SIMCREST
TECHNOLOGY SOLUTIONS THAT FIT

Time and Billing

Version 1.0.0.0
Countries: US, CA

Setup and User Manual
(include user demo scenarios in **red**)

For Microsoft Dynamics 365 Business Central

Last Update: January 11, 2019

Contents

App Description

Register time and bill customers with this easy-to-use app that also includes resource scheduling.

Do you lack control of time registration for your billable resources? Are you billing less due to late or lacking time registration? Is your billing to customers complex and error-prone? Would you like to take control of your capacity planning of billable resources?

Making sure all billable time is entered in a timely manner is critical to cashflow and customer satisfaction. Catching issues with time entry early is crucial so corrections can be made before billing is taking place. Scheduling of resources can help you with capacity planning and resource availability.

Our Time and Billing App makes time entry and billing customers effortless. Time registration is a controlled process that reduce mistakes and errors. Both time entry and billing follow predefined rules to avoid faulty billing of your customers. Resource time overviews allow control of billing and missing time entry is easily discovered and corrected. Billing is a one-click process that creates invoices to your customers based on their individual requirements. On top of all this we also provide an easy-to-use resource scheduling system that is closely linked to the time entry system.

We recommend using our Auto Email App to automatically email invoices to customers.

Demo Scenario of Time and Billing

This entire manual is built as a demo scenario. If you want to test this App before making a purchase, follow the scenario. If you purchased the App, the demo scenario explains all the functionality within the App.
If you like to follow the scenario, you must use a company that starts with CRONUS. Create a new company if needed.
Scenario actions are shown in Red in this manual.
WARNING: Do not attempt to create demo data in a production company. Data might be deleted!

Time and Billing License

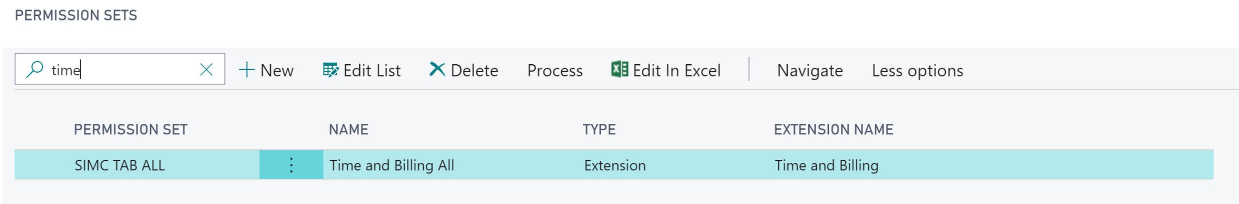
Time and Billing can be acquired as an App in the Extension Market Place inside Microsoft Dynamics 365 Business Central. Just click Free trial to install and try out the solution. The trial will last for 30 days. A subscription can be purchased from SimCrest.

Setup of Time and Billing

There are a couple of steps needed in order for Time and Billing to work.

Permissions

A permission set will be created upon installation of the Time and Billing App. It's called "SIMC TAB ALL".



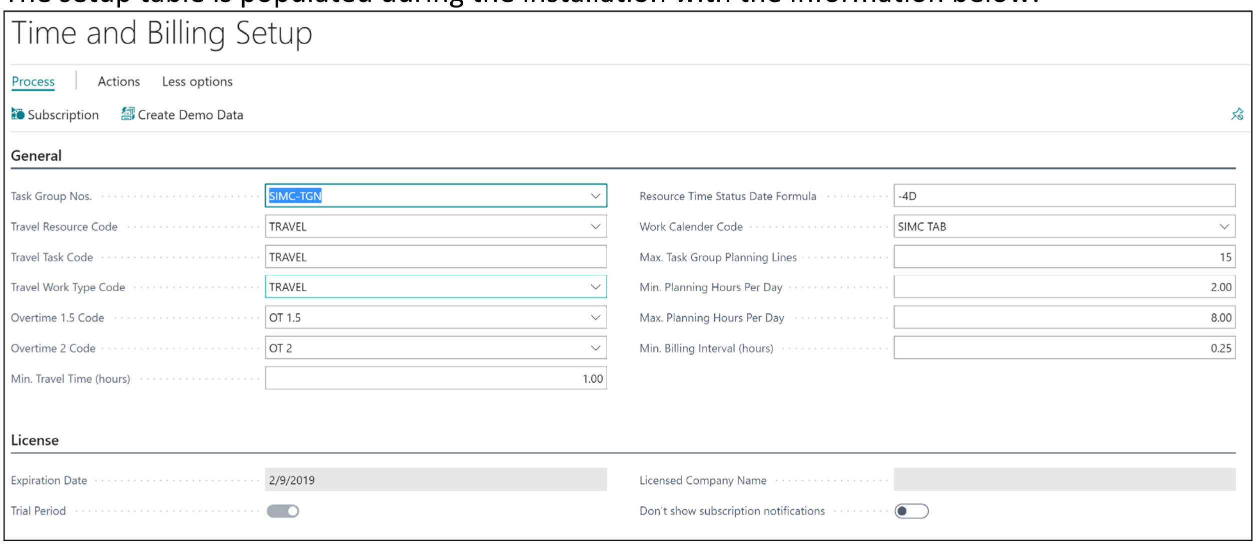
You must assign this permission set to all the users that need access to Time and Billing.

Scenario: Assign this permission set to users that need access.

Time and Billing Setup

Scenario: Search for "Time and Billing Setup".

The setup table is populated during the installation with the information below:



Here is an explanation for all the fields:

General Tab

- Task Group No.
  This is the number series used for groups of tasks used by the resource scheduling functionality (see later section for details).
- Travel Resource Code
  Enter the resource code used to register travel time in the time entry system.
- Travel Task Code
  Enter the Task code used for travel tasks under Jobs.
- Travel Work Type Code
  Enter the Work Type Code used for travel.
- Overtime 1.5 Code

The code used for 1.5 times overtime.

- Overtime 2 Code
  The code used for double overtime.
- Resource Time Status Date Formula
  Used to calculate the filter offset days from today's date for the Resource Time Status page. Should be between -7D to 0D to work best.
- Work Calendar Code
  Select the work calendar for your resources. A work calendar is created during the install that will have Saturday and Sunday as non-working days.
- Min. Travel Time (hours)
  This is the minimum travel time allowed when registering time.
- Max Task Group Planning Lines
  When the system creates Job Planning Lines for groups of tasks, this is the maximum number of lines allowed. An error will be shown if more lines are needed.
- Min. Planning Hours Per Day
  Here you indicate the minimum number of hours allowed when planning days of work.
- Max. Planning Hours Per Day
  Here you indicate the maximum number of hours allowed when planning days of work.
- Min. Billing Interval (hours)
  This is the minimum interval allowed for billing hours for jobs. 0.25 hours means that billing must be in minimum increments of 15 mins.

License Tab

- Expiration Date
  This is the expiration date of the App. After the expiration date, Time and Billing will no longer function. The solution will warn you 15 days in advance unless "Don't show subscription notifications" is checked.
- Trial Period
  If checked, this is a trial version. All features can be used.
- Licensed Company Name
  This is the company name used to activate the license. It should be the same as the name of the company in Dynamics 365 Business Central. If the company name is not the same as this field and the Trial Period is unchecked, the Time and Billing system will stop working.
- Don't show subscription notifications
  This will turn off all notifications from the subscription system like the message below.

  × Thank you for trying out the Time and Billing app. Your trial period expires in 30 days. Contact SimCrest, Inc. for a subscription.

Actions

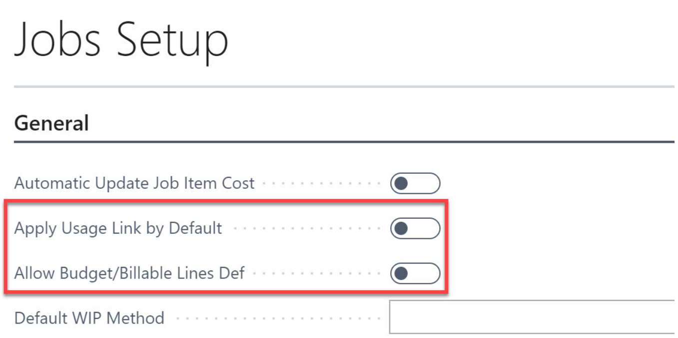
- Subscription
  This action is used to activate a subscription for the Time and Billing App. Refer to the last section of this manual how to activate the App.

- Create Demo Data
  This menu will only appear in companies that start with CRONUS. Use this action to create demo data to follow the scenario in this manual. DO NOT RUN this action in a production company.

Scenario: Make sure you are in a CRONUS company that is NOT used for production. Click Create Demo Data and confirm.

Jobs Setup

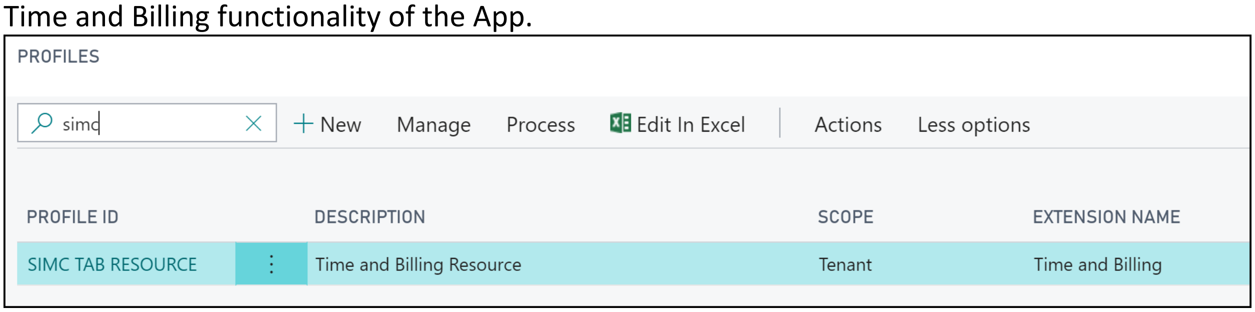
If you like to utilize all the budget and billing features of the Time and Billing app we recommend setting the following Jobs Setup fields like below:



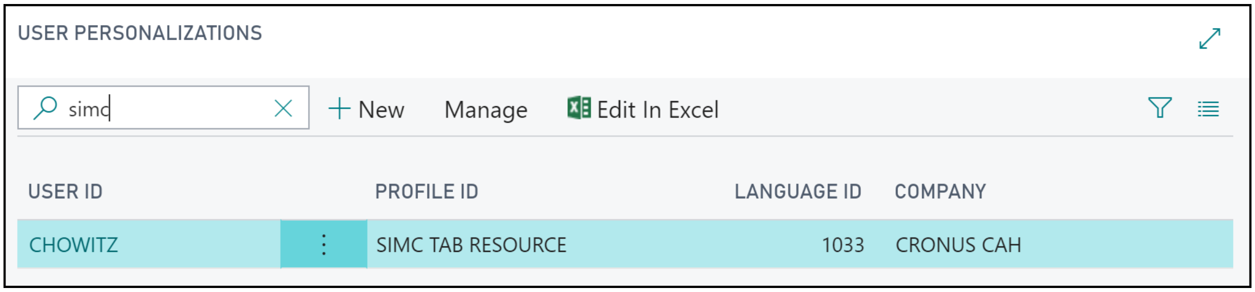
Both fields should be off.
The fields default onto the Job Card, so if you already have jobs with these fields turned on, make sure to turn them off before using the Time and Billing App.
Scenario: The creation of demo data should have turned off both fields. Please verify.

Time and Billing Profile

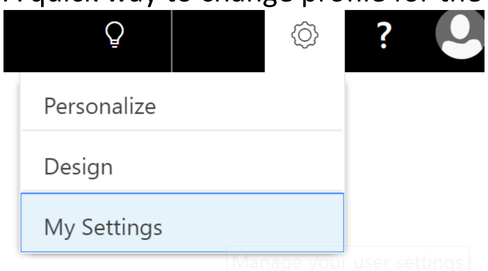
A profile is provided with the Time and Billing App. The profile will allow easy access to all the Time and Billing functionality of the App.



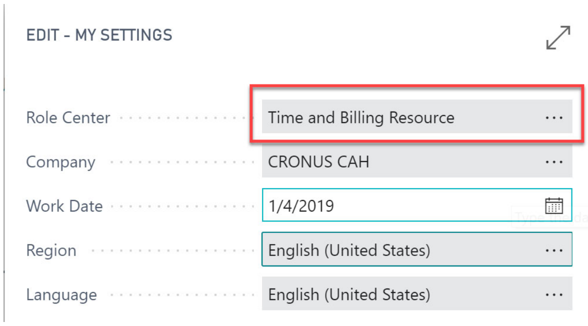
The profile is called SIMC TAB RESOURCE. You should assign this profile to time and billing users.



A quick way to change profile for the current user is to click My Settings (top right)

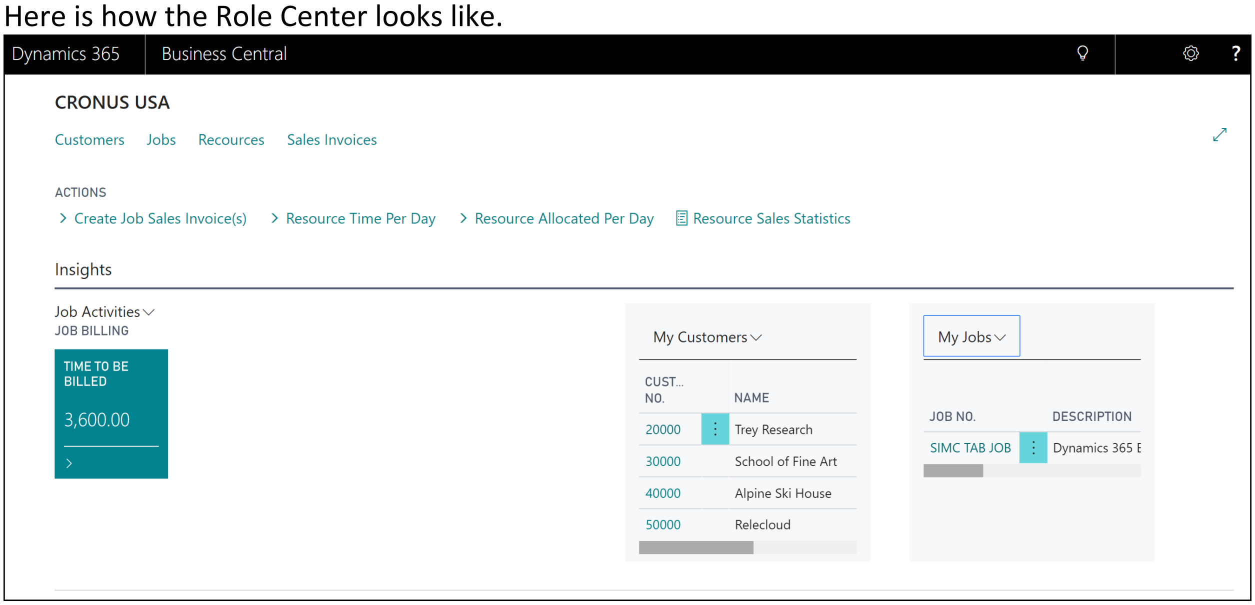


Set the Role Center like this:



Scenario: Select "Time and Billing Resource" in the Role Center like above and click OK.

