Time & Billing for Microsoft Dynamics CRM

Time and Billing for Microsoft Dynamics CRM Online or Premise is a flexible enhancement set that starts by dollarizing organizational resources – CRM Users and Contact, their cost and a sell amount, flexibly tracking time as cost and revenue accumulated in all your Resources' CRM Activities, managed by intuitive time collection tools.

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.

Activity sets, or projects/processes saved as Activity Templates capturing repetitive projects at the Activity, Stage, or complete Project level.

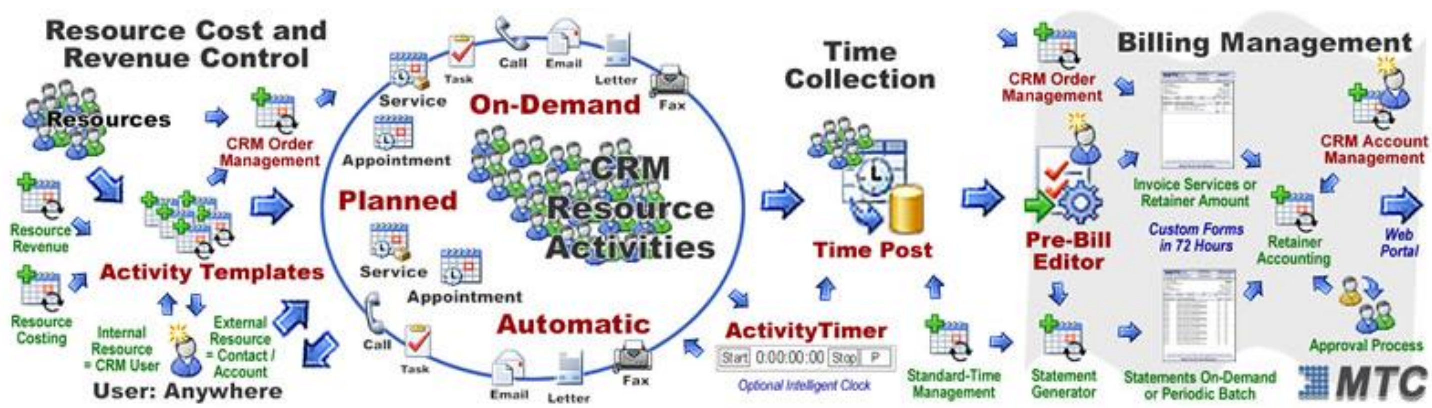
Execute a set series of Activities for a single CRM Product referenced Template in order management. Real-time status of resources is available.

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 are added to CRM as a Managed Solution self-install that 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.



Looking at this solution diagram the 4 sections of the Time and Billing CRM process illustrate the new tools that are added to Microsoft CRM Online or Premise that enhance existing CRM Activities across your business functions. Accurate Resource controls and task or multi-task project standard setting benefit across the business from order processing, to service delivery from the same Activities you probably perform now. Innovative and flexible time and data collection tools, operations and Account management controls, and accurate automatic billing statement production are natural extensions to the CRM Activities used or needed in your business today.

Use Time and Billing by itself or further enhance CRM with

Editable Grid Suite For Microsoft Dynamics CRM · Customer Portal Web System For Microsoft Dynamics CRM · Visual Project Scheduling For Microsoft Dynamics CRM · ConsultPro Professional Services Dynamics CRM · Sales Product Editor For Microsoft Dynamics CRM

MTC Management Technology Consulting LLC
Call 323-851-5008 8:00 AM to 5:00 PM
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Microsoft Dynamics CRM

Time & Billing
for Microsoft Dynamics CRM

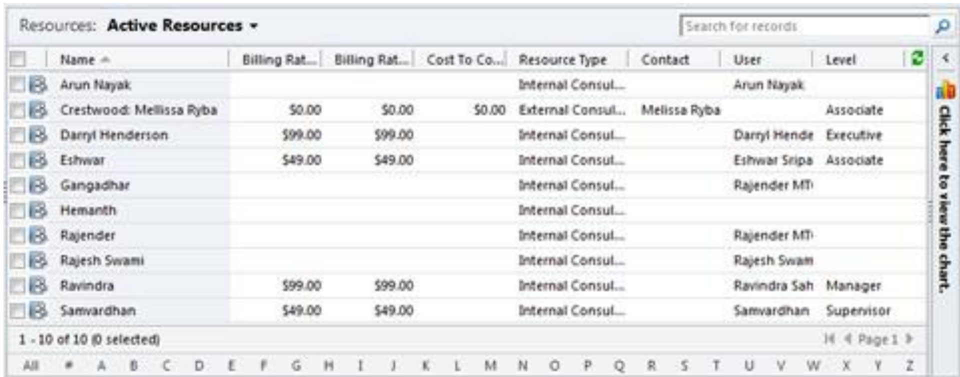
MTC

What Time and Billing Adds to 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.



