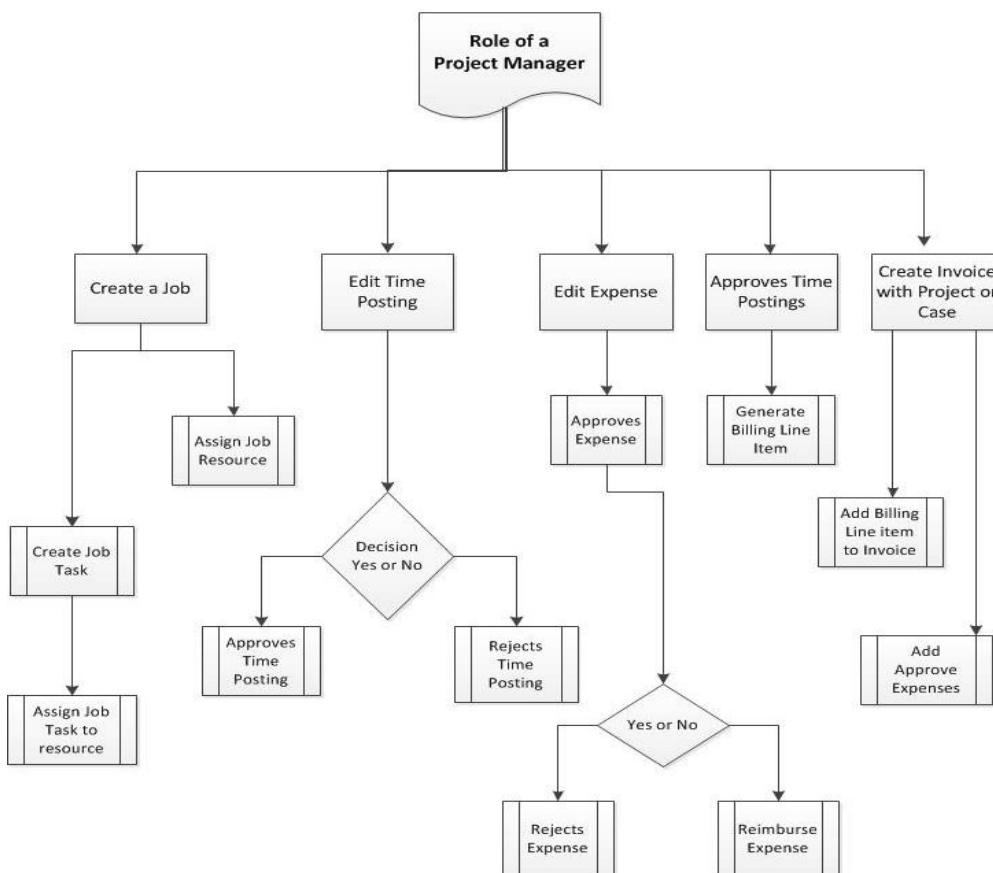# Time & Billing
for Microsoft Dynamics CRM

Time and Billing for Microsoft Dynamics 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 burdened-able 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.

Execute a set series of Activities for a single CRM Product referenced Template in order management. Real-time status of resources is available.

The Pre-Bill Editor allows easily managed overview of billing to clients through invoices and statements of billed time. Strong controls on an easy UI.

For customer satisfaction and continuous improvement, staff comments, billing notes, non-bill time in CRM Activities is collected to trigger workflows.

Finally performing basic accounting for billing, payments, retainers, and balances, and performing statement generation on-demand or as scheduled.

Time and Billing Adds Seamlessly to CRM...

Flexible components added to CRM as a Managed Solution self-install builds end-to-end functionality along a best-practice capable business process for time and billing in what most people are already doing in CRM.

The flow diagram of the Time and Billing CRM process illustrate the tools that managed natively, yet flexibly to your existing or new Microsoft CRM Online or On-Premise. Enhance existing CRM Activities across your business functions.

A Powerful Intuitive Time and Billing Solution built on your CRM and Office 365

What Time and Billing Adds to Microsoft Dynamics CRM . . .

Time and Billing gives you a simple efficient way to track and bill time.

