21CRM Time & Billing Extension
Version 3.0
Installation & Setup Guide

Publisher: 21CRM Systems Inc, Winnipeg, MB, Canada

Who Should Read This Guide

This guide is for CRM administrators and consultants. We assume that you have experience using:

- Sage CRM 5.7i+, or CRM 5.8B+
- MS SQL Server 2000+
- Experience implementing and customizing CRM

How this guide is organized

The process for installing CRM Time & Billing 3.0 is the same regardless of whether you are upgrading or installing a new copy into a clean CRM system. If you are upgrading, you must currently be using CRM Time & Billing 2.6. Previous versions are not compatible with this installer.

This guide is designed as a step-by-step manual allowing you to complete an installation and configuration (or upgrade) of the 21CRM Time & Billing Extension.

This will be accomplished using a series of screen captures and text that should approximate the environment you experience in your installation.

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Installation

Prerequisites

CRM Time & Billing extensions have several prerequisites that must be completed prior to attempting installation. Not completing any one of these steps may result in a failed installation.

- Sage CRM 5.8 or higher
- MS SQL Server 2000 SP3a or 2005
- CRM Configured, functioning properly
- **For Sage CRM 6.0 and higher, please add the field "cuvi_secterr" of data type 'integer' to the custom_views table. You will need to do this using sql enterprise manager before attempting your CRM installation. DO NOT SKIP THIS STEP.**
- IIS virtual directory User has read and write access to the Windows Registry.
- Dates should be configured to the same format (mm/dd/yyyy or dd/mm/yyyy) throughout the CRM installation, INCLUDING the SQL Server date format, to avoid date entry conflicts
- Microsoft.NET Framework v2.0 installed on the CRM Server (from Windows update)
- Microsoft J# 2.0, AND Microsoft J# 1.1 installed on the CRM Server. Version 2.0 is NOT a newer version of 1.1. Both versions must be installed.
  Downloadable from:
    - Download the 21CRM Prerequisite Pack by visiting http://www.21crmsystems.com/software/crmtb/resources.aspx OR
    - Download separately direct from Microsoft http://msdn.microsoft.com/vjsharp/downloads/howtoget
- SQL Server tools installed on the CRM server
- Exclusive access to CRM and the SQL Server database (no other users online)
- Installation of CRM Time & Billing will modify the "Users" table, which requires the publication to be removed prior to installation. If your CRM system is a Solo server, and a Solo Publication is active, you must delete it prior to attempting this installation. See the CRM Solo Guide P.17.
- If you plan on integrating Time & Billing to Sage Accpac ERP, AAS Server Integration Component must be installed

You are now prepared to begin the installation process.

Getting Started

The installation of 21CRM Time & Billing Extensions is a four part process. The steps should be followed in order, and later steps should not be attempted unless the previous step was successful.

Ensure that you

- Are logged onto the Windows server running Sage CRM 5.7i+, or CRM 5.8B+ with an account that has administrative rights.
- Know the name of your CRM database. By default, this database is named "CRM", but yours may be different.
- Have a MS SQL Server username/password combination that has administrative rights to the CRM database.
- Know the location (path) to your CRM installation. By default, this is "C:\inetpub\wwwroot\CRM" for CRM 5.7 and "C:\Program Files\Sage\CRM\CRM\WWWRoot\" for CRM 5.8- however, yours may be different.
- Have disabled or deleted the Publication for this CRM installation if you are using it as a Solo Server. You can re-enable the publication after the installation is complete.
- You have **BACKED UP YOUR CRM DATABASE**. In the event of an integration failure, or other problem, you will need this backup to return to your previous state of affairs. **DO NOT SKIP THIS!** To back up your database, right click on the database in Enterprise Manager, and select "All Tasks → Backup Database". If this is an upgrade, also back up your custompages/billing folder to a safe location.

Possible Errors

While in most cases your installation or upgrade should go smoothly, it is possible you could encounter errors during the install process. In particular, if upgrading it is possible that your Time & Billing configuration may be slightly different than the installer expects. This is due to the fact that you have the ability to customize Time & Billing and CRM. If you receive an error message please read it carefully. Any errors related to the database can normally be ignored (i.e. continue). Any messages related to file copy errors need to be addressed prior to continuing. Each message should include instructions on how to proceed. Please follow them.

Installing CRM Time & Billing 3.0

Run Self-Extracting Zip File

21 CRM Time & Billing Extensions are delivered in a single, self-extracting ZIP file named “21CRMTB30Setup.exe”. Locate and run this file. It will run the following installers for you:

- 21CRM Time & Billing v3.0 Installer

The Time & Billing Installer has five screens where you need to enter information:

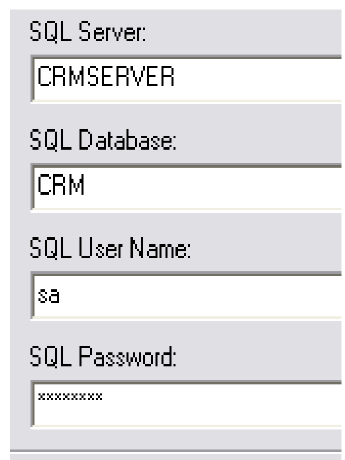
EULA License Agreement

You must agree to continue the installation.

SQL Credentials

Enter your SQL Server name, CRM database name, and a username/ password to SQL that has administrative rights (sa is preferable).
This lets the installer run some SQL scripts required for Time & Billing v3.0.

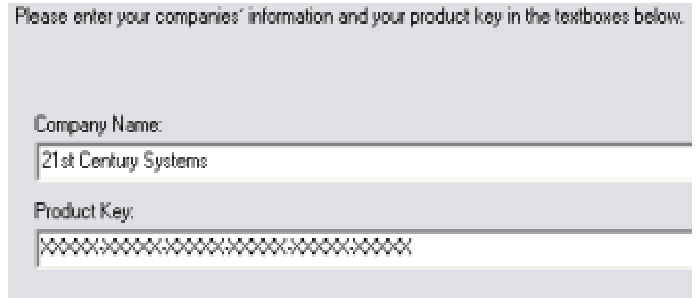
Click Next.



Company Name and License Key

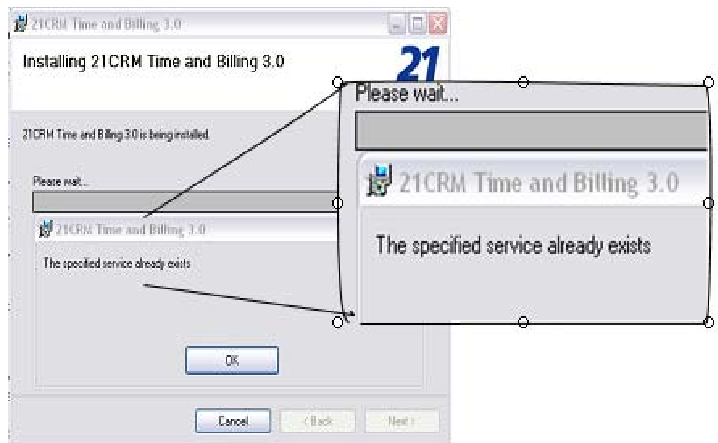
Enter your Company Name and the License Key given you by 21CRM Systems Corp.

Click Next to Continue.



Note: At this point, you may see the following screen only if you have previously installed Time & Billing 3.0 on the server and have incorrectly *uninstalled* it:

To resolve this issue: *While the message "The specified service already exists" <u>is displayed,</u>* navigate to the most recent .NET version folder (e.g.: "C:\WINDOWS\Microsoft.NET\Framework\v1.1.4322").



Enter the command:
"installutil –u "c:\program files\21crm\crmtb\tb30service.exe". Now you may click "OK" on the installer message. The installer will roll-back and you may attempt another install.

