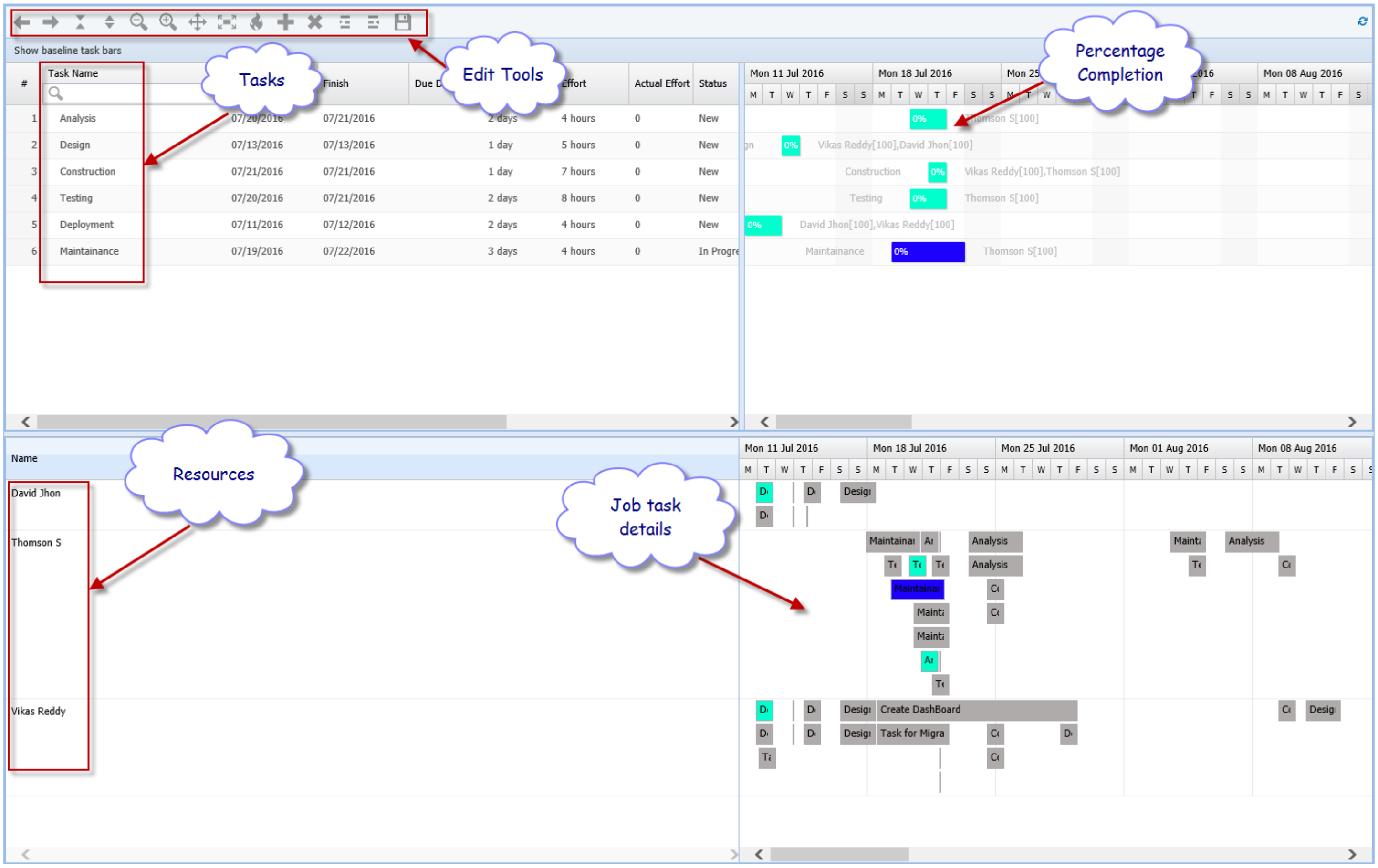


Figure 25: Gantt chart display

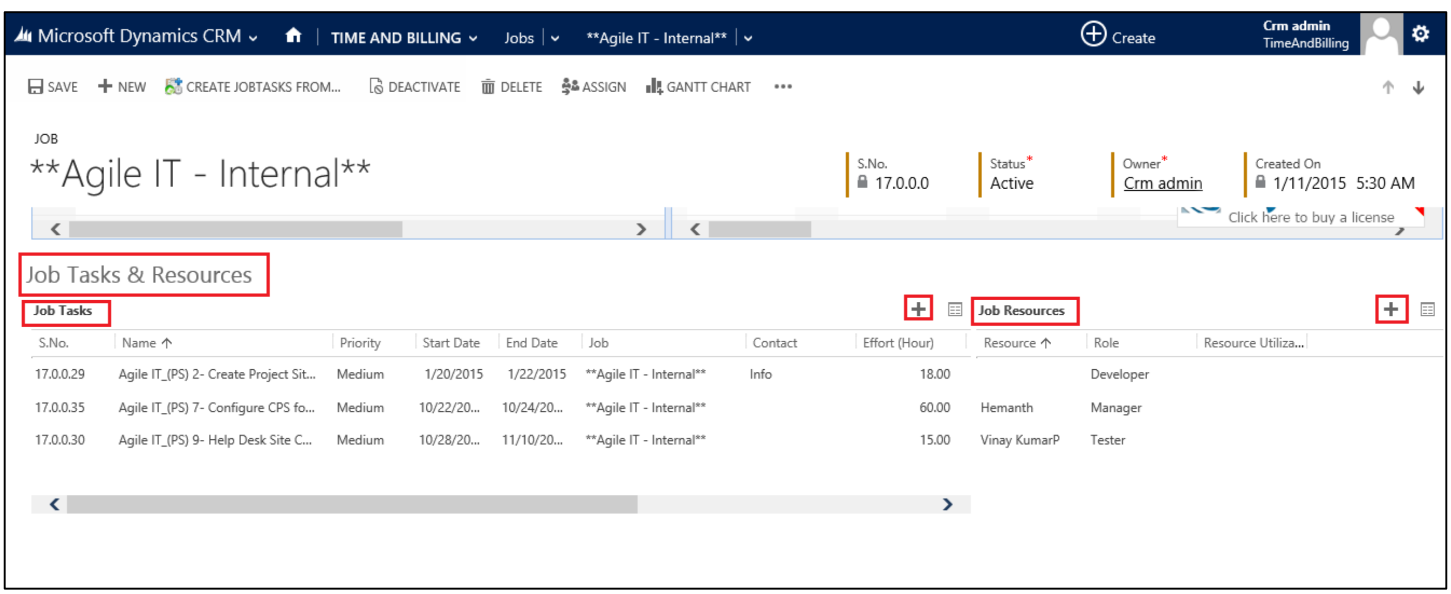
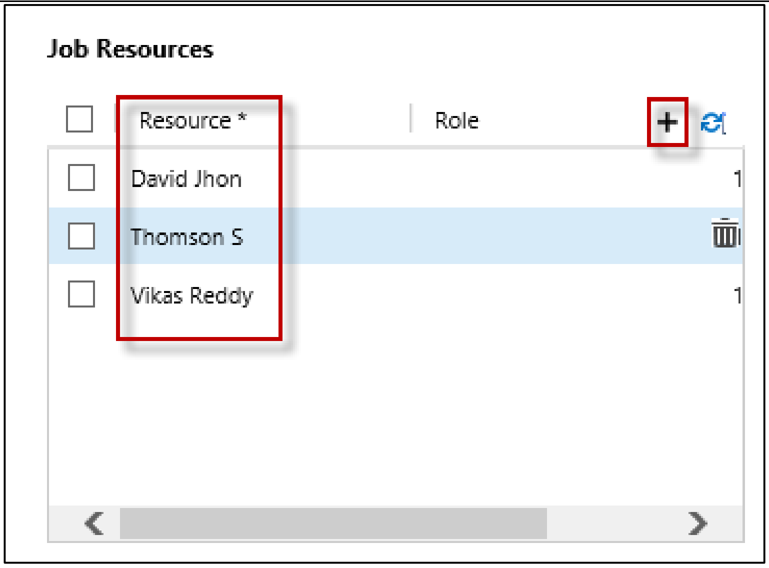


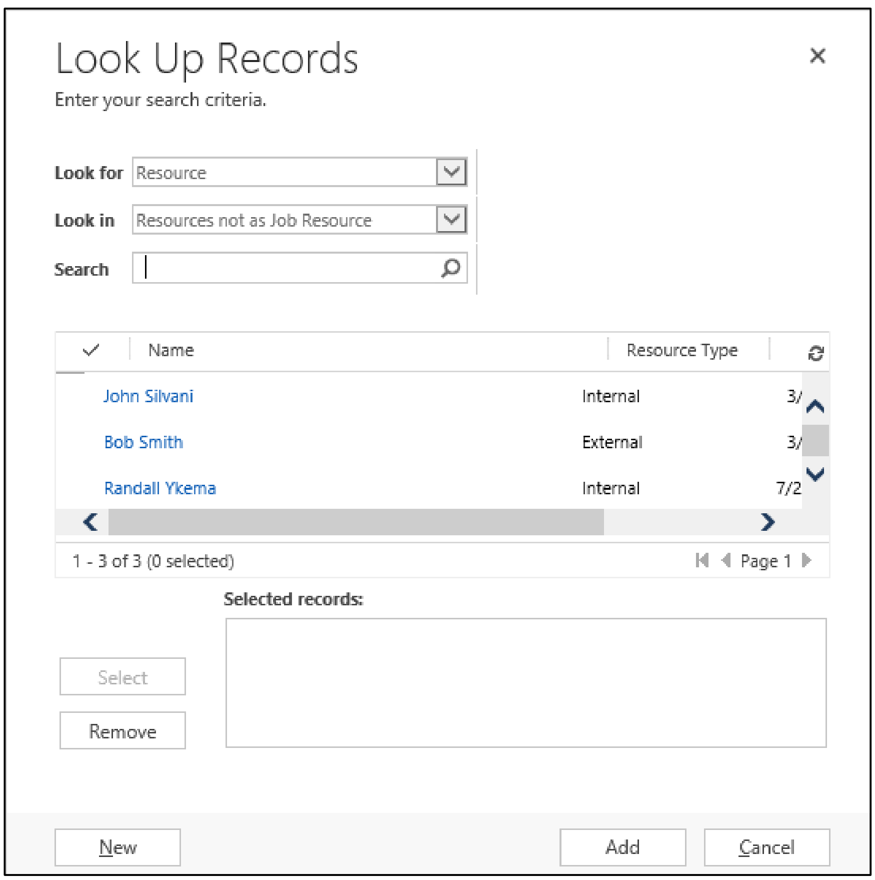
Figure 26: Job Task & Resource – in Job

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.

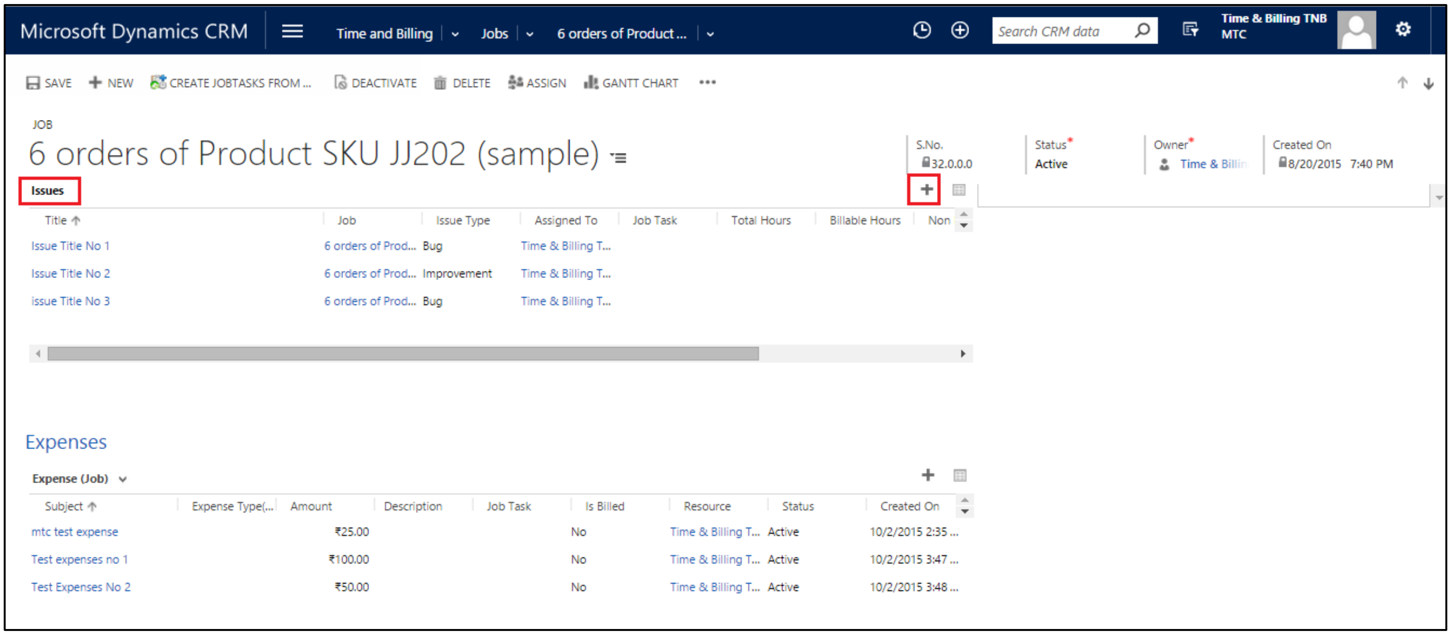


Figure 27: Issue – in Job

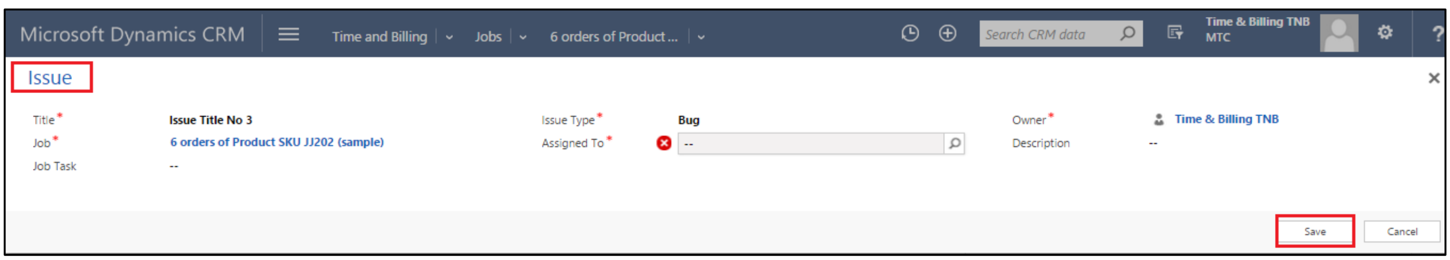


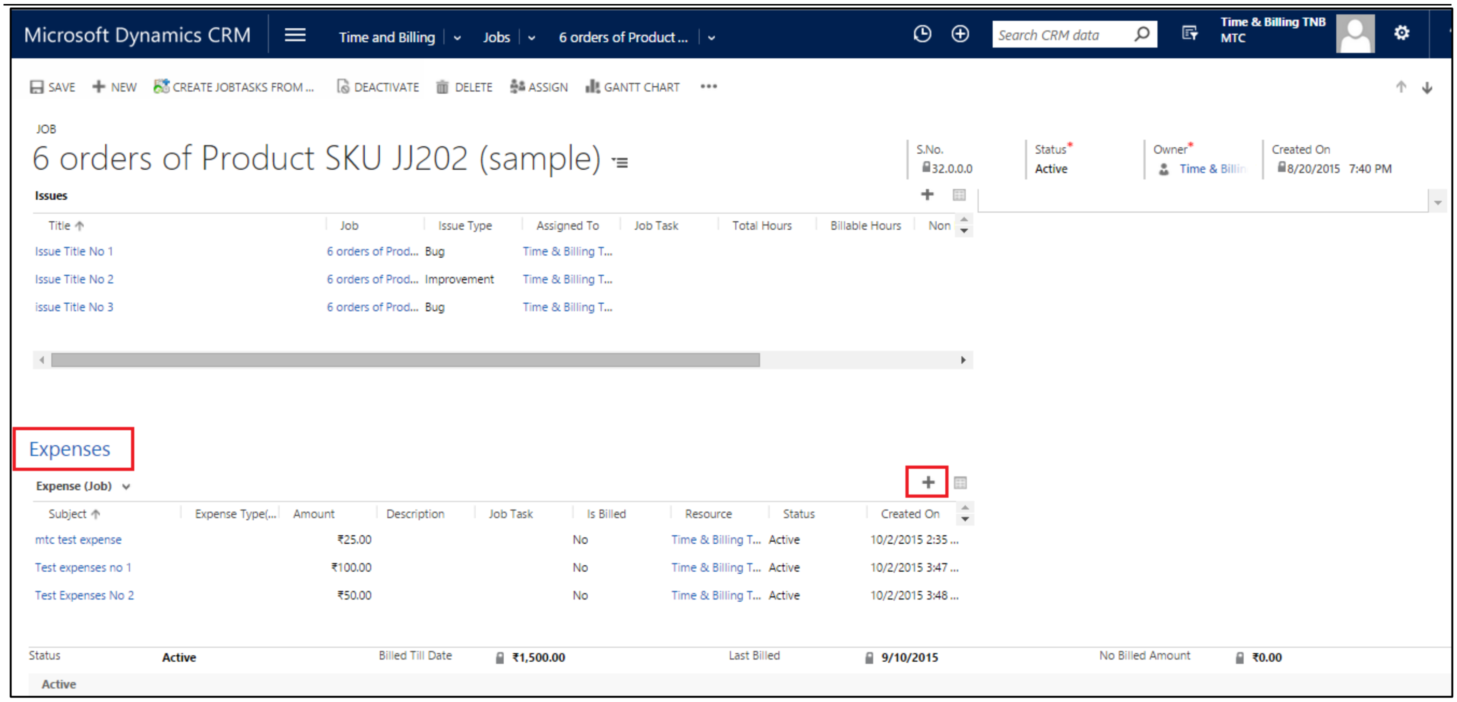
Figure 28: New Issue creation in Job

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.



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

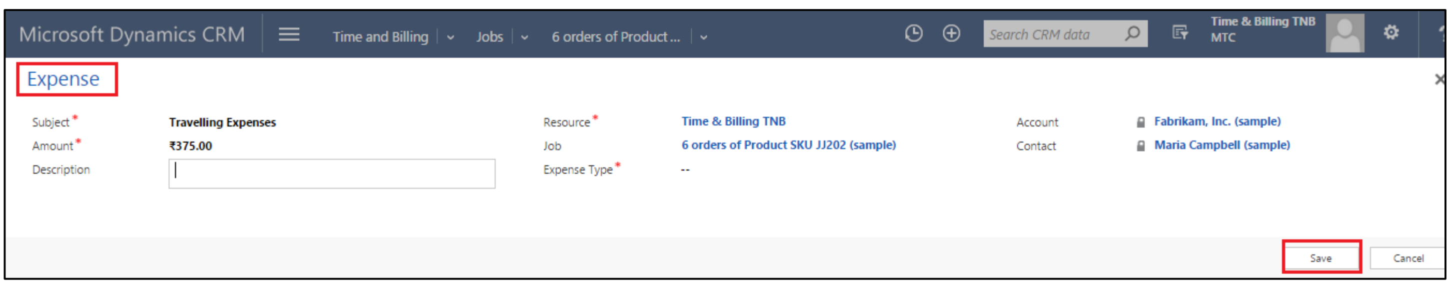


Figure 29: Job Task - Add New Expense

- 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 (…)**

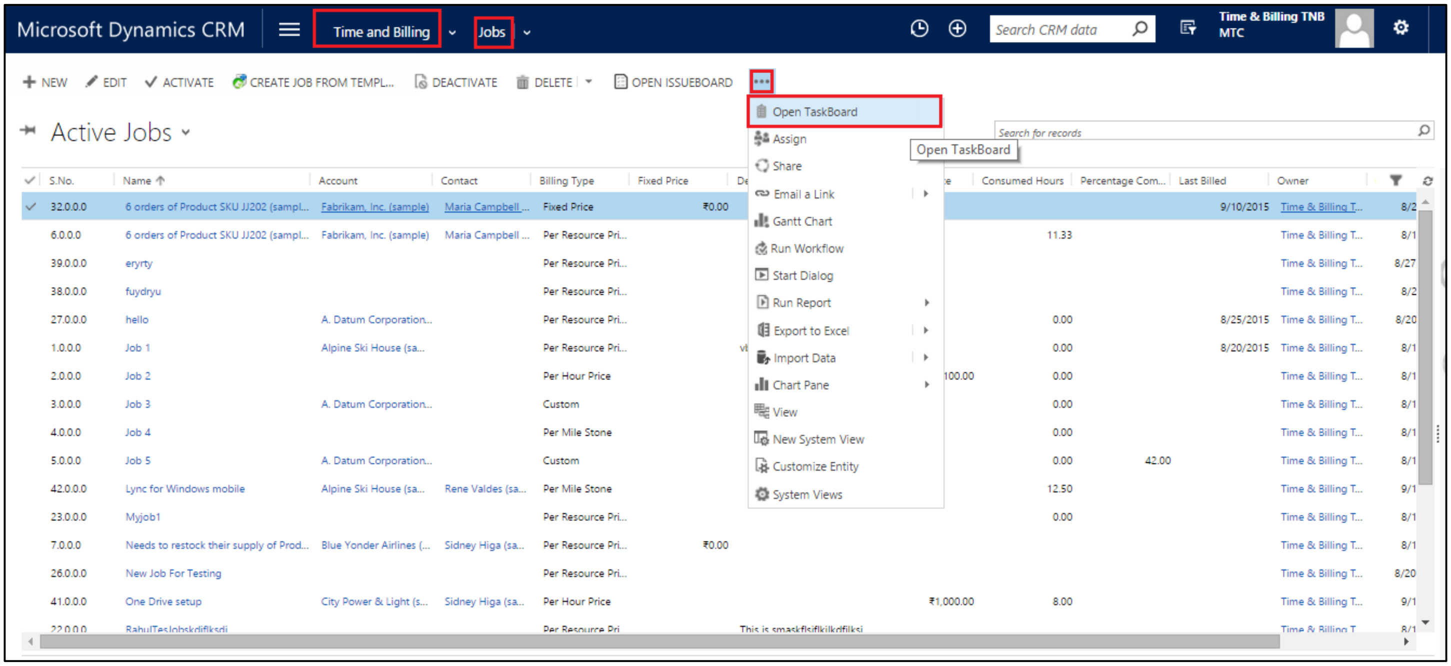


Figure 30: Navigation for Task Board

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

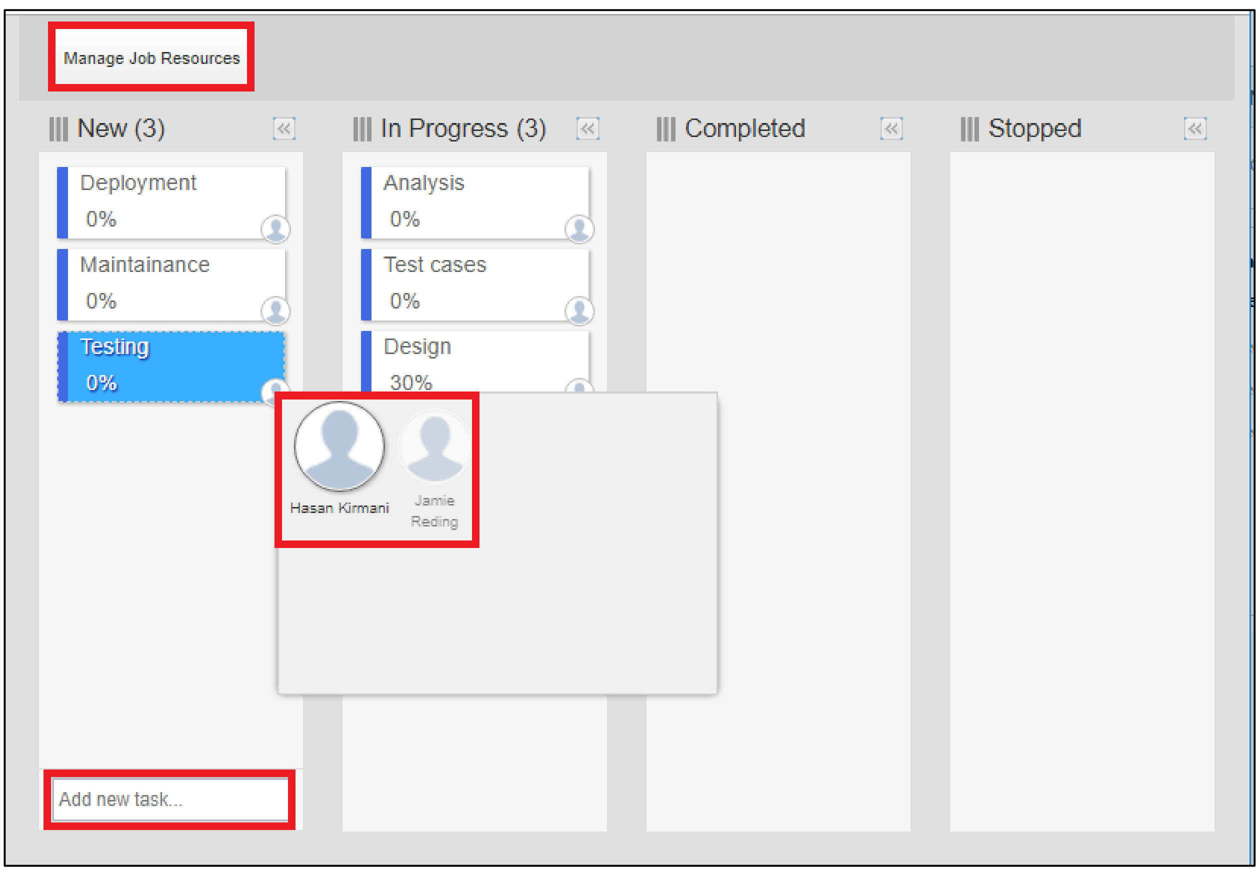
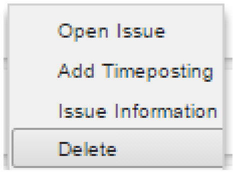


Figure 31: Task Board

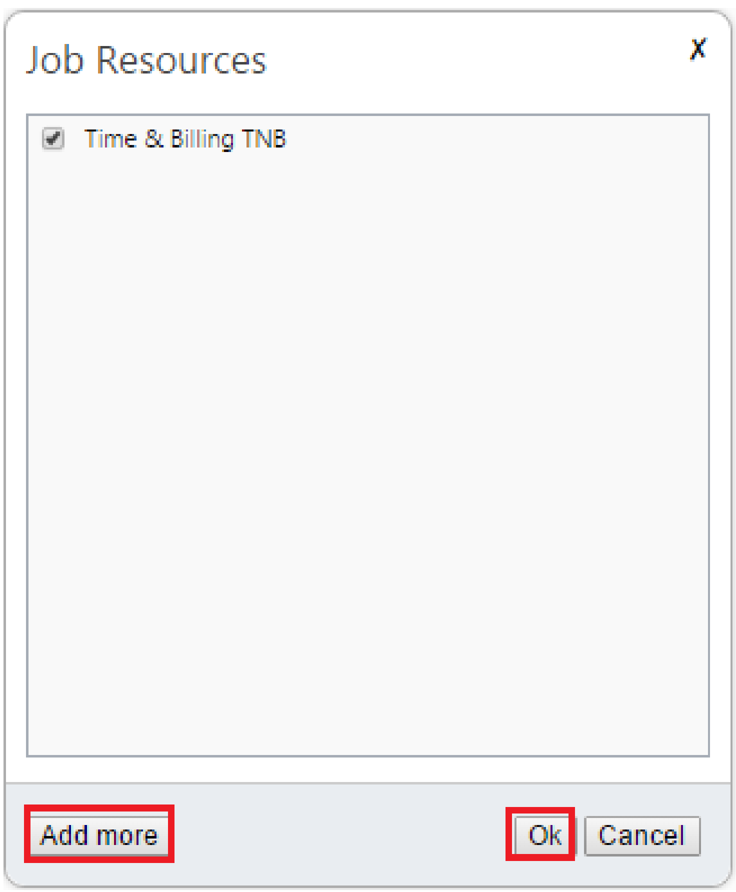
- The Task board display all the columns mentioned above to display information respectively.
- If user wants to create a New Task he has to enter in the space provided at the bottom under Not Started column.
- Select the Task and Right click to get



  - ✓ 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 (…)**

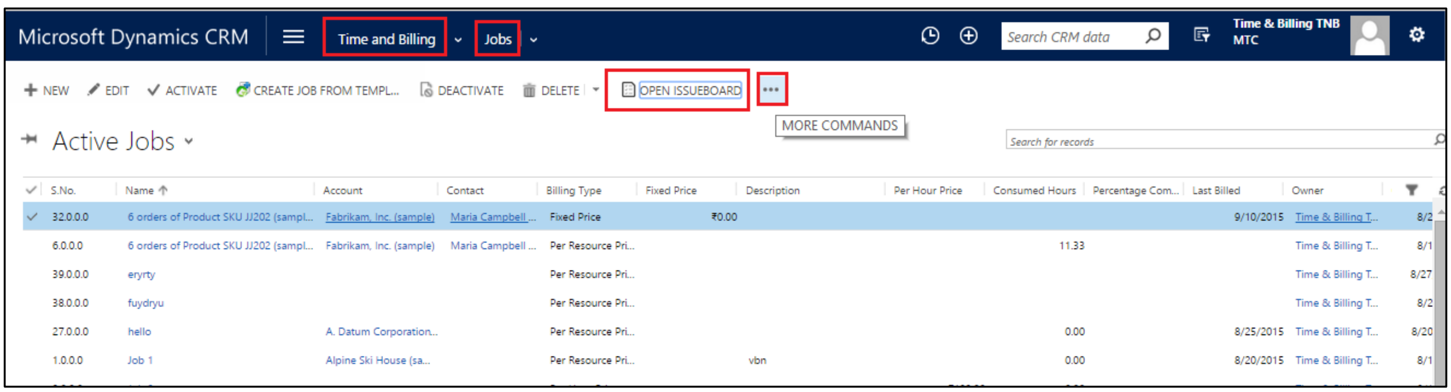


Figure 32: Navigation for Issue Board

- 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.