Resource Costing and Revenue Flexibility make Billing Easy

**Build Resources from CRM Users or Contacts with costs, revenue basis, skills.**

Accurate costing, revenue projections, and resource matching across all the Activities you want to bill and cost control in your business.

Your CRM Users for Internal Resources and Contacts for your External Resources.

Resources have skill Level matching
Fast load utility from your CRM Users.
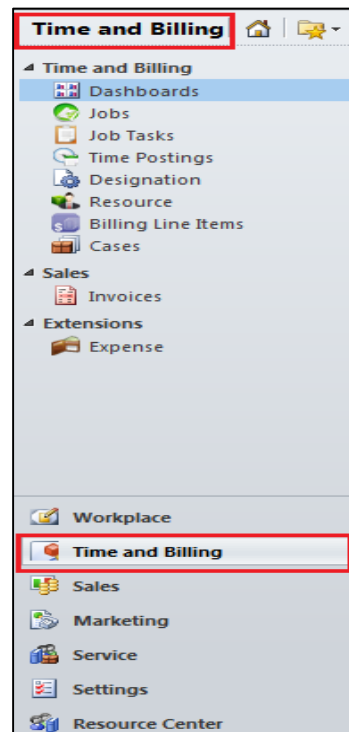
Now your Resources used in CRM Activities generate cost and revenue as you use CRM Web, Outlook, or Mobile and managing billing is practically automatic.
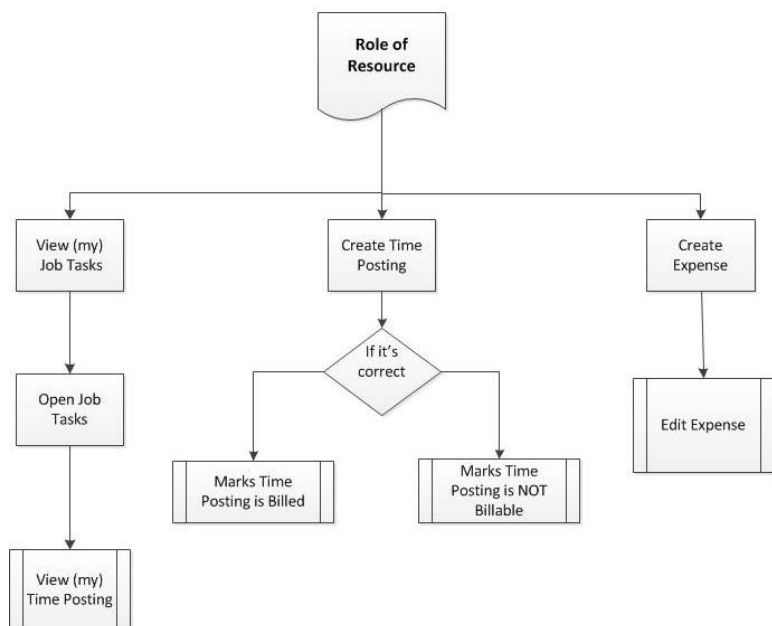
## Time and Billing Enhances CRM Activities with Process Tools

Once Resources are set-up to handle finances and resource talent, track time and serve as the "To Do" function fully contained to tell Resources what in detail, to do, when, where, with whom.

Added business process controls easily and accurately collect your business Activity data. All standard CRM Activities have the controls optimized for the type of Activity and are a flexible set of tools to apply to your Dynamics CRM business processes.