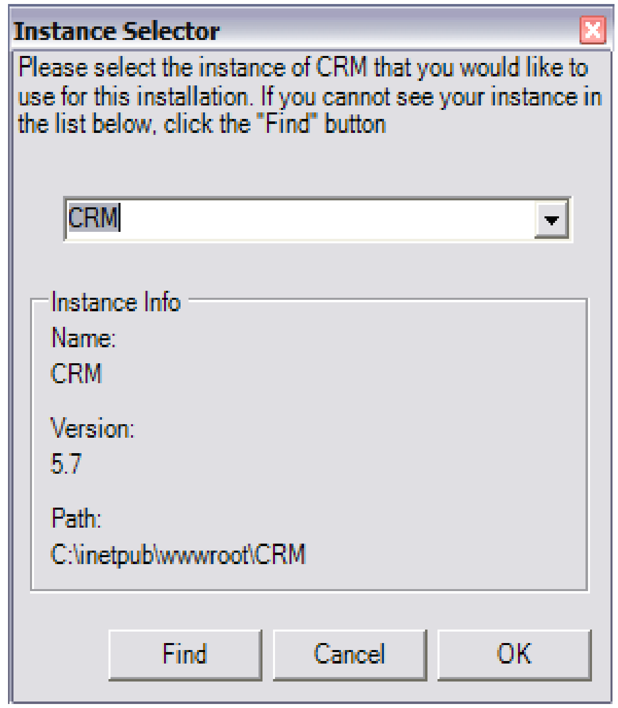
Select Installation Folder:

You are able to browse to a folder location for program file installations. The *recommended* default is "C:\Program Files\21CRM\CRMTB\ "

> **<u>IMPORTANT:</u>** When given the option to install the program for yourself or for anyone who uses the computer – always choose "**Everyone**".

CRM Instance Name:

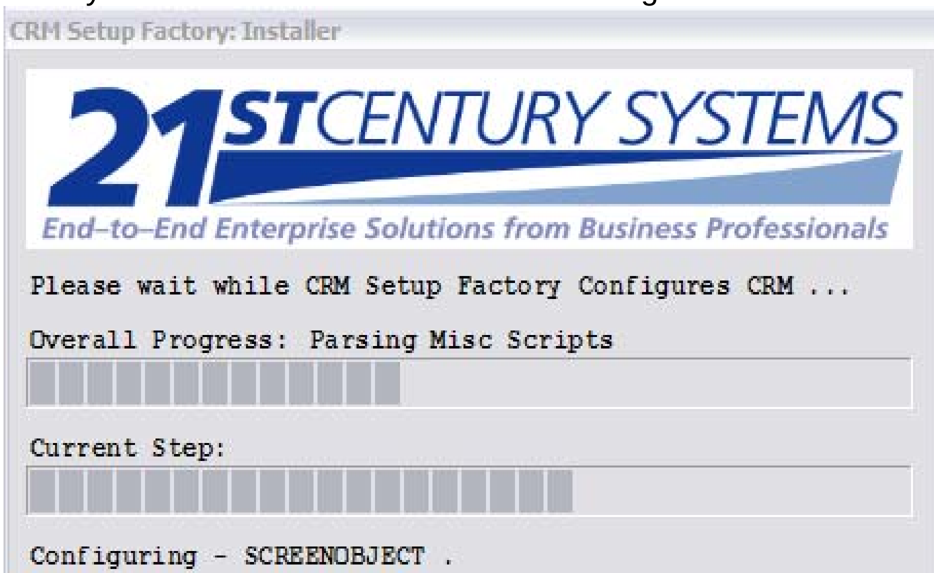
The installer will check your Server for more than one Installation of CRM. If it finds more than one, it will ask you to choose which installation you want to install Time & Billing on. Otherwise, the installer will Confirm the CRM installation instance it finds.



You also have the option to Find the location of the CRM installation if the Instance Selector has not found a default Installation.

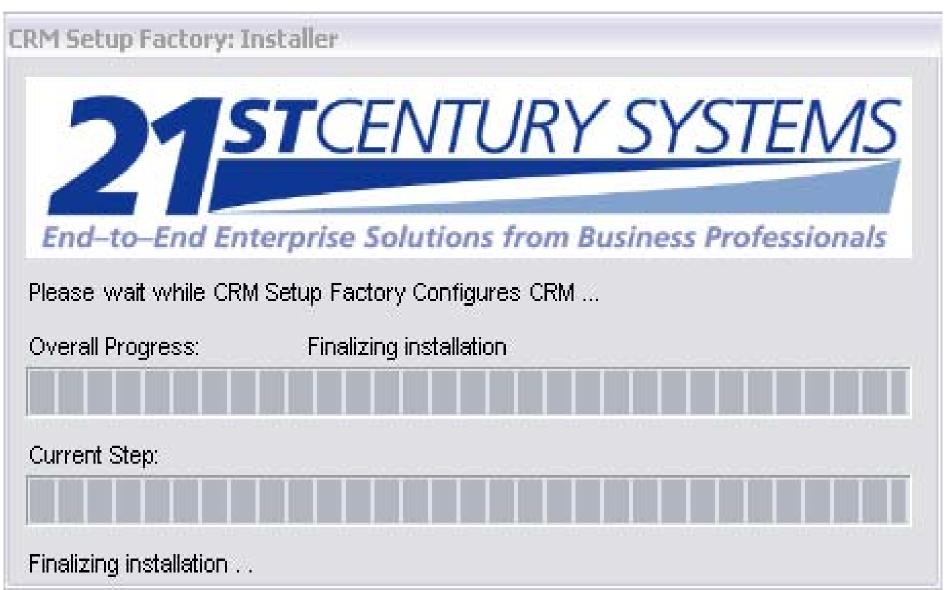
Click OK.

The Installer will now install all Time & Billing 3.0 files on your server, followed by database updates required. The installation has a progress bar that shows activity and should look similar to the following screen:



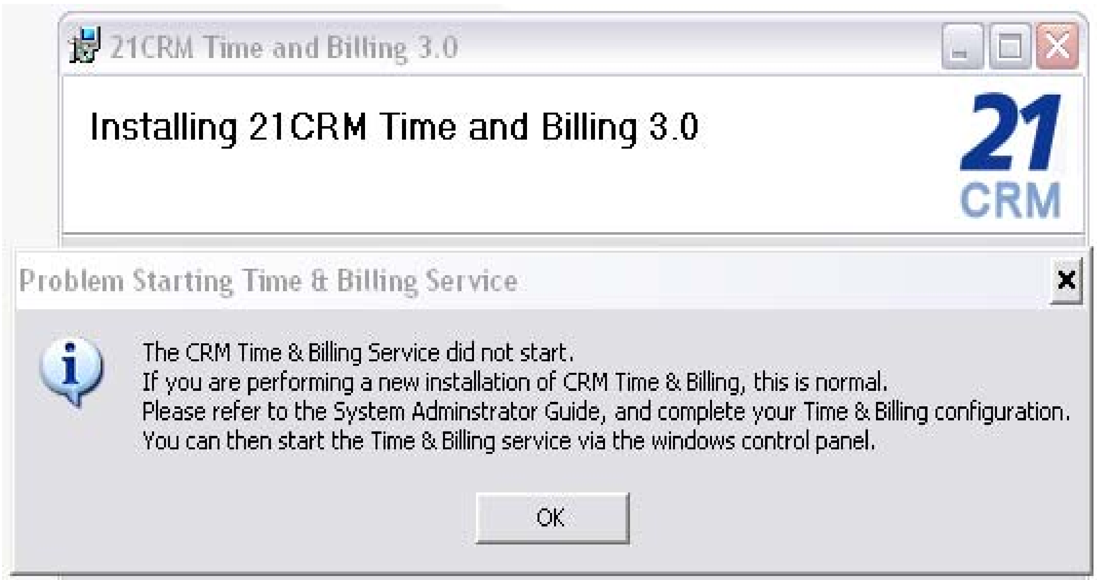
<u>Note:</u> Installing Time & Billing 3.0 over a Terminal Service may result in graphical displays not refreshing or displaying properly.

Once complete you will see this screen that shows the Installer is finalizing the installation:



Click Close.

On the a new installation, you will likely see the following screen, because connection credentials used by the Time & Billing Service are not yet in the system:



Attention: You can now reset IIS or refresh your system metadata, and then resume the usage of your CRM system without any further customization.

You have completed this activity.

Configuration

Enabling Users

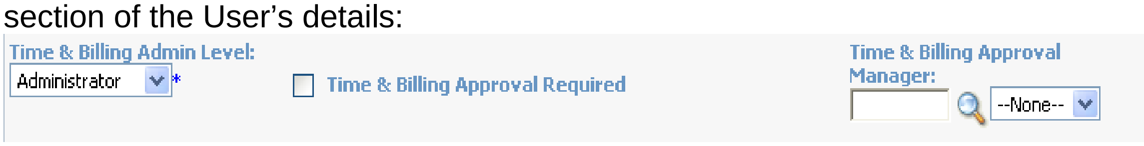
You will need to activate your user account for Time & Billing before you are able to configure the software.