Resources: **Active Resources**

Name	Billing Rat...	Billing Rat...	Cost To Co...	Resource Type	Contact	User	Level
Arun Nayak				Internal Consul...		Arun Nayak	
Crestwood: Mellissa Ryba	$0.00	$0.00	$0.00	External Consul...	Melissa Ryba		Associate
Darryl Henderson	$99.00	$99.00		Internal Consul...		Darryl Hende	Executive
Eshwar	$49.00	$49.00		Internal Consul...		Eshwar Sripa	Associate
Gangadhar				Internal Consul...		Rajender MT	
Hemanth				Internal Consul...			
Rajender				Internal Consul...		Rajender MT	
Rajesh Swami				Internal Consul...		Rajesh Swam	
Ravindra	$99.00	$99.00		Internal Consul...		Ravindra Sah	Manager
Samvardhan	$49.00	$49.00		Internal Consul...		Samvardhan	Supervisor

1 - 10 of 10 (0 selected)

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.

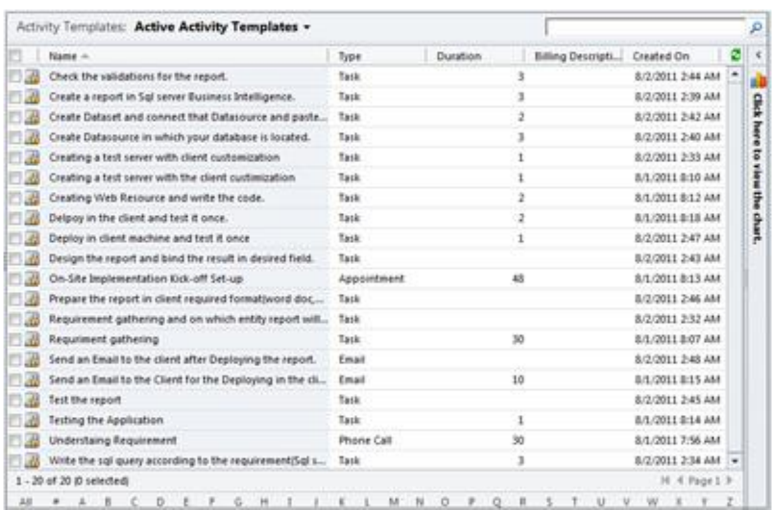
Resources have skill Level matching Fast load utility from your CRM Users.

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.

Templates Make Repeat Activities and Processes Easy

Save your Activities to Template. Define your business processes or projects.

Professional Resource and "To Do" control starts with the Templates. Three (3) stored template layers build on CRM Activity, interim Stage or milestone, and complete Project.



Activity Templates: **Active Activity Templates**

Name	Type	Duration	Billing Descripti...	Created On
Check the validations for the report.	Task	3		8/2/2011 2:44 AM
Create a report in Sql server Business Intelligence.	Task	3		8/2/2011 2:39 AM
Create Dataset and connect that Datasource and paste...	Task	2		8/2/2011 2:42 AM
Create Datasource in which your database is located.	Task	3		8/2/2011 2:40 AM
Creating a test server with client customization	Task	1		8/2/2011 2:33 AM
Creating a test server with the client custimization	Task	1		8/1/2011 8:10 AM
Creating Web Resource and write the code.	Task	2		8/1/2011 8:12 AM
Delpoy in the client and test it once.	Task	2		8/1/2011 8:18 AM
Deploy in client machine and test it once	Task	1		8/2/2011 2:47 AM
Design the report and bind the result in desired field.	Task			8/2/2011 2:43 AM
On-Site Implementation Kick-off Set-up	Appointment	48		8/1/2011 8:13 AM
Prepare the report in client required format(word doc,...	Task			8/2/2011 2:46 AM
Requirement gathering and on which entity report will...	Task			8/2/2011 2:32 AM
Requriment gathering	Task	30		8/1/2011 8:07 AM
Send an Email to the client after Deploying the report.	Email			8/2/2011 2:48 AM
Send an Email to the Client for the Deploying in the cli...	Email	10		8/1/2011 8:15 AM
Test the report	Task			8/2/2011 2:45 AM
Testing the Application	Task	1		8/1/2011 8:14 AM
Understaing Requirement	Phone Call	30		8/1/2011 7:56 AM
Write the sql query according to the requirement(Sql s...	Task	3		8/2/2011 2:34 AM

1 - 20 of 20 (0 selected)

Activities and Stages from Templates create collapsible proposal handling of services for controlled commitment and delivery statement uniformity.