Free trial plus unlimited installation support and custom development available

# Instant Service Job and Case Cost and Revenue Dashboards

Utilizing CRM Dashboard capability, Time and Billing displays your processes, resources, Activity and Case costs, and revenue automatically on set-up for intuitive business management from day one of use. Time and Billing functionality data charts throughout the CRM user interface of your service and support practice encourage fast implementation and short ROI.
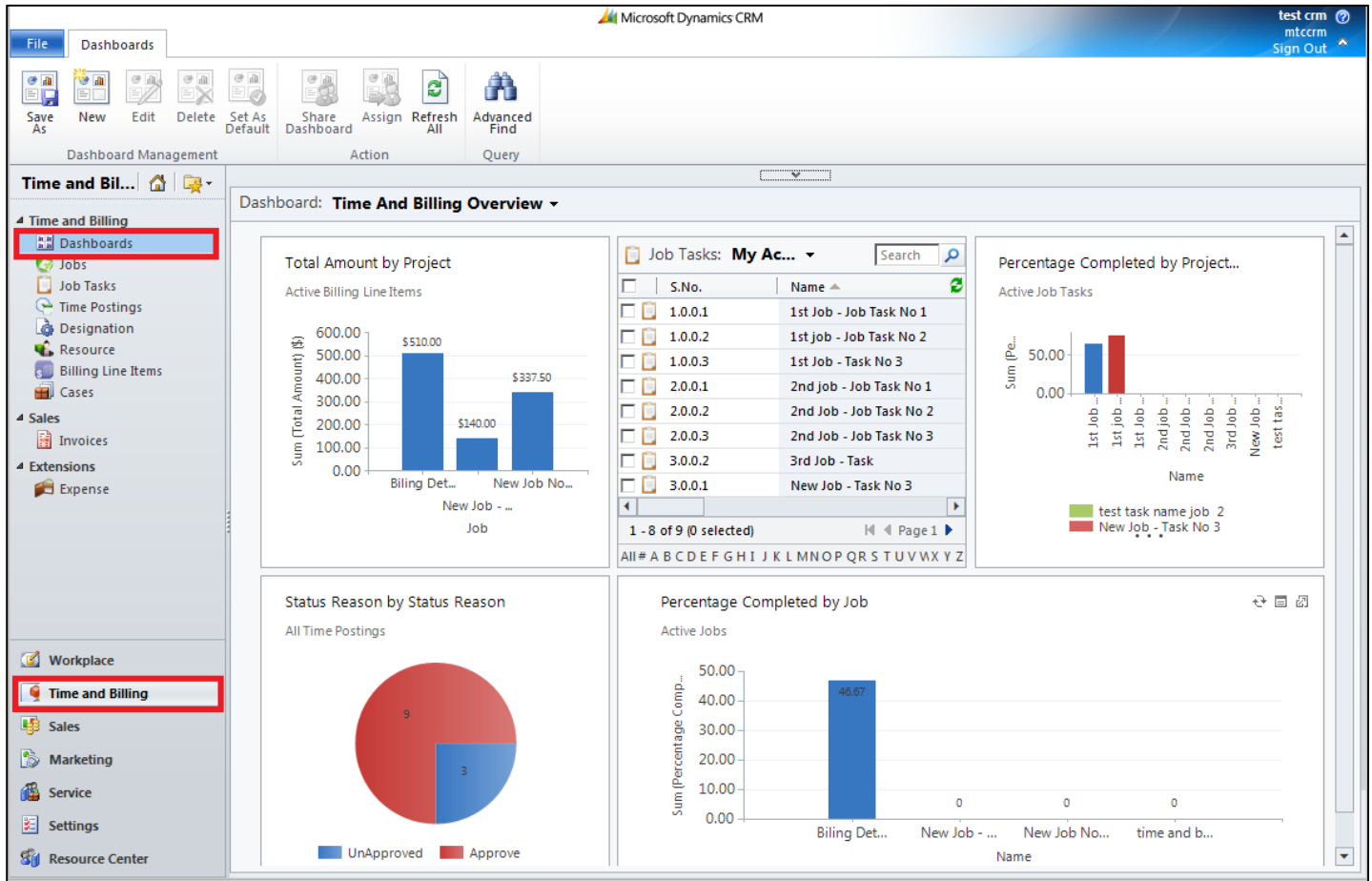
Instantly get a picture of your business to manage customer satisfaction through Job and Case performance visibility.