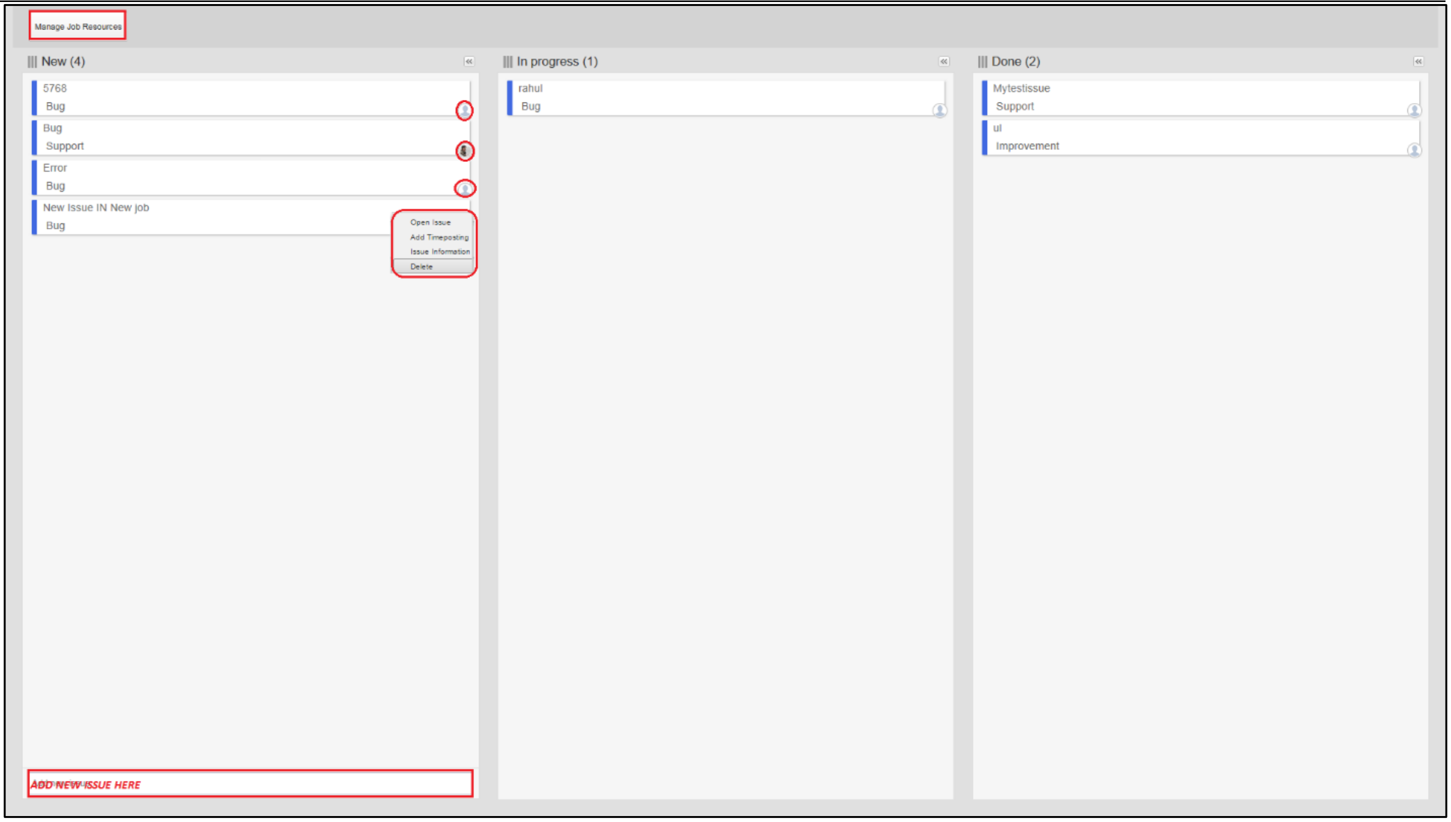
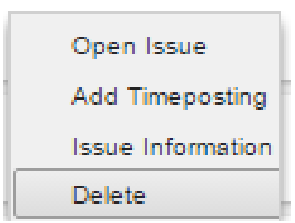


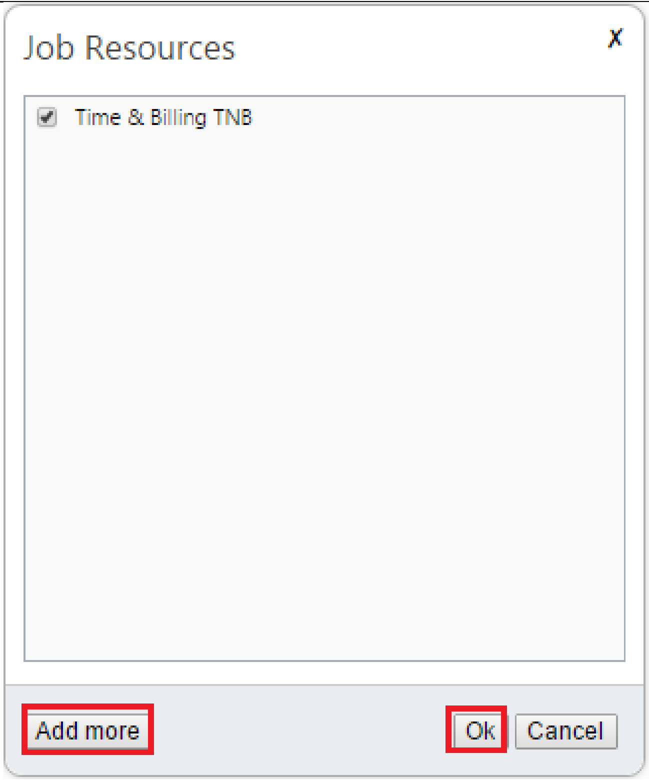
Figure 33: Issue Board

- 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

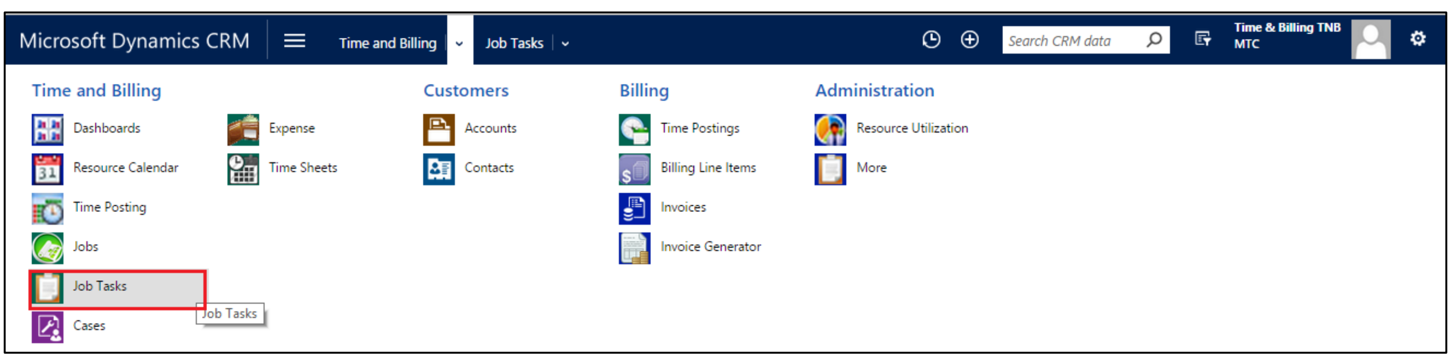
- Once the task is created you can click on Manage resource button on Top of the form to assign Resources to the particular task. A pop up window opens with resource Details
- Un check the box to remove resource or Select from the List to add resource
- Click on add more button to get full list of resources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

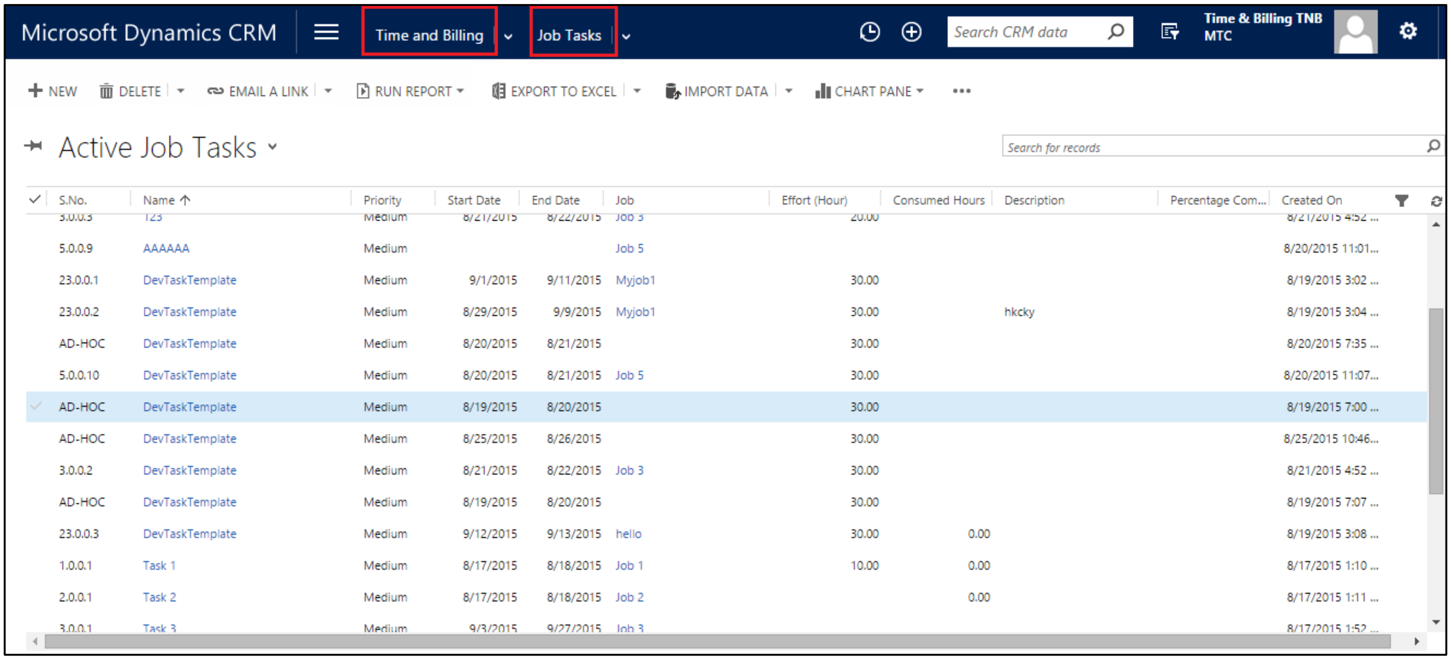


Figure 34: Job Task screen

- 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.

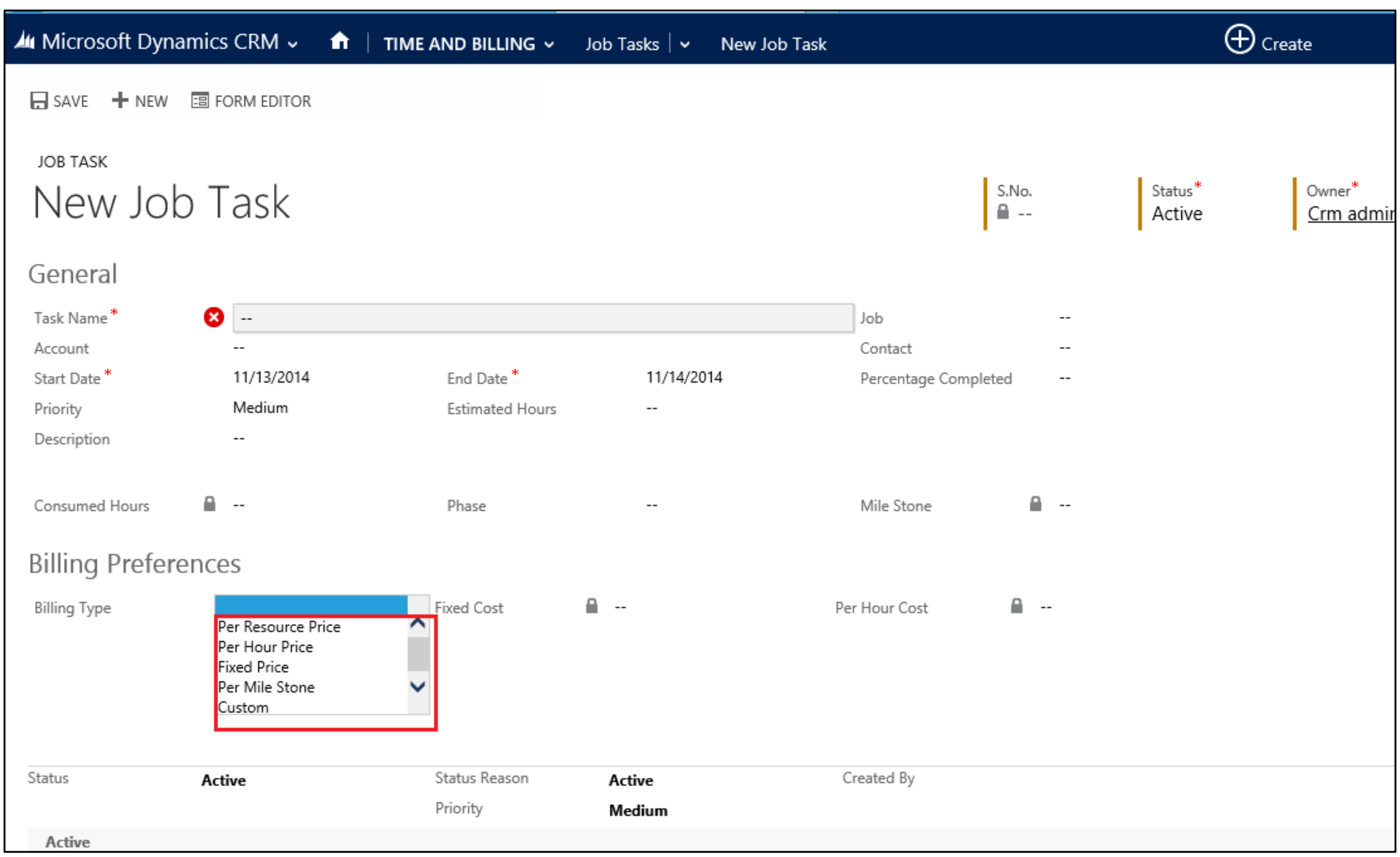


Figure 35: Add new job task general information

- 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.

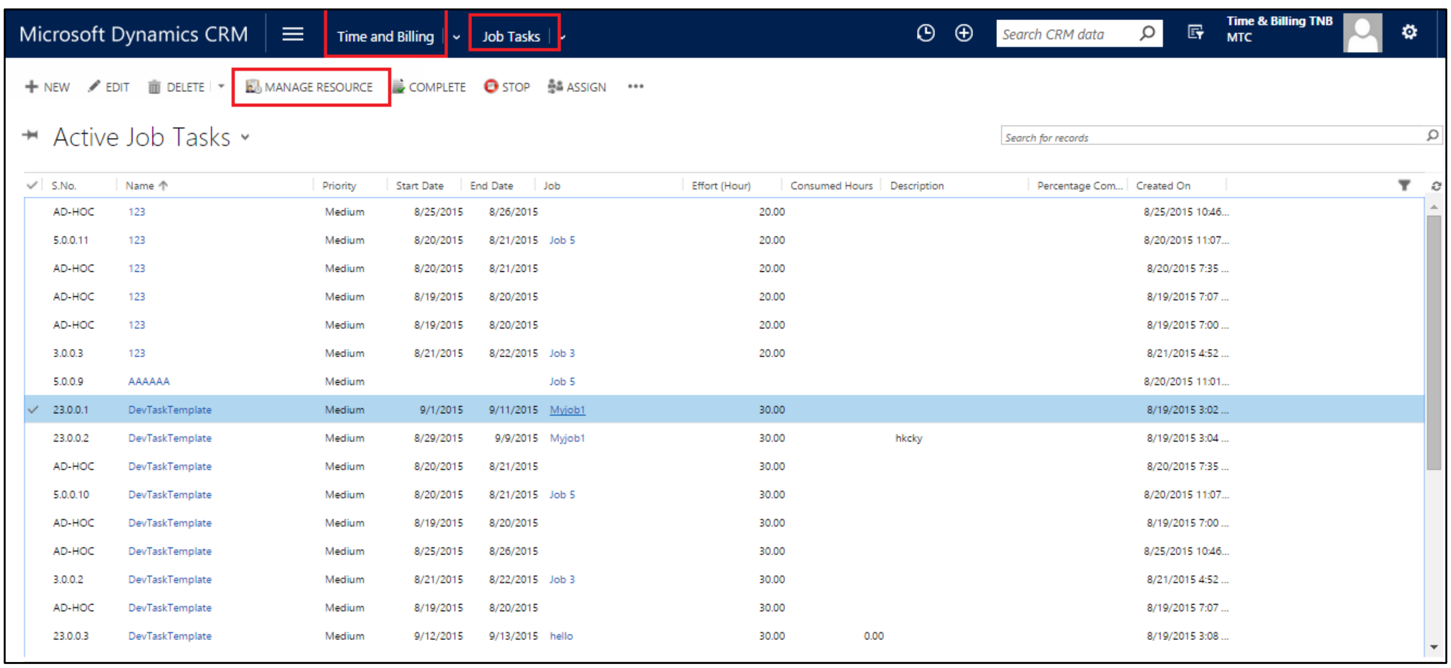


Figure 36: CRM showing Manage Resource icon

- 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.

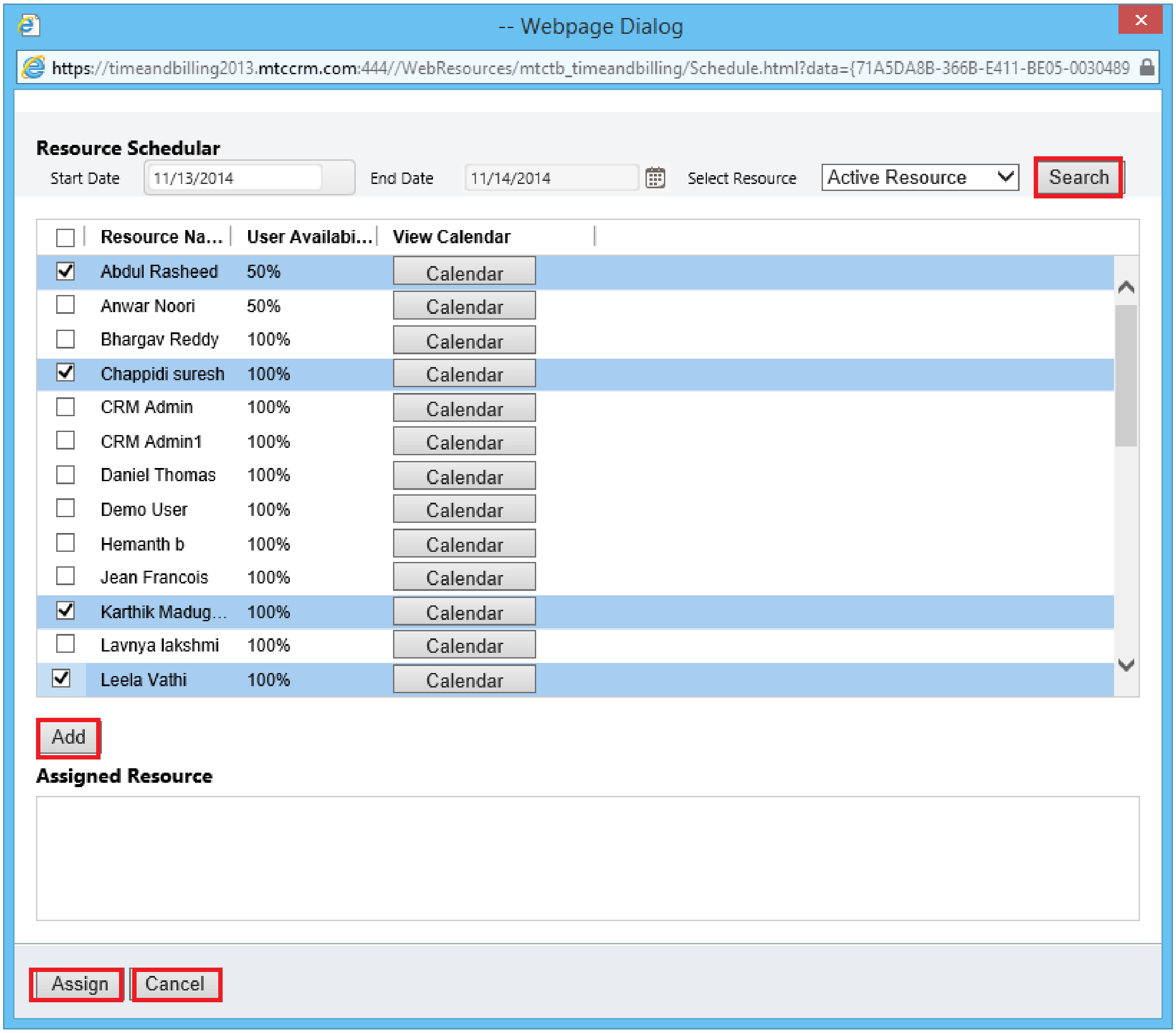


Figure 37: Pop up - Manage Job Resource

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

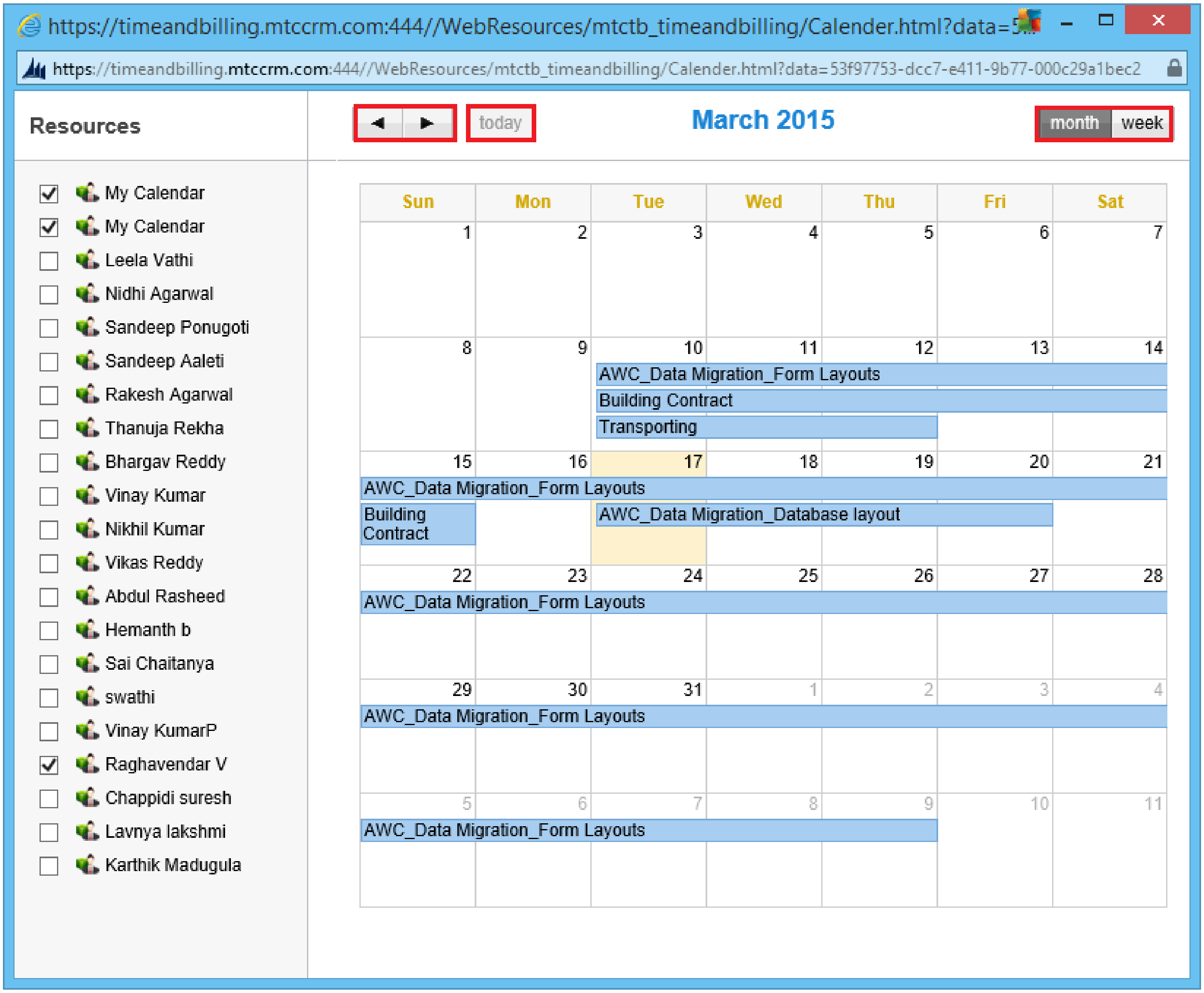


Figure 38: Resource calendar from Manage resource

- 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)