Here is how the Role Center looks like.



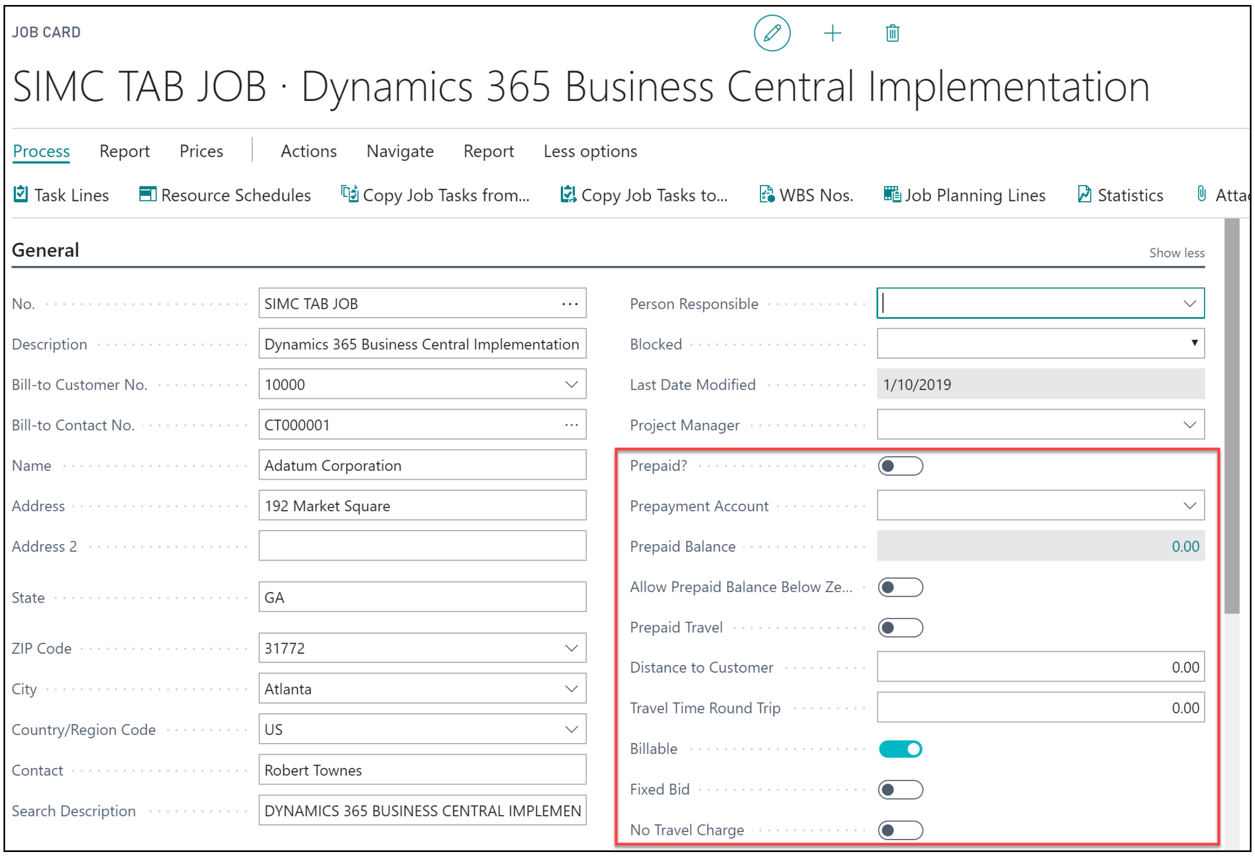
Time Entry Functions

One of the features of Time and Billing is the Time Entry functionality. Time Entry allows controlled entry of time spent on specific tasks on Jobs. In order for Time Entry to properly function you must have one or more jobs set up with Job tasks.

Setup of Jobs

Jobs must be setup with No. and Description and a Bill-to Customer must be associated with the job in order for the billing system to properly bill the customer.

Scenario: Find the below job that has been created for you already. You may have to click "Show More" on the General Tab to see all the fields.



The fields in the red box are fields specific to the Time and Billing app:

- Prepaid?
  Indicates if the job is prepaid in advance. If checked, you must also specify the prepayment account.
- Prepayment Account
  The G/L Account used for the prepayment from the customer. You must bill the client using this prepayment account to assign the prepayment to this job.
- Prepaid Balance
  A calculated field showing the current balance of the prepayment.
- Allow Prepaid Balance Below Zero

If checked, the billing system will allow the prepayment to go negative. If not, billing will stop applying the prepayment to invoices once exhausted.

- Prepaid Travel
  If checked, the prepayment will be used for travel expenses. If not, travel will be billed and not applied to any prepayment.
- Distance to Customer
  Indicated the distance to the customer. Used for resource travel reports.
- Travel Time Round Trip
  Specifies the average time it takes for a round trip to the customer. Used to bill travel time (using Travel Resource specified in Time and Billing Setup).
- Billable
  If checked, this job is billable to the customer
- Fixed Bid
  If checked, this job will never be invoiced by the billing system
- No Travel Charge
  Indicates that travel is not to be charged. Travel time is still posted to the job, but never billed.

Scenario: Notice the job has been made billable. If not, we won't be able to bill it to the customer.

Job Tasks

You have to setup up at least one Job Task for billing of time and one Job Task for travel time (Travel Task Code in Time and Billing Setup).

Tasks | Manage | More options

JOB TASK NO.	DESCRIPTION	RE... WBS NO.	NO... BIL...	JOB TASK TYPE	START DATE	END DATE	BUDGET (TOTAL QTY)	USAGE (TOTAL QTY)	BILLABLE (TOTAL QTY)
DESIGN	Design Document	☐	☐	Posting	_	_	_	_	_
DEVELOP	Development of Code	☑	☐	Posting	1/11/2019	1/11/2019	1.00	_	_
TRAVEL	Travel Time	☐	☐	Posting	_	_	_	_	_

Job tasks are used to break down the job into tasks when planning and registering time against the job.

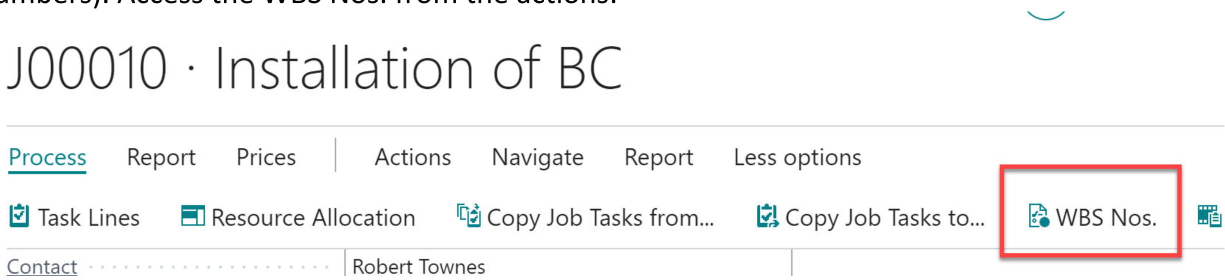
There are a few new fields on the Job Tasks:

- Require WBS No.
  If checked, a WBS No. must be specified for any time entry using the task code.
- Non-Billable
  If checked, the job task will default as non-billable on the time entry page but can be made billable during time entry.
- Budget, Usage, Billable, Billable Invoice Quantities
  Use to calculate quantities (hours) from the Job Planning lines.

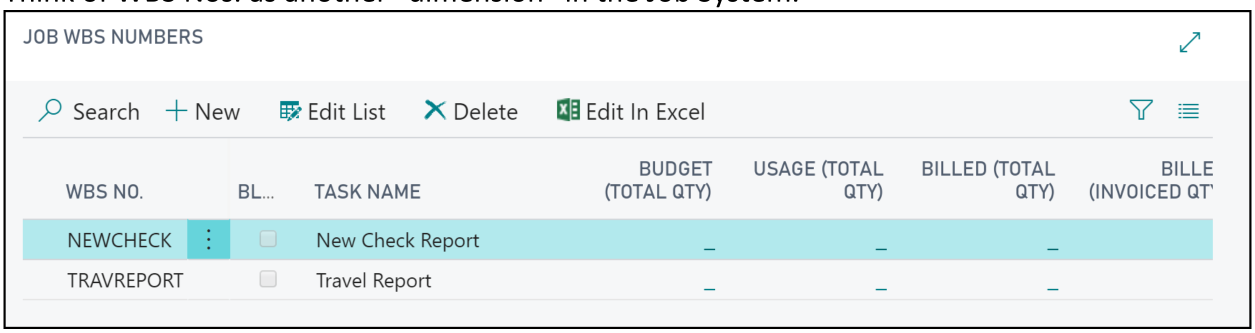
Scenario: These Job Tasks have already been created. Notice that Job Task DEVELOP has a requirement for a WBS No.

WBS Nos.

There is an additional way to break down jobs using WBS Nos (work breakdown structure numbers). Access the WBS Nos. from the actions:



Think of WBS Nos. as another “dimension” in the Job System.



Fields used on WBS. No.:

- WBS No.
  A unique No. for the WBS.
- Blocked
  If blocked is checked, the user will get an error if trying to use this WBS No. during time entry.
- Task name
  Name for the WBS.
- Budget, Usage, Billed and Billed Invoiced Quantities
  Calculated fields showing total Quantity of Job Planning Lines used with this WBS No.

Scenario: These WBS Nos. have been created already. In this case we have two work breakdowns, one for a new check report and one for a travel report. The budget and usage etc. are used to track budget vs. actual vs. billed.

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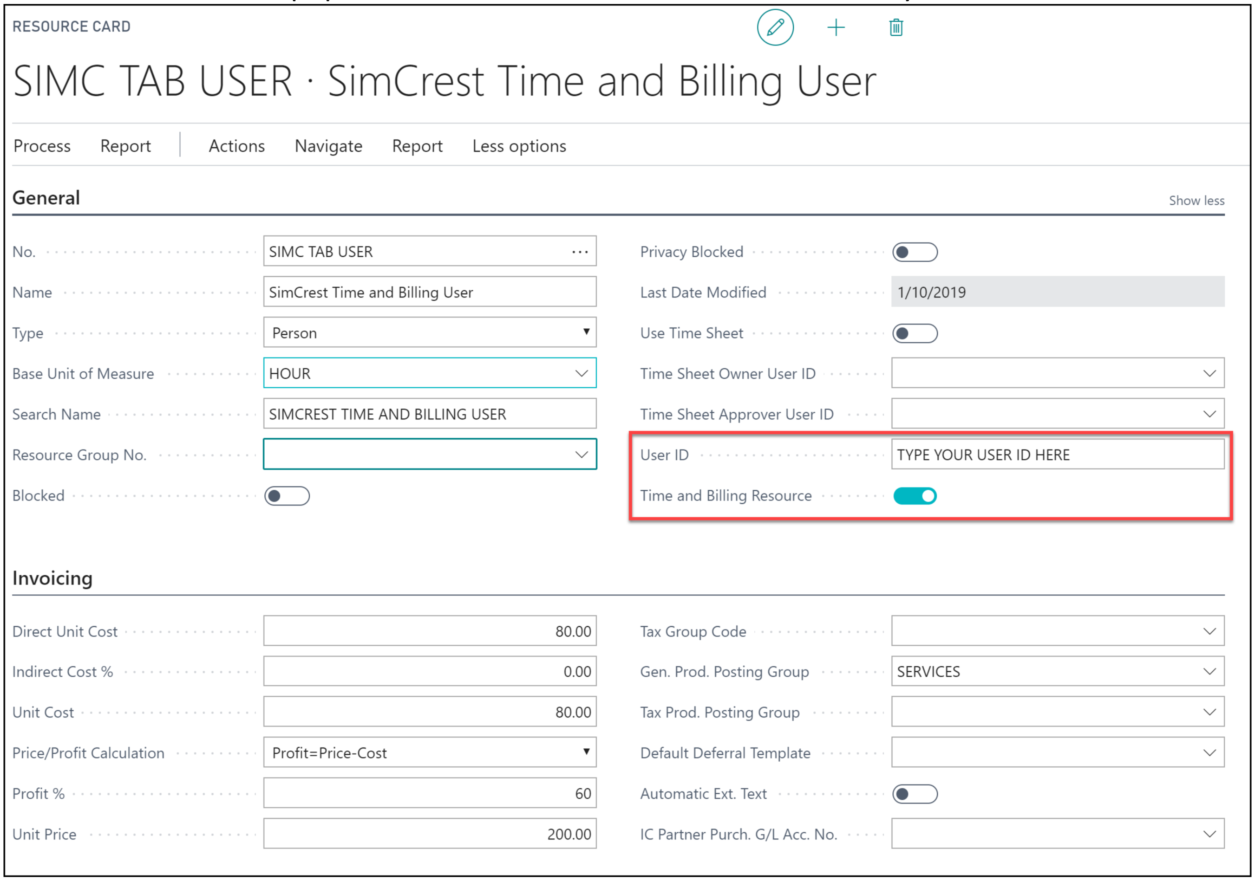
Resources

Two fields need to be populated for each resource used for time entry:

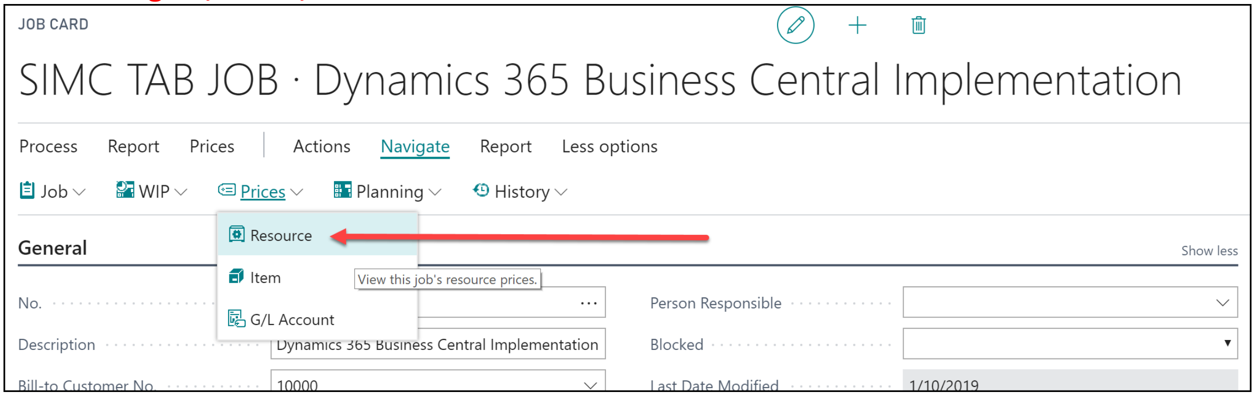


- User ID
  Used to tie the resource to the User ID, so Time Entry can post to the correct resource.
- Time and Billing Resource
  Used to indicate if the resource is going to show on billing and scheduling reports and pages. Should also be turned on for all billable resources that should use the time entry page.