Time Collection Tools Capture 100% of Your Resources' Time

Starting with above best practice repeatability in Activities for who, what, cost and revenue, must be tracked as exact as you want you're billing to be. "Time is Money". Time collection tools that are both intuitive and simply while assuring accuracy in collecting every billable resource Activity moment boosts revenue.
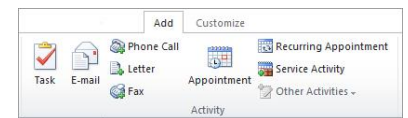
All Activities either real-time posted in live-time Activities, or as Activities' Start/Stop. ActivityTimer available in all Activities tracks actual durations OR set fixed Rate time from certain Activities, i.e. Template Emails. Time Post is a dedicated User or Admin Activity Post screen readily available on the CRM Ribbon for all Client types and allows easy

Manage Your Professional Services Business by the Numbers while you work.

Jobs: Active Jobs ▾

	S.No.	Name ▲
☐	1.0.0.0	Biling Details - Job No 1
☐	2.0.0.0	New Job - Job No 2

Billing Information: Selecting from the Account revenue settings and Product pricing.

Resource Control List: Manage who can post, and control and reference lots of diverse Resources in a single long-running Appointment or Task.

Real-Time Status Posting: Now CRM can show you what all your Resources are doing Live.
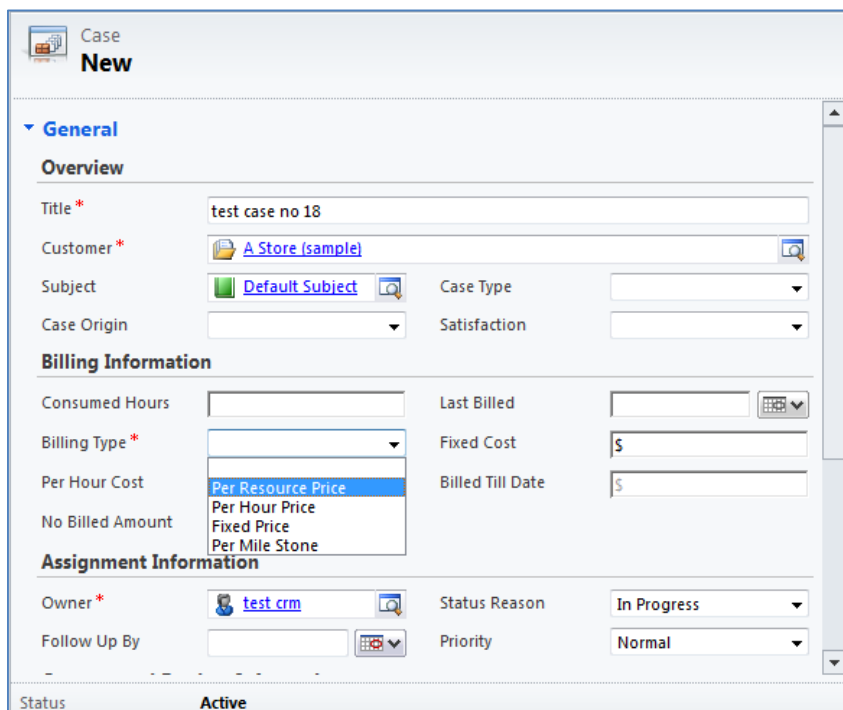
Unlimited Multi-Posting Entry: Any controlled resource can post as often as they wish, starting stopping, break time, and non-bill time.

Real-Time Digital Time Tracking Option: ActivityTimer Digital time controller allows manual, fixed, controlled time automatically.

ActivityTimer
For Microsoft Dynamics CRM

Your CRM Service Case's Collect Costs and Bill Your Clients

Case
New

▼ **General**

Overview

Title *	test case no 18
Customer *	A Store (sample)
Subject	Default Subject
Case Origin	

Case Type	
Satisfaction	

Billing Information

Consumed Hours	
Billing Type *	
Per Hour Cost	Per Resource Price / Per Hour Price / Fixed Price / Per Mile Stone
No Billed Amount	

Last Billed	
Fixed Cost	$
Billed Till Date	$

Assignment Information

Owner *	test crm
Follow Up By	

Status Reason	In Progress
Priority	Normal

Status   Active

Never Miss an Expense in Job Costing or Billing!