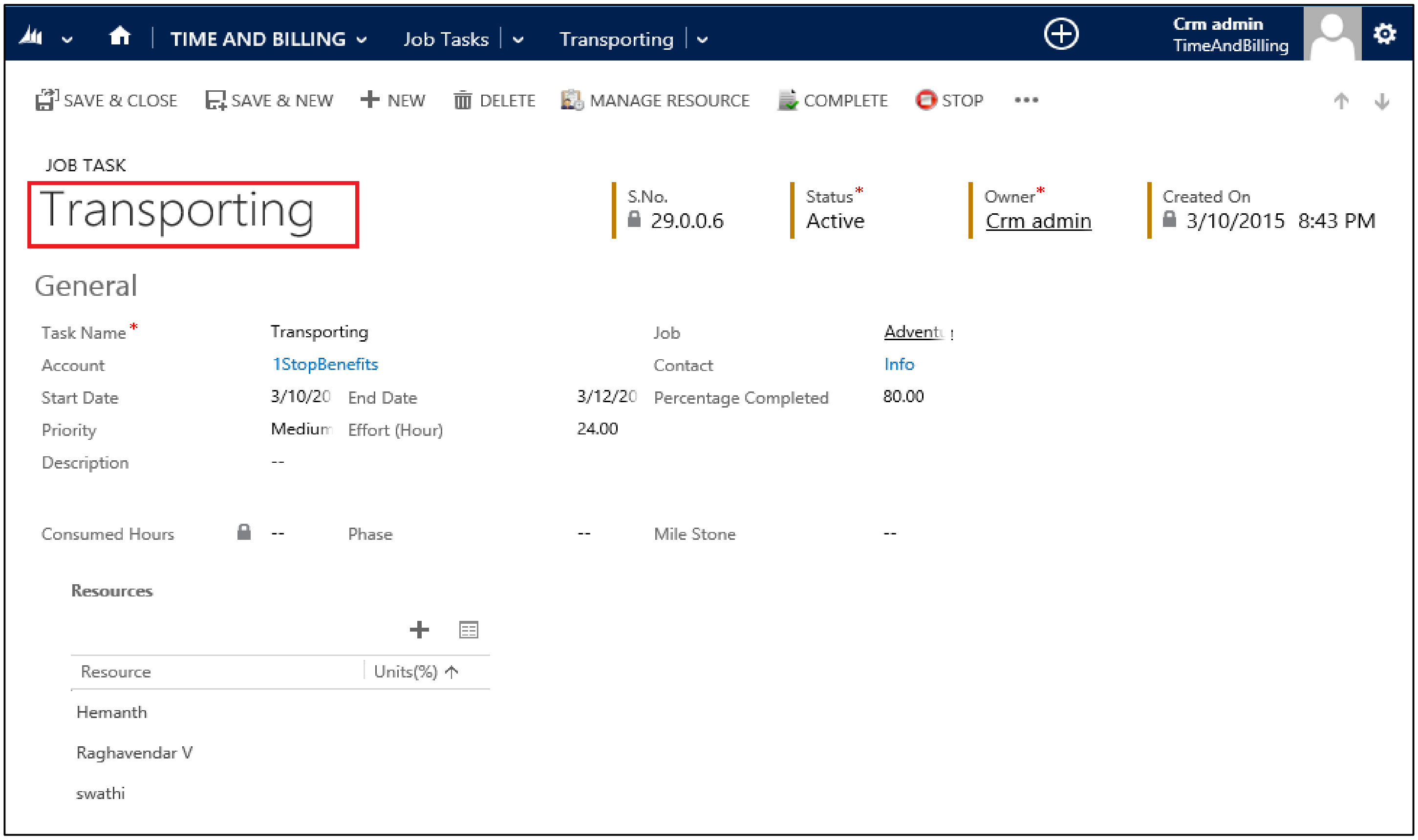


Figure 39: CRM screen navigating thru Calendar

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.

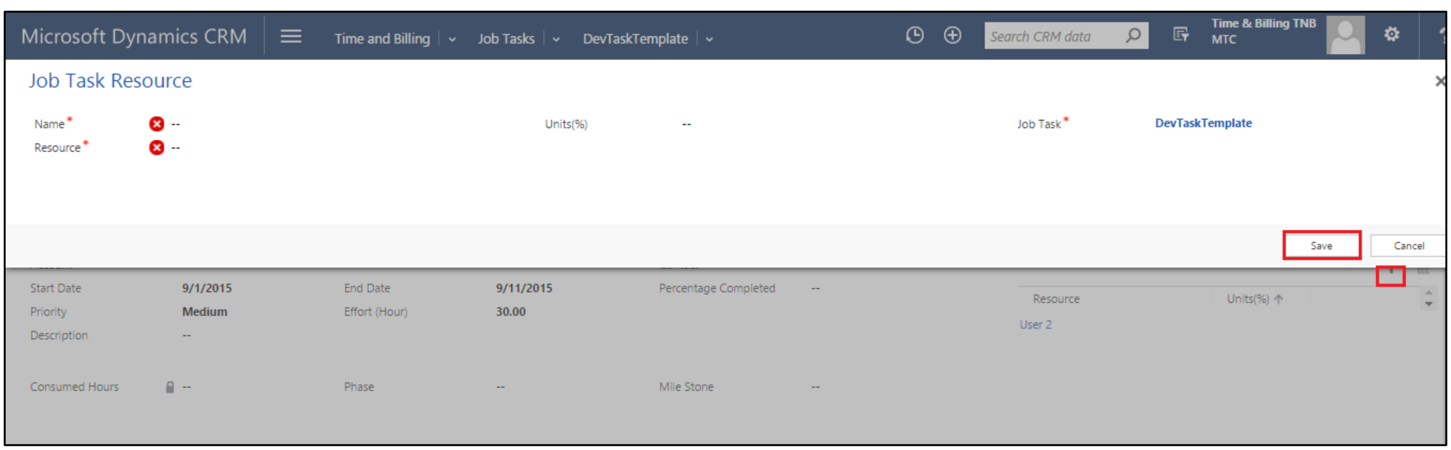


Figure 40: Add new Job Task resource

Time Posting

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

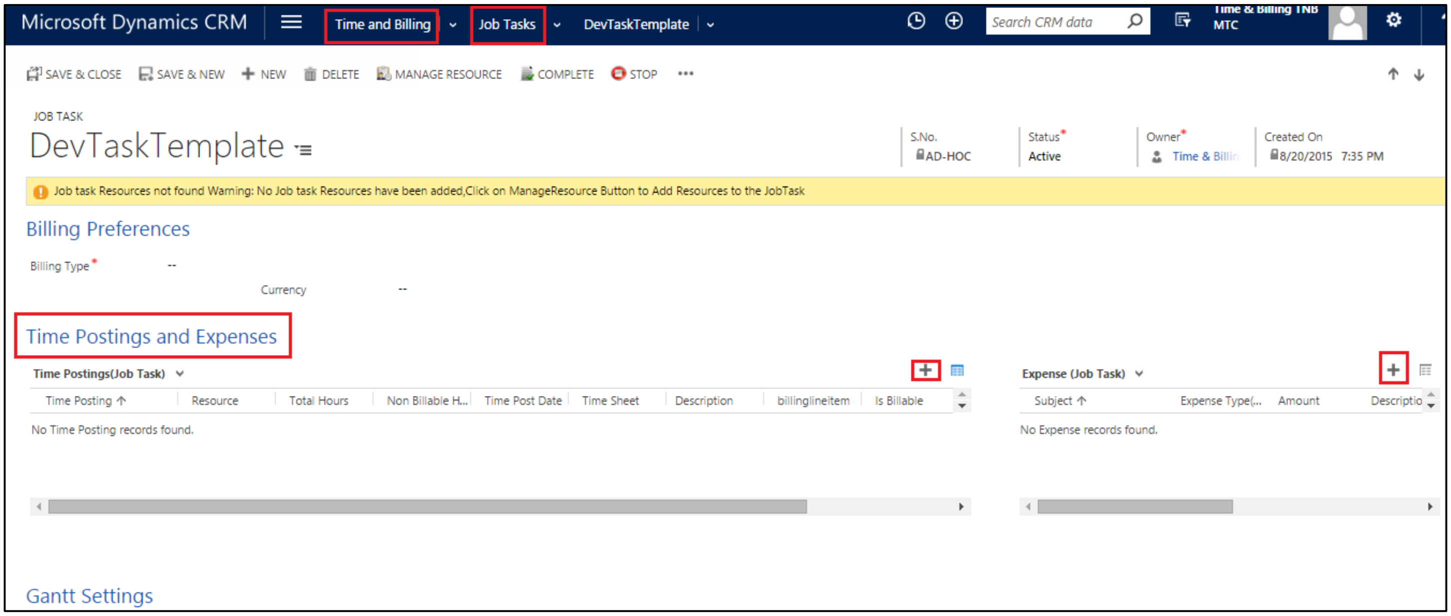


Figure 41: Job Task showing Time Posting

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.

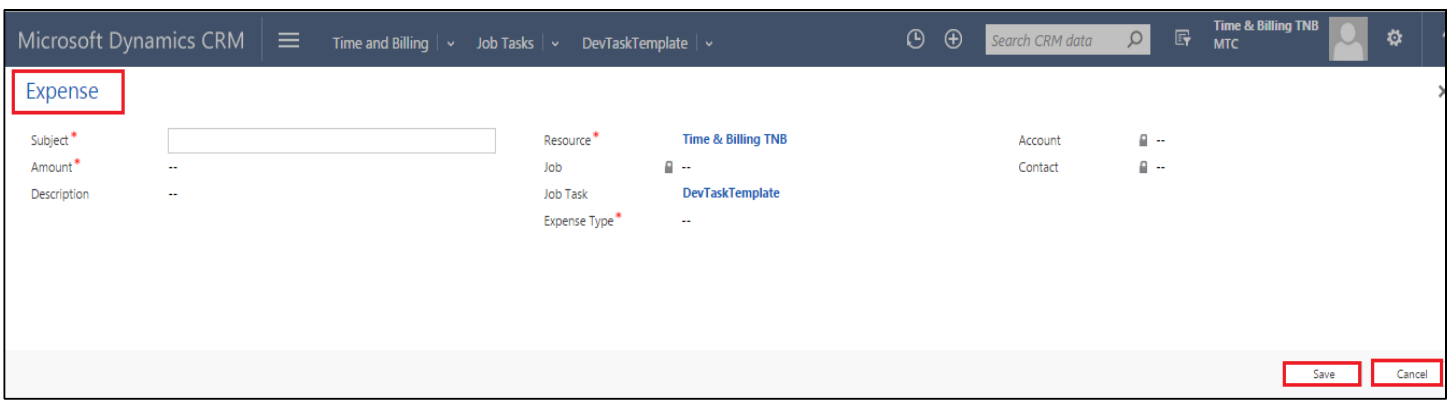


Figure 42: Adding New Expense in Job Task

Gantt Settings

- Scroll down Job task form to get Gantt Settings.

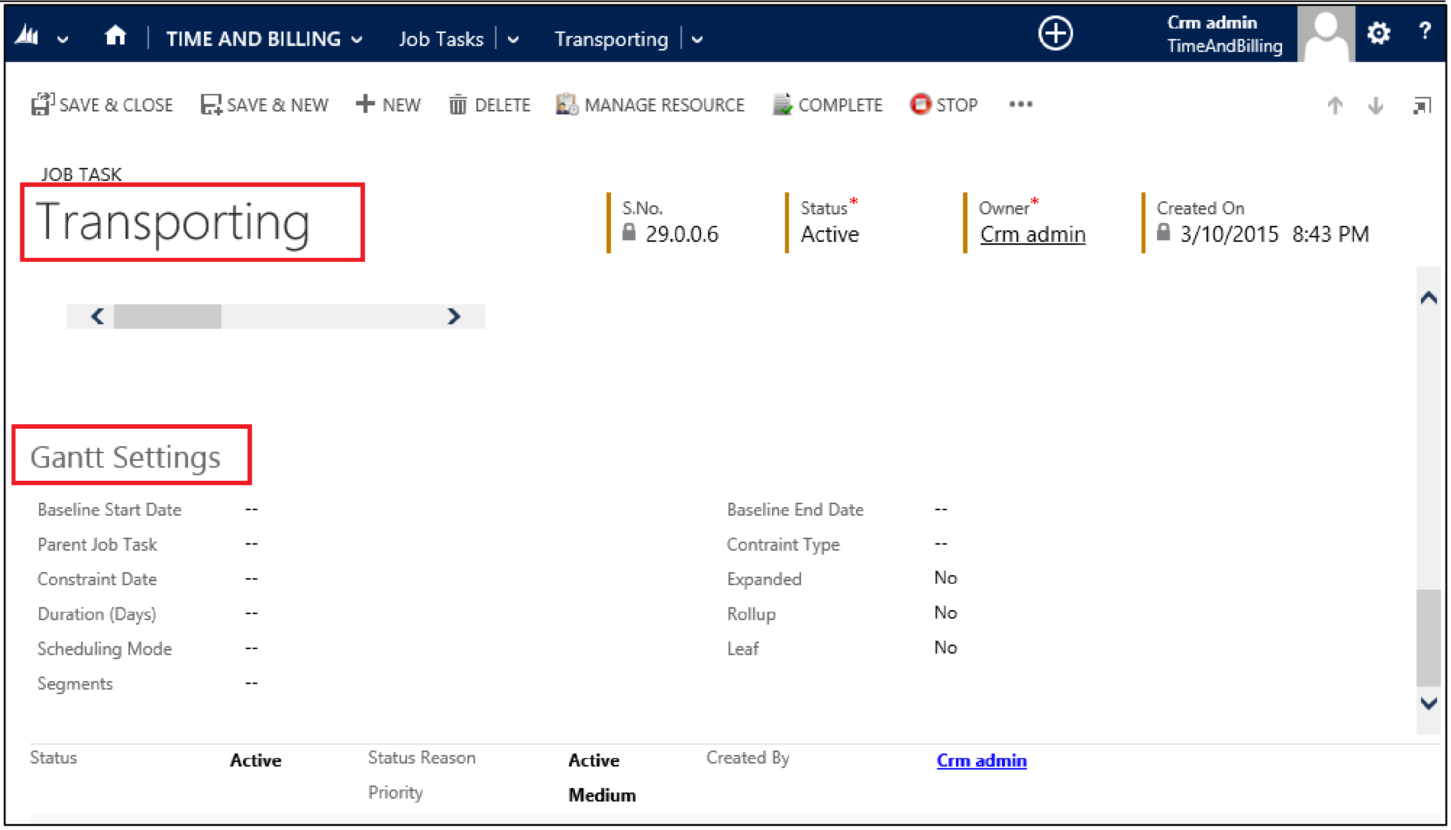


Figure 43; Gantt Settings in Job Task

- 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

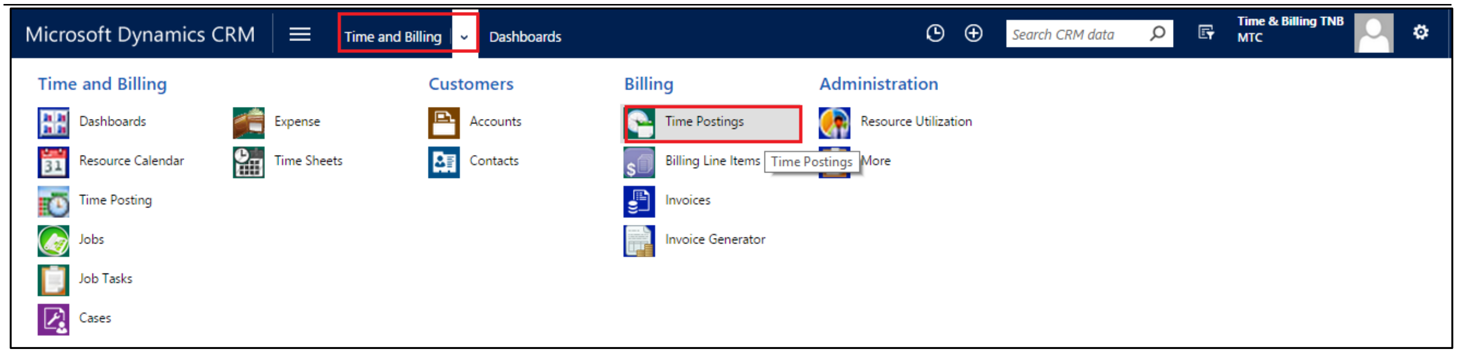
This section deals with Time posting, Billing Line items and Invoices and Invoice generator

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.

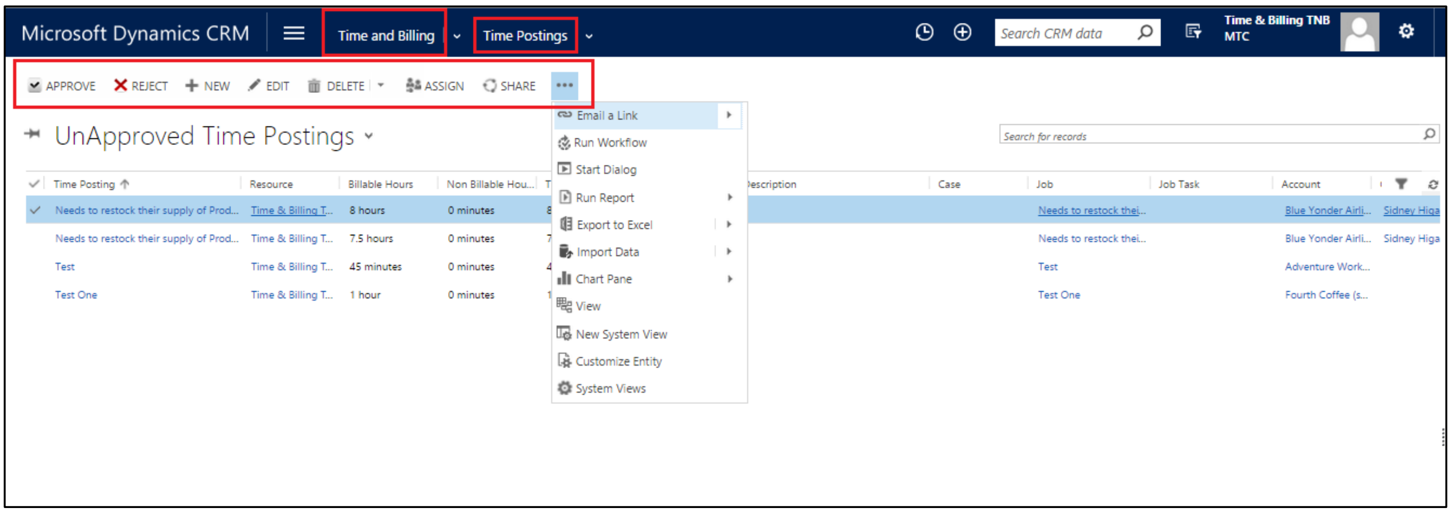
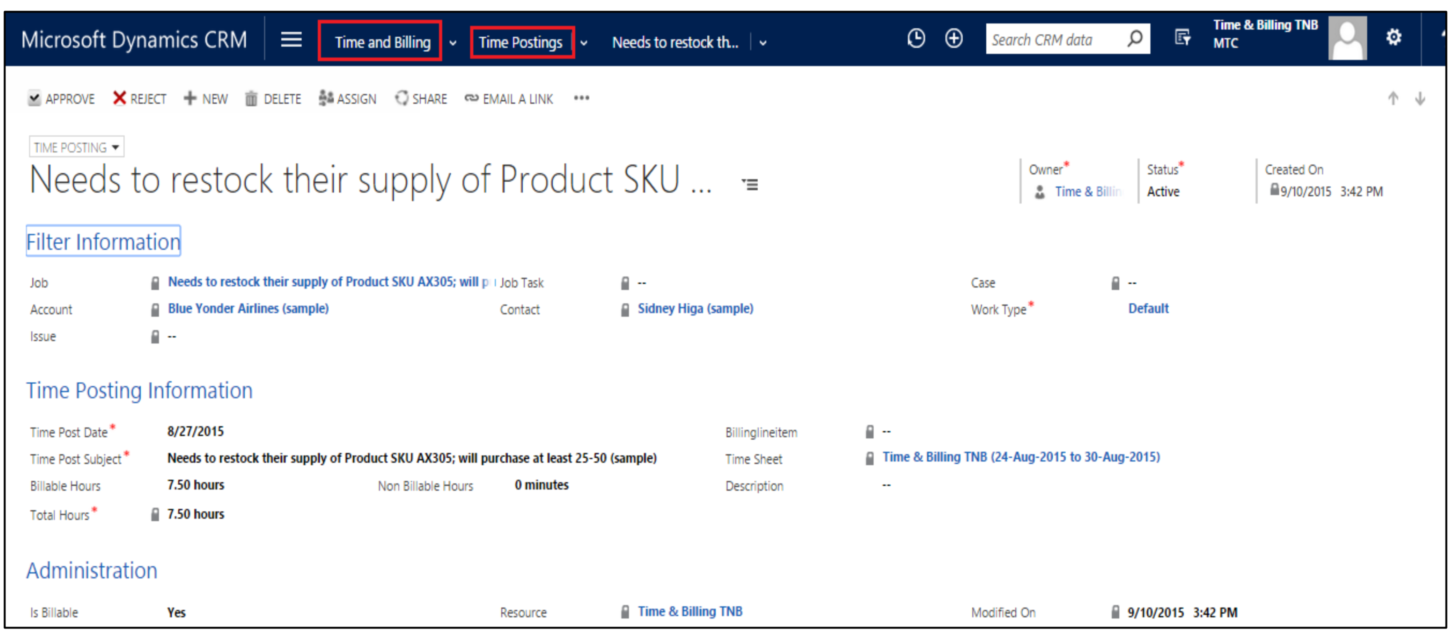


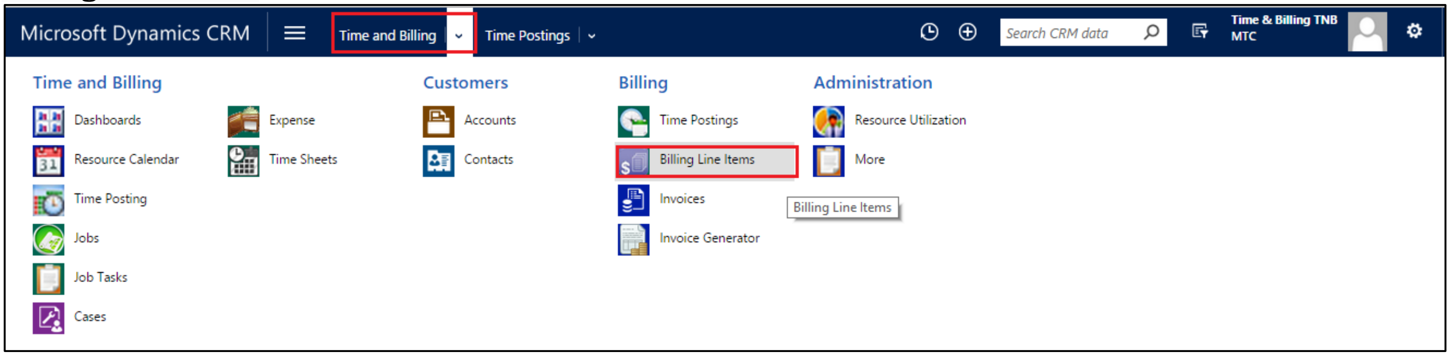
Figure 44: CRM Time posting (unapproved) list

- 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

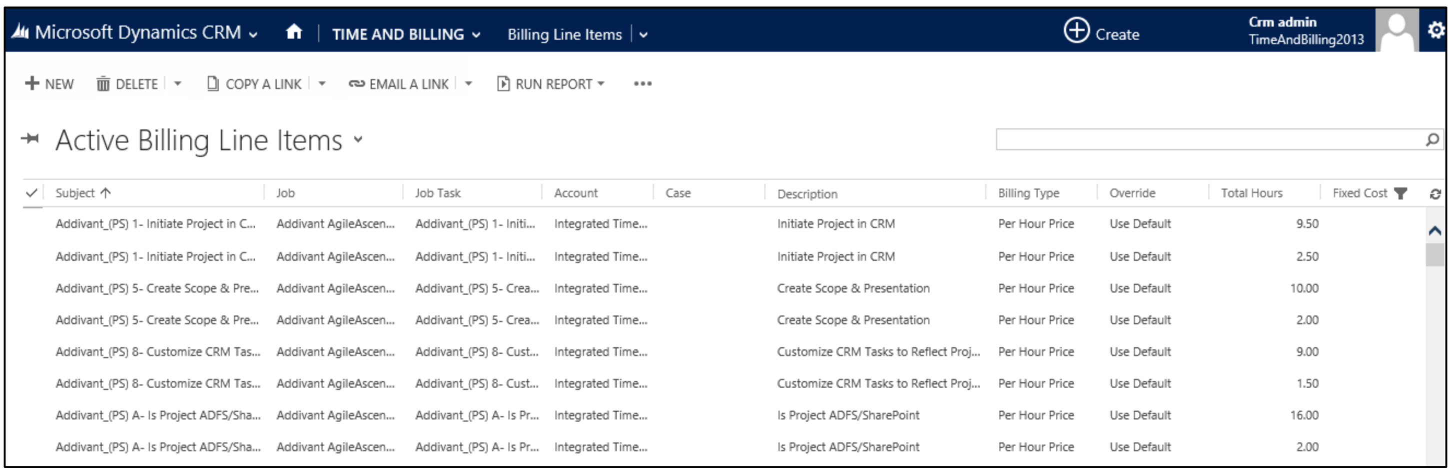


Figure 45: Billing line items

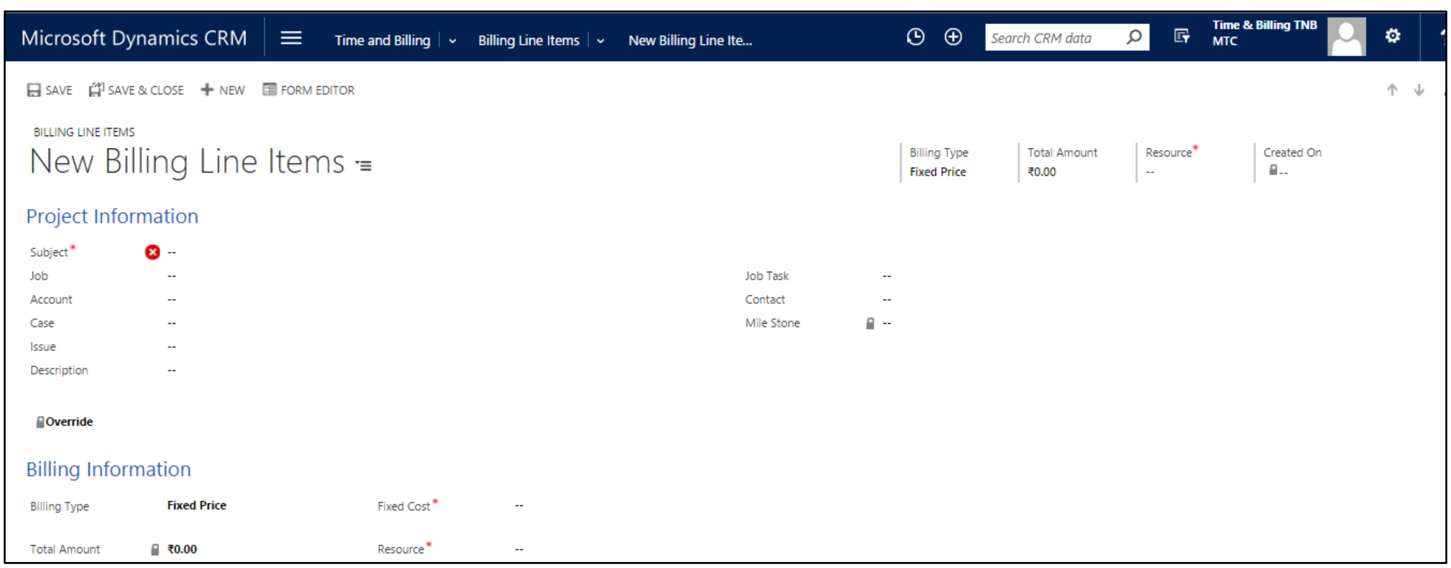
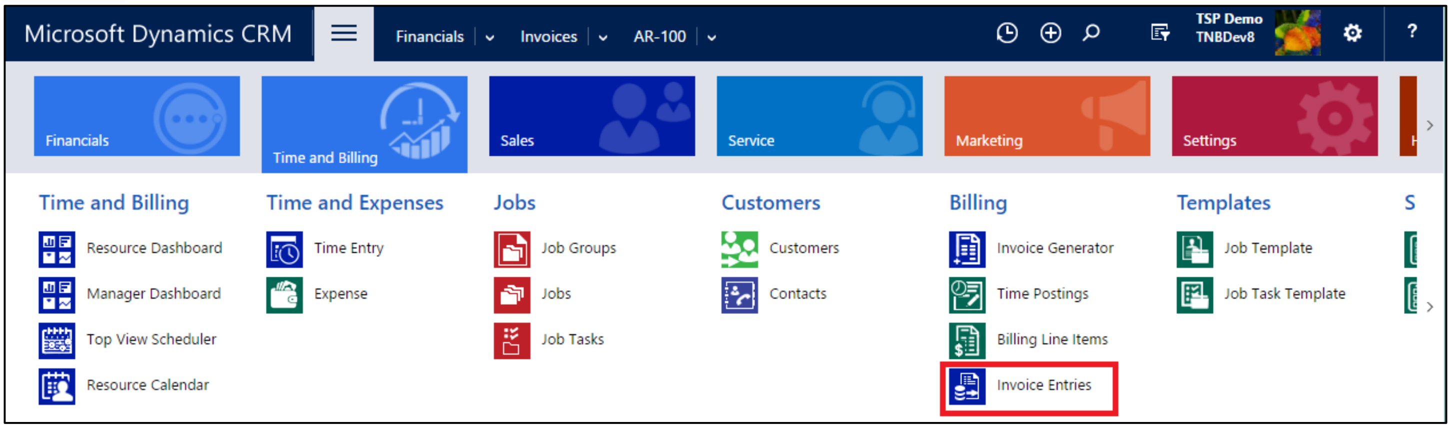