By default, all users that existed when the Time & Billing Extensions were installed are “deactivated” for Time & Billing and will not have access to the Time & Billing functionality.

Each user that will be using Time & Billing will need to be enabled, and new information added to their user profile.

Log in to CRM with a username that has access to edit user profiles. Go to the Administration menu, click Users and edit the details of a user you wish to be enabled for Time & Billing (Administrator is a good place to start).

You will notice several new fields added to the “Accpac (or Other) Details” section of the User’s details:



Time & Billing Admin Level

Select the appropriate level of security for this user. There are 7 possible levels to choose from:

- None
- View
- Add Edit Self
- Add Edit Codes
- Add Edit All
- Post Entries
- Administrator

Time & Billing Approval Required and Approval Manager

Users can be configured to require approval for submitted time. If approval is required, click the checkbox and select a user who has Time & Billing administrator rights who will approve, reject or edit the user’s time records.

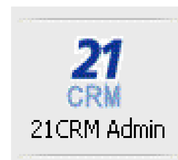
Other User settings depend on the integration mode chosen and will be described in those integration mode configuration sections.

Activation / Configuration

Your copy of 21CRM Time & Billing Extensions requires configuration prior to use. The program also requires an activation code in order to be fully functional. You can demo this product without an activation code, but a message will appear at the top of each screen until registration takes place. You will also not be able to export (post) your data to Sage Accpac ERP .

Log in to CRM as a user with Time & Billing Administration rights.

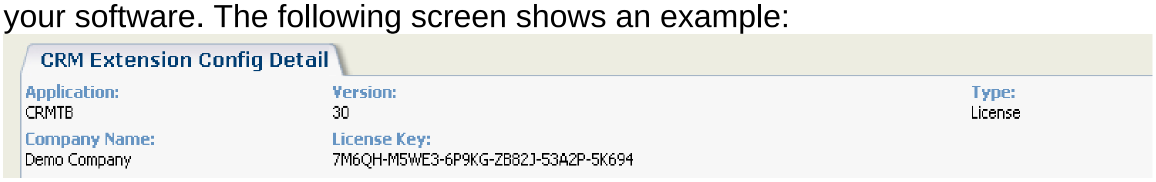
Your Activation Key Code will be installed if you entered it into the Time & Billing 3.0 Installer. If so, you can skip this step.



To enter the Activation Key Code

- Click on the CRM Administration button.
- Click on the "21CRM Admin" button.
- Click on the Settings button (with description "Licenses, Keys & Settings").

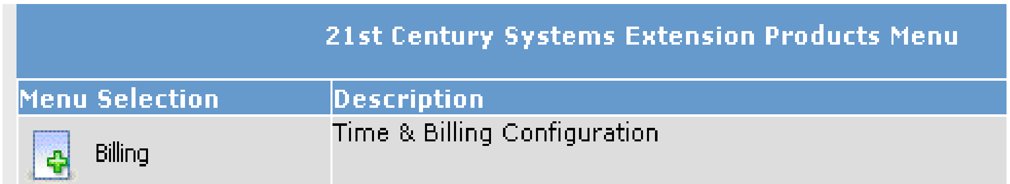
On the screen presented, enter the application as CRMTB, the version as 30, the type as License. The company name will be the name you provided 21CRM Systems. The license key will be the key 21CRM Systems provided to you with your software. The following screen shows an example:



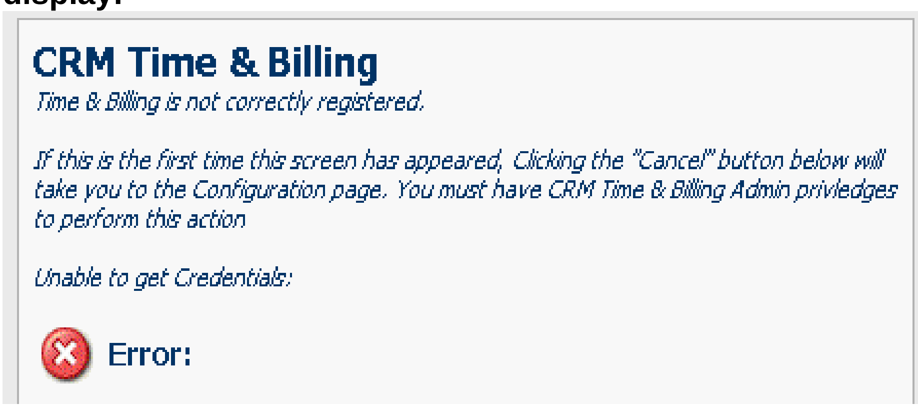
After you have clicked Save, your Time & Billing system is activated.

To configure Time & Billing:

- Click on the "21CRM Admin" button.
- Click on the Billing button.

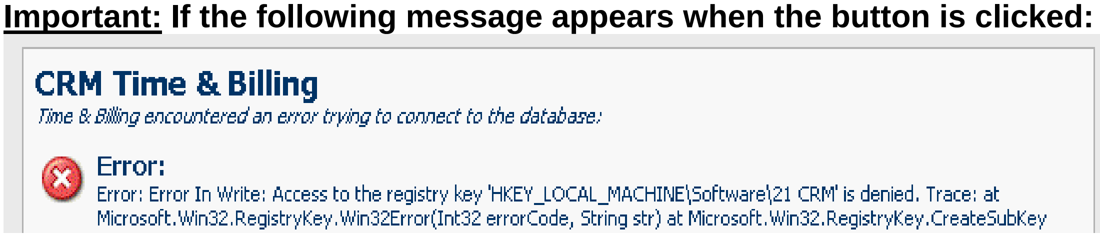


<u>Note:</u> The first time the button is clicked, the following message will display:



Only a Time & Billing Administrator will see the button that will take the user to the configuration screen where the CRM access credentials will be registered.

<u>Important:</u> If the following message appears when the button is clicked:



The Windows Active Directory user running the CRM website must be given write access to the registry. After Time & Billing has updated the registry, it only requires read access.

This instructions on this page may be skipped if you were directed to the configuration page automatically (see previous page).

After Time & Billing is registered (on the configuration screen), clicking on the Billing button will direct you to the Time & Billing v3.0 Administration screen:

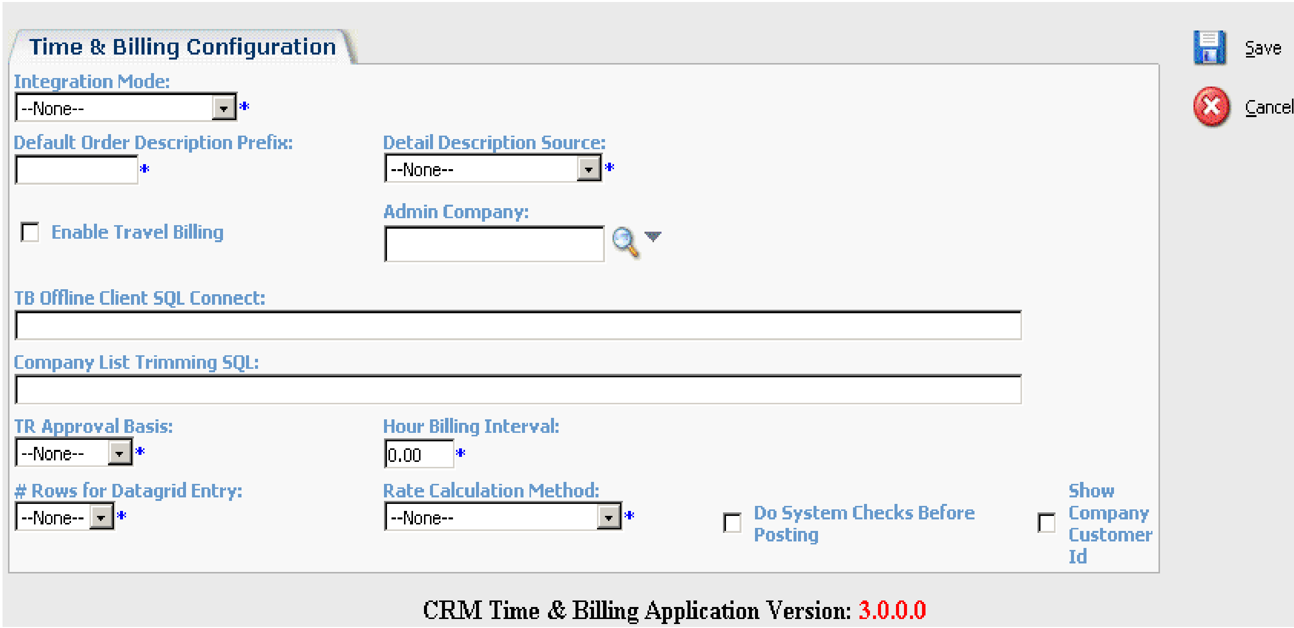
21CRM Time & Billing v3.0 Administration

Menu Selection	Description
System Config	Time & Billing System Configuration
Survey Config	Configure The Survey System
System Check-Up	Time & Billing System Check-Up Report
Defaults	Global System Defaults
UnPost Time	Unpost previously posted time records
Questionnaires	Create a new questionnaire or modify an existing questionnaire
Questions	Create a new question or modify an existing question
Cancel	Return to Time & Billing Search.

