

# Solution Accelerators

## Workin *Audit* 365

Complementary to  
Microsoft Dynamics 365

Designed for  
Audit & Accounting industry



- ◆ Unit billing
- ◆ Vintage renewal from N to N+1
- ◆ Automatic Billing Plan generation
- ◆ Mission Creation Wizard
- ◆ A set of complementary features to enhance the standard D365 Finance solution





# 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 feature to missions' 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 to modify / adjust units and sales prices.

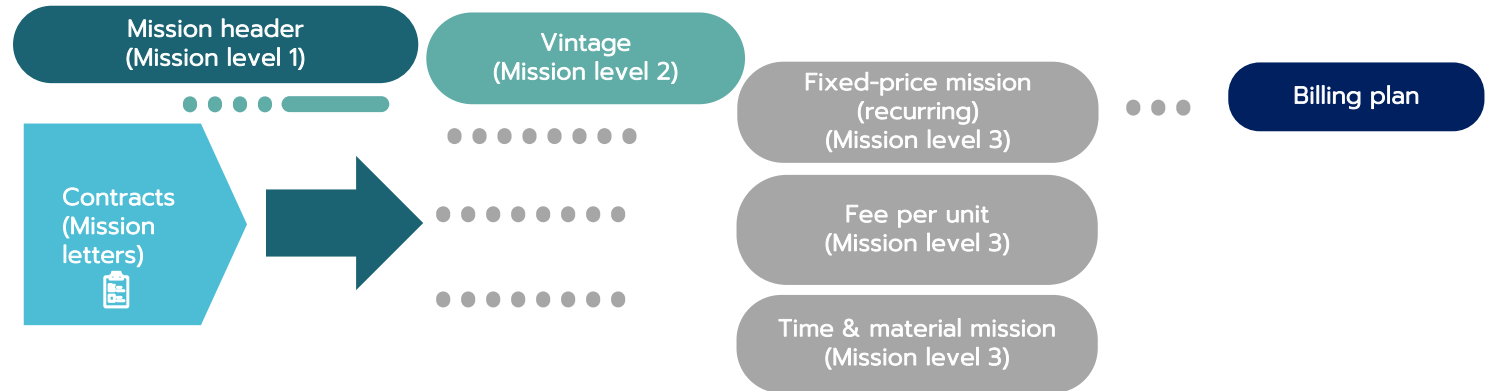


# Vintage renewal

## Mission accounting and management in Microsoft Dynamics 365.

Feature enabling automatic rollover of open and unbilled fiscal year (missions) to a new fiscal year (customer fiscal year).

Definition of a hierarchy adapted to the renewal of fiscal year.



## Benefits

*Considerable time savings at vintage renewal time.*

- Automated vintage renewal
- Possibility of automatic missions' revaluation on renewal

## Features

<b>Mission renewal</b>	Automatic renewal / duplication from N to N+1. Billing plan renewal
<b>Missions' mass renewal</b>	Automatic renewal / duplication of fiscal year N to N+1 in volume. Billing plan renewal.
<b>Valuation</b>	Possibility of revaluing missions on the basis of the new rate card at renewal time.

# Automatic Billing Plan generation



Automatic creation of a billing plan based on contract value, billing frequency and billing interval.

## Benefits

*An innovative solution that guarantees data reliability*

- Automates billing plan generation to save considerable time

## 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 milestone (down payments, fees, etc.)
<b>Flexible milestones</b>	Milestones can be modified as needed.
<b>Recalculation of contract value</b>	Automatic recalculation of contract value in line with defined milestones.
<b>Integration of invoicing plan</b>	Data entity used to import the billing plan and its contract value via Data Management. (DMF)



# Mission Creation Wizard



The mission creation wizard has been developed to facilitate the creation and management of mission hierarchies between *parent* and *child missions*.

This feature enables users not only to get an overview, but also to manage relationships between missions at several levels.

Therefore, when an update or deletion is made, all lower levels are automatically updated.

## Benefits

*Automated creation of the mission hierarchy, a real time-saver.*

- 📍 Facilitates management of the hierarchy between the different mission levels
- 📍 Quickly manages missions and related sub-missions
- 📍 Ensures sub-missions' compliance

## Features

Mission Creation Wizard	The wizard lets you create a mission structure and manages hierarchical levels. A dedicated mission creation form enables users to make modifications before creating their mission hierarchy.
Mission templates	Use of the Mission Creation Wizard, based on mission templates.
Mission name	Automated mission naming according to your needs.



# Complementary features



A set of complementary features to enhance the standard Microsoft Dynamics 365 solution, based on WorkinWith's experience in implementing numerous projects.

## Features

<b>Timesheets mass approval</b>	New screen for viewing and checking timesheet transactions of employees working on missions, and for managing mass approvals.
<b>Work breakdown structures (WBS) mass publication</b>	Enables automatic mass publication of work breakdown structures.
<b>Mass mission closing</b>	Adjustment of unbilled mission transactions with optional closing. Each adjustment request requires a reason code and may be subject to an approval process.
<b>Missions mass transfer from one legal entity to another</b>	This feature enables missions to be transferred from one legal entity to another, while retaining all master data except for historical transactions.
<b>Labels translation</b>	Customizable labels using terms related to your industry.
<b>Analysis</b>	Data model provisioning for BI

## Benefits

*An innovative solution tailored to the specific needs of your industry*

[www.workinwith.com](http://www.workinwith.com)