Figure 46: Billing line items new

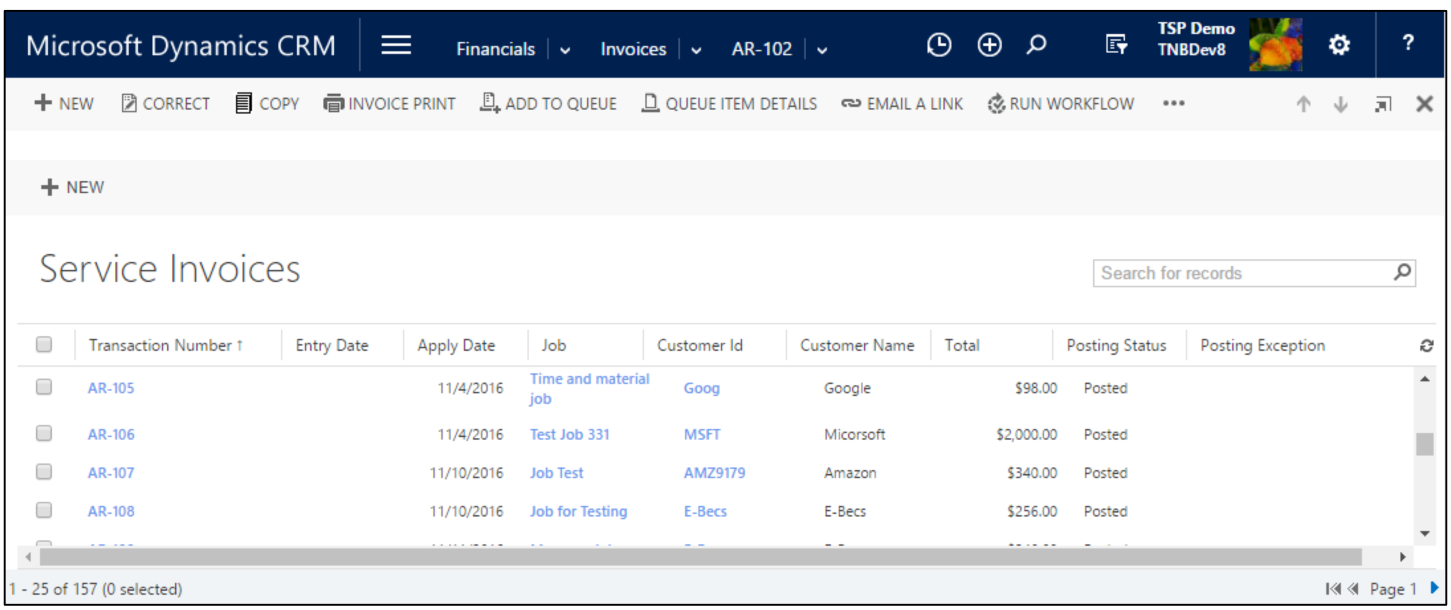
- Once you get the above screen opened Input the Subject Description
- Enter Detailed description
- Select Job, Job Task and case, Account, or Contact with the help of Look up icon
- Once done, it navigates to Billing Line Details for the Total Amount to be inputted
- Click on **Save** or **Save & Close**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

Invoices



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



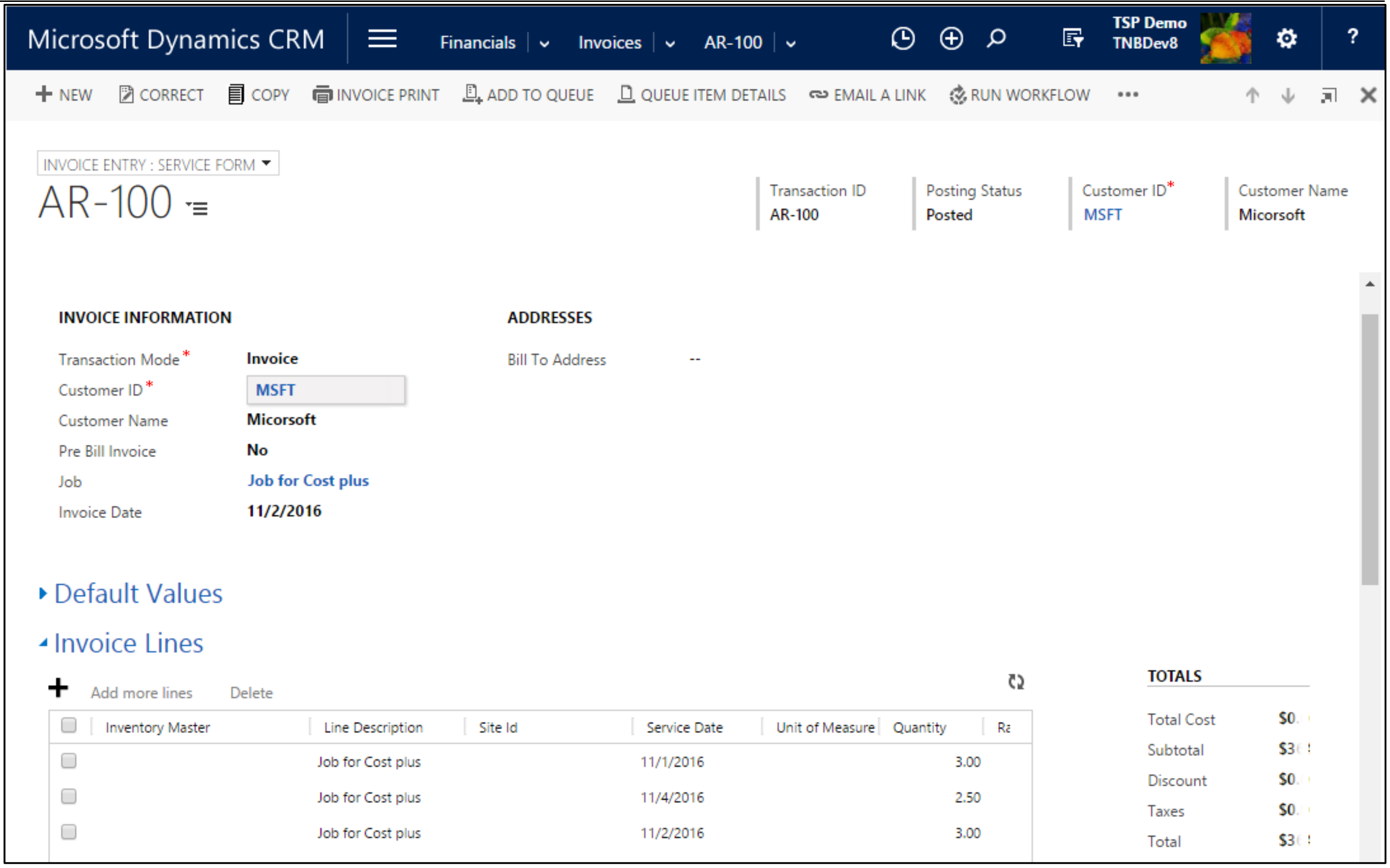


Figure 47: Invoice(s) list

- 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

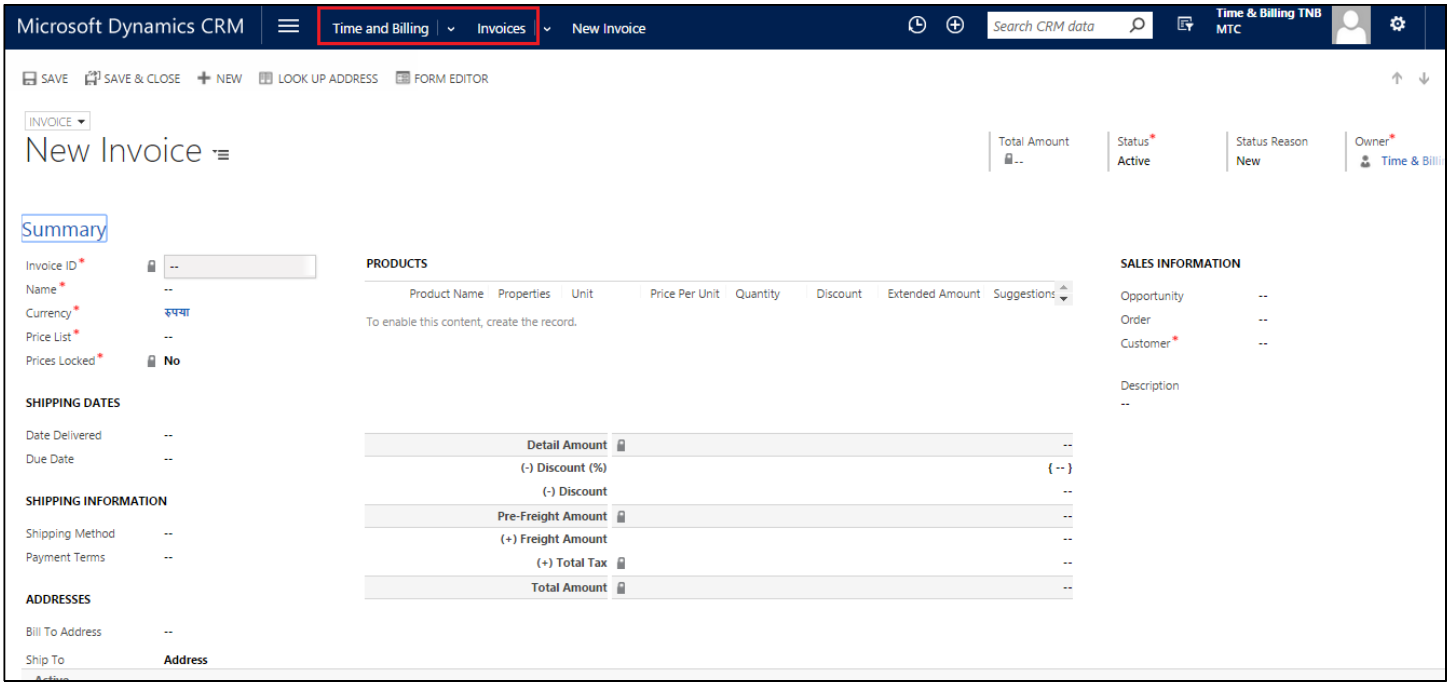


Figure 49: Invoice creation – New

- Fields marked with Astriex are mandatory.

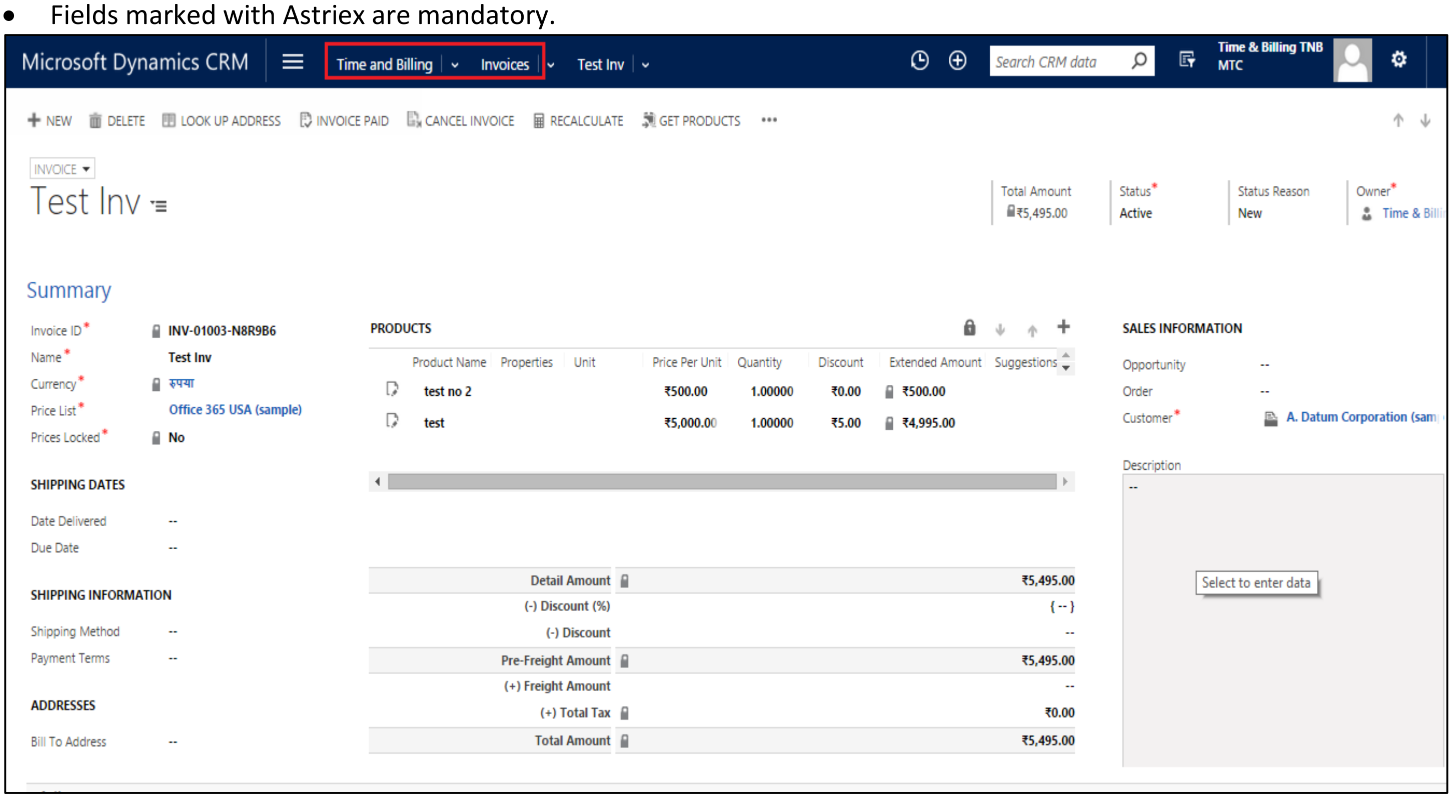


Figure 50: New Invoice Created

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

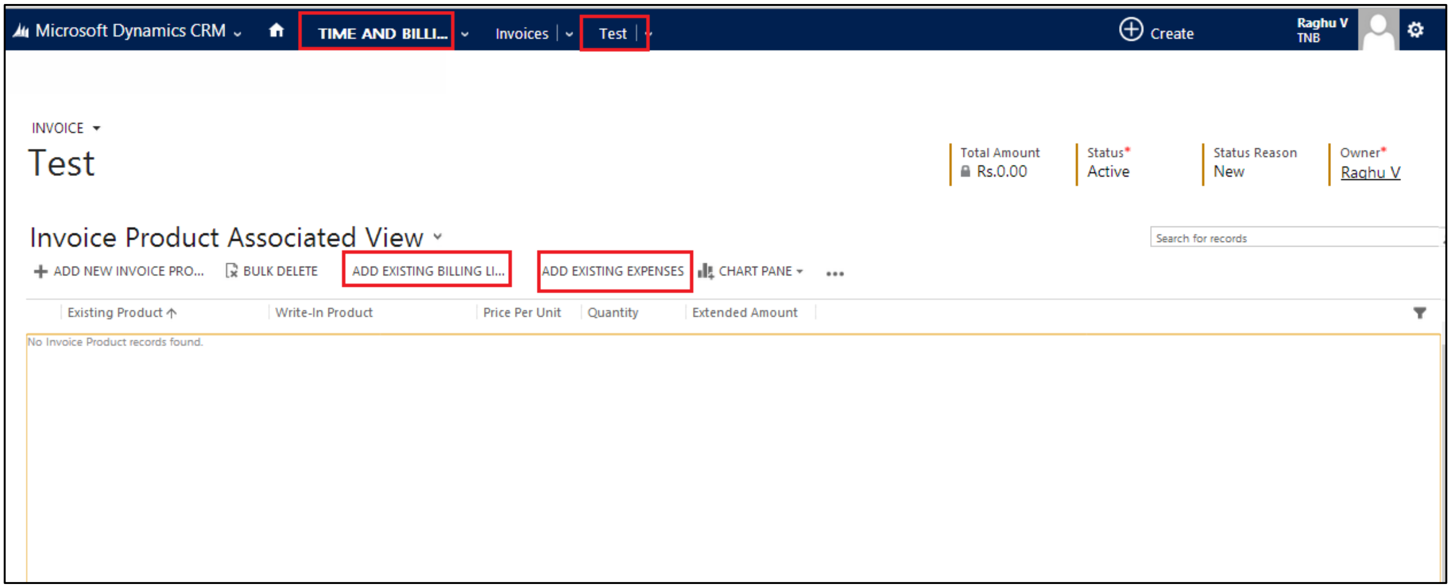


Figure 51: Add existing Billing Line Items

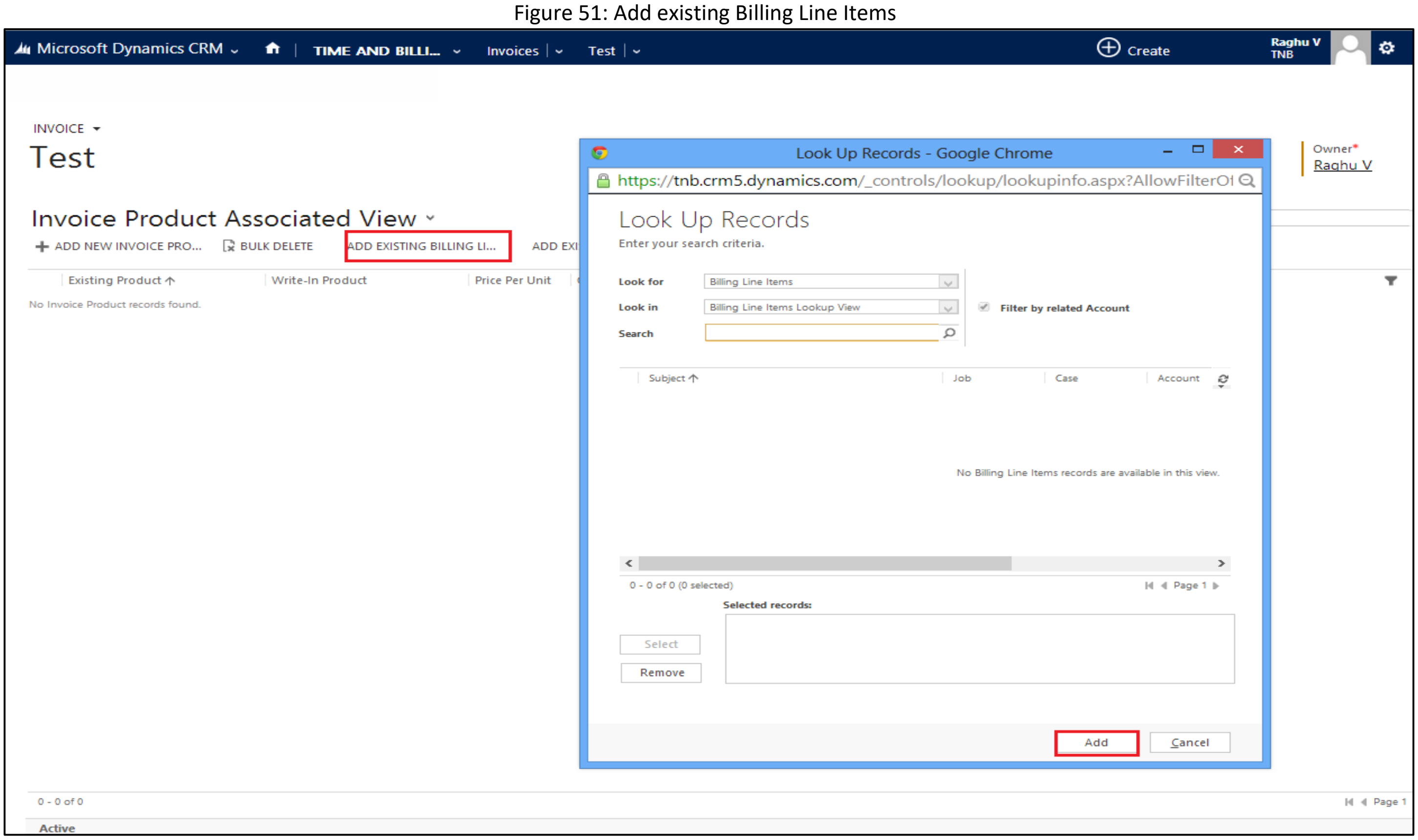


Figure 52: Invoice Products

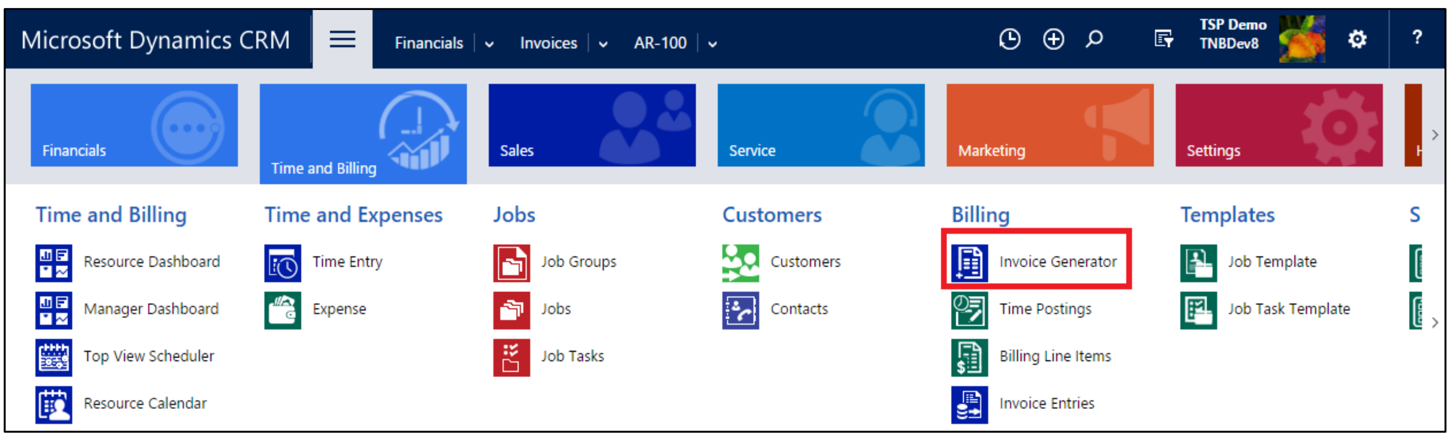
- Select any of the icons shown in the top ribbon "**Add Existing Billing Line items**" to "**Add Existing Expenses**"
- Only the relevant records pertaining to the selected Customer field (Account or Contact) are displayed in pop up screen.
- Select the item(s) if any and say **Ok**. As shown in the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

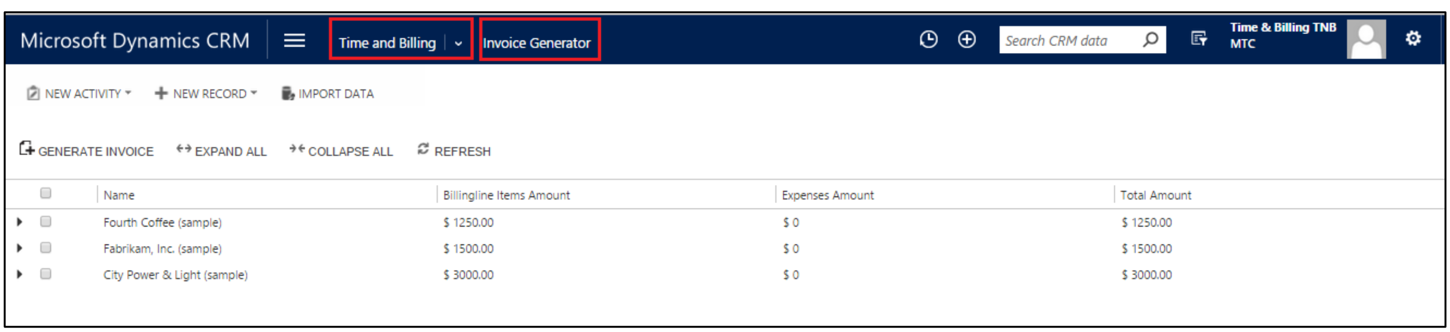
- If finished with Billing line items, then select **Add existing expenses** now
- Follow the same procedure to select from the pop up list for expenses
- Only the Approved expenses will be displayed in the list
- Complete all details like Bill to Address, Ship to Address Notes etc. and save to exit
- 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.

