Accelerators for
Project-oriented companies

WorkinWith
Stronger Together

Excellence in professional services

PROFESSIONAL SERVICES PACK

for Microsoft Dynamics 365

- Unit billing
- Advanced contract management and billing plan functionality
- Set of complementary features to enhance the standard employee solution

PROFESSIONAL SERVICES
Unit Billing

Unit Billing and missions' management in Microsoft Dynamics 365

Additional features to set up and manage data to enable unit billing.

The employee enters hours as well as units in timesheets in order to enable unit billing. This information is then used to calculate costs and applicable sales prices, and to generate detailed invoice.

Features

Price list	Define rate card by unit for unit billing categories. Possibility to manage discounts based on unit volume.
Service category management	Define specific unit billing categories at mission level. Enables unit entry billing information in timesheets.
Timesheet entry	If the mission is billed on a unit billing basis, the employee can enter the units performed by date for a mission directly when entering his timesheet.
Billing	Invoicing of units entered in timesheets. Possibility of modifying/adjusting units and sales prices.

Benefits

Complementary function to mission management, enabling to manage a common billing method in the audit & accounting industry.

- The employee can add the units produced when entering hours in his timesheet.

- Unit billing flexible settings

- Invoice proposal including various invoicing types (milestone, unit billing, direct billing, etc.) in a single invoice

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Advanced contract management and billing plan feature

This feature enables the management of various customer contractualization modes, allowing to set up billing plans based on contract value, billing frequency and billing interval.

Benefits

An innovative solution that guarantees data and billing reliability

♥ No duplicate data entry

♥ Simplified monitoring and validation

Features

Automatic generation	Automatic creation of a billing plan based on contract value, billing frequency and billing interval.
Milestones description	Automatic generation of descriptions for each fee milestone (down payments, fees, etc.).
Flexible milestones	Milestones can be modified as needed.
Integration of invoicing plan	Data entity used to import the billing plan and its contract value via Data Management. (DEMF)

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Additional features

Set of complementary features to enhance the standard Microsoft Dynamics 365 solution, based on WorkinWith's experience with numerous project-oriented companies.

Features

Status of time entry periods	Possibility of blocking time entry for a given period and/or shifting time entry to a previous period.
Timesheets mass approval	New screen for viewing and controlling timesheet transactions of project workers and managing mass approvals.
Labels translation	Customizable labels to match the terms used by employees, making the entire solution easier to use.
Analysis	Provision of the data model for BI

Benefits

An innovative solution tailored to the specific needs of your industry

- Data available to generate any type of report

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