Each is embedded with cost, revenue, skill, competency, duration, To Do instructions, Billing-note, and performance categorization and can be built on-the-fly and as completed saved back to the template for continual improvement.

Templates can be attached to CRM Products to define Services used in order management for very fast complex-services selling. Perfect for MTC Web Portal.

Use one of the included Best Practice Template collections or build your own on the fly or from any open or closed Activities to build better processes intuitively.

Time & Billing
for Microsoft Dynamics CRM

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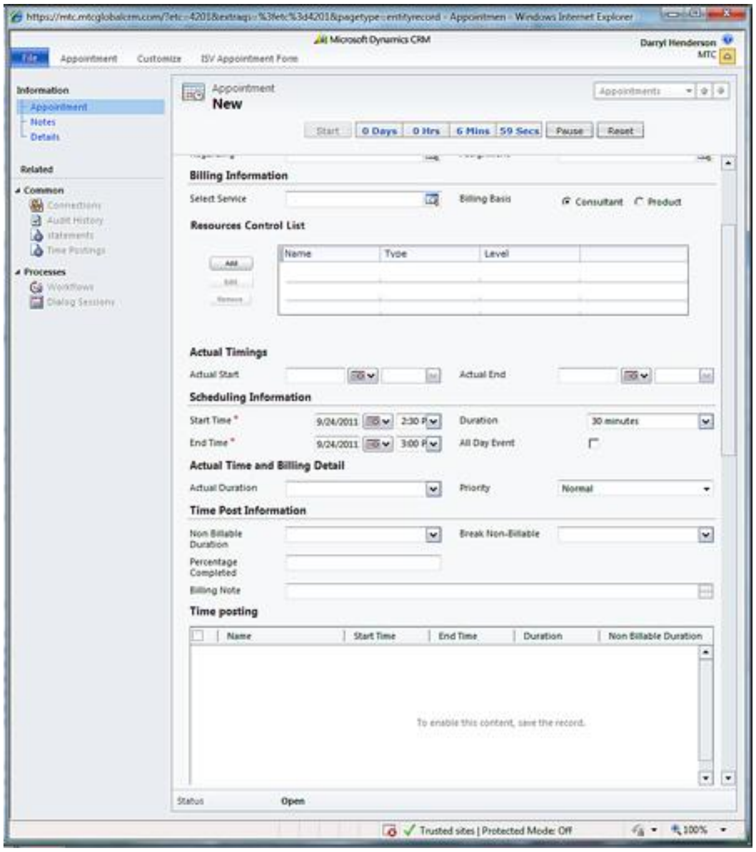
Partner NFR program, OEM, and custom development available from MTC to support unique needs

Time and Billing Enhances CRM Activities with Process Tools

Once Resources are set-up to handle finances and resource talent, Activity Templates track time and serve as the “To Do” function fully contained to tell Resources what in detail, to do, when, where, with whom, and with added business process controls to easily 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.



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.

Template Instructions Assurance: Collecting Activities you are doing and saving to Templates creates processes for your business.

Real-Time Status Posting: Now CRM can show you what all your Resources are doing Live.

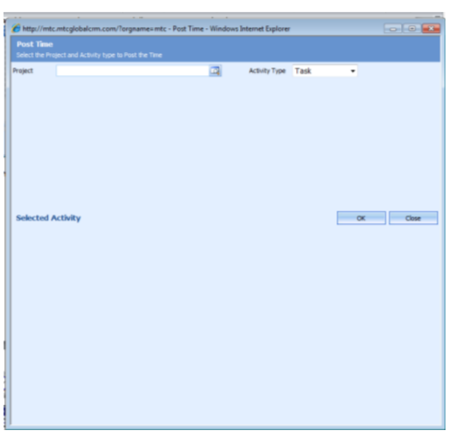
Unlimited Multi-Posting Entry: Any controlled resource can post as often as they wish, starting stopping, break time, and non-bill time.