- Click on System Config.

Menu Selection	Description
System Config	Time & Billing System Configuration

The Time and Billing Configuration screen initially appears as follows:



Time & Billing v3.0 has four integration modes. Before specific information can be entered for your mode of choice, you must first enter that mode and some required fields. After Saving the original screen, click Change and the screen will display more fields requiring input based on the selected integration mode.

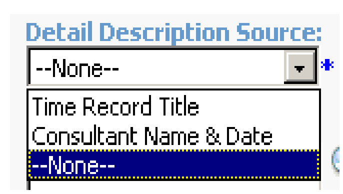
You must update the information here as appropriate. You should supply a value for every field, regardless of if it is marked as “required”. Not doing so could result in odd behavior by the system.

Base Fields (may enter in all integration modes):

- Integration Mode – Time & Billing v3.0 offers four integration modes – Non-integrated (generic), Sage Accpac ERP (OE), Sage Accpac ERP (AR) and CRMOE. CRMOE will only appear as an option if you have the 21CRM Order Entry v3.0 module installed.

- Default Order Description Prefix – The prefix to be used on the Order header description.

- Detail Description Source - Indicates where the description for each Order line will come from. Current options are to use the title from each entry, or the consultants name and the workdate.



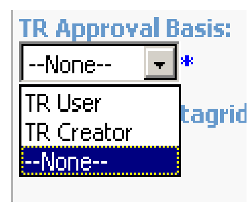
- Enable Travel Billing – This will be used to post billed travel time.

- Admin Company – Select the company from your database that is to be used for admin purposes. Generally this is YOUR company. If you are using an integrated mode other than generic, this company MUST be a customer in CRM. Non-chargeable time would be recorded against this company, and not billed to a client. You may have to add your company into the CRM database first.

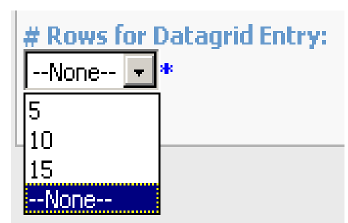
- TB Offline Client SQL Connect – This is used only in systems where the offline module for Pocket PC or laptop is used. If you are going to use these additions to Time & Billing, consult the guide for those modules. Otherwise, leave this blank.

- Company List Trimming SQL – You can customize which companies are returned for Company lists using this field. By default Time & Billing users can only see the companies that their CRM Security allows.

- TR Approval Basis – For v3.0, approving time records is enabled by either by either User or Creator. That is, the administrator can configure Time & Billing to approve time records based on who created the time record, or by whom the time record is for.

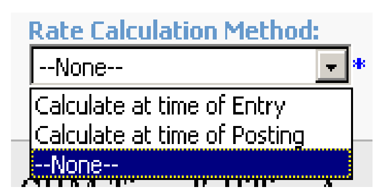


- Hour Billing Interval – V3.0 bills by part of hour intervals. The default is 0.1 (6 minutes). This is used by the Time Clock to round time to the nearest interval. (The system limit is to round to the nearest 100th of an hour (for example, 0.01667 would be rounded to 0.02)



- #Rows for Datagrid Entry – Number of rows to display when entering Time by the Datagrid method.

- Rate Calculation Method – V3.0 of Time & Billing uses rate calculation of time records to help with posting. This will be done automatically, either at the time of entry or pre-posting.

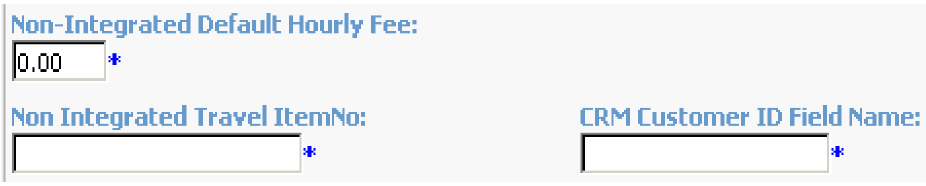


- Do System Checks Before Posting – The System Check-up process will be run, before Posting options are displayed, if this field is checked.

- Show Company Customer ID – If checked, the Time & Billing company drop-downs will include the Customer IDs to help distinguish companies for accounting purposes.

After filling in these default fields according to your needs, click Save.

If you selected **Non-Integrated** (generic) as your integration method, click Change and you will see the following additional fields:

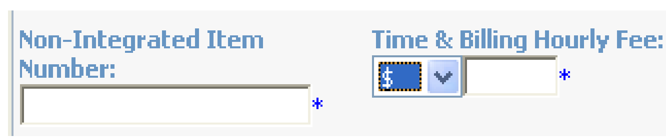


Described as follows:

- Non-Integrated Default Hourly Fee – The hourly fee to charge for a resource if none is identified.
- Non-Integrated Travel Item No – An item number to use for travel if none is identified for the customer.
- CRM Customer ID Field Name – The name of the field on the customer table that is your customer number. This is normally comp_Idcust, but yours may be different.

Additional User Configuration for Non-Integrated mode:

In the User details screen, you will see the **Non-Integrated Item Number** and **Time & Billing Hourly Fee** fields used for posting each consultant's time.



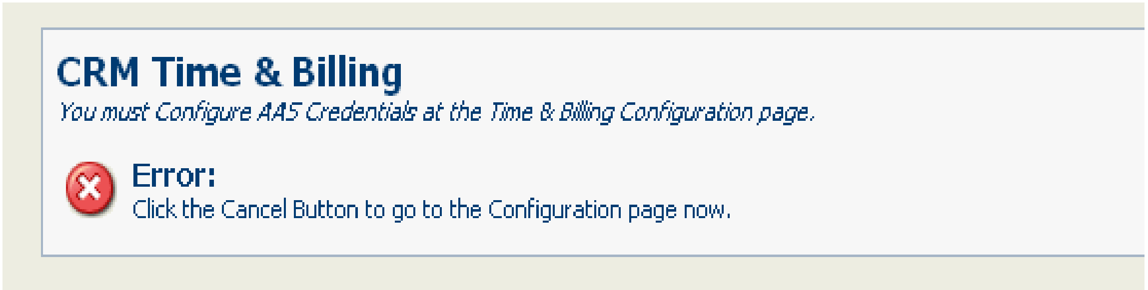
You cannot skip this step, or posting of your time will fail.

You will need to enable each user separately.