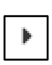
Figure 53: Invoice Paid / Cancel Invoice

Invoice Generator

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





- Click on  to Expand as shown below

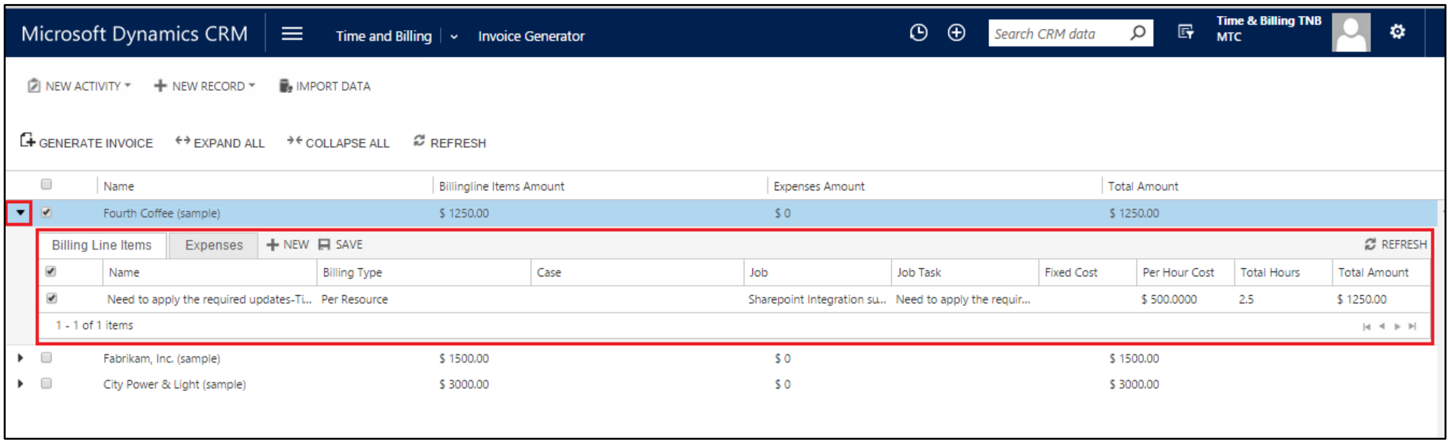
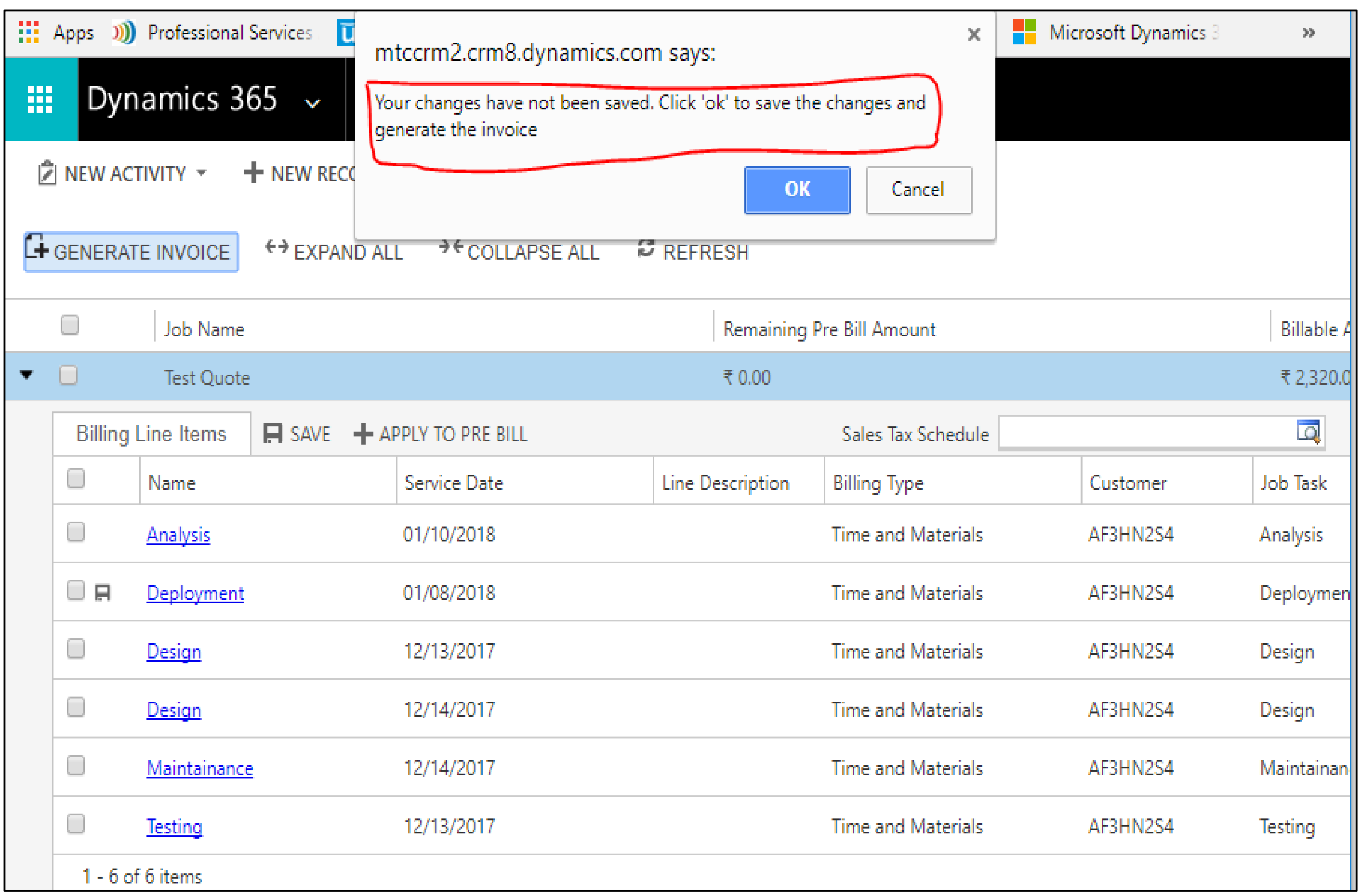


Figure 54: Invoice Generator

- 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 waring message pops up.



Cases

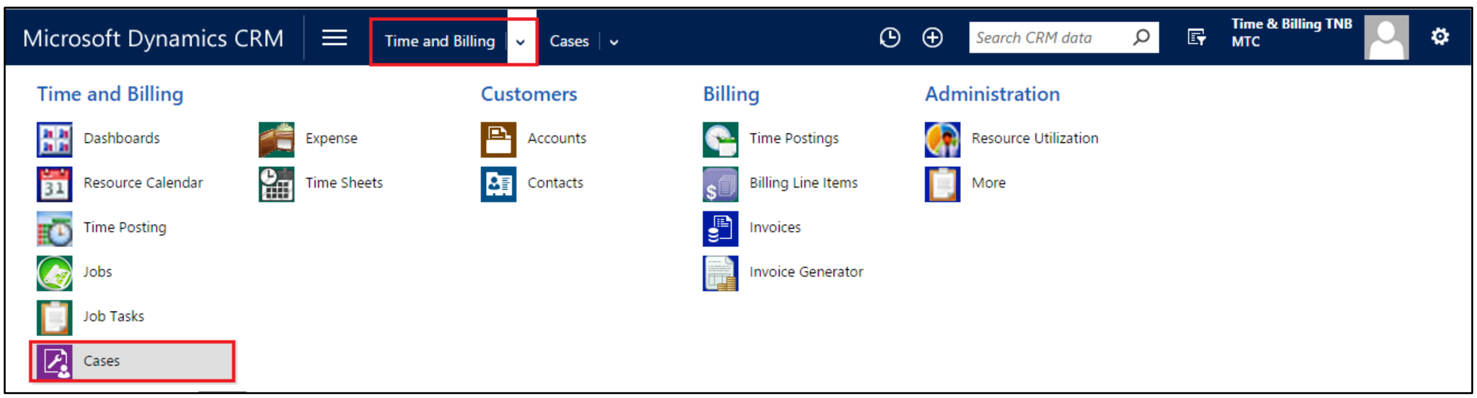
Generally Cases are not seen in the Time and Billing Site map. If a user wants to use cases in Time and Billing, the User has to initially configure as discussed Under Time and Billing Settings in the previous pages.

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

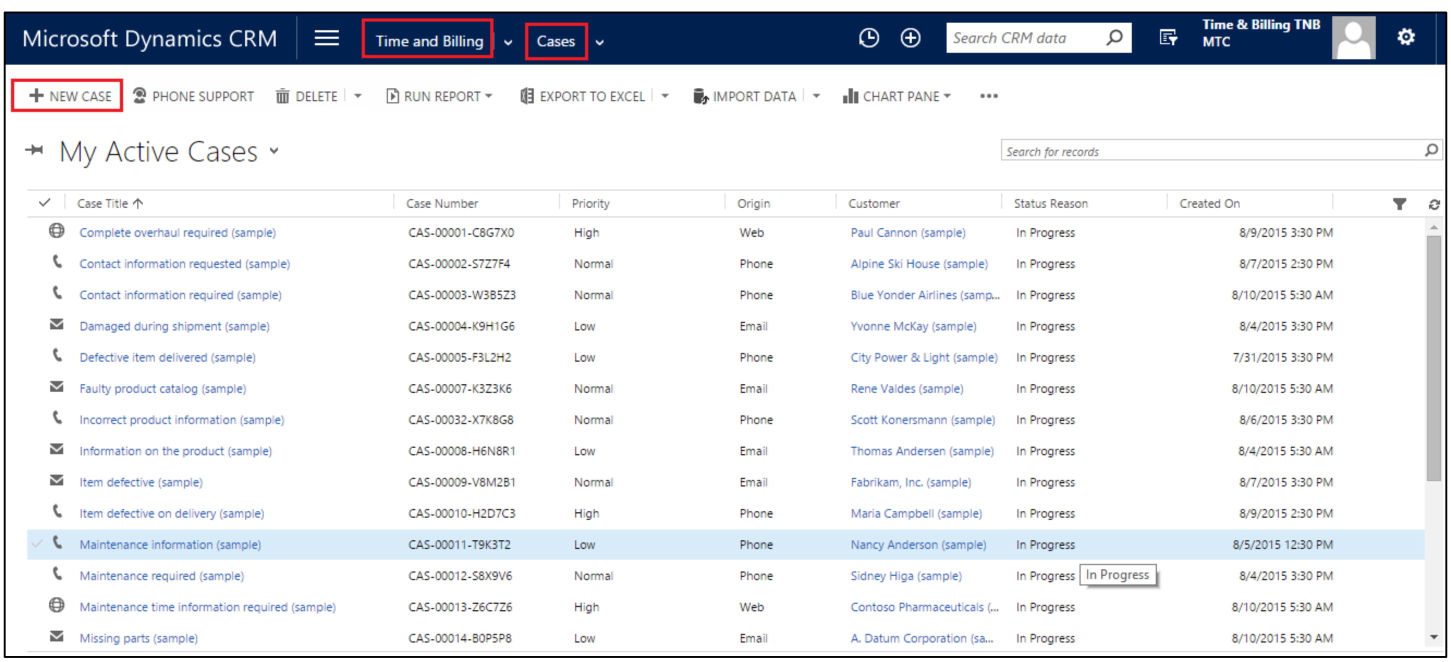


Figure 55: Types of cases displayed

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

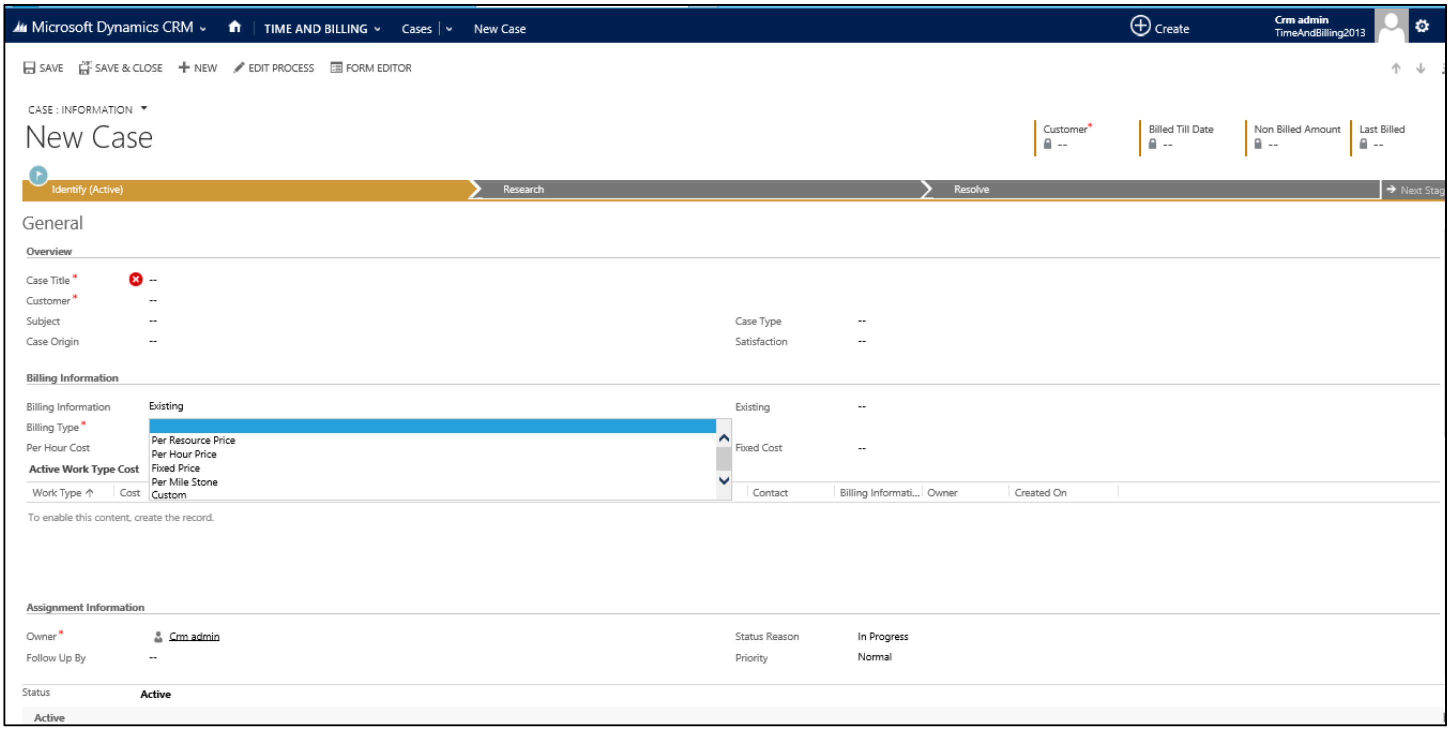
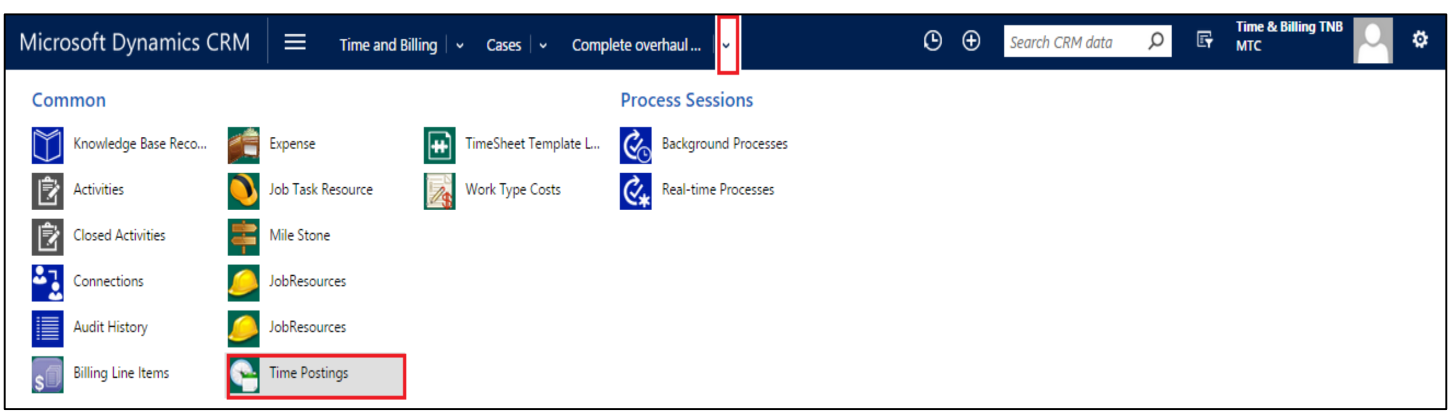


Figure 56: Cases - Create a New case

- 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)



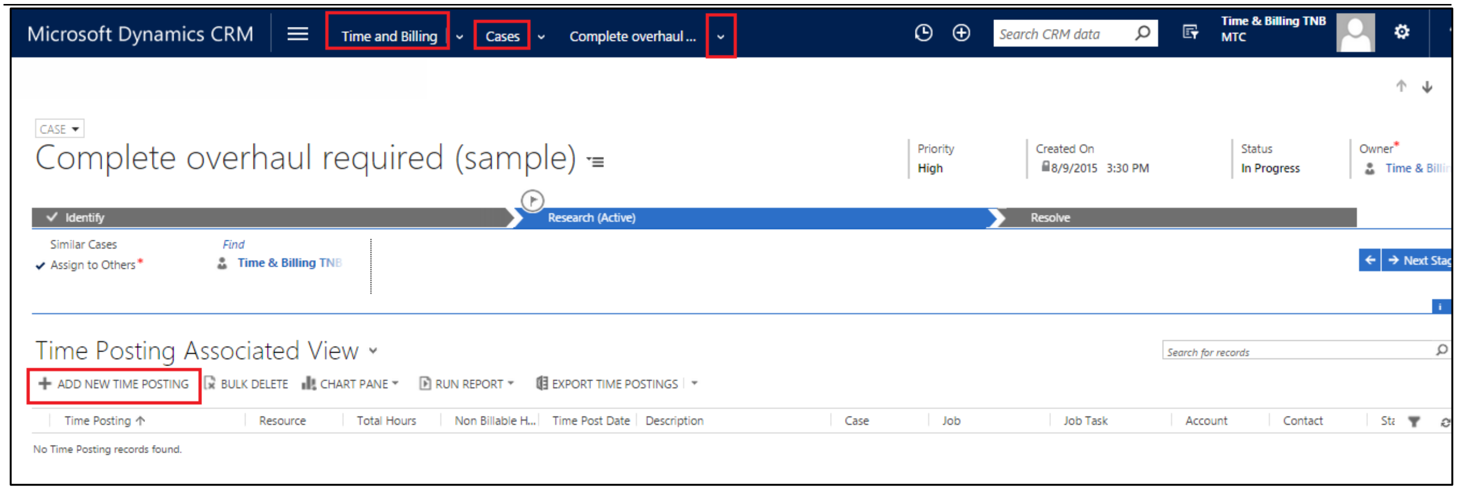


Figure 57: Time Posting Associated View

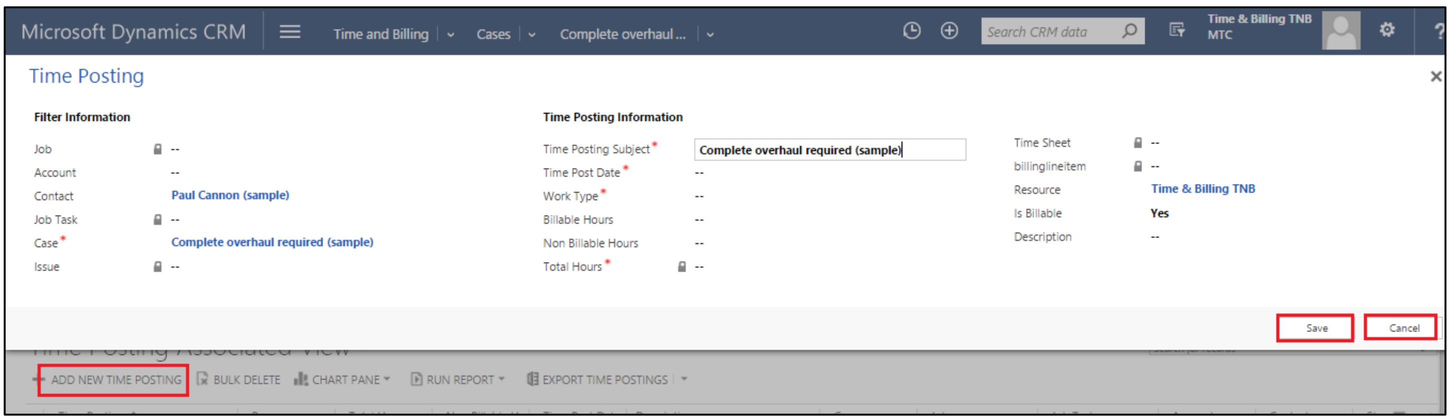
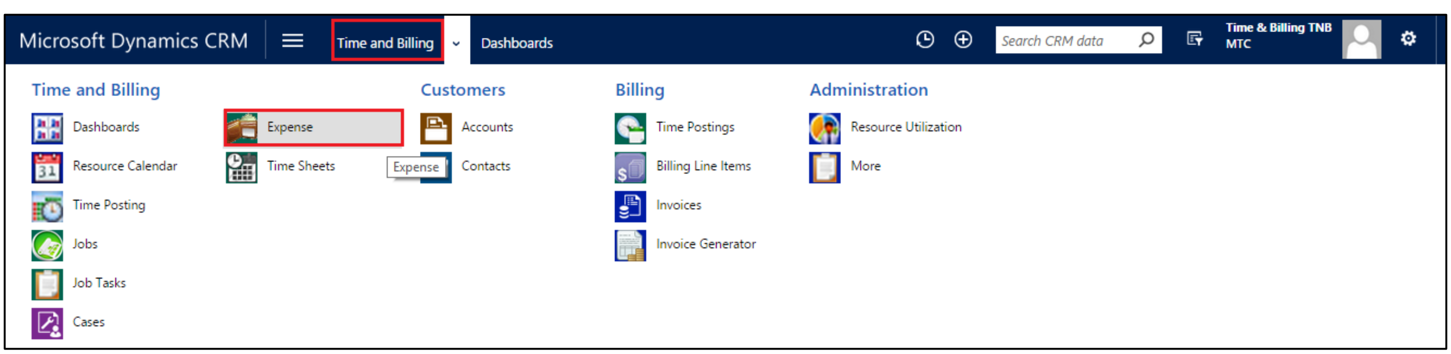


Figure 58: Cases - Time Posting

- 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 explaines 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

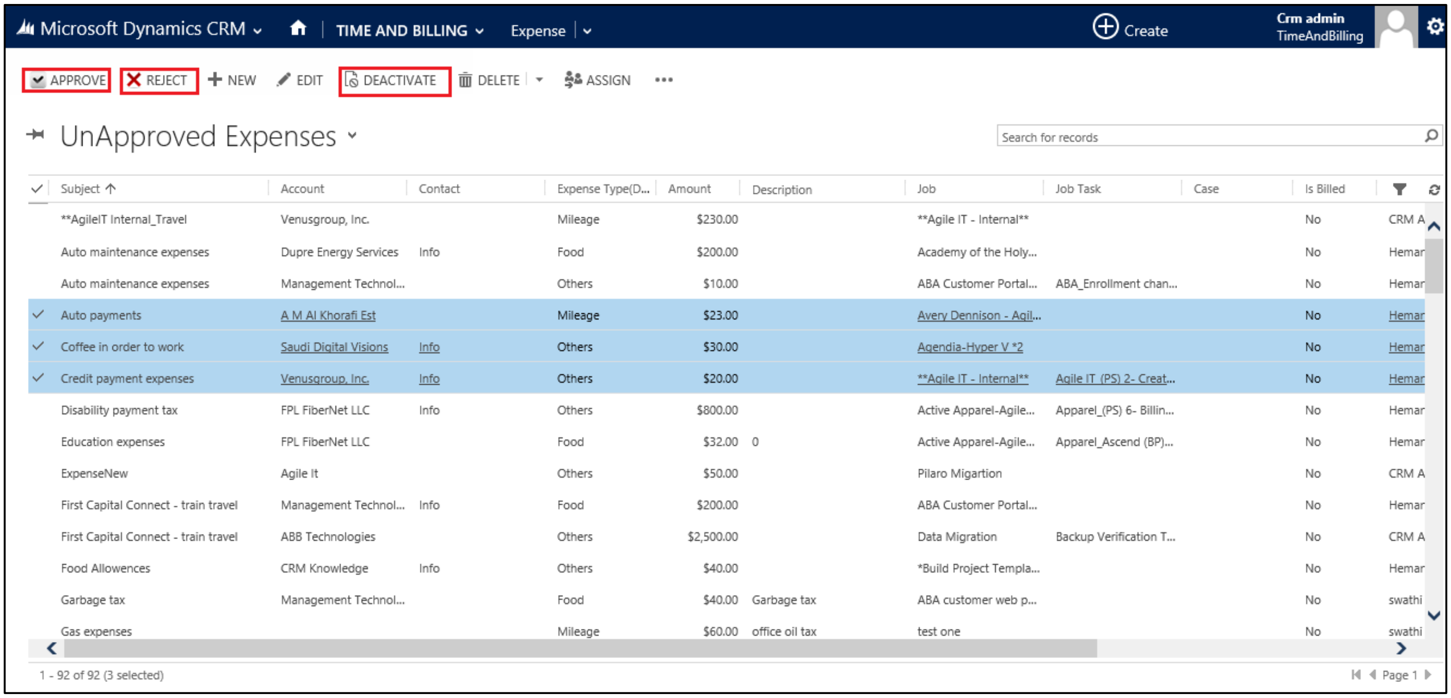


Figure 59: Expenses - Approve / Reject

- 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)

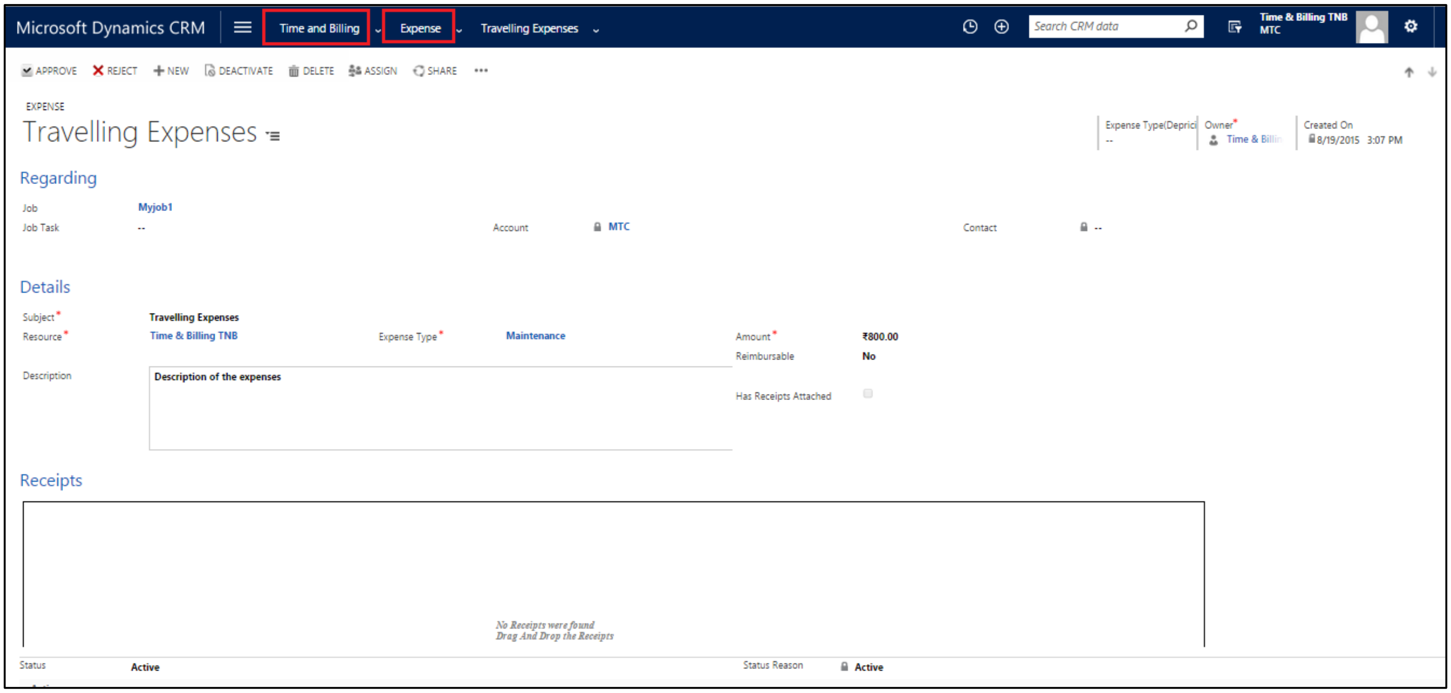


Figure 60: Expenses form

- **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.