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

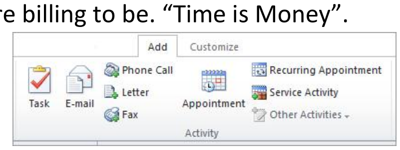
Continuous Business Improvement: Internal engagement notes and Ratings to drive Issues and Minutes and Risk Analysis. And automatic web survey email can be triggered as kept at the Template.

Innovative Process Tools that Assure You Collect all the Right Data - Real-Time!

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 posting of all status information you track.

Time & Billing
for Microsoft Dynamics CRM

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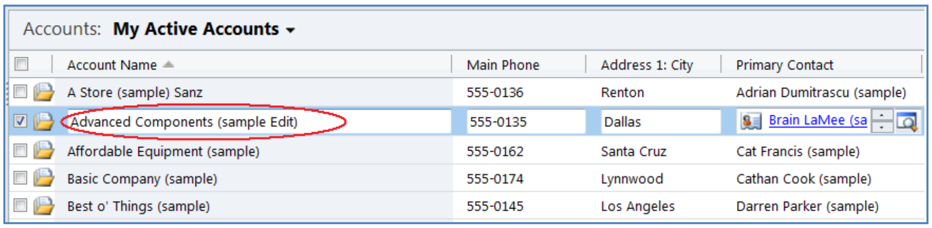
CRM Activity Editing, Pre-Bill Editing, Provide Great Controls

Billing customers with the right message in your invoicing documents, billing statements, delivery status are CRM functions it does well with Time and Billing. Your New Process, once established results in all billable Activities coming up through a process of control, collection, correction, and one decision point with a great deal of experience-driven pre-set customer information to produce satisfactory customer reactions.

My Activity Editing Made Simple with Editable Grid For Microsoft Dynamics CRM

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

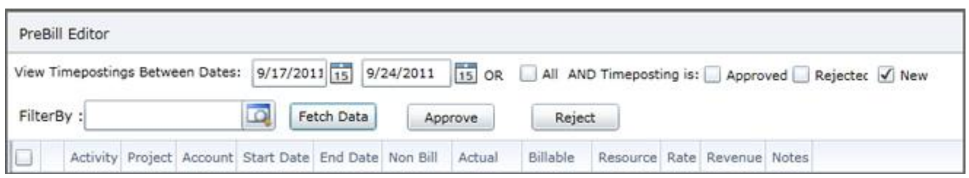


Assure resource accountability to utilization and customer engagement specific and proper communication by staff capability to adjust accurate time and rates and customer communications of process template Activities.

Never have Bad Billing Moments with Your Customers with Best-Practice Tools

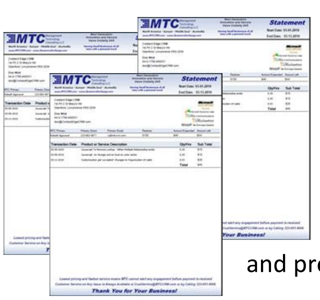
Account Revenue Billing Control Practice-wide is a Snap

The "Pre-Bill-Editor" allows you to edit any Activity field in any service engagement. Default view in chronological order to review, edit, release, delete, or hold any line items of resource activity billings. View Specifics across all projects, tasks, Activities - in any and all Activity Types, over any period from a handy, powerful, final approval in Account billing control. Security controlled.



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 . . .
after Statement Final Verification & Production

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.

Partner NFR program, OEM, and custom development available from MTC to support unique needs

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Microsoft Dynamics CRM

What are the Time and Billing Options . . .

Continuous Business Improvement

Business Improvement System For Microsoft Dynamics CRM

With a 3 legged closed-loop for quality management Time and Billing B.I.S. option includes template to job completion loop iteration, as leg one and Resource "comments and Issue Rating and notes, as part of the Activities are Internal Staff leg, System, and Staff, and the 3rd leg, Activity completion triggering automatic template e-mail-to-web-survey system for customer satisfaction management and closed-loop continuous business improvement.

Real-time Visual Company Status Views with exception alerts – State-of-the-Art!

Visual Live Status Series OPTION For Microsoft Dynamics CRM

This option adds significant business Visibility by displaying Activity records visually on a Gant chart for tremendous visibility of all your resources Activities over-time and Live Status right now. Manage with the ability to highlight actual live status and anomalies in a vibrant color display. Ideal for large picture full-screen display is used for operational control. Great for real-time project force management. An organization is more easily managed visually to drag-and-drop on-the-fly. Work with MTC to build alert Visibility to anomalies happening in your business real-time.