Enter a Case name. Select Customer from Look. Select Subject from the list: "Default Subject", "Query", or "Service"

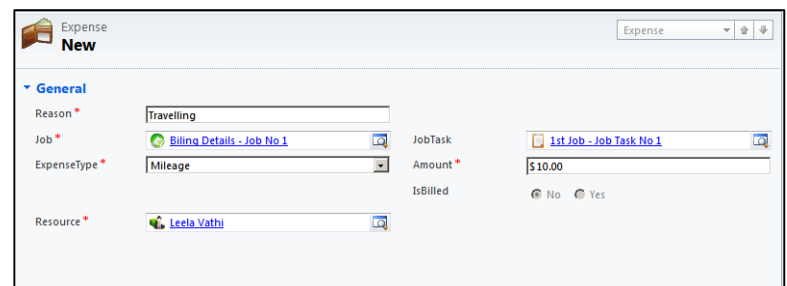Select from drop down for Case Type, Case Origin, and Satisfaction. Select Billing type from drop down list.

Click "to save. Click on Case Resources on the left panel and add new resources this cases just like Job tasks.

Click on Time posting tab just below the case resources and enter time posting

Easy and Intuitive Expense entry and approval are a Snap

Never Miss an Expense in Job Costing or Billing!

Enter Reason for Expense. Select the Job for which the expense is made. Select Expense type from the drop down list provided.

Expense
New

▼ **General**

Reason *	Travelling
Job *	Biling Details - Job No 1
ExpenseType *	Mileage
Resource *	Leela Vathi

JobTask	1st Job - Job Task No 1
Amount *	$ 10.00
IsBilled	○ No ○ Yes

MTC
Management Technology Consulting LLC

Call 323-851-5008 8:00 AM to 5:00 PM
323-853-0076 5:00 AM to 8:00 AM
323-853-0076 5:00 AM to 8:00 AM

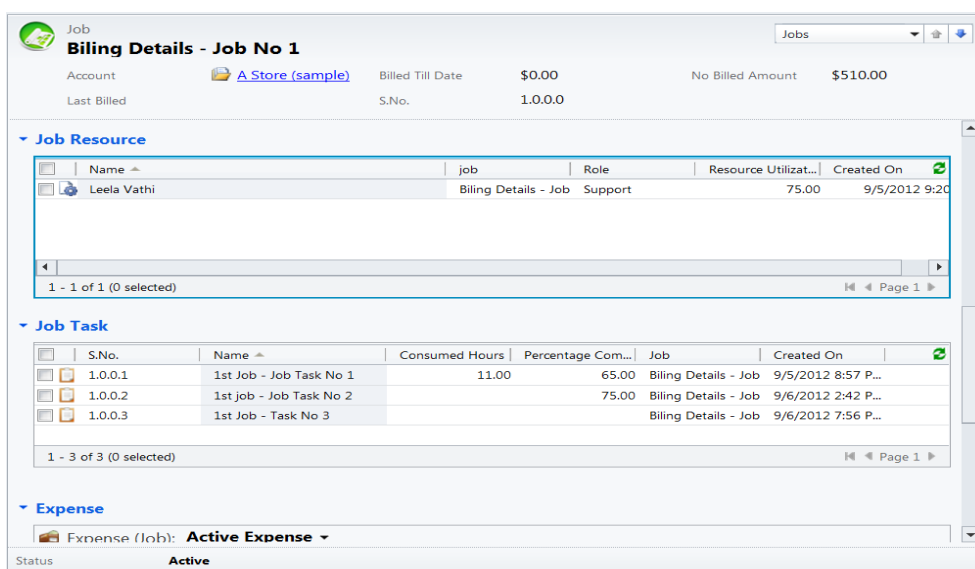Microsoft Dynamics CRM

Activity Editing Made Simple with

A good middle step after collection and before final decision is correction. With the companion optional "Editing Grid for Activities", defaulted to My Activities, your teams' police their own inputs across all projects, tasks, Activities - in any and all Activity Types, over any period from handy, powerful, and intuitive tools at all levels. Security controlled.

Alternate Time Post included with one-button Time Post from View

Assure resource accountability to utilization and customer engagement specific and proper communication by staff capability to adjust accurate time and rates and customer communications of process template Activities.

