

Smart PSA solution

PlanMill Finance

Overview

PlanMill Ltd

November 19, 2008

Version 1.0



Check-list before invoicing from PlanMill (default settings)



Roles & access to Finance functionalities and first Invoice number

- Example –access rights: Edit My company settings, Finance-module, Project revenues, Invoicing reports
- What is the first Invoice number you want to start with?



My company settings (invoice template footer texts)

- Invoice footer information is generated from My company –account Settings tab – only visible if your role has access rights
- https://online.planmill.com/help/flash/flashcontainer.jsp?flashfile=projekti_step1.swf



Check customer's basic & billing info

- <https://online.planmill.com/help/flash/flashcontainer.jsp?flashfile=Account plus Contact basics.swf>



Create projects & revenues

- https://online.planmill.com/help/flash/flashcontainer.jsp?flashfile=projekti_step1.swf



Accept hours, purchases and expenses, set revenue items “In billing” –status

- <https://online.planmill.com/help/flash/flashcontainer.jsp?flashfile=bp1.swf>



Generate invoices and attachments

- <https://online.planmill.com/help/flash/flashcontainer.jsp?flashfile=Billing part2.swf>



Contact support@planmill.com for details



See linked “Getting started movie” from www.planmill.com

How to handle continuous service invoicing with PlanMill

- Continuous services i.e. recurrent services (software licenses etc)
- Same invoicing amount in every invoice
- Invoicing is done regularly (every month, every 3 months, every year)
- Invoicing is based on a contract not consulting hours or other changing factors

SOLUTION:

Create revenue item and set "Repeat until-this date" to contract end-date and set "Invoicing -period"

The screenshot shows the 'Edit revenue item' form in PlanMill. The form is titled 'Edit revenue item' and has 'Save' and 'Cancel' buttons at the top. The form contains several fields and sections:

- Name ***: Requestien auto-e-mailit asiakkaalle
- Type**: 3011 PlanMill O-D
- Unit price**: [Empty field] EUR
- Planned revenue**: [Empty field] EUR
- Planned invoice date (dd.mm.yyyy) ***: 21.11.2008
- Automatically generate date in name (e.g. 12/2006)**: This month
- Repeat until this date (dd.mm.yyyy)**: [Empty field]
- Invoicing period**: -
- Reference/PO-number**: [Empty field]
- Billing rule**: Revenues based on billable tasks, expenses and purchases until invoice date with invoice/task unit price
- Invoice description**: [Empty text area]

A red circle highlights the 'Planned invoice date', 'Repeat until this date', and 'Invoicing period' fields, indicating the solution for handling continuous service invoicing.

How to handle project invoicing with PlanMill

- Projects can be invoiced according to hours, expenses and purchases or by fixed amounts that can even be tied in to a milestone
- Invoicing is based on the completeness and/or actual billable hours, expenses and purchases
- Invoicing is done every month or after completing a service request or milestone
- Customer wants to see invoicing details (invoiced time reports etc)

SOLUTION:

Create revenue item and set billing rule to "Revenues based on billable tasks etc" if you want to invoice according to actual hours or "Fixed" if you want to use fixed amounts