Distribute "To-Do" to resources on Exchange Server / Active Link – OWA, Phones

Visual Exchange Sync Series OPTION For Microsoft Dynamics CRM

This option allows organizations that are delivering resource "To-Do" information across the enterprise on Microsoft Exchange Server or Active-Link to continue that same process – Outlook, OAW, PDA's, phones, and most devices. Visual UI enhancement and data-enrichment synced controlled and released on-the-fly from CRM.

Give Customers more Visibility online

Visual Web Portal Series OPTION For Microsoft Dynamics CRM

This option extends Visual Scheduling presentation of project plan and job status to your Customers or Partners from CRM to your existing website. This option requires MTC's "CRM Web Portal" solution and appropriate Visual Project Scheduling options. Partner Portal option allows Partner/end-user hierarchical views and control for both Partner and End-user using the Microsoft Live ID already being used.

Business Benefits:

- ✓ Time and Billing gives you a simple efficient way to track and bill time and manage your client billing process.
- ✓ Time and Billing shows your billable and categorized non-billable hours mix for internal analysis or presentation to your clients.
- ✓ Visibility into total staff time expenditures allows maximizing your revenues while highlighting personnel and individual project issues.
- ✓ Flexible bill rate and resource cost application supports varied rate structures and business models within a single organization to support your activities for different clients and markets.
- ✓ Time & Billing CRM integrates the business mission of tracking, pricing, and costing all resource time simply within the processes extended from the client interactions you now track in your Customer Relationship management from calls, emails, appointments, etc. to assure efficiency and staff coordination.
- ✓ Time and Billing CRM takes advantage of the Quote, Order, and Invoice solution you own in Dynamics CRM and implements accounting functionality through the billing process reducing the needs of an accounting solution double entry reducing accounting work to periodic journal entries.
- ✓ The Statement Generator and optional Pre-Bill editor allows for a simpler process to assure accuracy and timeliness of client billings.
- ✓ Client services Retainer management performs the critical function within the visibility of the CRM already in use in client relations and services delivery.
- ✓ The flexibility of ActivityTimer within Time and Billing CRM assures that set amounts are applied to batched processes like

Time and Billing Enterprise Solution Value…

Visual Project Scheduling and its expanding functional options are products integrated to a family of enterprise Microsoft CRM solution building blocks under the "**SMB Custom Enterprise**" (SMB) banner. SMB Custom is just that – All the building blocks to configure a complete enterprise solution fit to your business, scalable for growth. The entire solution family can be seen in the "**ConsultPro**" professional services practice management solution. The SMB and ConsultPro are solutions of MTC. MTC is the leader in efficient global CRM engineering for low-cost, fixed-rate Online and 24/5 live product support. MTC can configure product components, customize product functionality. Have MTC add workflow and scripting automation for you. We provide data migration, and configuration services.

Time and Billing Pricing:

Solution Name	Included Functionality	Premise Purchase *Per User	Online Monthly *Per User
Time and Billing Core	All standard dynamics CRM functionality customized to the ConsultPro functionality	99.00	7.00
ActivityTimer	**	49.00	3.00
Continuous Business Improvement	** enhance modules purchased.	35.00	2.00
Visual Exchange Sync	** to clients including the enhance modules purchased.	15.00	1.00
Your Forms Package	** to clients including the enhance modules purchased.	199.Flat	199.Flat
Complete Solution	Includes all of the above per user functionality plus the flat options customer web portal, partner web portal, and QuickBooks integration. Phones NOT	200.00	15.00
Visual Live Status Activity Starter Kit		*Flat Fee* 750.00	*Flat Monthly* 20.00

*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 15%. Upgrade from Dynamics CRM 4.0 to CRM 2011 is covered only for software delivery. Any required installation, configuration, or training in conjunction with a version upgrade is not included in maintenance and the support agreement.

Licensed issued by Organization to match number of CRM Users. 1st year maintenance is always included. Free email-based or $50.00 Live Web Installation and Use Support or just about any customization

Starter Kit: See Your Company's Activities enterprise-wide to get control now!

This is a great way to see your business from the heart pounding real-time. This entry-level Microsoft CRM Managed Solution Visual "Activity" display instantly shows all of your business's CRM Activities happening in in real-time. Isolate CRM views by Organization and delegate the View to be managed. The idea of seeing the data is to watch what you need to watch while building enterprise solution discipline new to an growing organization.

Available at www.DynamicsExchange.com/TB.aspx www.MTCCRM.com/TB.htm

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