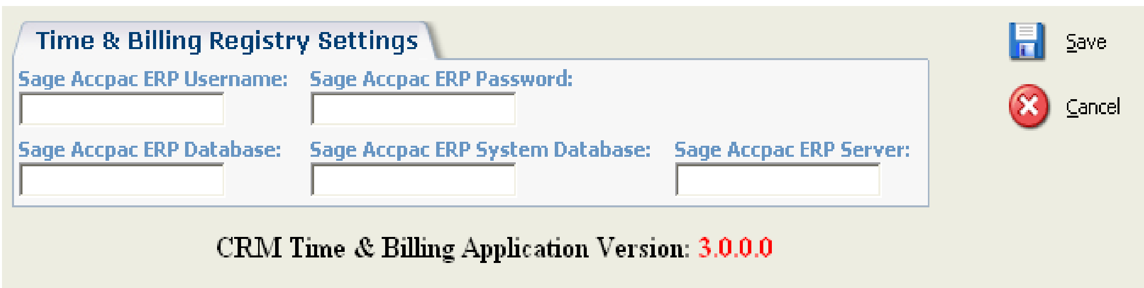
If you have selected one of the integration modes that uses Sage Accpac ERP, you must perform TWO additional steps before filling in the *additional* Time & Billing configuration fields. These steps are:

1. Enter Sage Accpac ERP credentials
2. Sync ERP – with Time & Billing

1. Clicking "cancel" on the Configuration screen (after saving the default fields), will show the Time & Billing administration screen with this message at the top:



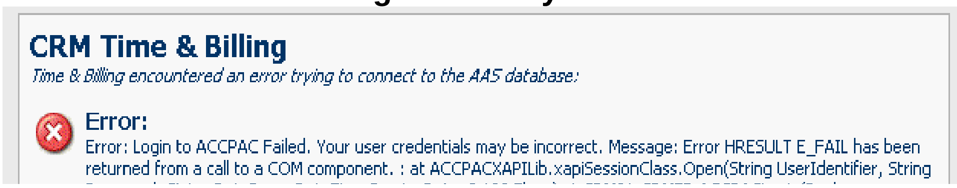
Click the Cancel button. (Alternatively, you will now see an additional button on the administration screen labeled "ERP Credentials". This button takes you to the same screen).



The information in these fields will be used to connect to Sage Accpac ERP.

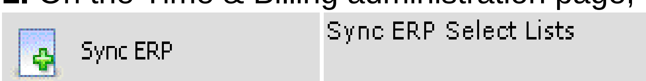
- Sage Accpac ERP Username – a valid username to the Sage Accpac ERP Application (ie, a user account name)
- Sage Accpac ERP Password – the correct password for the Sage Accpac ERP Account specified
- Sage Accpac ERP Database – the database name configured in Accpac Database Setup. NOT the SQL Server database name.
- Sage Accpac ERP System Database – the system database name configured in Accpac Database setup. NOT the SQL server database name.
- Sage Accpac ERP Server – the computer name of the machine running Sage Accpac, generally this should be the computer name of the CRM server, as Accpac will be installed on the CRM server for integration purposes.
- Click Save.

Note: All Credentials for Sage ERP must be UPPER case in both CRM and Sage Accpac ERP, otherwise, Time & Billing will be unable to connect to the Sage Accpac ERP database. As well, the password cannot contain NUMERIC (0-9) digits.
You will see the following screen if your credentials fail:



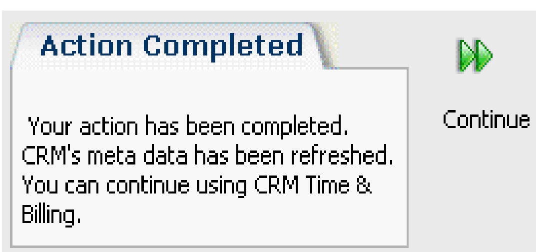
Step 1 is finished, Step 2 will synchronize Sage Accpac ERP Location, Pricelists and Categories

2. On the Time & Billing administration page, click the "Sync ERP" button.



The button will cause the system to synchronize the dropdowns used in the Time & Billing configuration screen and will refresh the CRM metadata to display these correctly.

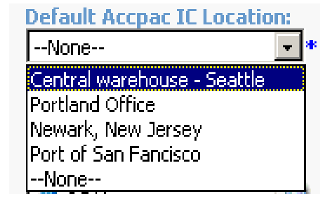
You will see the following screen when the process is complete:



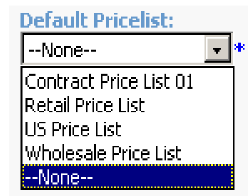
Now that you these two steps are complete, you may finish configuring Time & Billing for integration modes using Sage Accpac ERP.

Return to the Time & Billing configuration screen.

If you selected **Sage Accpac ERP (OE)** as your integration method, click save, then click Change again, you will see the following *additional* fields:



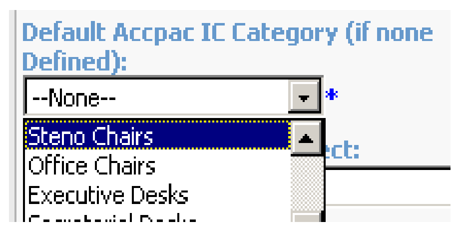
- Default Accpac IC Location – If you created a WorkLocation without a Location code, this one will be used. Do not leave this blank.



- Default PriceList – If you created a WorkCode without a Pricelist, this one will be used. Do not leave this blank.

- ACCPAC Default Payment Schedule – The payment schedule that all Orders exported from Time & Billing will use. 32 is the standard value.

- Accpac item # – If you have enabled a CRM user who does not have an IC ItemNumber, and they enter time into the system, this ItemNumber will be used instead. Do not leave this blank.



- Default Accpac IC Category – If you do not specify an Accpac category on your WorkCodes, and there is none specified in ACCPAC, this will be used. Technically this field should never be used as ACCPAC enforces entry of a location on each IC Item.

- Enable Travel Billing – Select this field checkbox.

- Default ACCPAC OE Template – The ACCPAC OE Template to use if one is not specified.

Additional User Configuration for Sage Accpac ERP (OE) mode:

Returning to the User Detail screen, another field will appear here: **Accpac Unformatted Item Number.**

Each consultant requires an Accpac Unformatted Item number if your system is to be integrated to Sage Accpac ERP. You cannot skip this step, or posting of your time will fail.

You will need to enable each user separately.

Basic configuration for Sage Accpac ERP (OE) mode is complete.

CRMOE mode, which is a great new addition to Time & Billing v3.0, integrates 21CRM System's CRM Order Entry module. It uses the same fields as the Sage Accpac ERP (OE) mode.

Additional User Configuration for CRMOE mode:

Same as Sage Accpac ERP (OE) mode.

Sage Accpac ERP (AR) is similar to the (OE) integration mode, in that it uses Sage Accpac ERP Credentials. Any non-default field on the screen in this mode are described in the (OE) mode section.

Additional User Configuration for CRMOE mode:

Returning to the User Detail screen, you will see the **Accpac AR Item No** and **Accpac AR Item UOM** fields.

Each consultant requires these fields to be filled if your system is to be integrated correctly. You cannot skip this step, or posting of your time will fail.

You will need to enable each user separately.

You have completed this activity.

Attention: If you see the following message during Time & Billing configuration:

> **Attention:**
> The IIS user controlling the directory security
> for this asp page's virtual directory has a regional date format: "dd/MM/yyyy"
>
> Set it to be the same as the sql database's dateformat which is: "MM/dd/yyyy"
> *or posting routines will* NOT *function correctly.*

you *must* change the regional settings of the IIS user (e.g. IUSR_XXXX, or the alternate user you configured) to have the same format as the SQL Server.

Enabling Companies

Only companies that exist in your CRM database that are designated as Customers and who have valid Customer IDs (comp_Idcust by default) can be used with the Time & Billing Extensions.

Before you can use a company with Time & Billing Extensions, you need to set up WorkCodes and WorkLocations for that company. You may also want to define any Projects or Tasks that are applicable (Time & Billing 3.0 may be integrated with MSProject, enabling Tasks to be billed for certain Projects).

Log in as a user who has been given the appropriate security rights to, at a minimum, Add Edit Codes.

Go to the context of the ***company*** you want to configure in your CRM database. You will now have the "Time & Billing" tab available. Click on it.

You will see the "Admin" button. Click on it.

A new screen will be displayed that will look like the following. It will change depending on your Time & Billing security level.

You will find several buttons on the left hand side. Which buttons appear will depend on the security level your account has.

21CRM Time & Billing v3.0 Configuration for "ACME Plumbing"

Menu Selection	Description
Setup Company	Setup and configure Time & Billing Company Settings
UnPost Time	Unpost previously posted time records.
Prepaid Blocks	Setup and configure Prepaid Blocks
Projects	Setup and configure projects.
WorkCodes	Setup and configure Work Codes.
WorkLocations	Setup and configure Work Locations
Cancel	Return to Time & Billing Search.