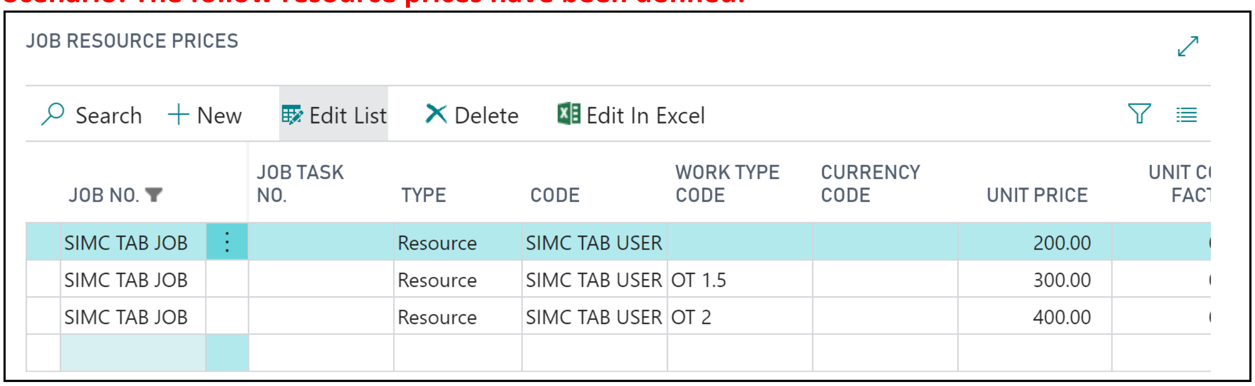
Scenario: This resource has already been created. Find it and notice we have cost and price entered. We also used SERVICES for the product posting group.
You will need to replace the User ID above with your own User ID. Type in your User ID in the User ID field. Check “Time and Billing Resource” for all the other resources also (no User ID needed for them).

Job Resource Prices

Scenario: The job that was created has resource prices setup for this demo. Go to the job and select Navigate, Prices, Resource:



Scenario: The follow resource prices have been defined:



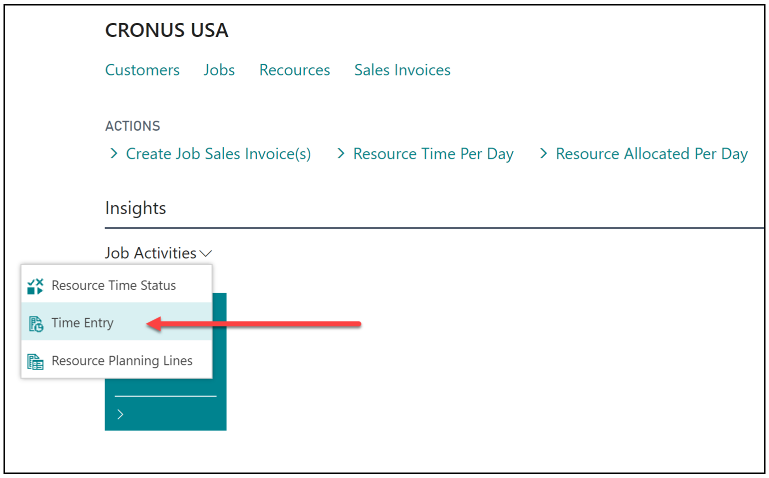
JOB NO.	JOB TASK NO.	TYPE	CODE	WORK TYPE CODE	CURRENCY CODE	UNIT PRICE	UNIT C… FACT…
SIMC TAB JOB		Resource	SIMC TAB USER			200.00	
SIMC TAB JOB		Resource	SIMC TAB USER	OT 1.5		300.00	
SIMC TAB JOB		Resource	SIMC TAB USER	OT 2		400.00	

Scenario: Notice that we have used Work Types to allow different prices depending on the work type. Time and Billing uses this to handle overtime when doing Time Entry.

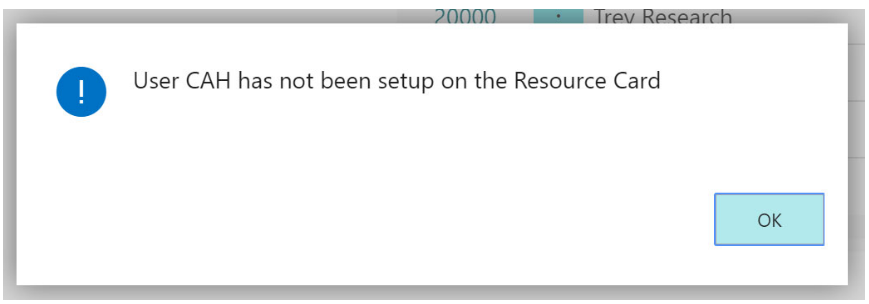
Time Entry Page

The Time Entry Page allows users to register time and travel to jobs.

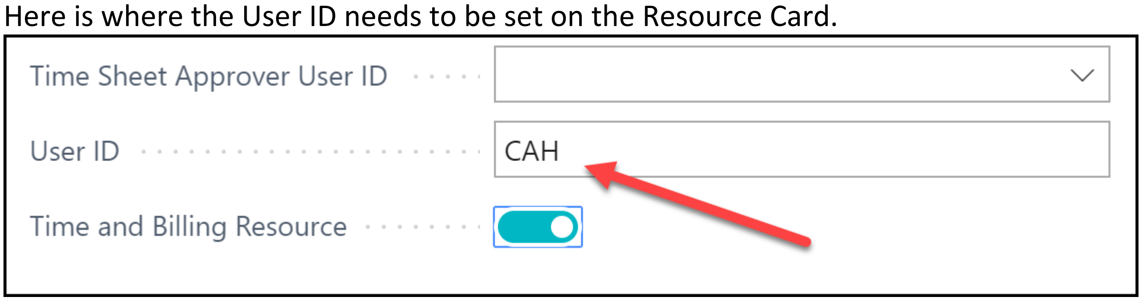
Scenario: Go back to the Role Center and click Job Activities, Time Entry:



If you get an error like this one, you are missing setting the correct User ID on the Resource Card.



Here is where the User ID needs to be set on the Resource Card.



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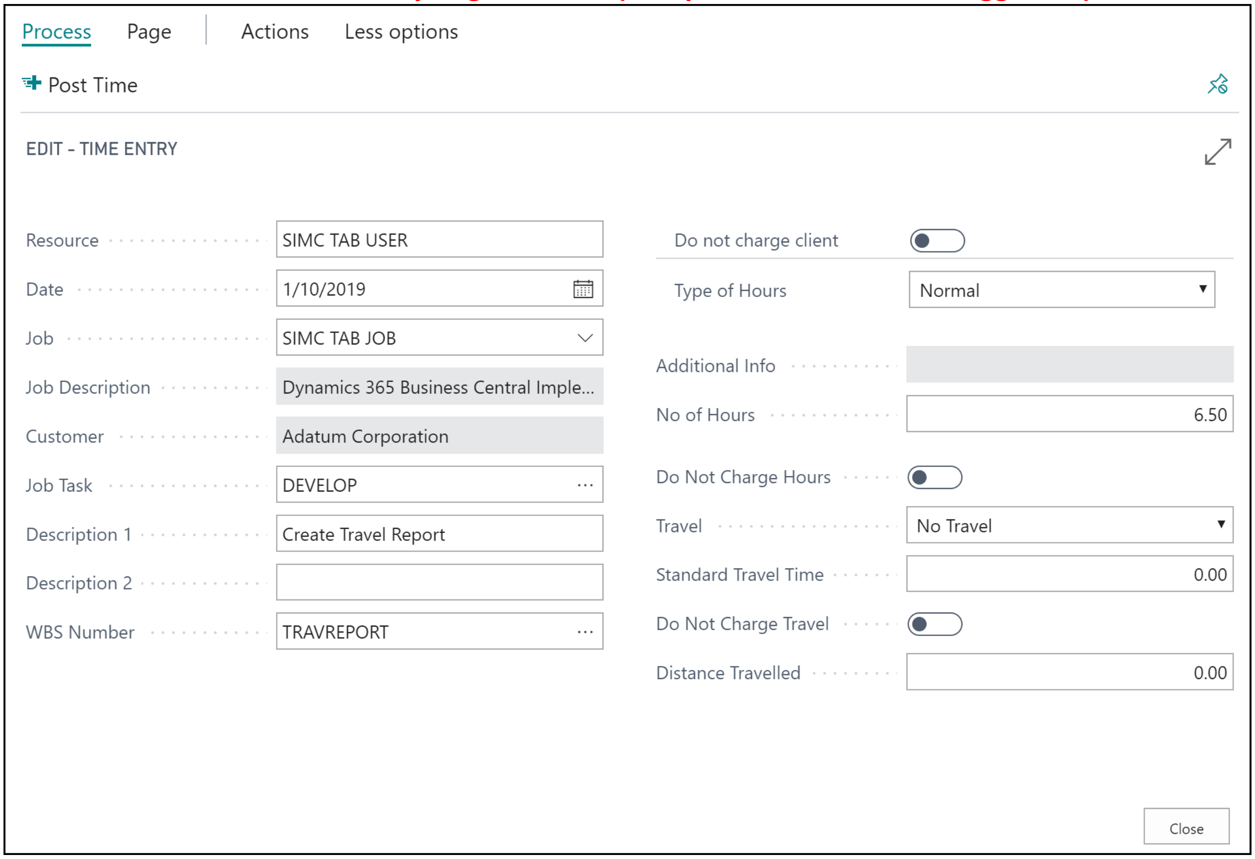
Scenario: Fill out the Time Entry Page like this (accept whatever date is suggested):



Scenario: We are registering 6.5 hours toward developing a travel report. Since WBS Number is mandatory for the DEVELOP task we specified TRAVREPORT for WBS.
DO NOT POST TIME YET.

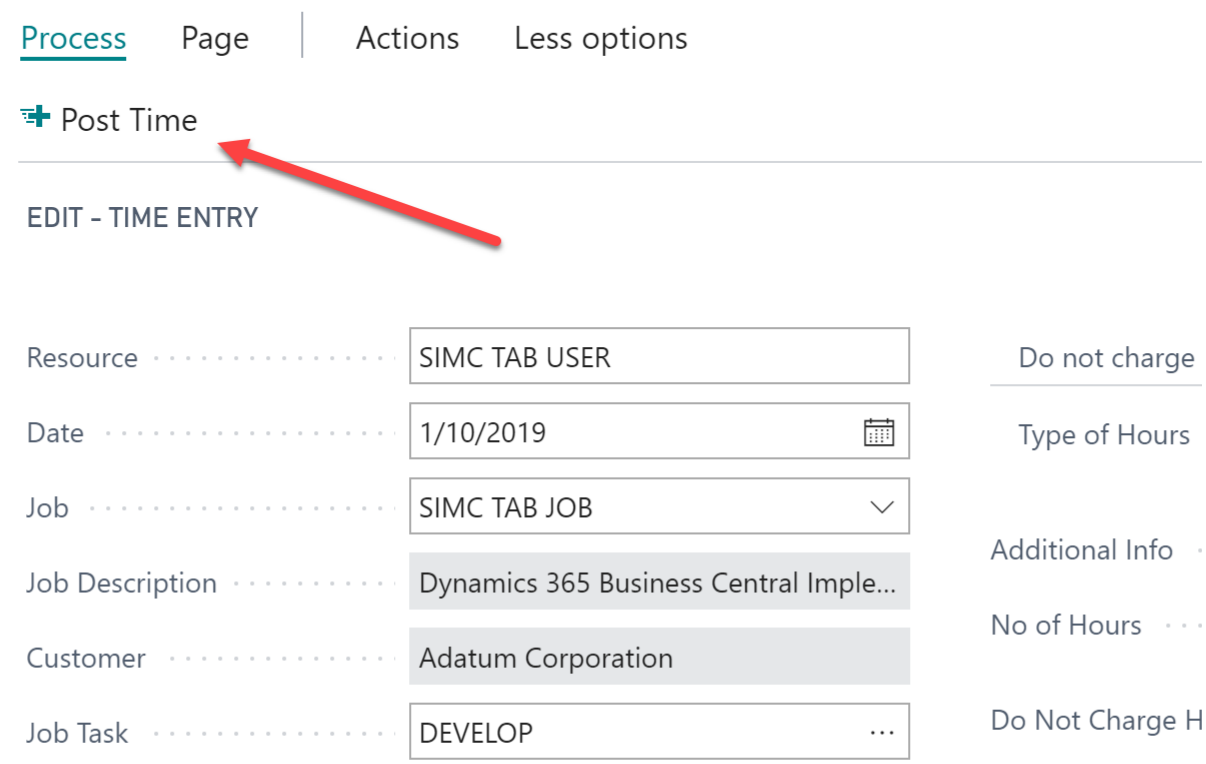
Here are the details of each field:

- Resource
  This is the resource code used for the time entry. This will default onto page from the User ID link to the Resource. This field is mandatory.
- Date
  This is the date of the time entry. This will default using today's date. This field is mandatory.
- Job
  Job Number of the job you like to register time for. You can look up or just start typing the job no or description. If you change the Job No. at any time during the time entry, all subsequent fields will be reset. This field is mandatory.
- Job Description and Customer
  Read only fields for information only. Will populate once the Job has been selected.
- Job Task
  Select the job task. Tip: You can type part of the name and just hit enter to get the job task. In the example above, typing DEV will be enough to pick the DEVELOP task. This field is mandatory.

