

Solution Accelerators

Workin *ProServ* 365



Complementary to
Microsoft Dynamics 365

Designed for
Project-oriented companies

- 📍 Unit billing
- 📍 Advanced contract management and billing plan functionality
- 📍 Set of complementary features to enhance the standard D365 solution





Unit Billing



Unit Billing and project' 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 project management, enabling to manage a common billing method in your 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

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 project level. Enables unit entry billing information in timesheets.
Timesheet entry	If the project is billed on a unit billing basis, the employee can enter the units performed by date for a project directly when entering his timesheet.
Billing	Invoicing of units entered in timesheets. Possibility of modifying/adjusting units and sales prices.



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. (DMF)



Additional features

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

Features

Period status of time entry	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 monitoring timesheet transactions of project workers and managing mass approvals.
Labels personalization	Customizable labels to match the terms used by employees, making the entire solution easier to use.
Analysis	Data model provisioning for BI

Benefits

An innovative solution tailored to the specific needs of your industry

- 📍 Data available to generate any type of reports

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