You can add, edit, or remove Prepaid Blocks, Projects, Tasks, WorkCodes and WorkLocations here, as well as UnPost TimeRecords (not used during initial setup). You can also configure the company's preferences for this client using Setup Company.

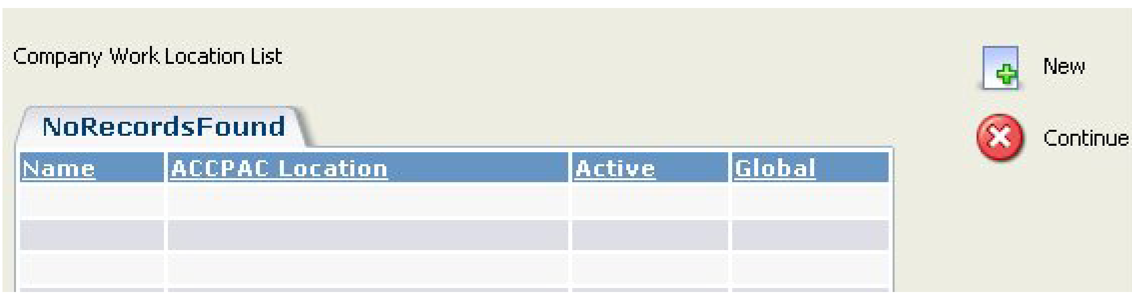
WorkLocations

> **<u>Important:</u>**
> **At least one WorkLocation must be defined for each company you want to use with Time & Billing**. You will be unable to add time entries if there are no active WorkLocations defined. A *global* WorkLocation applies to all companies, and qualifies for this requirement.

WorkLocations can be used in a number of ways. They can be used to indicate physical geography, as may be needed in organizations that have multiple offices in different cities. However, they can also be used to denote different physical locations of work in the same city, such as in your office, on client site, by telephone, etc.

The choice is yours. You can also combine these together for a more complex usage.

When you click the WorkLocations button, your screen will appear like this:

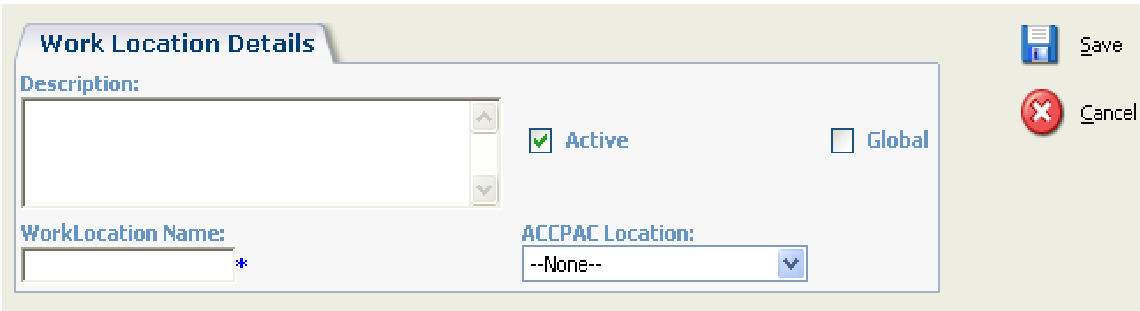


WorkLocations are displayed in alphabetical order. You can sort them on this criterion or by their active status.

To edit a WorkLocation, click on its name.
To add a new WorkLocation, click the New button on the right.

Adding / Editing / Deleting WorkLocations

The process of adding, editing, and deleting items are all related, as they are elsewhere in CRM.



Enter the appropriate details for each field.

The fields are:

- Name – a name, used for display
- Description – a description, used for display
- Active – a check box, indicates whether the item is active or not (can be used)
- Accpac Location – a Sage Accpac IC location code. Should be specified if you are using Sage Accpac ERP integrated mode. If one is not specified, the default, specified in the configuration page, will be used. This Location code will be added to each line item in the OE Order created in Sage Accpac when you Post your items.
- Global – enables the WorkLocation for ALL companies

Making a WorkLocation inactive will prevent it from being used when time entries are entered. You may need this option if, for example you wanted to temporarily prevent use of a WorkLocation, or you wanted to discontinue a WorkLocation that has previously been used.

Important:
DO NOT delete WorkLocations that have previously been used. Much like in the remainder of CRM, deleting entries that have previously been used for entry can cause existing time records to be "invisible". Mark them as inactive.

Once you have finished adding or editing your item, click Save.

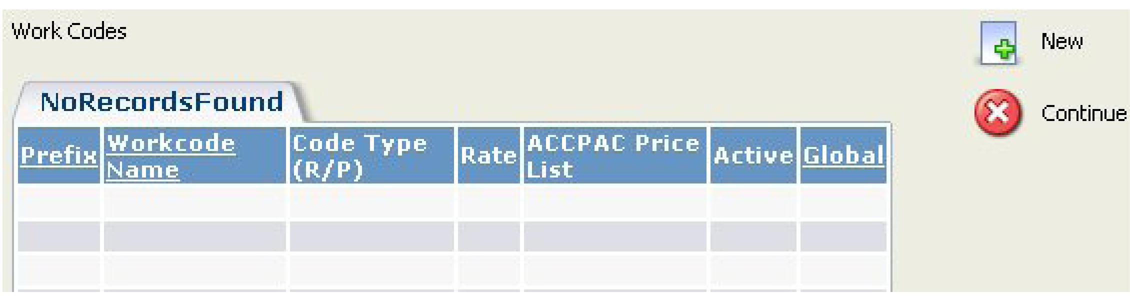
WorkCodes

> **<u>Important:</u>**
> **At least one WorkCode must be defined for any company you want to use for Time & Billing.** You will be unable to add time entries if there are no active WorkCodes defined. A *global* WorkCode applies to all companies, and qualifies for this requirement.

WorkCodes allow you to add flexibility to your billing beyond what is available within Sage Accpac ERP. WorkCodes can be used in many different ways, you can:

- Specify specific rates for different types of work
- Specify discounts for different types of work based on the consultant's price in the Sage Accpac ERP price list
- Create Non-Billable codes to help you enhance your invoices by letting clients know when you did work for them "for free"
- Charge premiums for certain types of work
- Many more

When you click the WorkLocations button, your screen will appear like this:

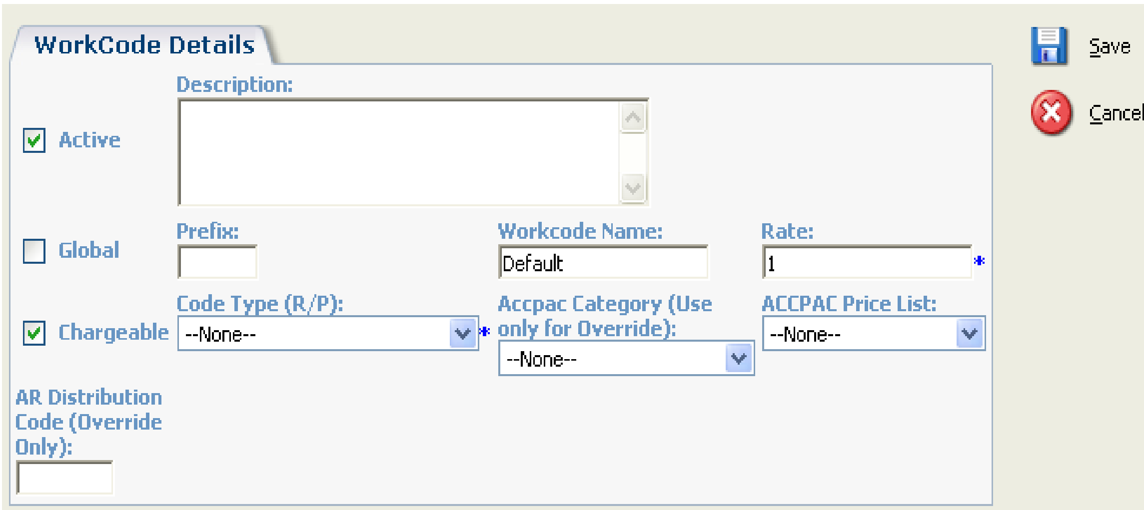


WorkCodes are displayed in alphabetical order.

To edit a WorkCode, click on its name.
To add a new WorkCode, click the New button on the right.

Adding / Editing / Deleting WorkCodes

The process of adding, editing, and deleting items are all related, as they are elsewhere in CRM.