# Time to Amount Billed, Owed, Balance, Date Status Fields

Account billing information fields add Amounts for Un-billed, Un-paid, Retainer, and Billed-to date total for Account and dates for Last Billing, Next Billing, as well as Billing Days Frequency increment to automatically bill. Tie in credit card processing.

Forms Complete Your Message . . . Invoices and Statements to match your proposals and Orders

The last step in invoicing your clients is a final check of the Invoice or statement before emailing individually or from the Statement Generator for instant or scheduled bulk statement emailing or other delivery.

MTC can customize your customer-facing forms, Custom Reports On-Line or Premise, to your image and provide CRM Workflows and Ribbon controls to enhance your specific business processes.

Free trial plus unlimited installation support and custom development available
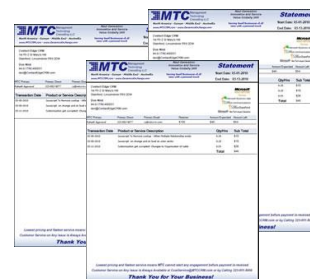
Time and Billing Enterprise Solution Value...

MTC offers a selection of technologies that directly complement Time and Billing for Microsoft Dynamics CRM Online and On-Premise solutions. From Activity Timing digital time-keeping, and Report-to-PDF document handling, and improved User-Interface technology for in-place editing and improved user efficiency, to low-cost integrated Document Management, and marketing and sales contact quality control and lead acquisition, to full CRM Customer Web Portal and back office account.

Only MTC backs all its
Microsoft CRM Managed Solution products with enterprise comprehensive product depth and 24/5 Low-Cost, Fixed-Rate customizations to craft Your Business integration solution affordably implemented and supported long-term.

Time and Billing Pricing:

Solution Name	Included Functionality	Online or On-Prem Ownership **Base Price**	Online or On-Prem Ownershp **Per User**
Time and Billing Core	All standard Dynamics CRM functionality customized to the MTC Time and Billing Managed Solution functionality described in this brochure.	$499.00	$49.00
ActivityTimer	A process definable Clock or Stop Watch for all CRM Activities. Intelligent auto-start/stop. Manual adjustable stop watch or multi-start/stop cumulative CRM Activity time keeping	249.00	15.00
CRM Web Time and Billing Portal	Built on the Microsoft CRM Customer Care Web Portal Accelerator, is MTC's Time and Billing Managed Solution with resource tracking and billing Invoices and Statements. Order, start, and status Jobs, Cases, Account, and review Resources. Create cases, and substantially reduce interaction and process costs while raising customer satisfaction on a 24/7 open-basis and CRM scripted control.	999.00 Flat	CRM Web services dev 49.00 Per Hour
CRM Credit Card User CRM Web Credit Card	MTC's Web Only credit card processing on several Processors offers secure off-CRM Autothorize.Net CMS capture of records. Add to Time and Billing to process service orders on-the-fly online. Use with CRM Products and MTC's CRM Products CMS.	CRM USER 499.00 Web User 499.00	CRM USER 499.00 Web User 499.00
Your Forms Package	**Your Order Management and Billing Forms - up to 4**	$199.Flat	

*All prices are in US Dollars. Prices are per user unless otherwise specified and are matched by the solution to the number of Microsoft Dynamics CRM users. Web Portals require the additional one-time purchase of the Microsoft Dynamics CRM External Connector License.

Volume discounts are available at the time of initial purchase only and in accordance to the following schedule:

50 to 99 users provides a 5% per user price discount
250 to 499 users provides a 20% per user price discount
1000 + users provides a 40% per user price discount

100 to 249 users provides a 10% per user price discount
500 to 999 users provides a 30% per user price discount
Volume discounting does not apply to "Flat" pricing items.

Maintenance and Support: 12 Months unlimited technical support and ongoing upgrades and solution enhancements are included with initial purchase. Annual maintenance and support thereafter is 25%. Any required installation, configuration, or training in conjunction with a version upgrade is not included in maintenance and the support agreement.

License issued by Organization to match number of CRM License enabled Users.
1st year maintenance is included with email-based or Live Web installation and trouble-shooting.