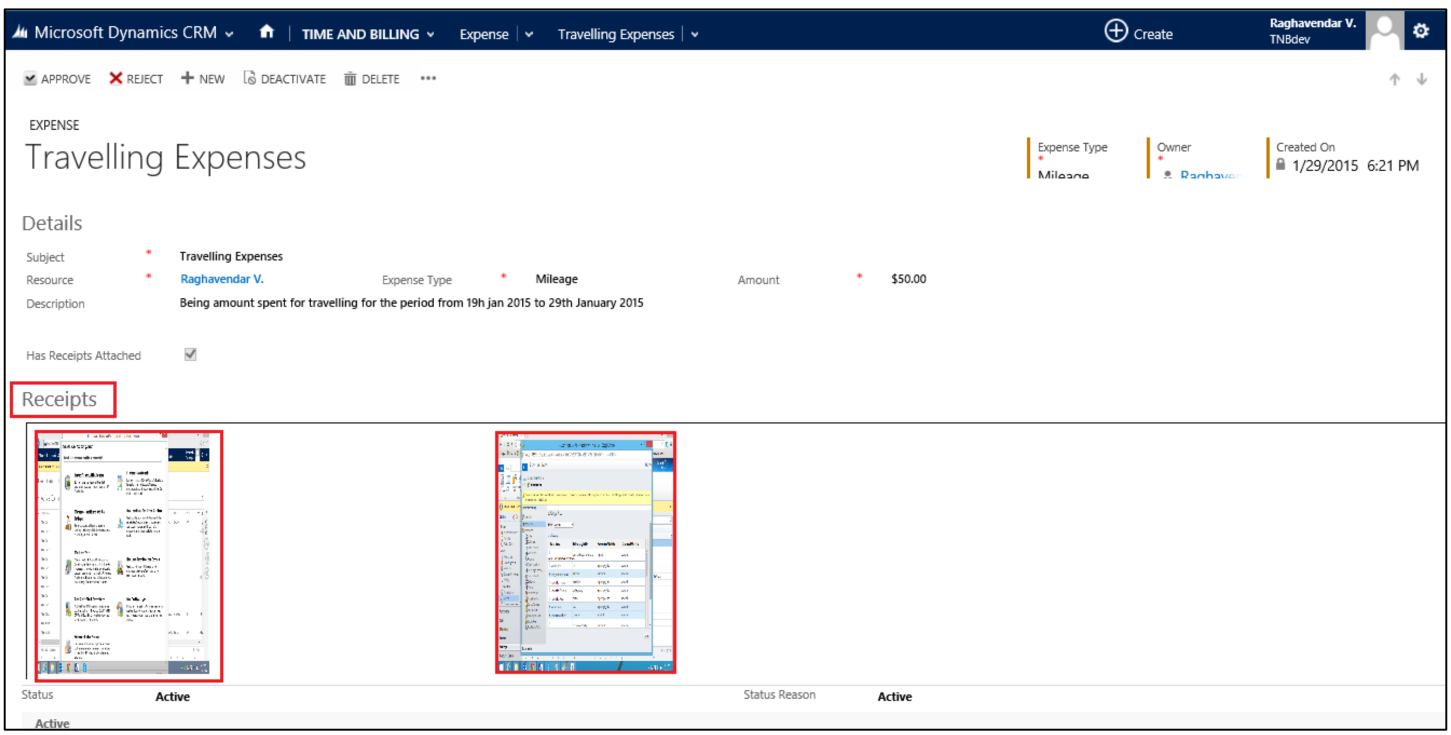


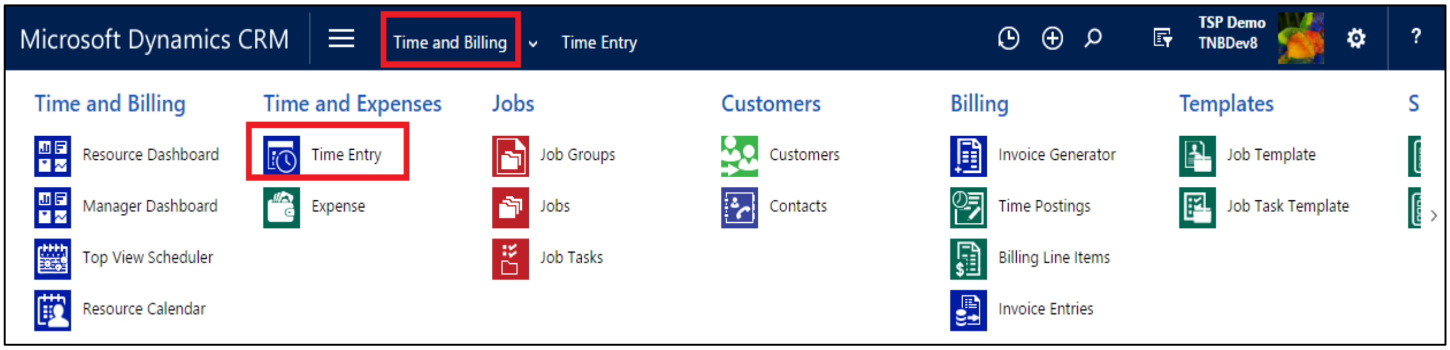
Figure 61: Expense Form showing Receipts stored

- 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 continent 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 pin pending state for Approval.



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

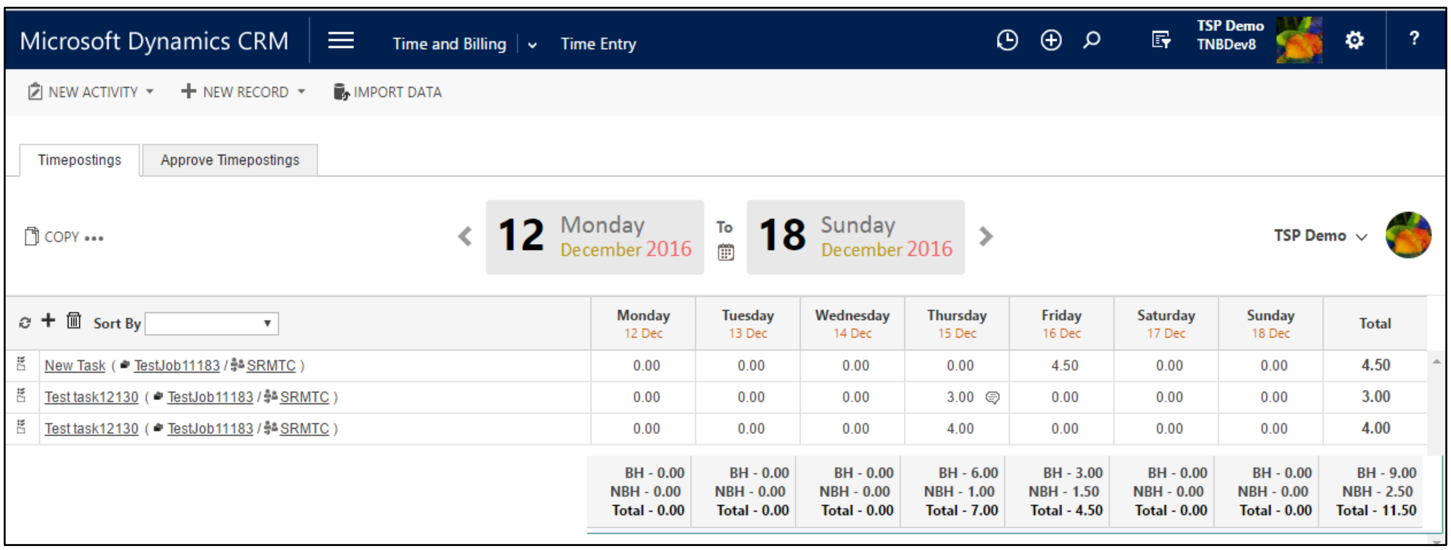


Figure 62: List of all Times sheets

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

Time posting is very important to record all working hour for any like Account, Job, Job Task, Case, Contact or an issue. It is one place where in the user will have option to input his working hour time for a total week in a single go.

Usually the time posting is displayed for the user who has logged in with right credentials. He can only do the Time post for his hard work. But if the user has the user privileges such as Manager or Administrator, he can also change the user name and post time for others. (This has been explained in detail in Security roles in the previous pages).

Is unique facility provided to the user to copy the previous time sheet stored or Copy it from Template. This is helpful if the user is working on similar projects. This also save lots of time in creating a new sheet.

This is available on the top right corner of the page. Click here to change the User accordingly.

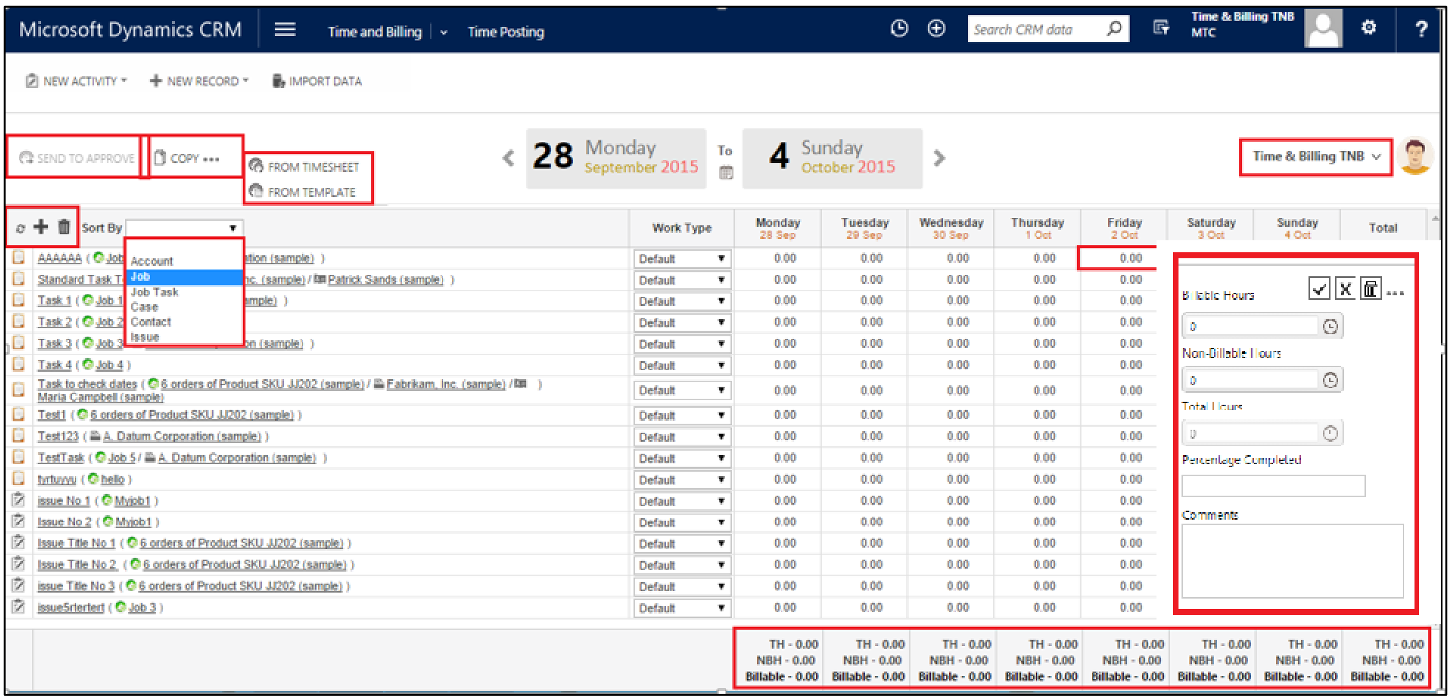
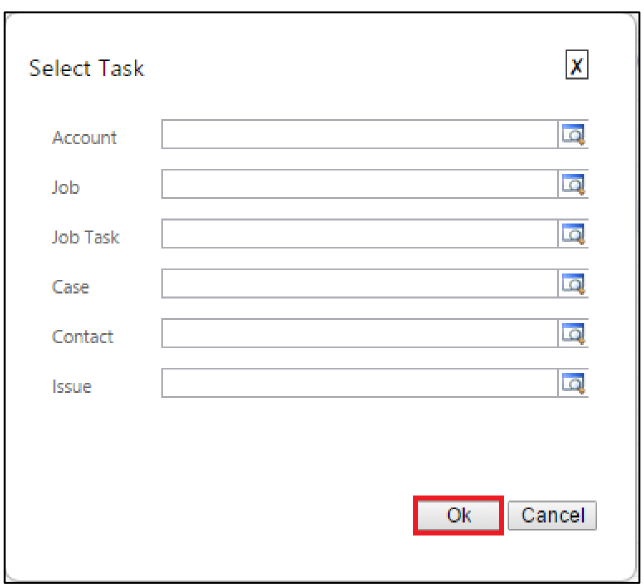
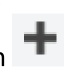


Figure 63: Time Sheet



- Enter all details like Time Sheet description, Start & End Date, Resource and Approver
- Filter and Sort data by Account, Job, Job Task, Case, Contact or Issue
- Click on  to get the list of tasks
-  These are the icons for Refresh, Add and Delete any of the Activities.
- Select any one to proceed to create time sheet for example, you have selected Job Task, then a look up screen populates to get information
- Select the right Job Task from the list and click on Ok
- A New row is created in the Time sheet from Monday to Sunday.(as defined previously)

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

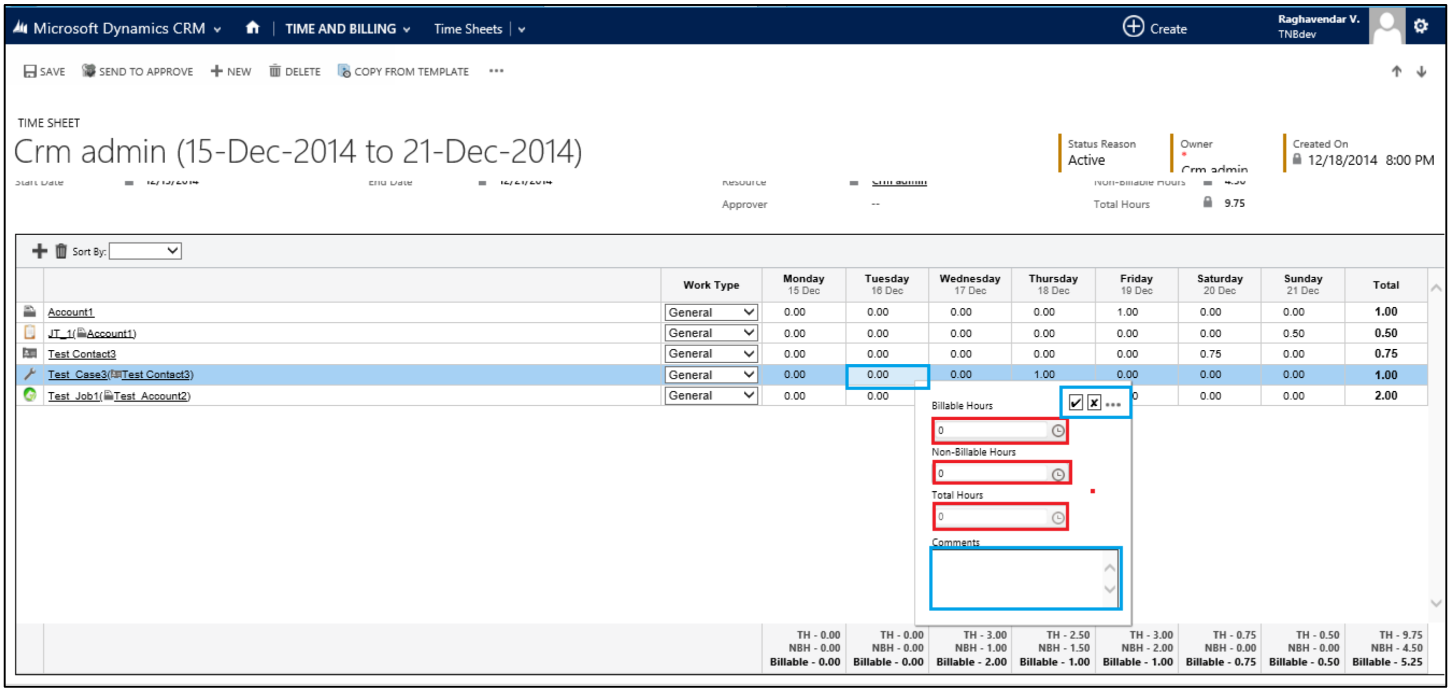


Figure 64: Time Sheet - Information

- 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,

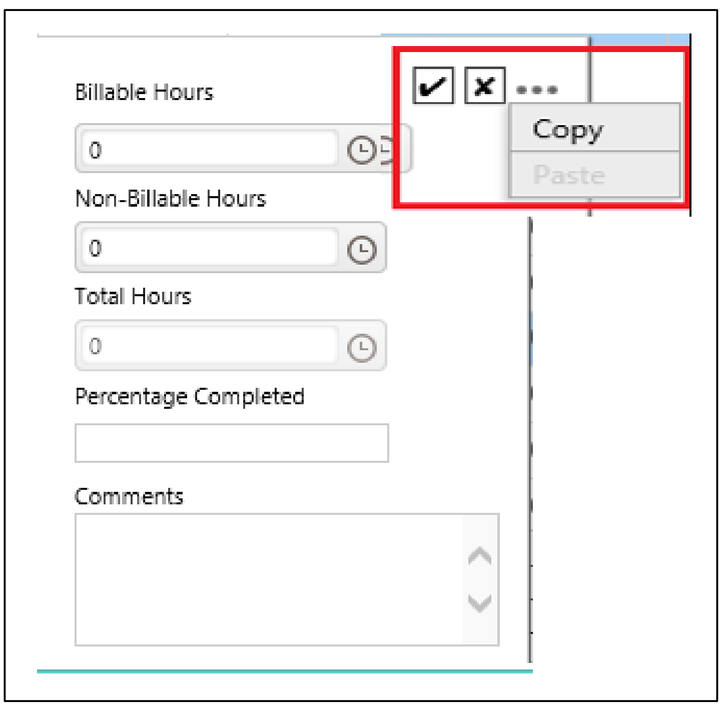
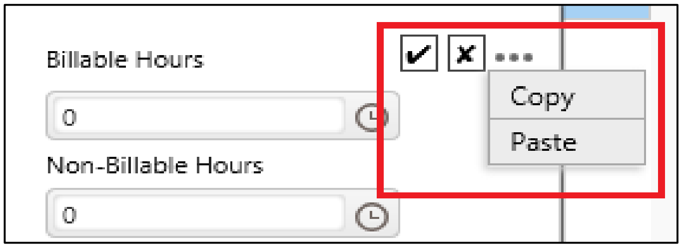


Figure 65: Pop up for Billable Hours

- For example the above data is for Monday Jan 19th, you can copy the same for Friday 23rd Jan also. Click on Friday to get a pop up display, Select (…) and click on Paste followed by ☑ to save data. All the Billable Hours, Non Billable Hours, Total Hours and Comments are copied as it is from the previous one. User can repeat this process any number of times



Copy Time Sheet for Template or from other Time Sheet.

- User can also copy Time sheet from Template (already Created) for from the Existing Time sheet already created.
- On the form as shown below select the desired option

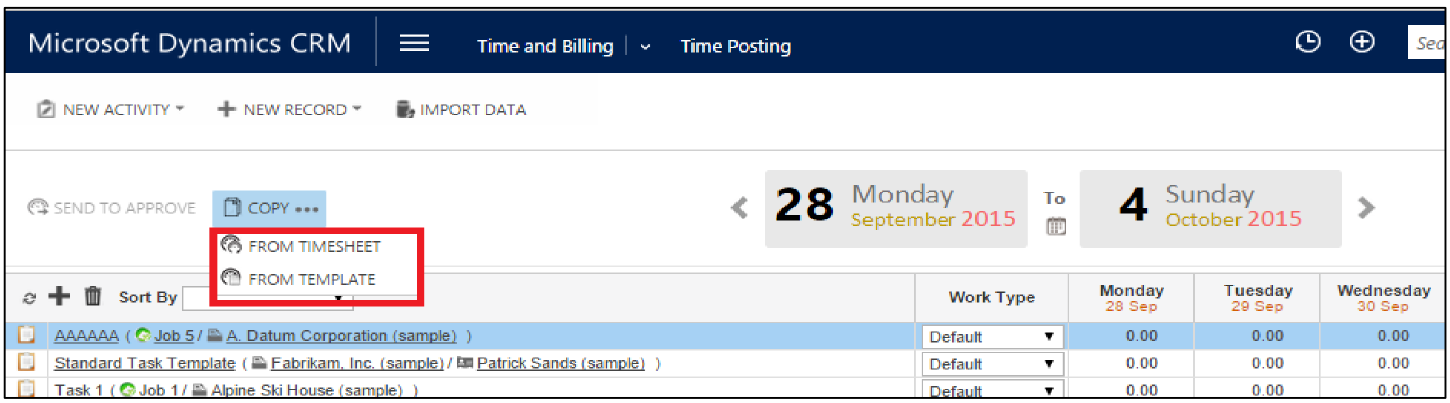


Figure 66: Time Sheet form showing icons

- By clicking on from Time sheet it opens a new Pop up window as shown below

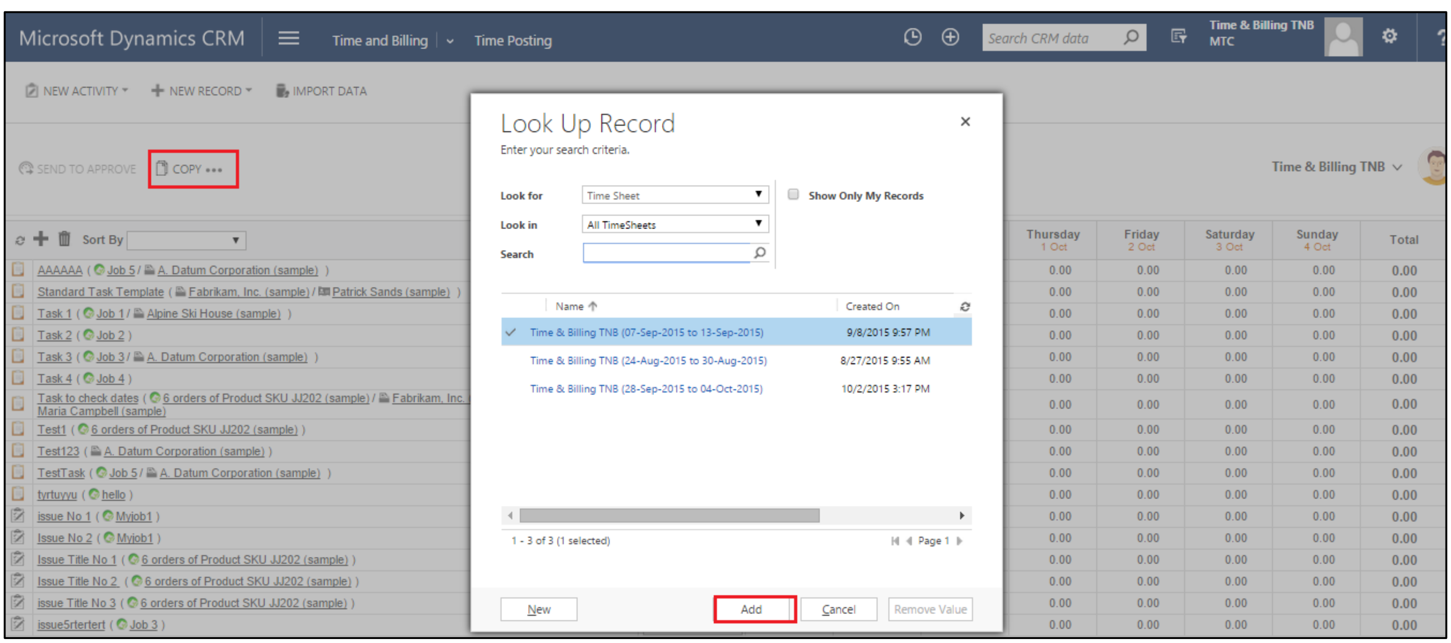


Figure 67: Pop up to Copy from time Sheet

- 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.

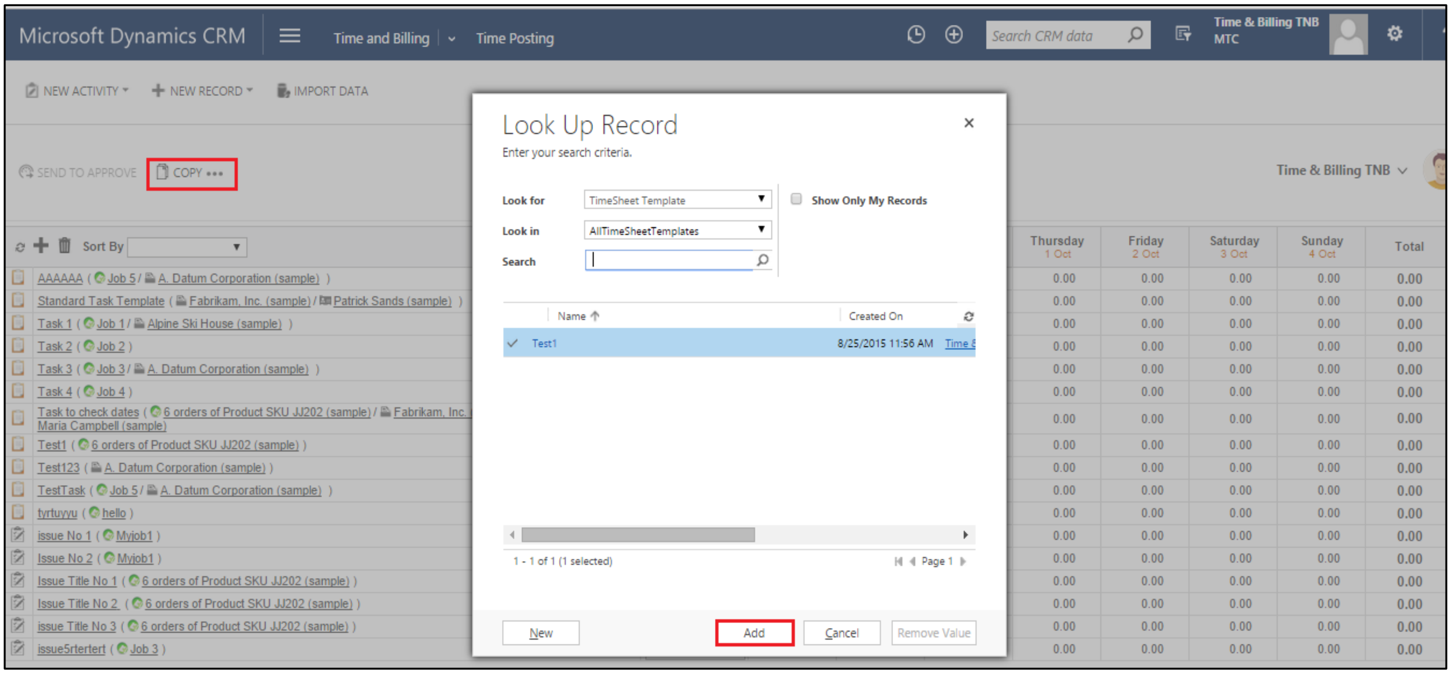


Figure 68: Time Sheet with Look up Screen

- 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.