Enter the appropriate details for each field.
The fields are:

- Active – indicator of whether this WorkCode can be used
- Description – More detail for administrative purposes
- Global – indicates if this WorkCode is available to all companies
- WorkCode Name – a name, used for display
- Rate – If the CodeType is "R", the rate is a dollar amount, If CodeType is a "P" then it is a percentage. Percentages are from 0 – 1 and indicate the formula Result = Percentage X Price in Price List
- Chargeable – Indicates whether this workcode is billable for accounting purposes
- CodeType (P/R) – indicates if this workcode is based on a Rate (dollar value) or a Percentage (of the ICITEM's price in the Accpac Price List).
- Accpac Category – the Accpac Category used by this WorkCode.
- Accpac Price List – the Accpac Price list used by this WorkCode. Ensure that each of your consultants (items) has a price in this pricelist if you specify one. If one is not specified, the default pricelist from the time & billing system configuration will be used.
- AR Distribution Code – Will only appear if you are using Sage Accpac ERP AR Integration mode. This setting if used will override the default distribution code for the consultant's item.

Making a WorkCode inactive will prevent it from being used when time entries are entered. You may need this option if, for example you wanted to temporarily prevent use of a WorkCode.

<u>Important:</u>
DO NOT delete WorkCodes that have previously been used. Much like in the remainder of CRM, deleting entries that have previously been used for entry can cause existing time records to be "invisible". Mark them as inactive.

Once you have finished adding or editing your item, click Save.

Projects, Tasks and Prepaid blocks are not required for Time & Billing use, however, they are powerful features. To see more information, view the User's guide.

Projects

The fields are:

- Project Name – a name, used for display
- Project Description – a description, used for display
- Active – an indicator of whether this project can be used

  The following are used for project statistics/reporting. You can click on the project Calculate Project Completion button anytime to adjust or recalculate based on your configuration settings.

- Budget in Hours– a decimal amount indicating the number of hours budgeted for this project
- Budget in Dollars - a dollar amount indicating the budget for this project.
- Budget Used – Sums time record entries, based on Calculation Basis (Hours or Dollars)
- Budget Remaining – Budgeted minus Used
- Percent Complete – uses Calculation Method to determine percentage
- # Time Records Using Project
- Completion Calculation Basis – Hours or Dollars
- Completion Calculation Method – “0/50/100” or “Actual”
- Calculate for Time Entries having Status – choose a possible Time & Billing status

  The next four fields are used for MS Project Integration.

- MS Project Name – the name of a MSProject saved in a SQL Server database
- MS Project Server – the name of the server set up for the Project
- MS Project UserName – the account that has access to the server
- MS Project Password – the password for the above account

- Consultant List – a list that can be excluded, included or ignored for the project
- WorkCode List – same as Consultant List
- Pre-Paid Block – choose the pre-paid block that will limit time entry for this project.
- Do not Charge PrePaid Block Time-Records – When posting, if this is checked, the time records will be posted with a 0 (zero) dollar amount.

Tasks

The fields are:

- Task Name – a name, used for display
- Task Cost/Budget – a description, used for display
- Start Date – display for when the task starts
- Finish Date – display for when the task ends

Note on Tasks: Cannot be added or removed if the Project is an MS Project, just viewed.

Pre-Paid Blocks

Pre-Paid blocks help control how much time can be entered against a project. The blocks are added to projects in the project configuration screen. Information on how to use them is detailed in the User Guide.

The fields are:

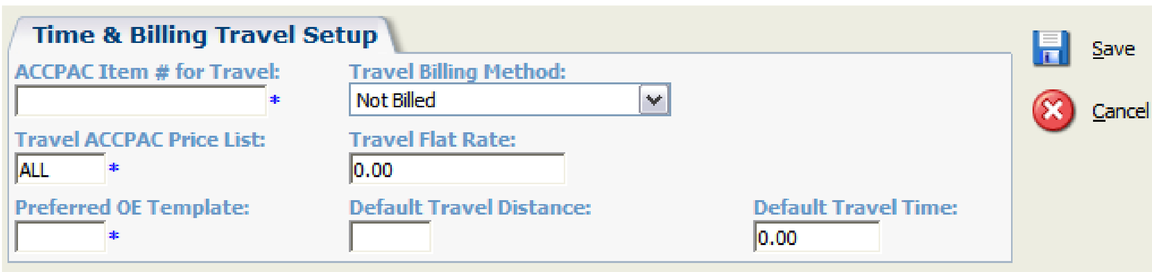
- Prepaid Block Name – A name to distinguish the block
- Block Budget Type – Dollars or Hours
- Budget Amount – A value based on type

Setup Company

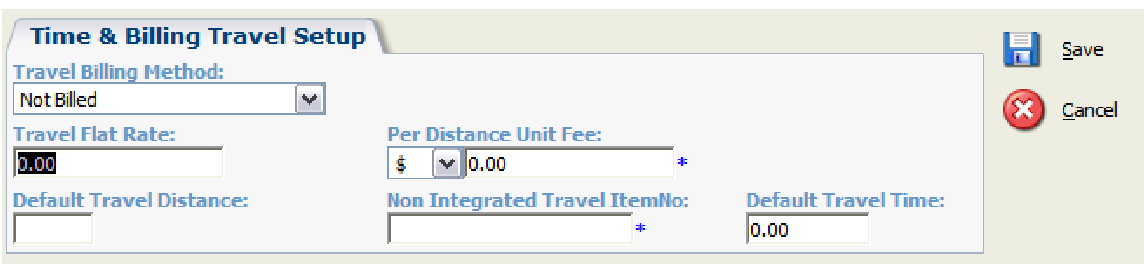
Use Setup Company to configure the appropriate general and travel billing preferences. Your screen will vary depending on which integration mode you have enabled for Time & Billing.

You MUST configure each customer in this way. By default, after installing Time & Billing v3.0, each customer will be configured, and their travel billing method will be set to “not billed”. You will need to change this if you wish to bill for travel time or distance.

If you have Sage Accpac ERP integration turned on, your screen will look like:



If you are using non-integrated mode, it will look like this:



In Sage Accpac ERP OE (and CRMOE) integrated mode, the fields are:

- ACCPAC Item # For Travel – an unformatted Accpac item # that you have set up in IC to be used for travel
- Travel Billing Method – select the criteria you want to bill this client based on
- Travel ACCPAC Price List – the price list to use for the ACCPAC Item # when billing
- Travel Flat Rate – if you have selected Flat Rate as your billing method, enter the per trip flat rate here.
- Preferred OE Template – the OE Template (invoice template) to use for this customer in ACCPAC
- Default Travel Distance – not currently used, but will identify a default travel distance per trip for this customer
- Default Travel time – not currently used, but will identify a default travel time for this customer

Click Save when you have completed these settings.

In Sage Accpac ERP AR integrated Mode, the fields are similar to OE mode, with the following exceptions:

- AR Travel Item # - customer number in AR
- AR Travel Item UOM – as in AR (overrides User settings)
- AR Travel Distribution Code (Override Only) – specify a distribution code to override Accpac, if desired

In Non-Integrated Mode, the fields are:

- Travel Billing Method – select the criteria you want to bill this client based on
- Travel Flat Rate – a dollar amount for flat rate travel
- Per Distance Unit Fee – a dollar amount for per unit of travel distance
- Non-Integrated Travel Item No – an item number to use for travel, if any
- Default Travel Distance – will identify a default travel distance per trip for this customer
- Default Travel time – will identify a default travel time for this customer

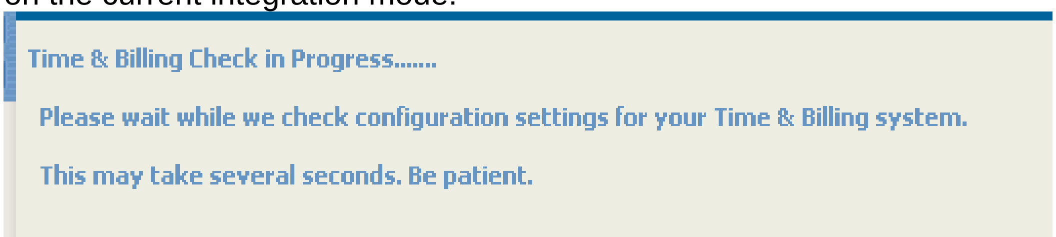
You have completed this activity.