- Description 1 and 2
  Type a short description in one or both fields. You are limited to 2 x 50 characters.
- WBS Number
  Select the WBS Number. You can use the same tip to enter quickly (see Job task above). May be mandatory depending on setup.
- Do not charge client
  This defaults from the Job Card. If the job is billable, this field will be unchecked/off. If checked, both time and travel will be set to non-billable.
- Type of hours
  Pick the type of hours for this time entry. You have the option of Normal, Overtime 1.5 and Overtime 2.0. Use the Work Type Codes to associate overtime pricing using job resource prices.
- Do Not Charge Hours
  If checked, hours will not be billed.
- Travel
  Options are No Travel and Travel.
- Standard Travel Time
  Defaults from job card in case Travel is selected as an option above. Can be changed to reflect actual time used for travel.
- Do Not Charge Travel
  If checked, travel hours will not be billed.
- Distance Travelled
  Here the distance travelled is entered. Will default from Job Card and can be edited for actual distance.

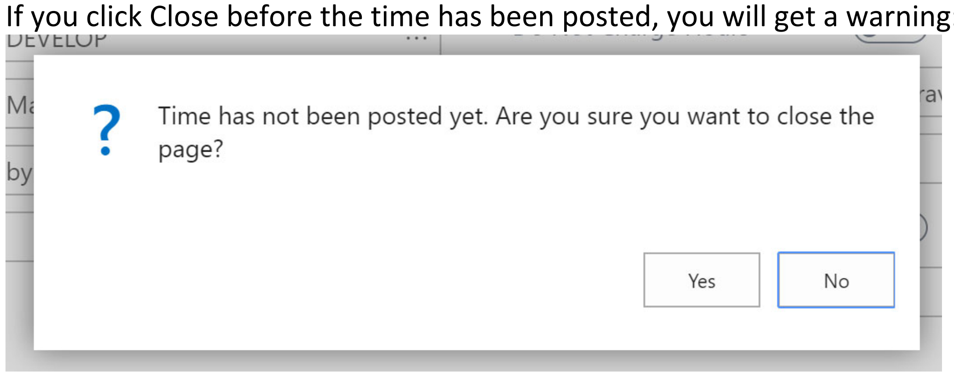
Posting Time

Time is posted by clicking Post Time. Do not click Close unless you like to cancel the time entry.
Scenario: Click Post Time. Once posted, Click OK.



The idea is to post the time and let the time entry page stay open to allow the user to continue time entry for the same or another job.

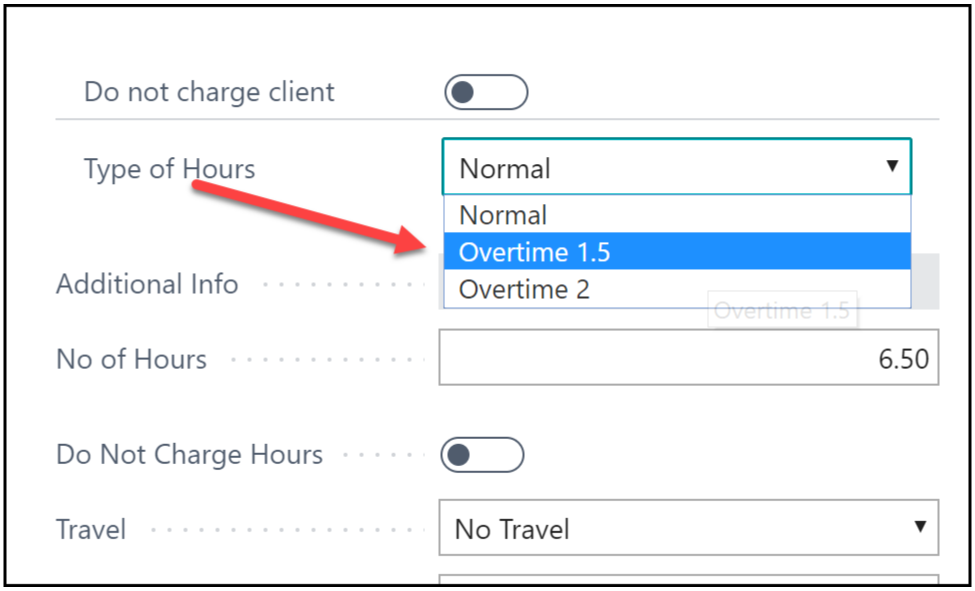
If you click Close before the time has been posted, you will get a warning:



If you click Yes, the time will NOT be posted.

Once posted, the entry page will look like before and can be edited as needed. If a new job is being selected, all other information will be reset.
Once all time is registered, click Close to close the page.

The Time Entry page will populate job planning line(s) with the information from the entry when posted.
Overtime can be entered using Type of Hours provided you have set up Job Resource Prices:



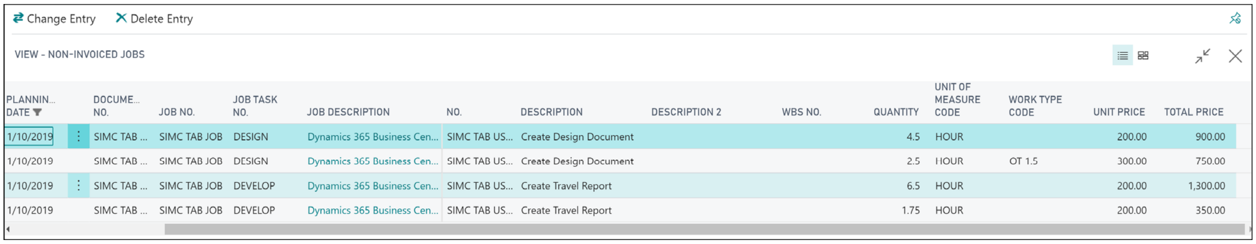
The customer will be billed using the resource price for the overtime type as defined.

Scenario: Post the following time to the same job:

- **DESIGN, Create Design Document, 4.5 hours**
- **DESIGN, Evening meeting, 2.5 hours, OT 1.5**
- **DEVELOP, Final changes to report, TRAVREPORT, 1.75 hours**

Check the lines that were created. They can be found by clicking on the billing tile under Job Billing (amount might be different than below):

Here are the Job Planning Entries that were created:



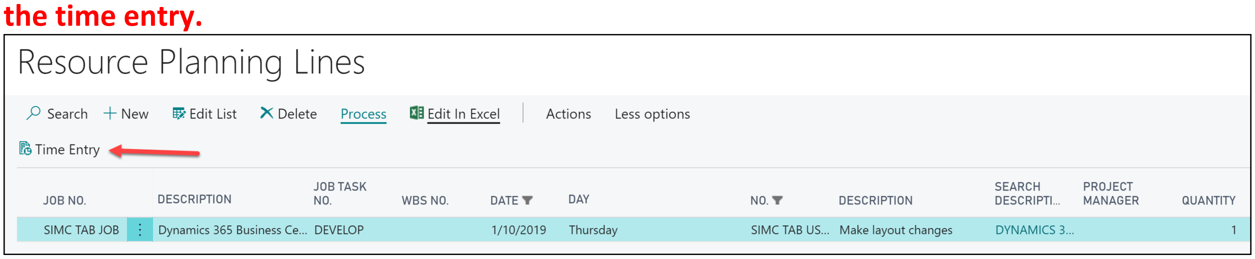
PLANNIN... DATE	DOCUME... NO.	JOB NO.	JOB TASK NO.	JOB DESCRIPTION	NO.	DESCRIPTION	DESCRIPTION 2	WBS NO.	QUANTITY	UNIT OF MEASURE CODE	WORK TYPE CODE	UNIT PRICE	TOTAL PRICE
1/10/2019	SIMC TAB ...	SIMC TAB JOB	DESIGN	Dynamics 365 Business Cen...	SIMC TAB US...	Create Design Document			4.5	HOUR		200.00	900.00
1/10/2019	SIMC TAB ...	SIMC TAB JOB	DESIGN	Dynamics 365 Business Cen...	SIMC TAB US...	Create Design Document			2.5	HOUR	OT 1.5	300.00	750.00
1/10/2019	SIMC TAB ...	SIMC TAB JOB	DEVELOP	Dynamics 365 Business Cen...	SIMC TAB US...	Create Travel Report			6.5	HOUR		200.00	1,300.00
1/10/2019	SIMC TAB ...	SIMC TAB JOB	DEVELOP	Dynamics 365 Business Cen...	SIMC TAB US...	Create Travel Report			1.75	HOUR		200.00	350.00

Time Entry using Resource Planning Lines

If a resource has been allocated using the scheduling system, time entry can be done from the resource planning lines created by the schedule:

The planning lines are shown.

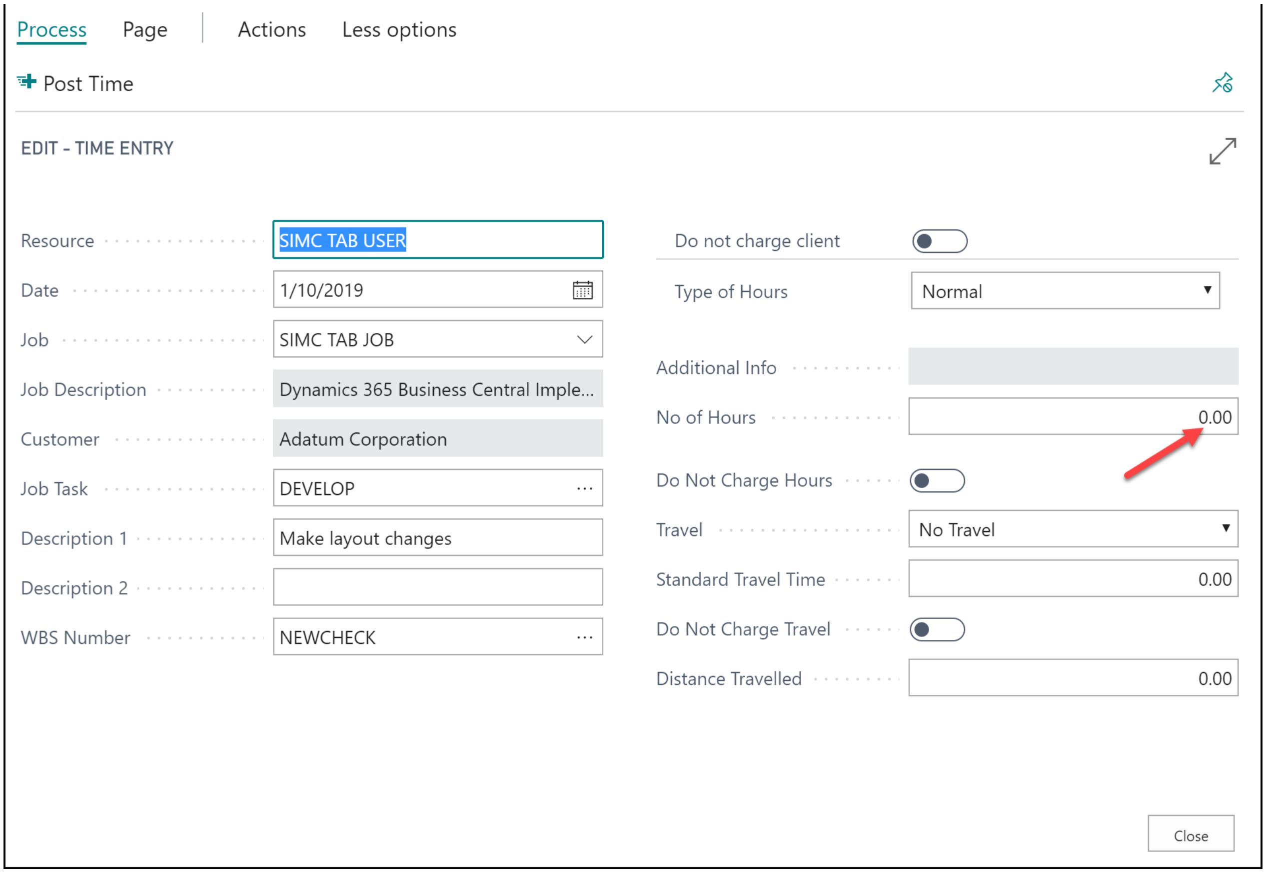
Scenario: The demo data included one scheduled resource planning line. Use that line to do the time entry.



JOB NO.	DESCRIPTION	JOB TASK NO.	WBS NO.	DATE	DAY	NO.	DESCRIPTION	SEARCH DESCRIPTI...	PROJECT MANAGER	QUANTITY
SIMC TAB JOB	Dynamics 365 Business Ce...	DEVELOP		1/10/2019	Thursday	SIMC TAB US...	Make layout changes	DYNAMICS 3...		1

Pick the line you like to register time against and click Time Entry.

The time entry page is prepopulated with the details from the scheduled planning line except for No. of Hours (enter the actual hours used). This is very useful if resources are working on tasks from the schedule and just want to register the time they used on each scheduled task.