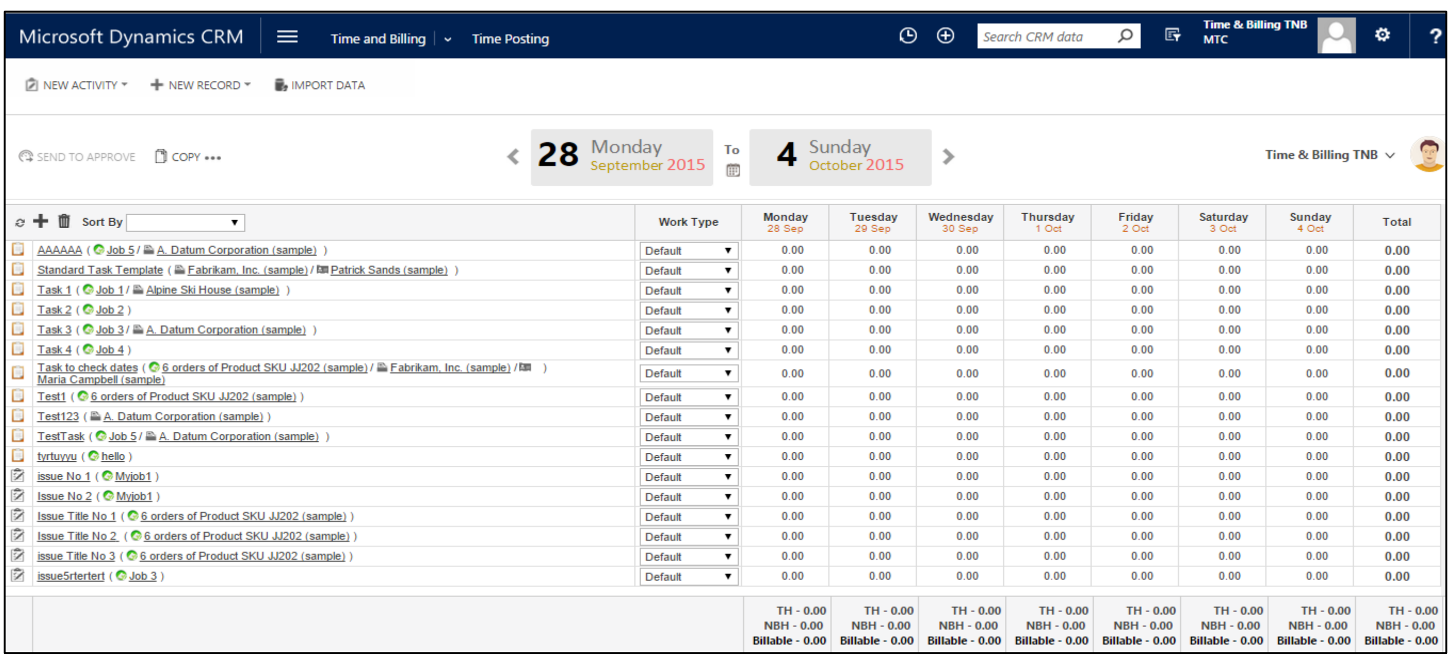
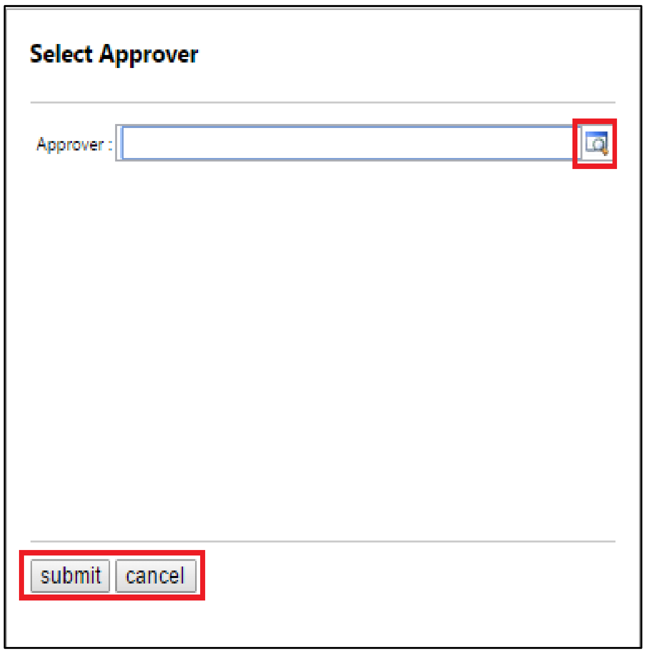


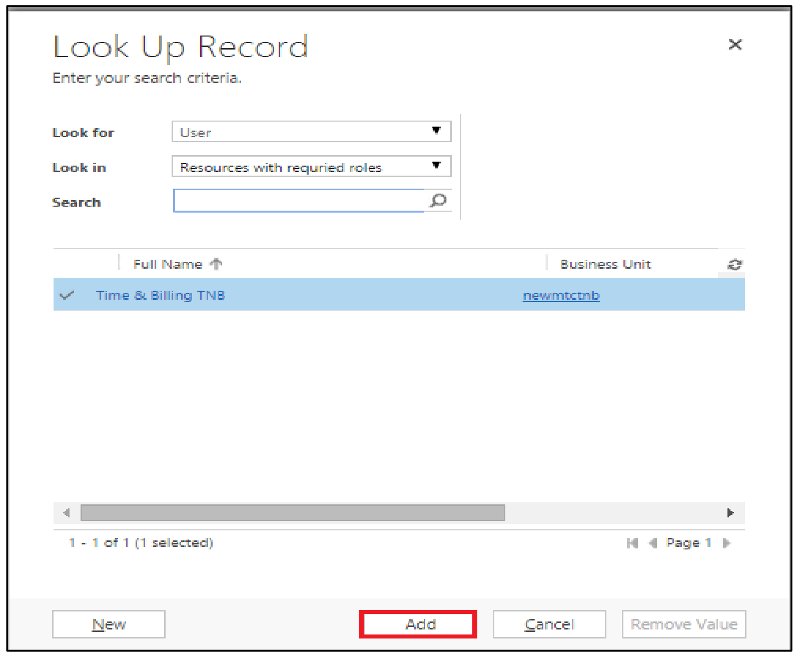
Figure 69: Time Sheet with Template data

- Once the time sheet is ready, you can sent 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 create Billing line items which enables you to easily make the Invoice.

The Approver can also reject the Time sheet.

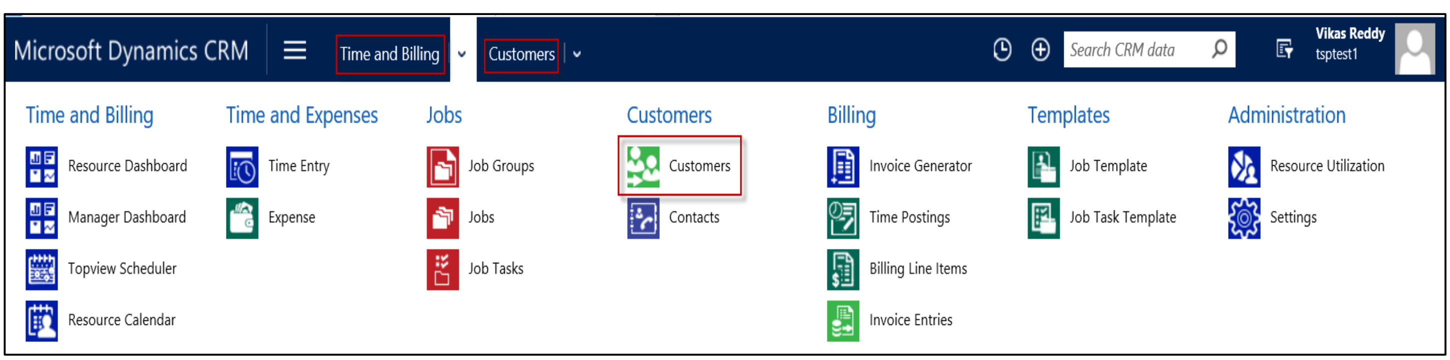




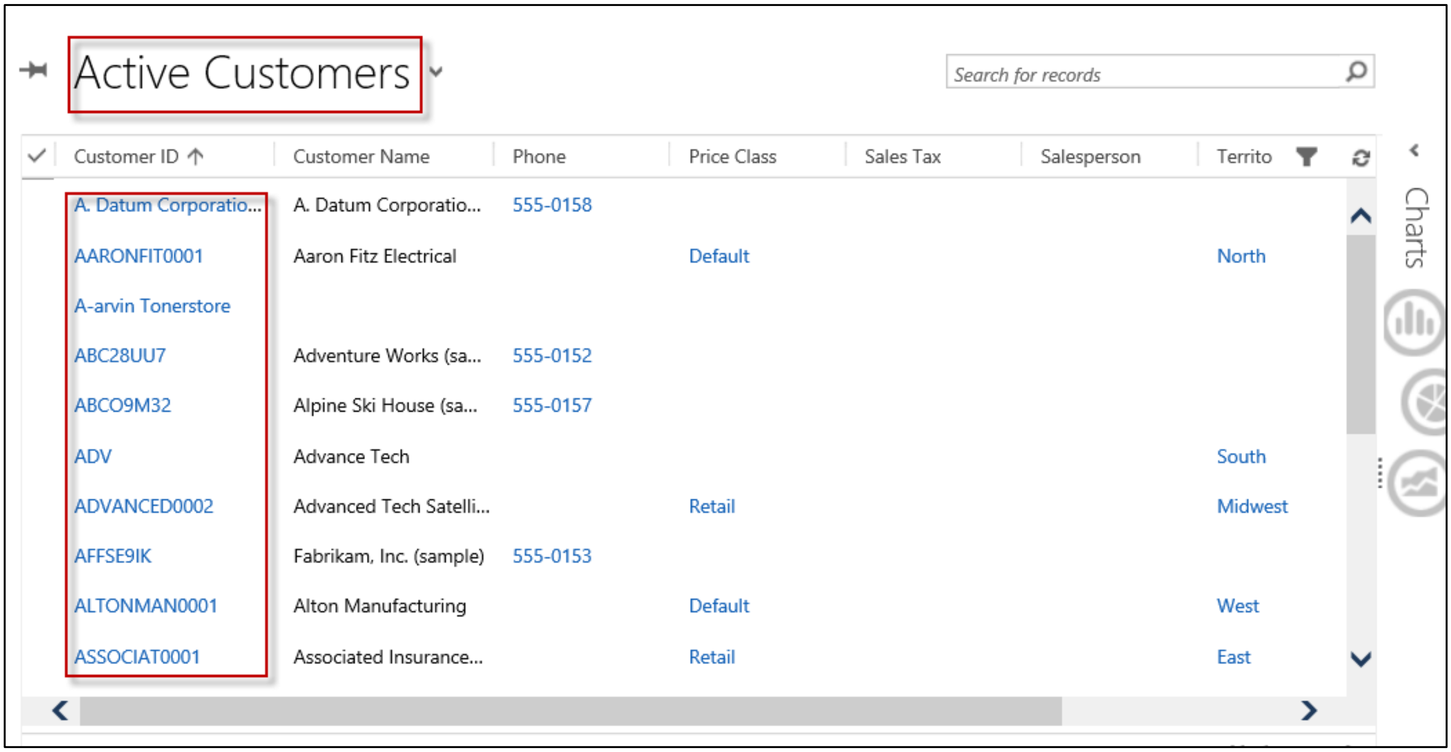
Customers

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

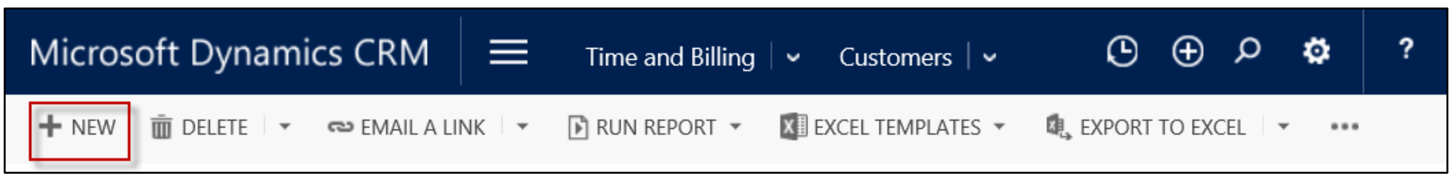
To view Customers, follow the navigation: Time and Billing → Customers.



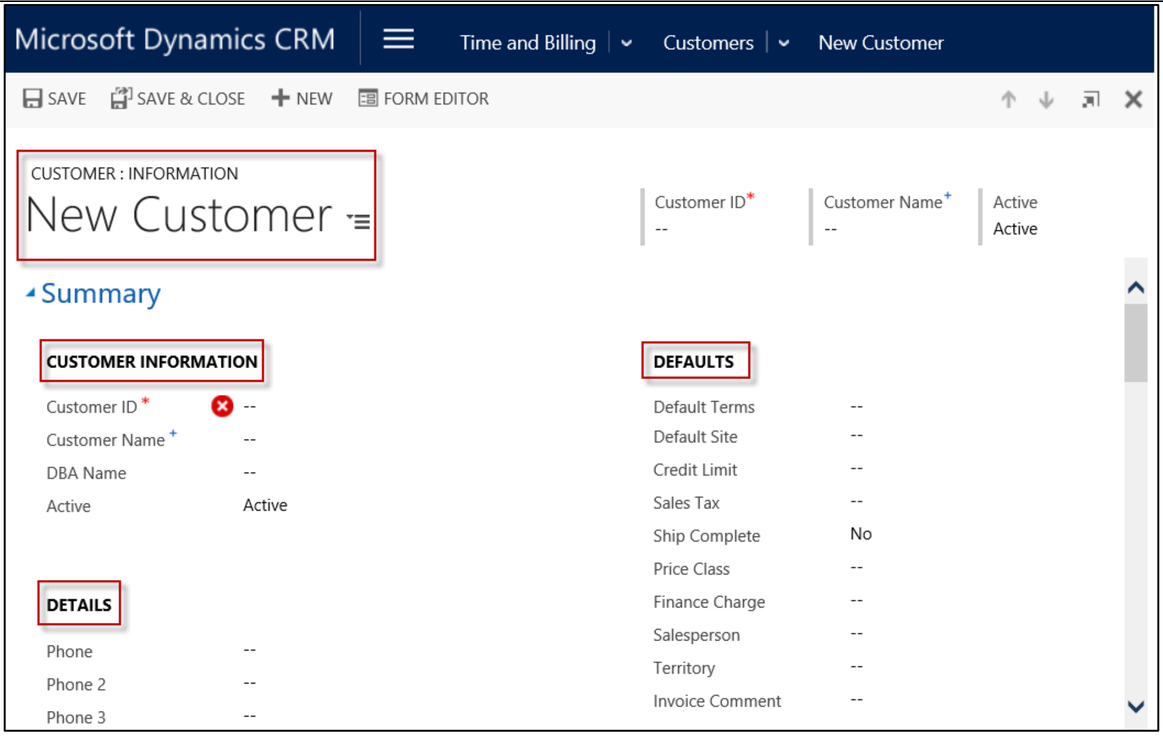
- Click on Customers. You can see the already existing customers list if there is any.

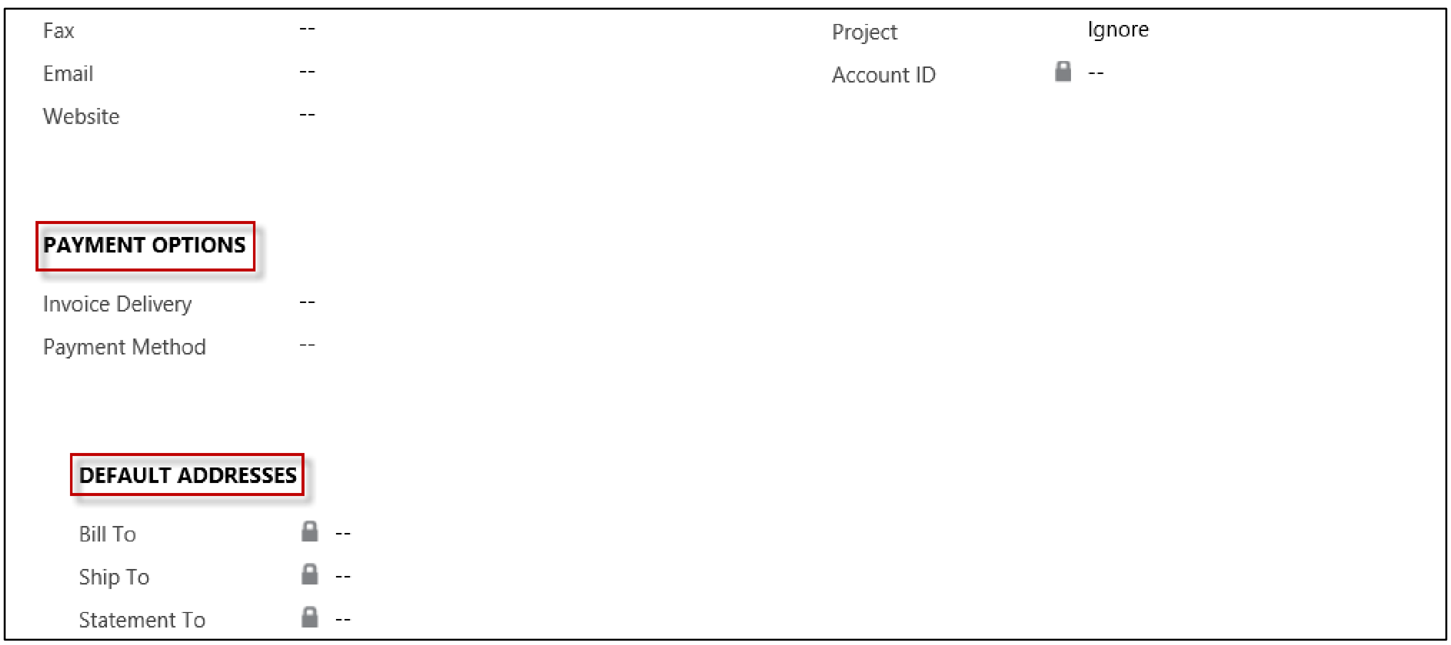


- To create a new customer, simply click on +NEW button from the CRM ribbon.

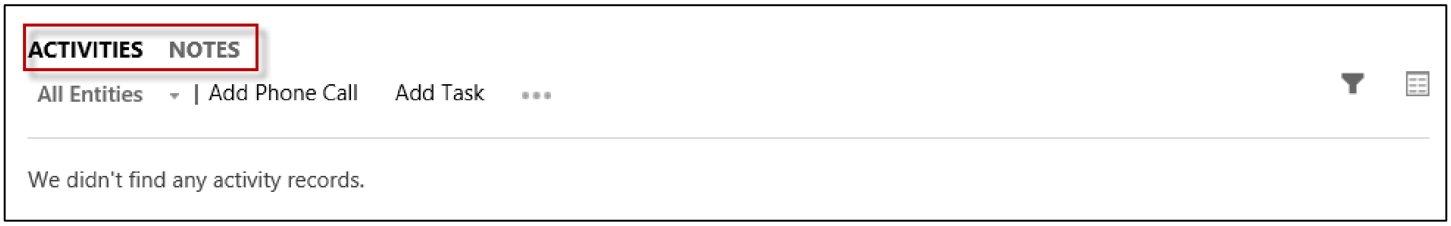


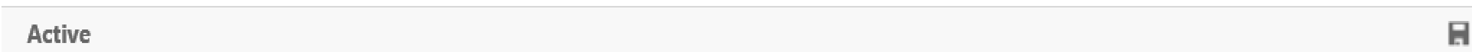
- New Customer Window page pops up. Fill the necessary fields under Customer Information, Default Details, Payment Options, Addresses & Contacts, and Credit Cards.
- Details under Addresses & Contacts, and Credit Cards can only be entered after creating the record with necessary details.
- Please refer 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
Customer ID * --
Customer Name * --
DBA Name --
Active Active
DETAILS
Phone --
Phone 2 --
Phone 3 --
DEFAULTS
Default Terms --
Default Site --
Credit Limit --
Sales Tax --
Ship Complete No
Price Class --
Finance Charge --
Salesperson --
Territory --
Invoice Comment --


Fax --
Email --
Website --
Project Ignore
Account ID --
PAYMENT OPTIONS
Invoice Delivery --
Payment Method --
DEFAULT ADDRESSES
Bill To --
Ship To --
Statement To --


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



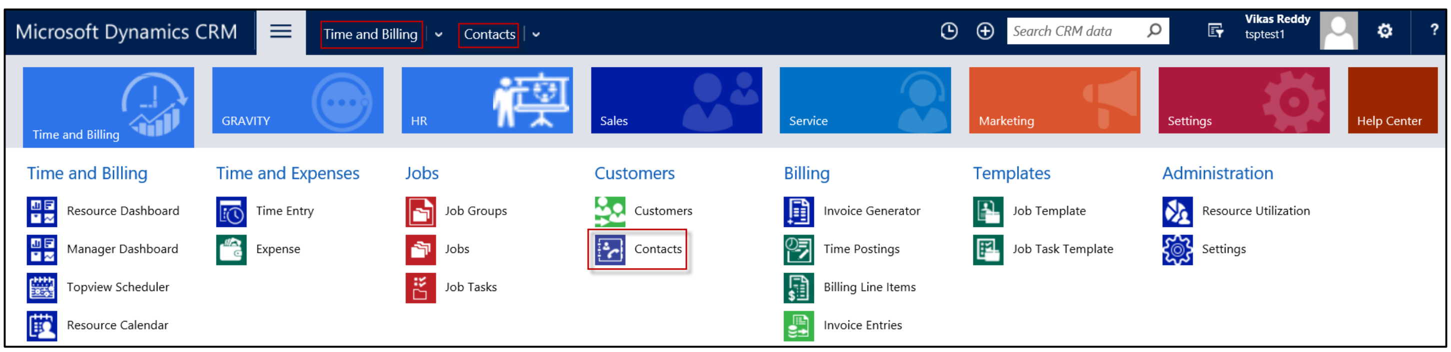


- After filling the necessary details, don’t forget to click on the **Save** button.

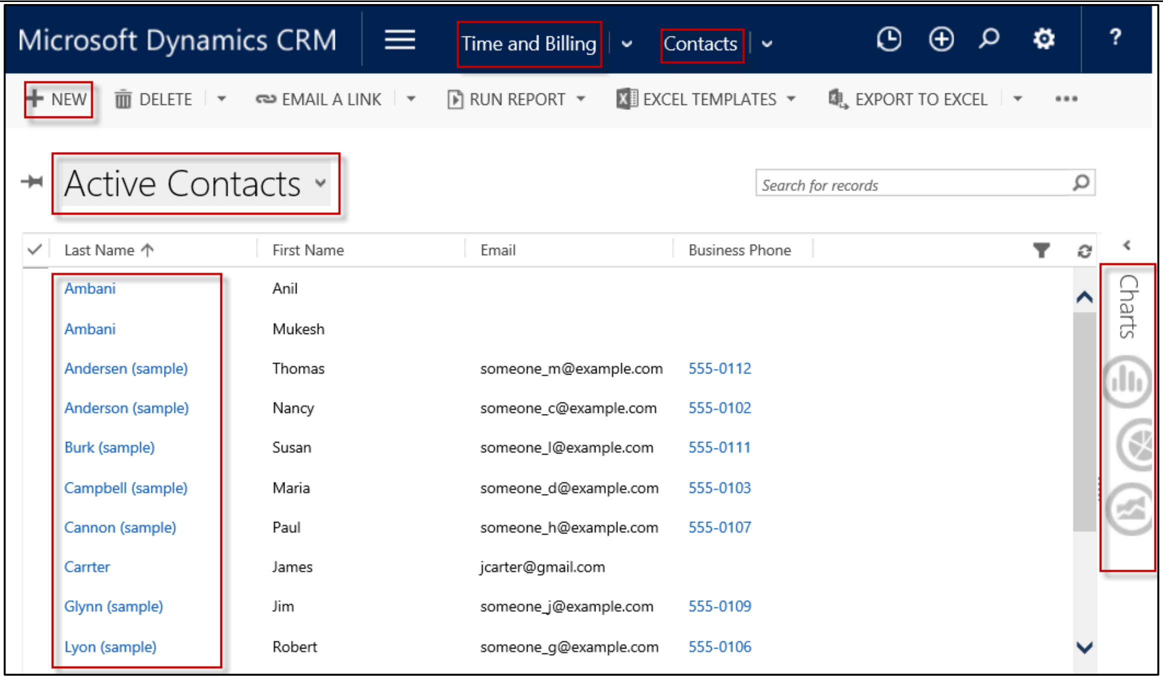
Contacts

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

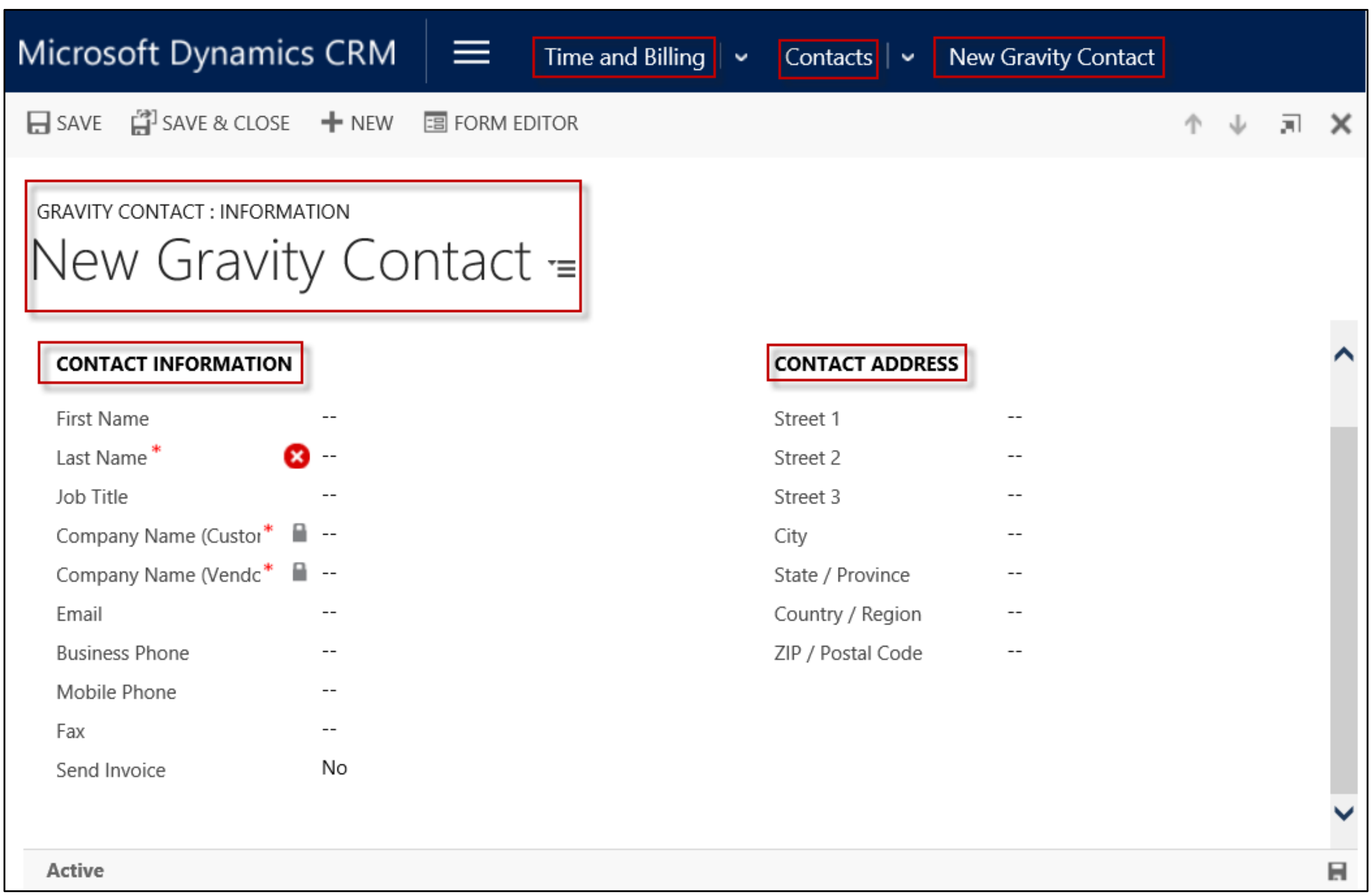
To view Contacts, follow the navigation: Time and Billing → Customers → Contacts



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



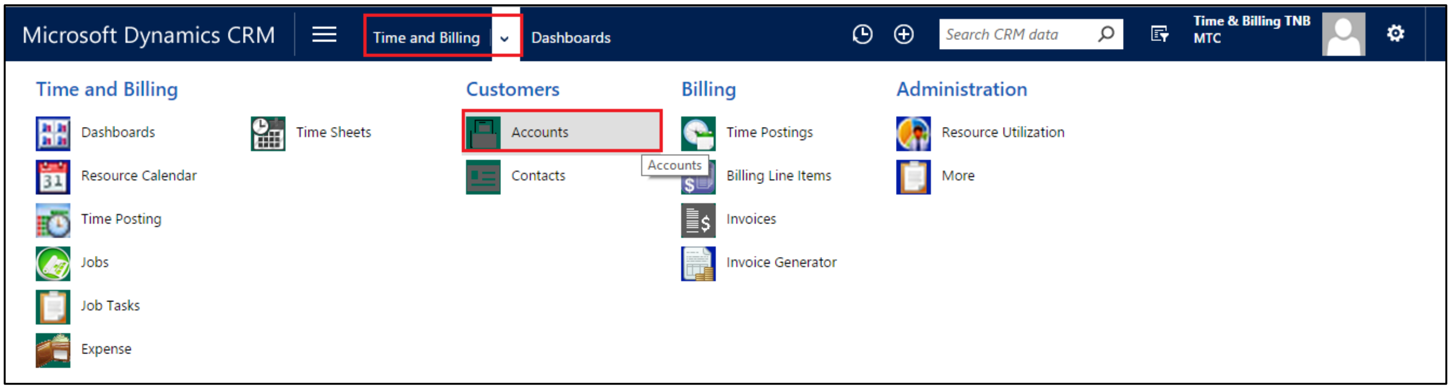
- To create a new contact, click on +NEW button from the CRM ribbon.
- New Contact Window page opens up.
- Fill all the necessary fields under Contact Information and Contact Address as shown below.