Save | Cancel

Edit revenue item | Email notification

Name *
Professional services

Type
3010 PlanMill O-P

Unit price
100 | EUR

Planned revenue
| EUR

Planned invoice date (dd.mm.yyyy) *
30.11.2008

Automatically generate date in name (e.g. 12/2006)
This month

Repeat until this date (dd.mm.yyyy)
31.03.2009

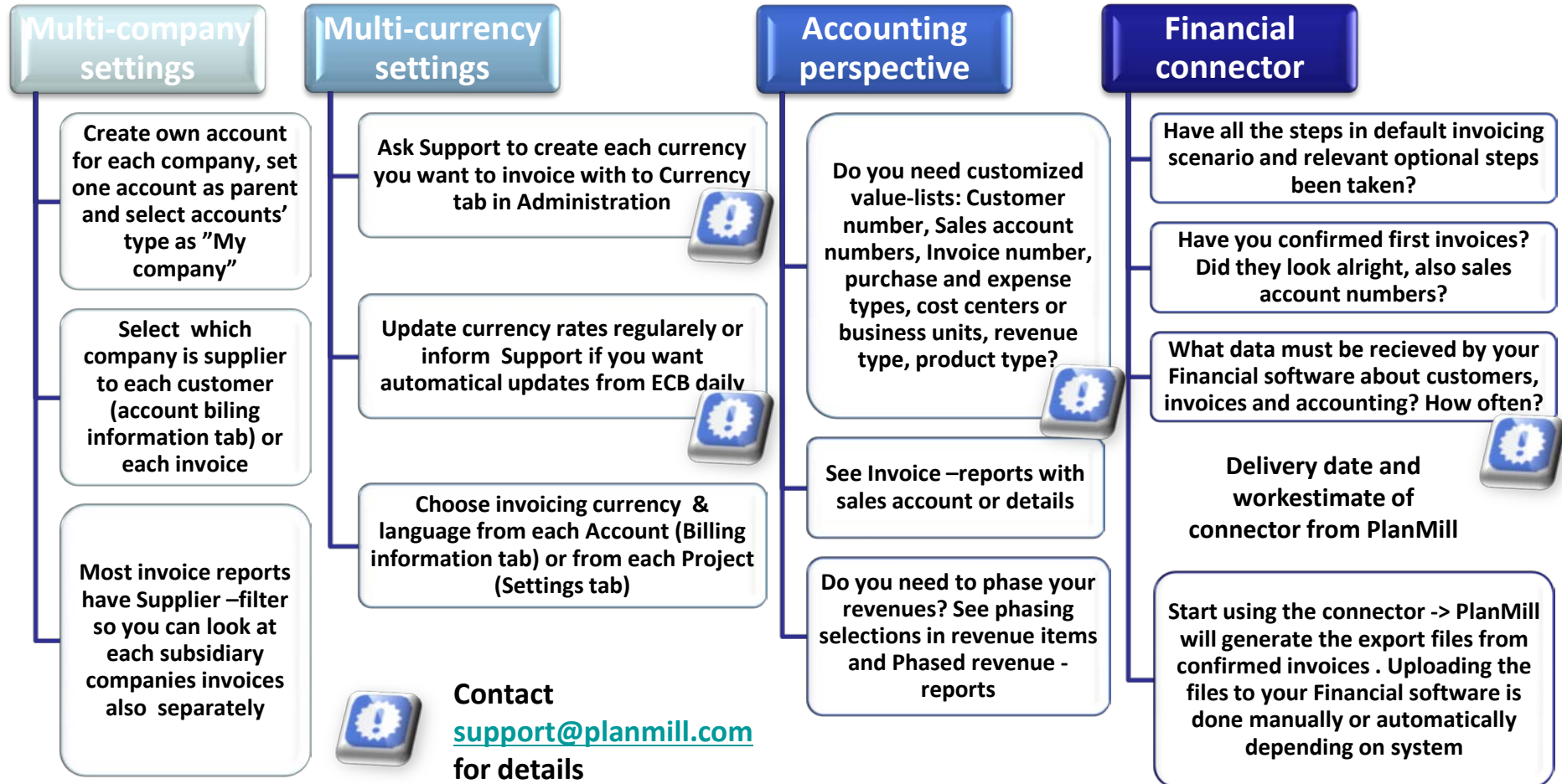
Invoicing period
Every month (last day)

Reference/PO-number
|

Billing rule
Revenues based on billable tasks, expenses and purchases until invoice date with invoice/task unit price

Milestone
-

Optional steps to Invoicing with PlanMill



Smart PSA solution

Interested to learn more?

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