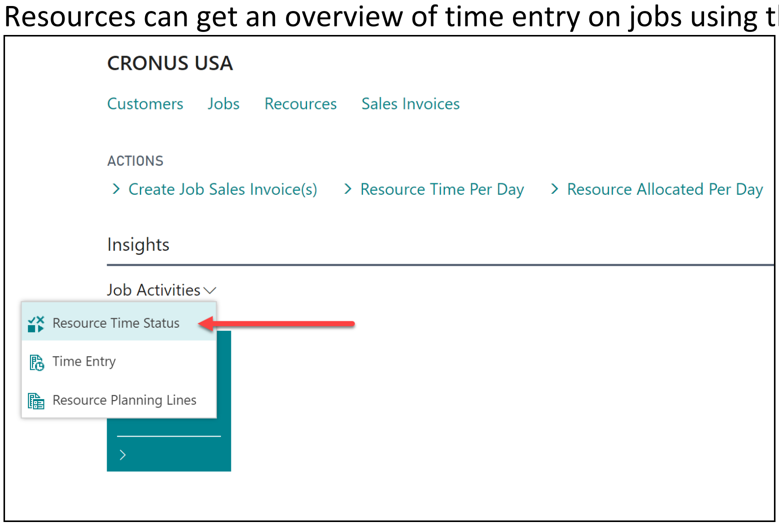
Make the needed changes and post the time.

Scenario: Enter 1.25 hours for this entry. Leave everything else like it was. Post the time.

When you close the time entry page, you will be asked if you like to complete the planning line entry. If you pick yes, the lines are marked completed. If not, you can manually do this later. Once completed, the lines will no longer show up under Resource Planning Lines.

Resource Time Status

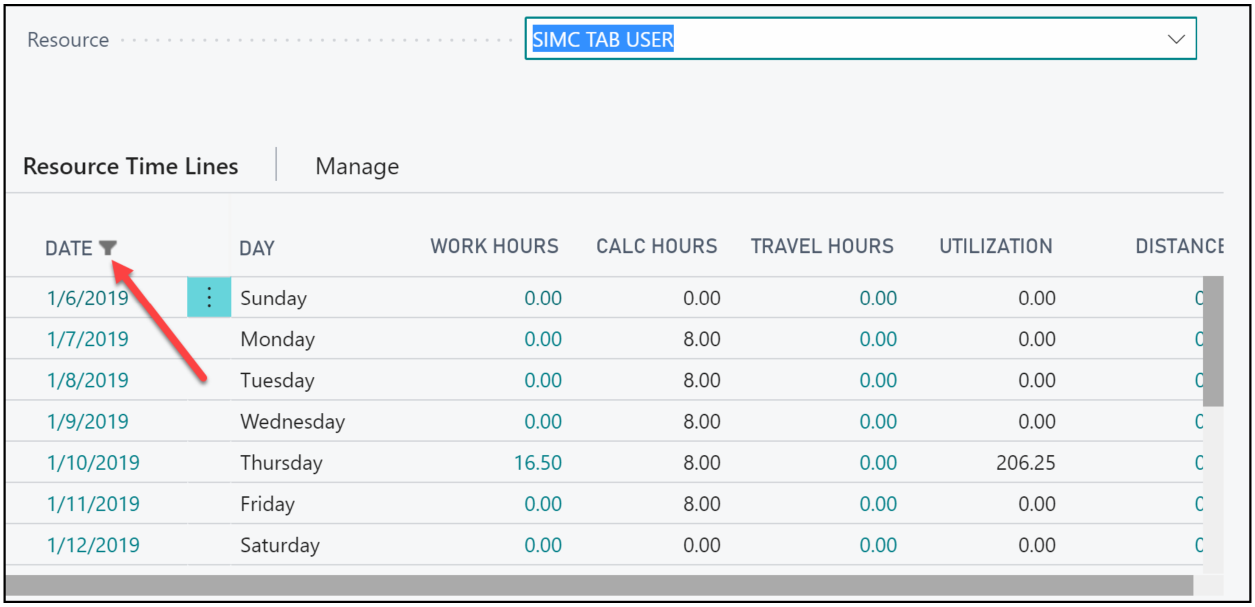
Resources can get an overview of time entry on jobs using this page.



Scenario: Click on Resource Time Status and review the page.

This page shows what time has been entered per day for the resource. This is very useful to determine if time is missing or needs to be moved. NOTE: You can drilldown on the work and travel hours to see the details of what was registered. Click on the date will start a time entry on that date.

The Date is filtered according to the Time and Billing Setup. Click the filter symbol to change the filter if needed.



The first available date inside the filter will be TODAY + [Resource Time Status Date Formula] from the Setup.

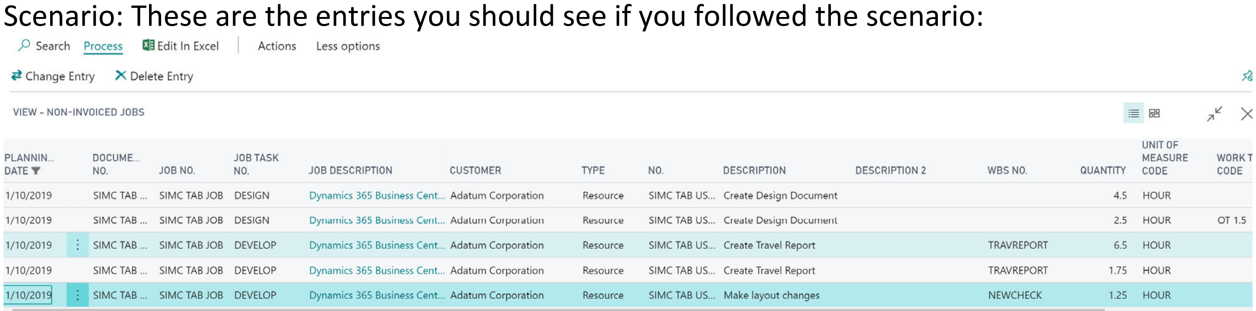
Scenario: Drill down on the Work Hours and check the entries.

Reviewing and Editing Non-Billed Time

At any time, users can review time that has not been billed yet.

Scenario: From the role center click the Assist Edit button next to the total amount of non-billed entries:

Scenario: These are the entries you should see if you followed the scenario:

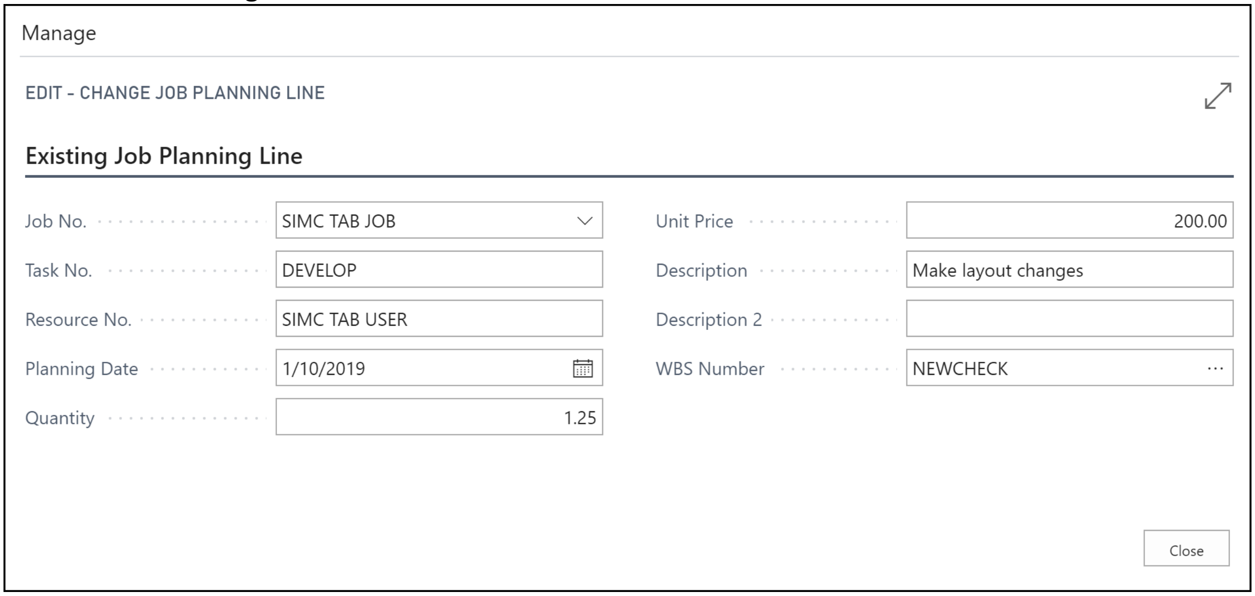


PLANNIN... DATE	DOCUME... NO.	JOB NO.	JOB TASK NO.	JOB DESCRIPTION	CUSTOMER	TYPE	NO.	DESCRIPTION	DESCRIPTION 2	WBS NO.	QUANTITY	UNIT OF MEASURE CODE	WORK T CODE
1/10/2019	SIMC TAB ...	SIMC TAB JOB	DESIGN	Dynamics 365 Business Cent...	Adatum Corporation	Resource	SIMC TAB US...	Create Design Document			4.5	HOUR	
1/10/2019	SIMC TAB ...	SIMC TAB JOB	DESIGN	Dynamics 365 Business Cent...	Adatum Corporation	Resource	SIMC TAB US...	Create Design Document			2.5	HOUR	OT 1.5
1/10/2019	SIMC TAB ...	SIMC TAB JOB	DEVELOP	Dynamics 365 Business Cent...	Adatum Corporation	Resource	SIMC TAB US...	Create Travel Report		TRAVREPORT	6.5	HOUR	
1/10/2019	SIMC TAB ...	SIMC TAB JOB	DEVELOP	Dynamics 365 Business Cent...	Adatum Corporation	Resource	SIMC TAB US...	Create Travel Report		TRAVREPORT	1.75	HOUR	
1/10/2019	SIMC TAB ...	SIMC TAB JOB	DEVELOP	Dynamics 365 Business Cent...	Adatum Corporation	Resource	SIMC TAB US...	Make layout changes		NEWCHECK	1.25	HOUR	

There are a couple of actions available:

- Delete Entry
  Will delete the entry completely as if it wasn't never entered.
- Change Entry
  Will allow changes to the entry (if errors were made).

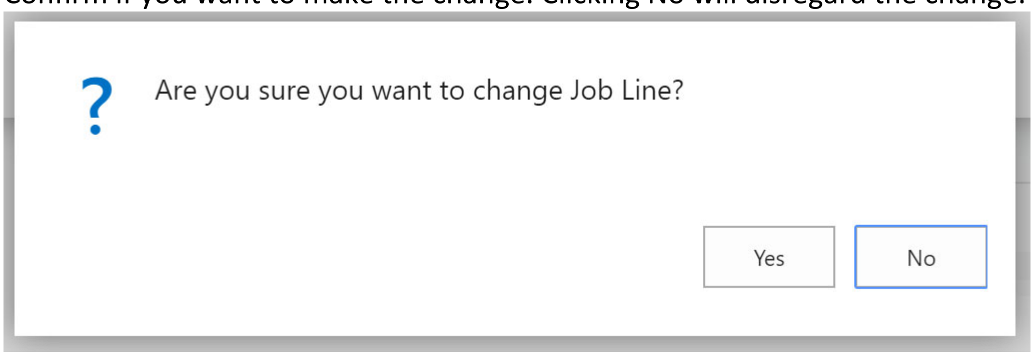
Here we are editing the last line in the list above:



Make any changes and click Close.

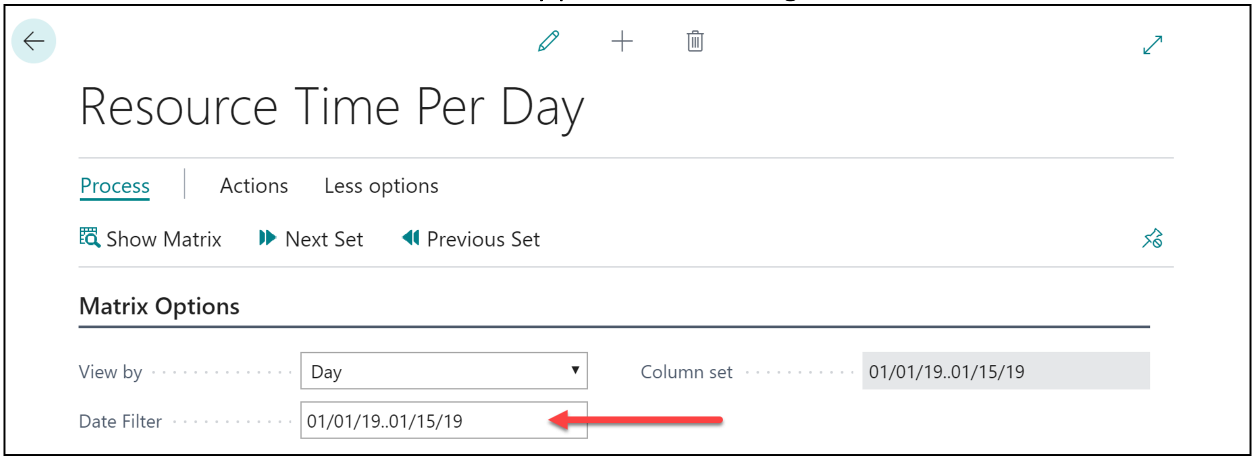
Scenario: Change the Quantity to 1.5. Close and Confirm.

Confirm if you want to make the change. Clicking No will disregard the change.



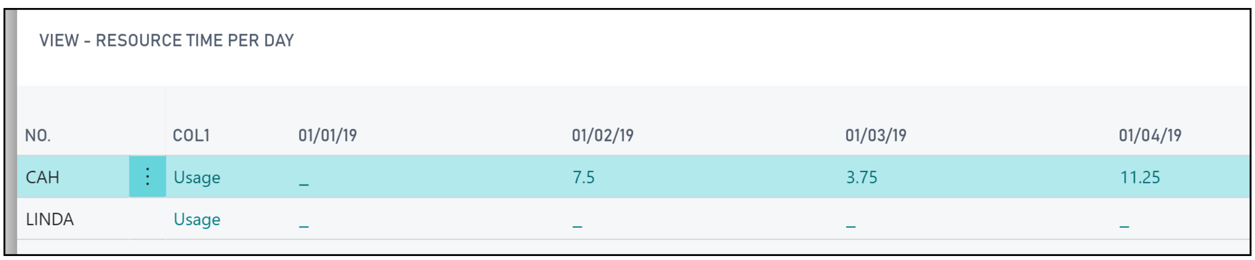
Resource Time per Day Matrix

You can see an overview of the time entry per resource using this matrix:



Make sure you specify a date filter that will contain the date you like to review.

