

**Accelerators** for  
Project-oriented  
companies



**WorkinWith**  
Stronger Together

Excellence in professional services

## PROFESSIONAL SERVICES

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.

## 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

### Features

<b>Price list</b>	Define rate card by unit for unit billing categories. Possibility to manage discounts based on unit volume.
<b>Service category management</b>	Define specific unit billing categories at mission level. Enables unit entry billing information in timesheets.
<b>Timesheet entry</b>	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.
<b>Billing</b>	Invoicing of units entered in timesheets. Possibility of modifying/adjusting units and sales prices.



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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

<b>Automatic generation</b>	Automatic creation of a billing plan based on contract value, billing frequency and billing interval.
<b>Milestones description</b>	Automatic generation of descriptions for each fee milestone (down payments, fees, etc.).
<b>Flexible milestones</b>	Milestones can be modified as needed.
<b>Integration of invoicing plan</b>	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

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