- 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 Jab about the billing type, the same matches with this account/contact and creates a new bill with this billing preferences.

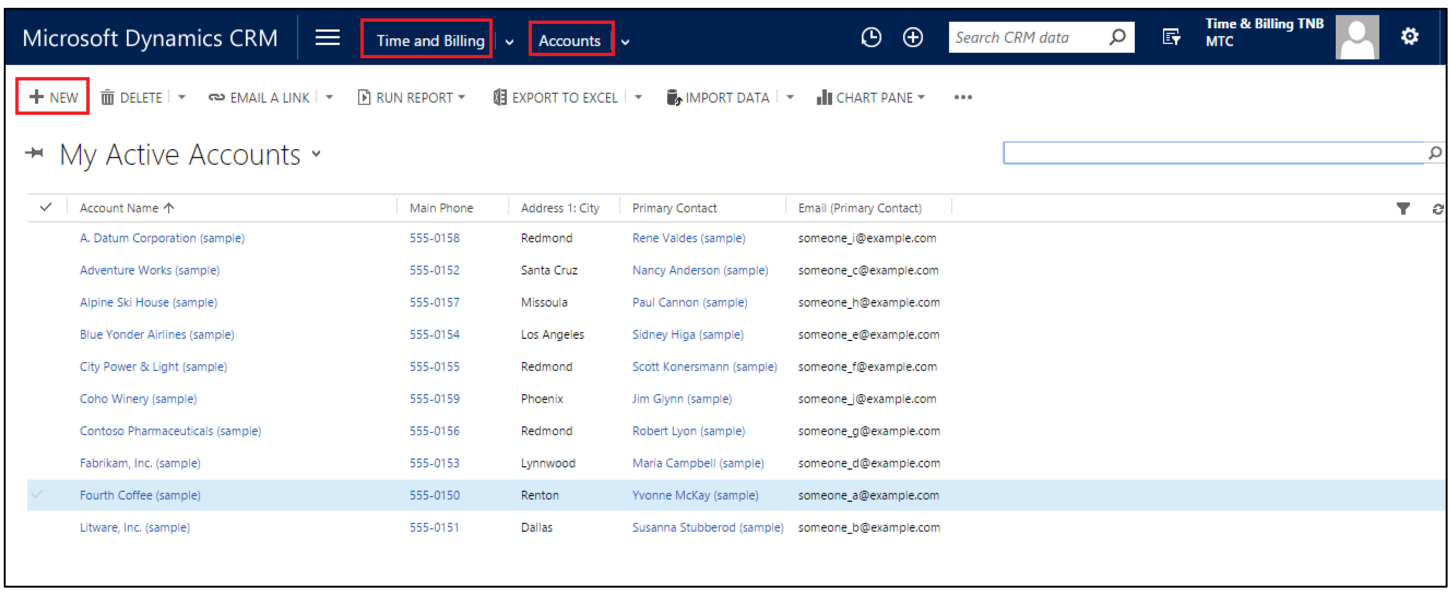


Figure 70: CRM Accounts form

On the form select Information as shown below

Figure 71: Account Form showing options

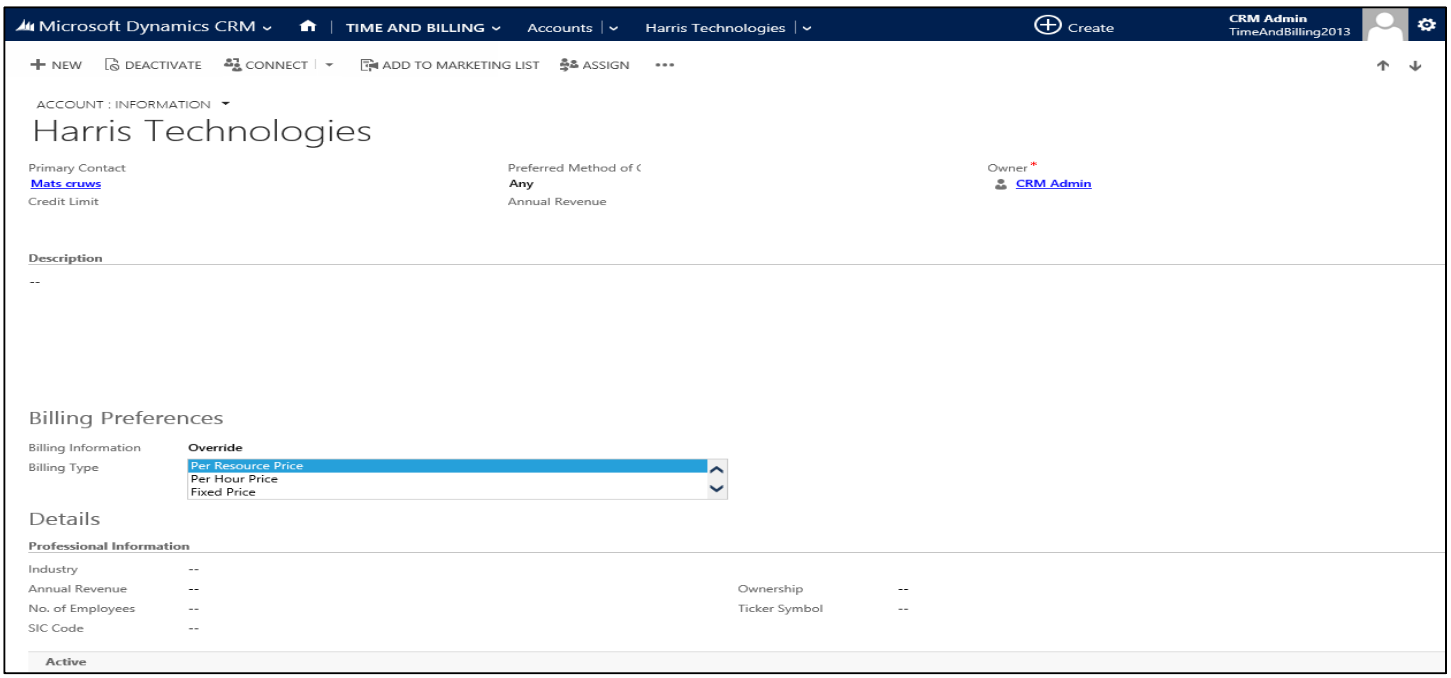
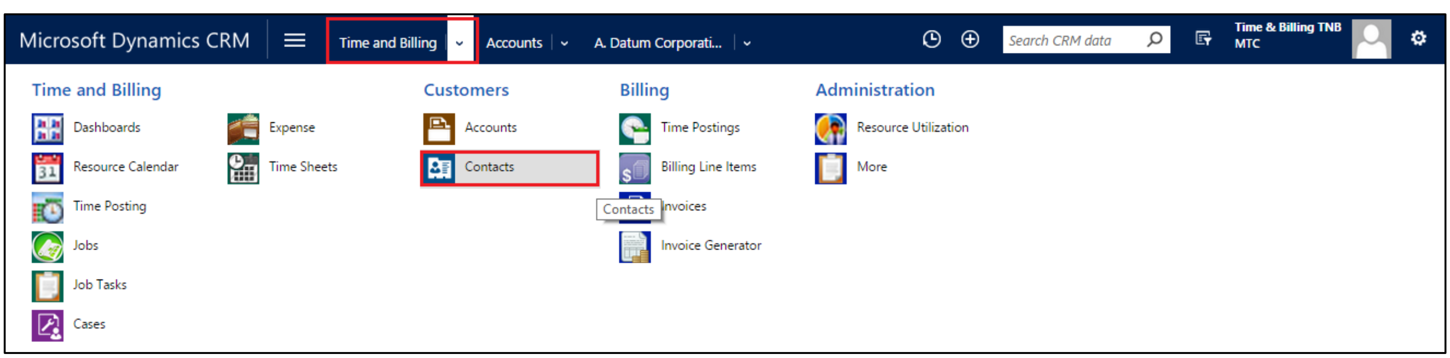


Figure 72: Account - Billing Preference

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 Jab about the billing type, the same matches with this contact/ account and creates a new bill with this billing preferences.

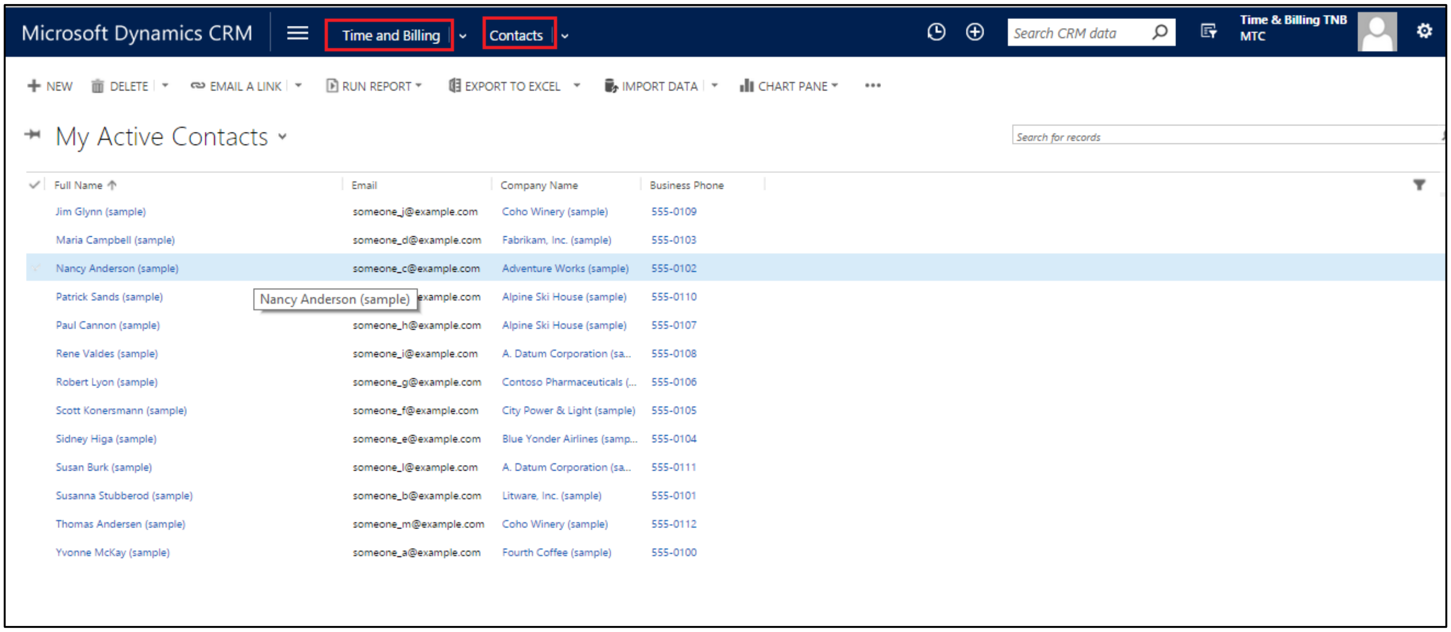


Figure 73: CRM Contact form

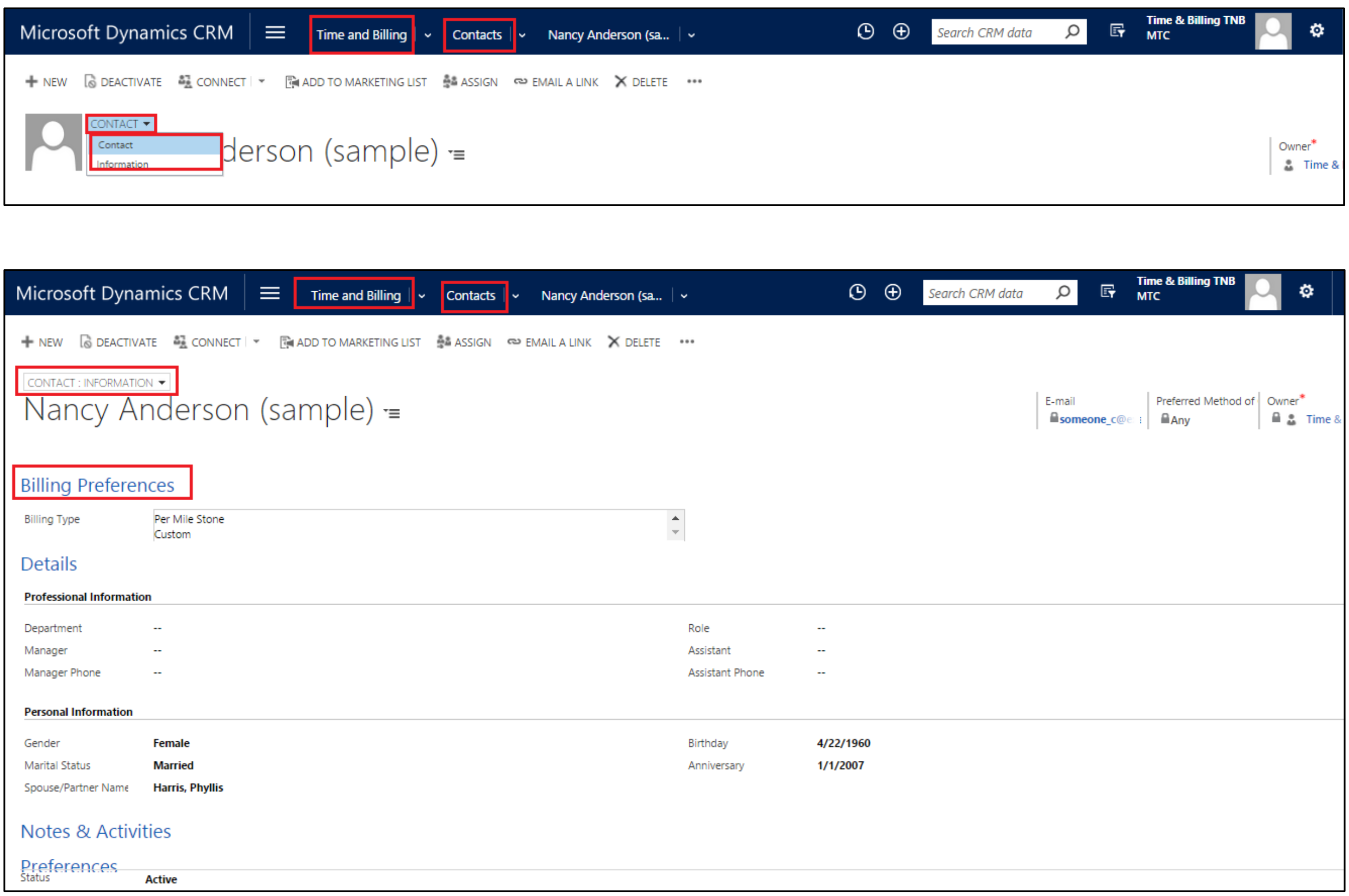


Figure 74: New Contact Billing Preferences

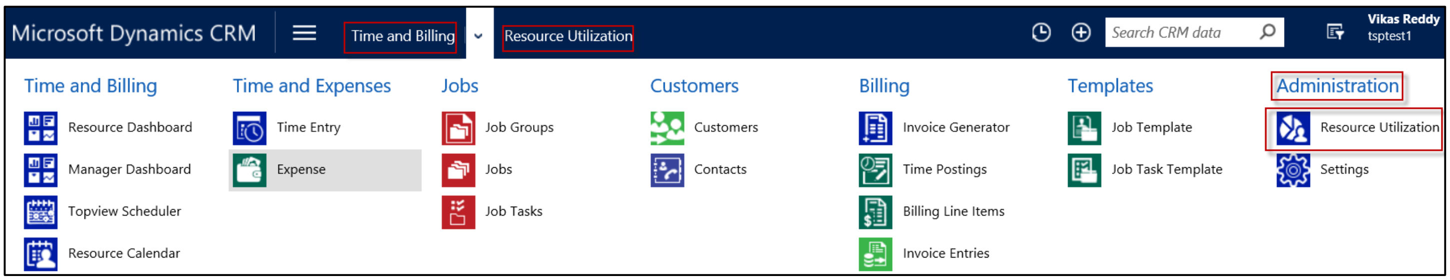
Administration

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

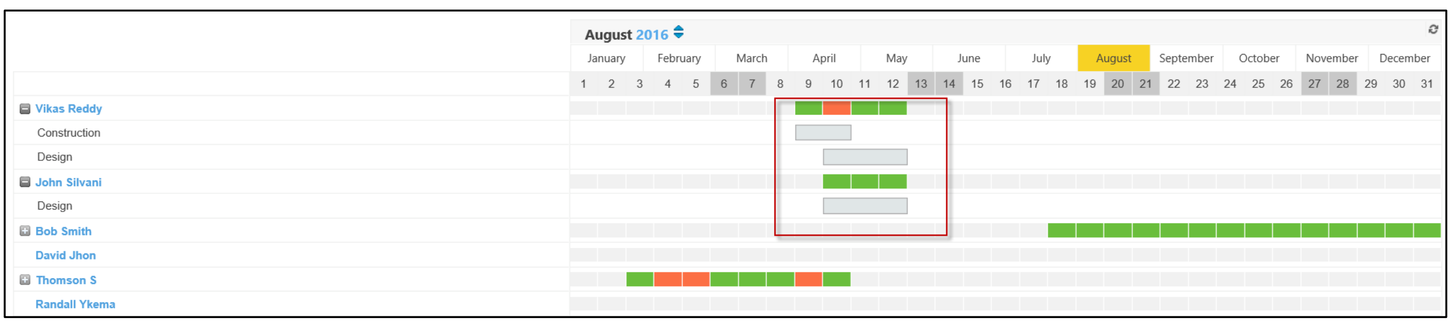
Resource Utilization

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

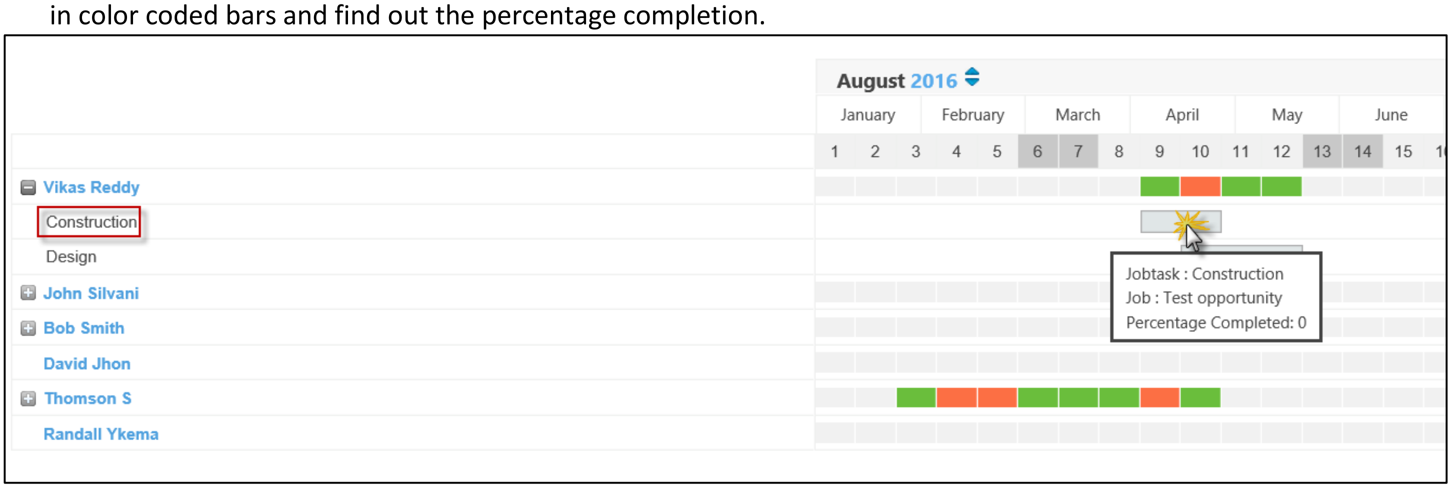
To view Resource Utilization, follow the navigation: Time and Billing → Administration → Resource Utilization.



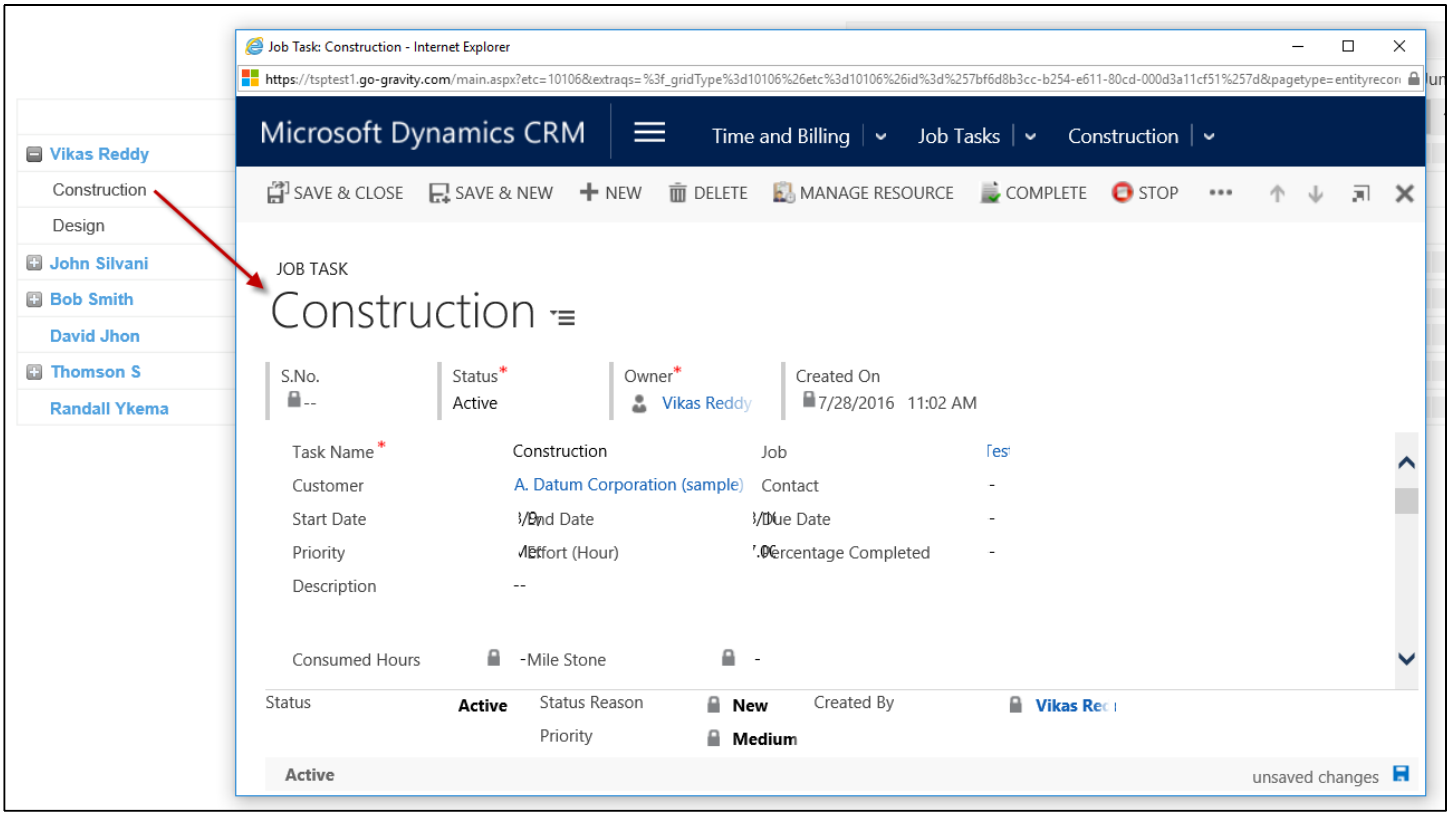
- Click on Resource Utilization.
- You can see resources along with their activities/job tasks. On the right hand side, the calendar gives you the availability status of resources through color coding references. Green color indicates that a particular resource is available while orange color indicates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



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