Click Show Matrix:



Drilldown on the hours as needed for details.

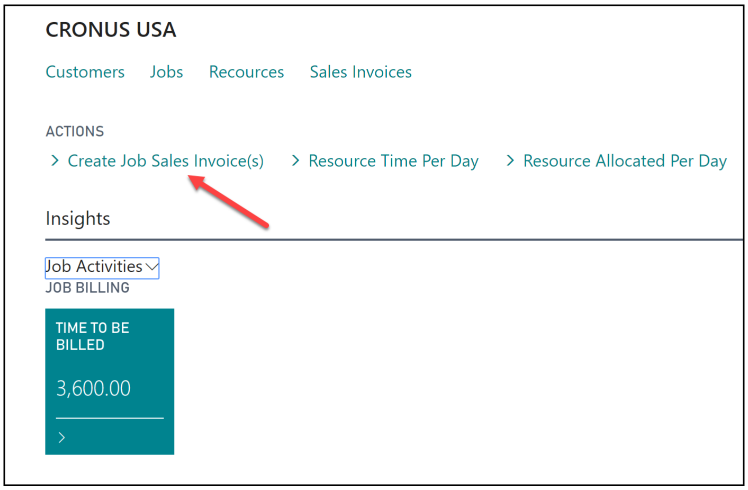
Scenario: Find the date where you registered the time and drill down on the number. Review the entries.

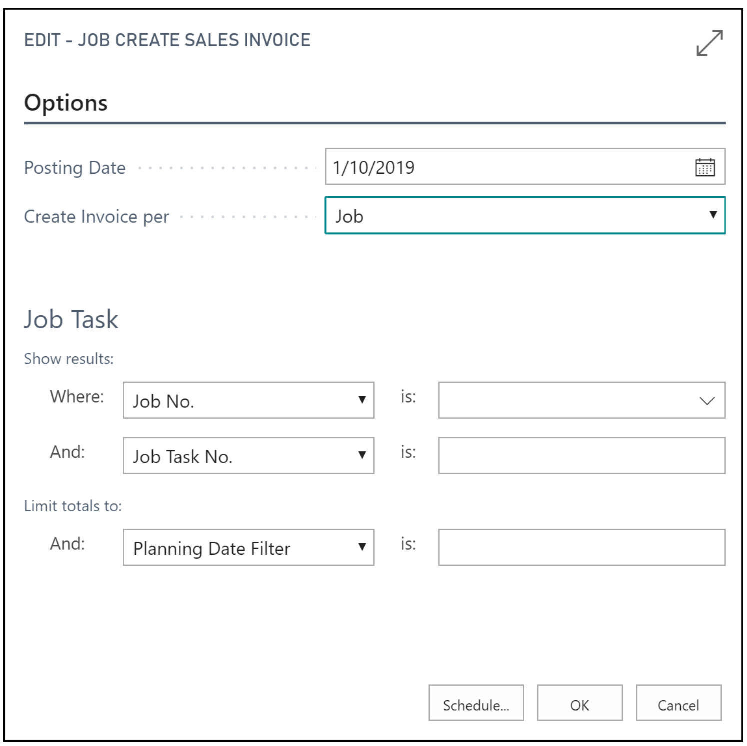
Billing

At a certain point the time that has been registered will need to get billed to the customers. The Time and Billing App has a simple process to bill all time.

Create Invoices

From the Time and Billing Role Center select Create Job Sales Invoice(s) or search for it in the search bar.





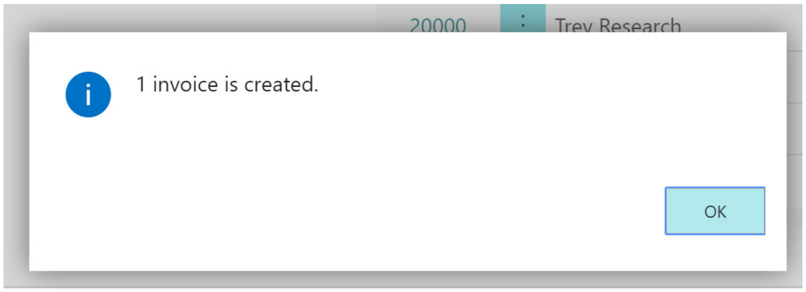
The report has the following parameters:

- Posting Date
  This is the posting date for the invoice that are being created.
- Create Invoice Per

Should be set to Job.

There are several filters to limit the jobs, tasks and dates that should be included on the invoices. The result will be an invoice per job.

For the Job that was created in this manual an invoice was created:

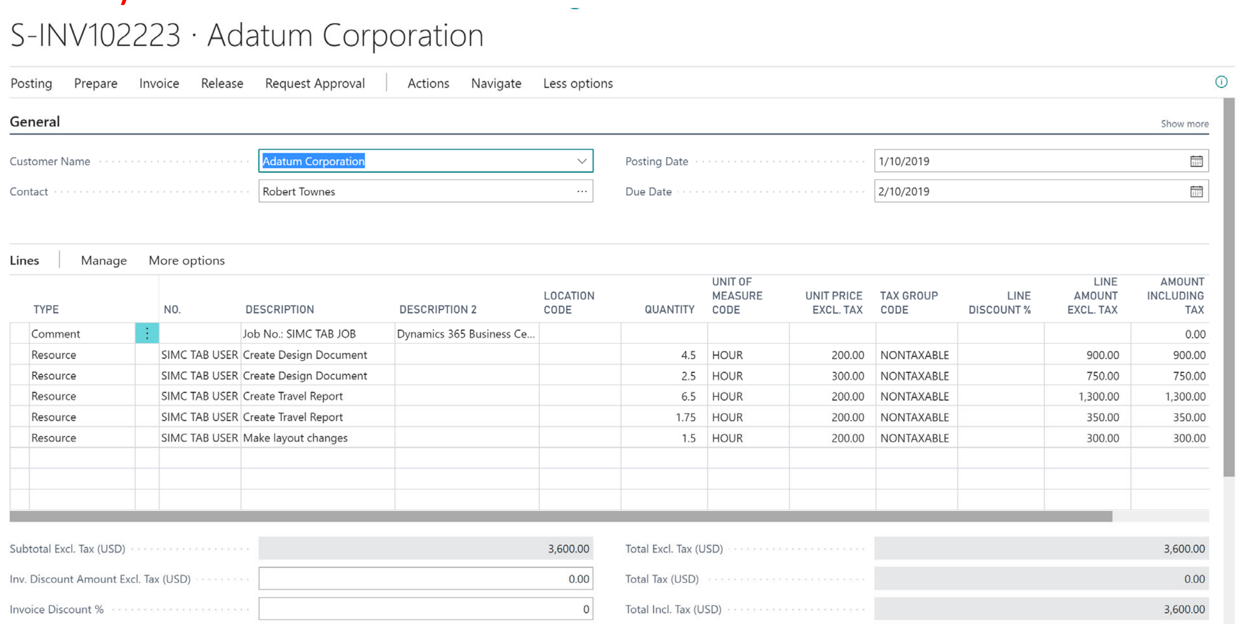


Scenario: Create an Invoice using the above method for the job time entries we made up till now. Use today's as the posting date.

Invoice without prepayment

Here is an example of an invoice without prepayment:

Scenario: Review the sales invoice that was created (invoice number and lines may be different).



S-INV102223 · Adatum Corporation

Posting Prepare Invoice Release Request Approval Actions Navigate Less options

General — Show more

Customer Name: Adatum Corporation
Contact: Robert Townes
Posting Date: 1/10/2019
Due Date: 2/10/2019

Lines Manage More options

TYPE	NO.	DESCRIPTION	DESCRIPTION 2	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	LINE DISCOUNT %	LINE AMOUNT EXCL. TAX	AMOUNT INCLUDING TAX
Comment		Job No.: SIMC TAB JOB	Dynamics 365 Business Ce...								0.00
Resource	SIMC TAB USER	Create Design Document			4.5	HOUR	200.00	NONTAXABLE		900.00	900.00
Resource	SIMC TAB USER	Create Design Document			2.5	HOUR	300.00	NONTAXABLE		750.00	750.00
Resource	SIMC TAB USER	Create Travel Report			6.5	HOUR	200.00	NONTAXABLE		1,300.00	1,300.00
Resource	SIMC TAB USER	Create Travel Report			1.75	HOUR	200.00	NONTAXABLE		350.00	350.00
Resource	SIMC TAB USER	Make layout changes			1.5	HOUR	200.00	NONTAXABLE		300.00	300.00

Subtotal Excl. Tax (USD): 3,600.00
Inv. Discount Amount Excl. Tax (USD): 0.00
Invoice Discount %: 0
Total Excl. Tax (USD): 3,600.00
Total Tax (USD): 0.00
Total Incl. Tax (USD): 3,600.00

Scenario: Notice that the entries we made were all added to the invoice.

Invoice with prepayment

Here is another example, this time with prepayments applied:

SALES INVOICE

S-INV102236 · Adatum Corporation

Posting | Prepare | Invoice | Release | Request Approval | Actions | Navigate | Less options

General — Show more

Customer Name	Adatum Corporation	Posting Date	7/1/2019
Contact	Robert Townes	Due Date	8/1/2019

Lines | Manage | More options

TYPE	NO.	DESCRIPTION	DESCRIPTION 2	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	LINE DISCOUNT %	LINE AMOUNT EXCL. TAX	AMOUNT INCLUDING TAX
Comment		Job No.: J00010	Installation of BC								0.00
Resource	CAH	Design of system			4	HOUR		NONTAXABLE			0.00
Resource	CAH	Design document			5.25	HOUR	195.00	NONTAXABLE		1,023.75	1,023.75
Resource	CAH	Design			7.5	HOUR	195.00	NONTAXABLE		1,462.50	1,462.50
Resource	CAH	Changes to code			5	HOUR		NONTAXABLE			0.00
Resource	CAH	More coding			6	HOUR	195.00	NONTAXABLE		1,170.00	1,170.00
Resource	CAH	Making changes to report re...	by Alan		3.75	HOUR	195.00	NONTAXABLE		731.25	731.25
Resource	CAH	Development of special table			6	HOUR	195.00	NONTAXABLE		1,170.00	1,170.00
G/L Account	22000	Prepaid (travel not included)			-1		5,557.50	TAX		-5,557.50	-5,557.50
Comment		Prepaid balance after this in...	$4,442.5								0.00

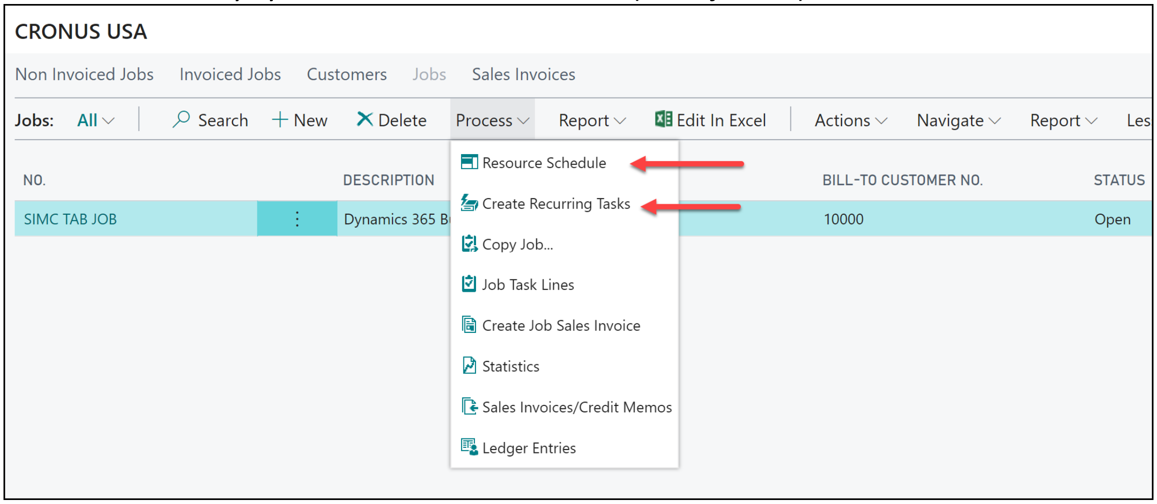
Prepayment invoices will apply any prepayment available. If not enough

Be aware that:

1. As long as the invoice is created with the job lines, the non-invoiced job overview will no longer show these lines.
2. If the invoice is posted the job entries on the invoice will not be suggested again.
3. If you need to make changes to the sales lines, you can't do that on the invoice because these entries are linked to the job planning lines. Instead, delete the entire sales invoice and revise the job planning lines in the job module and run the batch job again.
4. If the sales invoice is deleted, the job entries will be suggested next time you run the Job Create Sales Invoice.

Resource Scheduling

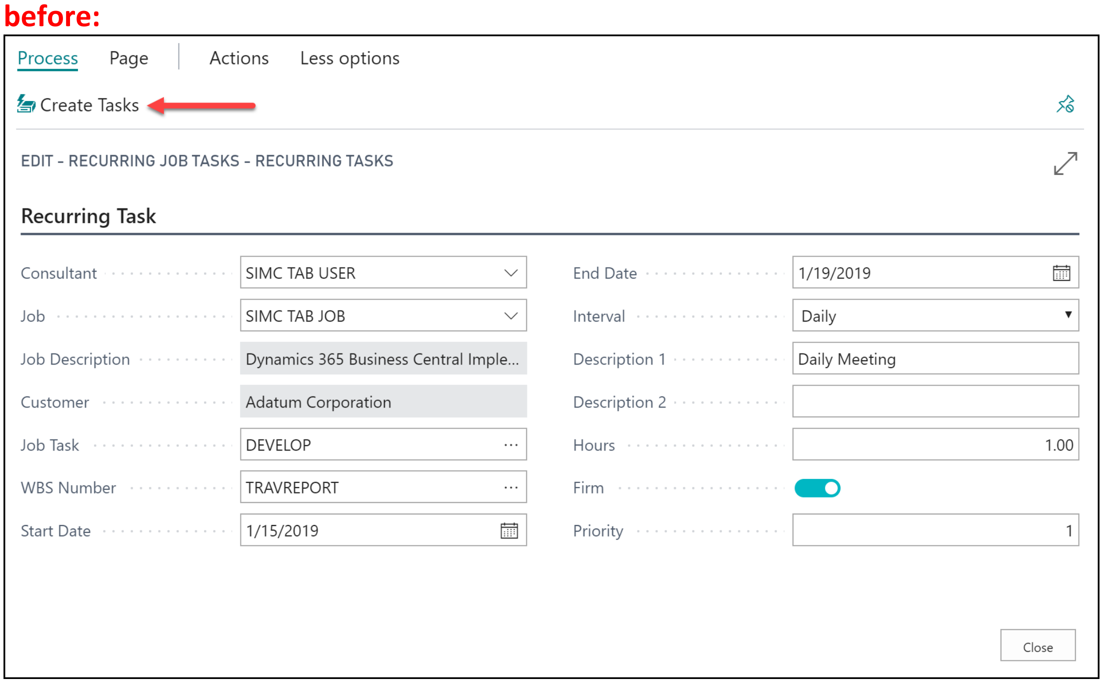
The App allows scheduling resources on jobs.
There are two ways you can schedule resources (from job list):



The Resource Schedule allows you to allocate a resource to a job task and the system will schedule the needed time within the parameters of the scheduling fields in the Setup page. Recurring Tasks can also be created, and they also become part of the overall resource capacity planning.

Recurring Tasks

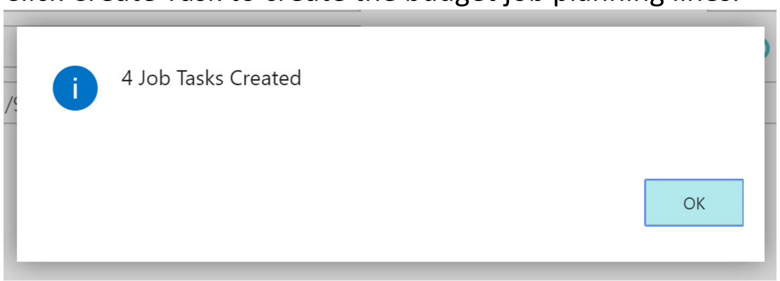
**Scenario: Go to the Job List like above and click Process, Create Recurring Task.
Make sure to schedule this into the future (like next week) and use the same resource as before:**



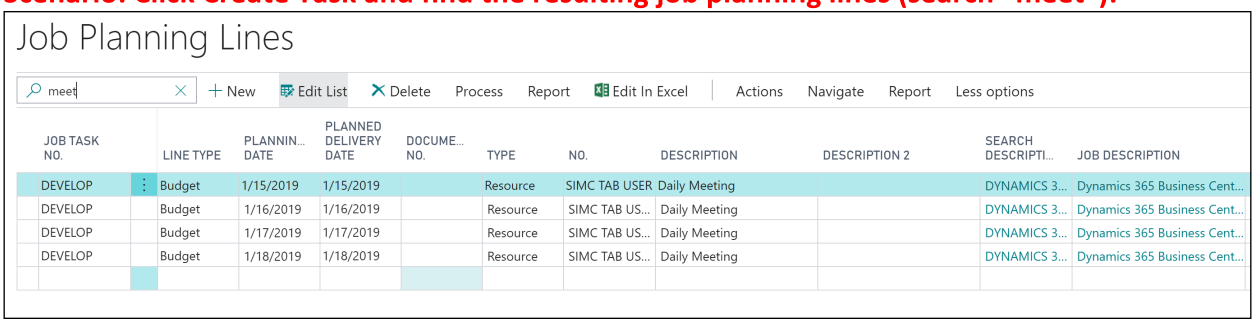
There are a few new fields here:

- Firm
  Indicates that the schedule is firm and should not be moved. This is only for internal info and has no effect on any automated scheduling.
- Priority
  Indicates what priority this schedule has. This is only for internal info and has no effect on any automated scheduling.

Click Create Task to create the budget job planning lines.



Scenario: Click Create Task and find the resulting job planning lines (search "meet"):



Job Planning Lines

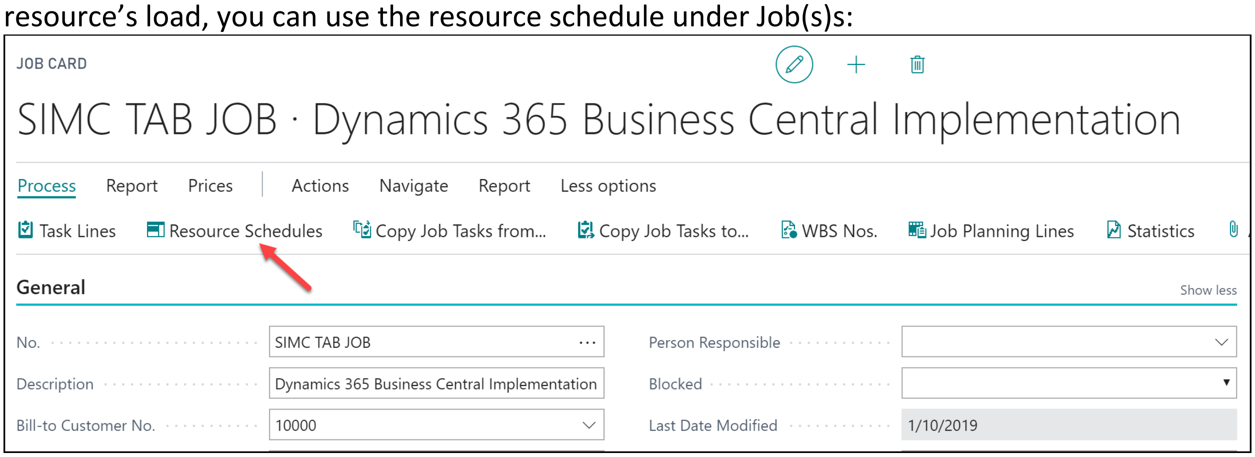
meet | New | Edit List | Delete | Process | Report | Edit In Excel | Actions | Navigate | Report | Less options

JOB TASK NO.	LINE TYPE	PLANNIN... DATE	PLANNED DELIVERY DATE	DOCUME... NO.	TYPE	NO.	DESCRIPTION	DESCRIPTION 2	SEARCH DESCRIPTI...	JOB DESCRIPTION
DEVELOP	Budget	1/15/2019	1/15/2019		Resource	SIMC TAB USER	Daily Meeting		DYNAMICS 3...	Dynamics 365 Business Cent...
DEVELOP	Budget	1/16/2019	1/16/2019		Resource	SIMC TAB US...	Daily Meeting		DYNAMICS 3...	Dynamics 365 Business Cent...
DEVELOP	Budget	1/17/2019	1/17/2019		Resource	SIMC TAB US...	Daily Meeting		DYNAMICS 3...	Dynamics 365 Business Cent...
DEVELOP	Budget	1/18/2019	1/18/2019		Resource	SIMC TAB US...	Daily Meeting		DYNAMICS 3...	Dynamics 365 Business Cent...

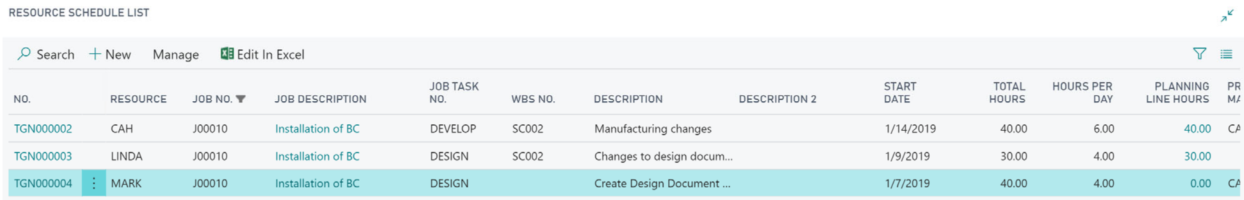
Scenario: In this case only 4 entries were made because the last day was a Saturday that is a non-working day.

Resource Schedule

If you like to create budget job planning lines for a resource and take into consideration the resource's load, you can use the resource schedule under Job(s)s:

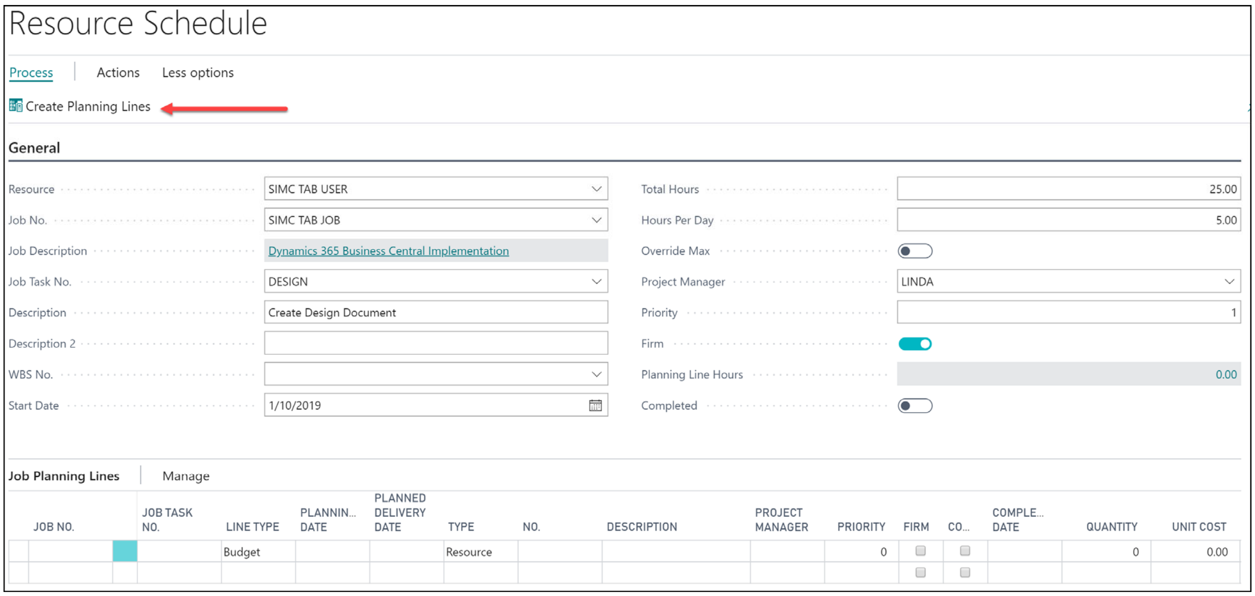


The list of resource schedules will show:



Scenario: We have no schedules yet, so we will create a new one.

Create New or edit an existing one (until the resource is selected, lines will show at the bottom. That is perfectly normal):

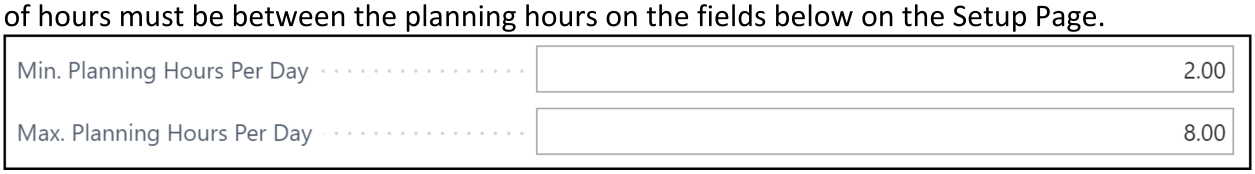


Scenario: Fill out like above. Here is what this means:

- **The App will try to schedule a total of 25 hours with up to 5 hours per day (if available) from January 10, 2019 and forward. Since we need at least 2 hours available to schedule for a day (according to setup: "Min. Planning Hours Per Day"), if there is not 2 hours available for a specific date, it will be skipped.**

The fields are very similar to the fields on the Time Entry with a few exceptions:

- Start Date
  This is the start date that this job task.
- Total Hours
  This is the total number of hours that needs to be scheduled.
- Hours Per Day
  This is the maximum number of hours per day that will be scheduled. Note: This number of hours must be between the planning hours on the fields below on the Setup Page.



- Override Max

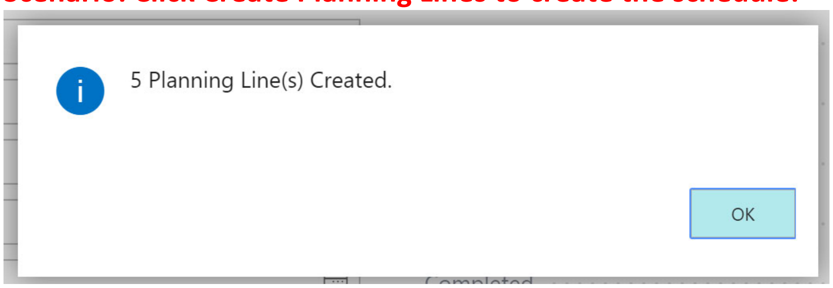
This will allow you to specify a daily number of hours greater than the Max Planning Hours from the Setup Page.

When the Resource Schedule is created, the job planning lines are populated to the lines below (Job Planning Lines).

Max. Task Group Planning Lines · · · · · · · · · · · · · · 15

The above field sets the maximum planning lines allowed to be created. If more lines will be the result of the scheduling, an error will be shows. This is to prevent accidental creation of schedule lines if an error was entered.

Scenario: Click Create Planning Lines to create the schedule:



The Job Planning Lines are created and can be seen as lines on the screen.

Job Planning Lines | Manage

JOB NO.	JOB TASK NO.	LINE TYPE	PLANNIN... DATE	PLANNED DELIVERY DATE	TYPE	NO.	DESCRIPTION	PROJECT MANAGER	PRIORITY	FIRM	CO...	COMPLE... DATE	QUANTITY	UNIT COST
SIMC TAB JOB	DESIGN	Budget	1/10/2019	1/10/2019	Resource	SIMC TAB USER	Create Design Document		1	☑	☐		5	80.00
SIMC TAB JOB	DESIGN	Budget	1/11/2019	1/11/2019	Resource	SIMC TAB USER	Create Design Document		1	☑	☐		5	80.00
SIMC TAB JOB	DESIGN	Budget	1/14/2019	1/14/2019	Resource	SIMC TAB USER	Create Design Document		1	☑	☐		5	80.00
SIMC TAB JOB	DESIGN	Budget	1/15/2019	1/15/2019	Resource	SIMC TAB USER	Create Design Document		1	☑	☐		5	80.00
SIMC TAB JOB	DESIGN	Budget	1/16/2019	1/16/2019	Resource	SIMC TAB USER	Create Design Document		1	☑	☐		5	80.00

Important: The resulting Job Planning Lines can be edited as needed. The schedule is just a suggestion. Job Planning Lines in the schedule are also seen and editable from the Job Planning Lines page from the Job Card.

Scenario: The recurring tasks and resource schedule we did before resulted in the following Job Planning Lines:

SIMC TAB JOB DYNAMICS 365 BUSINESS CENTRAL IMPLEMENTATION D...

Job Planning Lines

Search | + New | Edit List | Delete | Process | Report | Edit In Excel | Actions | Navigate | Report | Less options

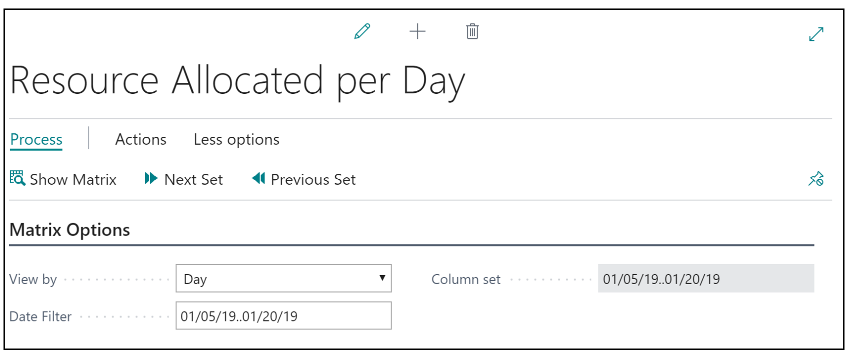
JOB TASK NO.	LINE TYPE	PLANNIN... DATE	PLANNED DELIVERY DATE	DOCUME... NO.	TYPE	NO.	DESCRIPTION	DESCRIPTION 2	SEARCH DESCRIPTI...	JOB DESCRIPTION	PROJECT MANAGER	PRIORITY
DESIGN	Billable	1/10/2019		SIMC TAB U...	Resource	SIMC TAB US...	Create Design Document		DYNAMICS 3...	Dynamics 365 Business Cent...		0
DESIGN	Billable	1/10/2019		SIMC TAB U...	Resource	SIMC TAB US...	Create Design Document		DYNAMICS 3...	Dynamics 365 Business Cent...		0
DESIGN	Budget	1/10/2019	1/10/2019		Resource	SIMC TAB US...	Create Design Document		DYNAMICS 3...	Dynamics 365 Business Cent...		1
DESIGN	Budget	1/11/2019	1/11/2019		Resource	SIMC TAB US...	Create Design Document		DYNAMICS 3...	Dynamics 365 Business Cent...		1
DESIGN	Budget	1/14/2019	1/14/2019		Resource	SIMC TAB US...	Create Design Document		DYNAMICS 3...	Dynamics 365 Business Cent...		1
DESIGN	Budget	1/15/2019	1/15/2019		Resource	SIMC TAB US...	Create Design Document		DYNAMICS 3...	Dynamics 365 Business Cent...		1
DESIGN	Budget	1/16/2019	1/16/2019		Resource	SIMC TAB US...	Create Design Document		DYNAMICS 3...	Dynamics 365 Business Cent...		1
DEVELOP	Budget	1/10/2019	1/10/2019	SIMC TAB U...	Resource	SIMC TAB US...	Make layout changes		DYNAMICS 3...	Dynamics 365 Business Cent...		0
DEVELOP	Billable	1/10/2019		SIMC TAB U...	Resource	SIMC TAB US...	Create Travel Report		DYNAMICS 3...	Dynamics 365 Business Cent...		0
DEVELOP	Billable	1/10/2019		SIMC TAB U...	Resource	SIMC TAB US...	Create Travel Report		DYNAMICS 3...	Dynamics 365 Business Cent...		0
DEVELOP	Billable	1/10/2019		SIMC TAB U...	Resource	SIMC TAB US...	Make layout changes		DYNAMICS 3...	Dynamics 365 Business Cent...		0
DEVELOP	Budget	1/15/2019	1/15/2019		Resource	SIMC TAB US...	Daily Meeting		DYNAMICS 3...	Dynamics 365 Business Cent...		1
DEVELOP	Budget	1/16/2019	1/16/2019		Resource	SIMC TAB US...	Daily Meeting		DYNAMICS 3...	Dynamics 365 Business Cent...		1
DEVELOP	Budget	1/17/2019	1/17/2019		Resource	SIMC TAB US...	Daily Meeting		DYNAMICS 3...	Dynamics 365 Business Cent...		1
DEVELOP	Budget	1/18/2019	1/18/2019		Resource	SIMC TAB US...	Daily Meeting		DYNAMICS 3...	Dynamics 365 Business Cent...		1

Resource Planning Lines

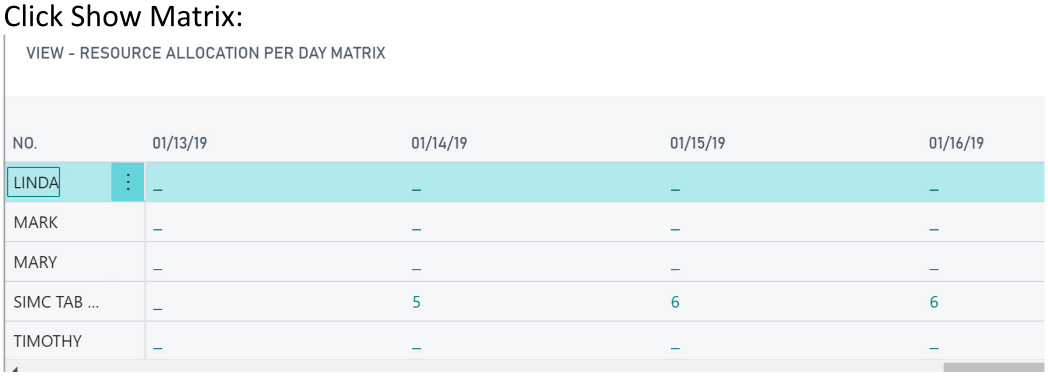
A resource can see his or her resource schedule are any time to see what they need to work on today or any other day:

Resource Allocation per Day Matrix

You can see how resources are allocated per day using this matrix:



Click Show Matrix:


VIEW - RESOURCE ALLOCATION PER DAY MATRIX

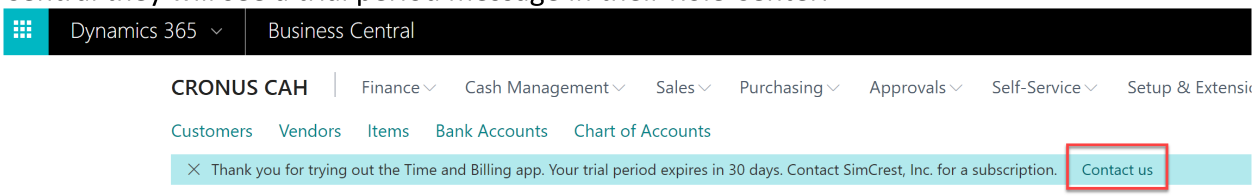
NO.	01/13/19	01/14/19	01/15/19	01/16/19
LINDA	_	_	_	_
MARK	_	_	_	_
MARY	_	_	_	_
SIMC TAB ...	_	5	6	6
TIMOTHY	_	_	_	_

Drilldown on the hours show as needed for details.

Scenario: End.

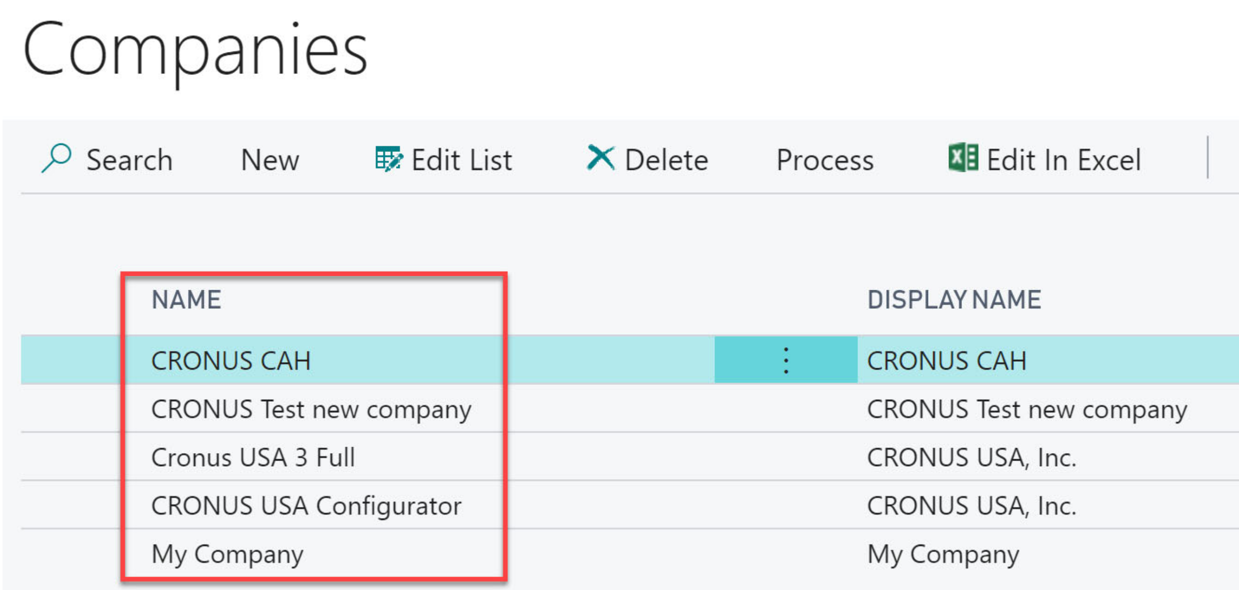
Trial Period and Activating/Renewing a Subscription

When you have installed Time and Billing, it will automatically run for a trail period of 30 days. During that time, you are free to evaluate the solution and there are no restrictions to the version running under the trial period. Each time anyone logs into Dynamics 365 Business Central they will see a trial period message in their Role Center.



Once the trial period has expired, Time and Billing will no longer work. To avoid that, you need to subscribe to Time and Billing. Contact SimCrest to purchase a subscription. You can click the “Contact us” link in the message to send us a message (http://simcrest.com/ContactUs).

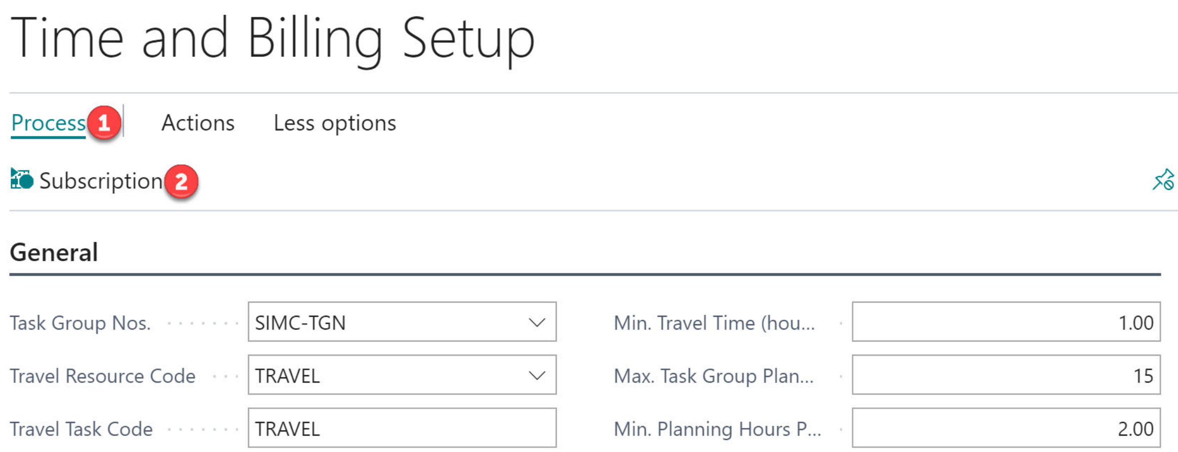
Time and Billing is licensed per company and is tied to the company name. You can see the company name by searching for “Companies”:



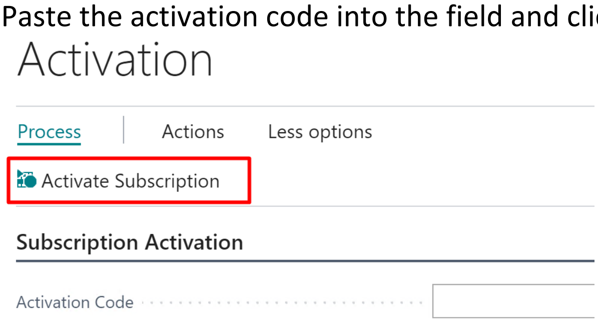
Pick the company name from the name column (not the Display Name) and send it to SimCrest together with the request for a subscription. Subscriptions usually run for 1 year at a time but can be customized to your specific needs.

Once purchased, SimCrest will issue you an activation code. Here is how to activate the subscription:

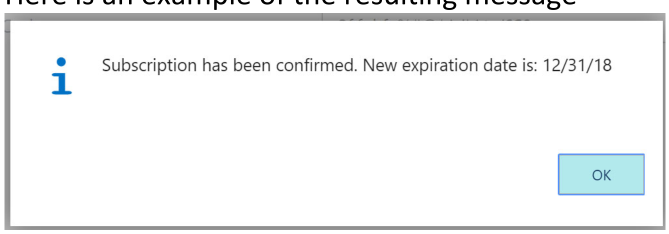
- Go to Time and Billing Setup and click Process, Subscription



- Paste the activation code into the field and click Activate Subscription



- Here is an example of the resulting message



Customer Support and Request for new features

If you have questions how to use Time and Billing or have issues to report, we would love to hear from you. Please go to http://simcrest.com/ContactUs and send us a message. Use the same link if you like to request new features for Time and Billing.