System Check-Up

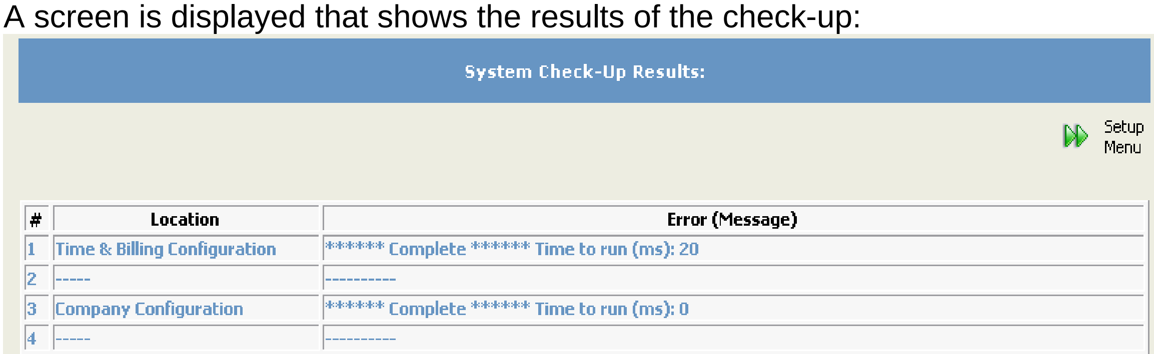
After the initial setup/configuration of the Time & Billing software, you can run a system diagnosis/check-up to determine if anything needs to be altered or added.

Click the “System Check-Up” button on the Time & Billing administration screen.

You will see a message displayed while the system performs its checks, based on the current integration mode:



The check-up looks at configuration settings and determines if something is missing or incorrect that will be used for Time Entry or Posting.
A screen is displayed that shows the results of the check-up:


System Check-Up Results:

Setup Menu

#	Location	Error (Message)
1	Time & Billing Configuration	****** Complete ****** Time to run (ms): 20
2	-----	----------
3	Company Configuration	****** Complete ****** Time to run (ms): 0
4	-----	----------

The following is a list of locations in the Time & Billing system that the system checks and what they mean:

- Time & Billing Configuration : Based on the integration mode, whether you have entered information in all fields that are required.
- Company Configuration: For each company that is a customer, the system checks that required fields (in the Company T&B configuration screen) are filled in.
- Workcode Configuration: Required fields on the workcode screen.
- Worklocation Configuration: Required fields on the worklocation screen.

- CRM User Configuration: An important part, since many of Time & Billing's features are based on the user using the system. It checks that they have proper billing information entered and things like date formats etc. The following is an example message:

9	CRM User Configuration	User: System Administrator. The User's Preference for DateFormat does not match the SqlServer. This must be changed if Posting using this User is to work correctly. SqlServer Format: mdy

- AAS TB Configuration: If the integration mode is with Sage Accpac ERP, the system will check to make sure things like default items exist in the accounting system.
- AAS CRM User Configuration: Will check Sage Accpac ERP to make sure the User's itemno (UOM also in AR mode) exists there.
- AAS Workcode Configuration: Checks Sage Accpac ERP for the pricelist and category that were entered in the Workcode.
- AAS Worklocation Configuration: Checks Sage Accpac ERP for the existence of the location.

The system check-up is a great tool for ensuring you have correctly configured your Time & Billing 3.0 system.

Preparing for Posting Time Records

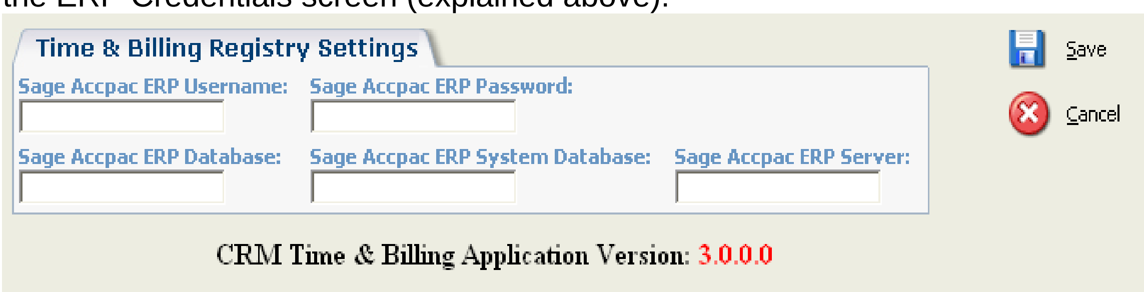
<u>Attention:</u> Posting and Unposting functionality is significantly altered from previous versions. In Time & Billing v3.0, Postings are grouped based on the criteria used when Time Records are posted. Therefore, unposting Time Records can only be performed on these groups of Time Records. Refining which records are to be unposted is *not* allowed. All the time records in a posting group (if it is chosen for unpost) will be unposted.

See the User manual for more detailed explanations of posting and unposting procedures.

Posting to Sage Accpac ERP OE

The Time & Billing Extensions integrate with Sage Accpac ERP by way of an OE Order Import done directly from the CRM Database.

In order to allow your users to do this, you must enter the credentials correctly in the ERP Credentials screen (explained above):



This will allow Time & Billing to post correctly calculated time entries.

The process is simple:

- In Enterprise Manager, create a new SQL Server user, and give it READ access to the CRM Database. You can restrict this account to read access on the following tables if you wish:
  - Orders
  - Order_Comments_Instructions
  - Order_Details
  - Order_Payment_Schedules
  - Order_Serial_Numbers
- Create an ODBC DSN (System). Point it to your CRM database, and have it log in with SQL authentication using the account you just set up.

- Provide this DSN name and credentials to the user(s) who will be posting items to ACCPAC.

In Sage Accpac ERP, an import is accomplished by doing an Order Import when in OE Order Entry. The user should select ODBC Data Source as the source of the import, and then the DSN you created above. The import will then be automatic.

Posting to Sage Accpac ERP AR

Other than entering ERP credentials in the Time & Billing configuration screen, you do not need to set up anything. The Time & Billing system imports all posted Time into AR as new AR Invoice Batches.

Non-Integrated Exports

Non-Integrated Versions of Time & Billing post their entries to two tables in the database, specifically:

TBNonIntOrder
TBNonIntOrderDetail

You can access posted data from these tables through whatever means you like (ODBC, ADO, exports).

Note: These tables are emptied each time a posting is done. You must obtain your data prior to doing another posting, or the data will be lost.

You have completed this activity.

Time & Billing and CRM Solo

Time & Billing used in Sage CRM SOLO is currently not supported in Sage CRM.

For offline use, please contact us about the CRM Time & Billing offline module for Desktop/Laptop PCs or Windows Mobile (PocketPC) devices.

For further instructions, please contact us at info@21crmsystems.com.

Time and Billing 3.0 Windows Service

Features

Time & Billing v3.0 includes a Windows Service that helps automate several features of the system. Currently, these include:

- Surveys
- Calculating Time Record Prices
- Calculating Project Stats

The Surveys is explained in the next section.

TimeRecords have their accounting cost (for posting to the Accounting software) calculated based on the integration mode. This can be configured in the Time & Billing configuration screen to be done at time of entry or during posting. To keep the system up-to-date, we have included this process in the Windows service that can be configured to calculate price costs at set intervals.

Project statistics are based on Time Records using configured Projects and report how those Time Records consume Project resources. (This is viewable in the Company context's admin Project screen). This feature can be run manually in the Project context or can be configured to be calculated by the service.

Configuring

In the program files installation folder for Time & Billing 3.0, there is a "config.cfg" file. Settings in this file control how the service executes.

There are three setting types in the .cfg file: Config, Event and Interval.

Double slashes (//) indicate a comment and lines beginning with those will be ignored by the Time & Billing Service.

The Config type template is as follows (2 parameters):

```
Config:     Setting          Value
```

The following Config settings can be altered:

```
Config:     RunOnStart       False (or True)
//RunOnStart can be True or False, and will instruct the
// service to run at startup or only when interval or event
// settings explicitly tell it to.
```

```
Config: Log False
//Log can be True or False, set to True if you want to track
//potential errors.

Config: Interval 1
//the Interval value determines how many minutes are between each
//interval. Usually set to 1.
```

The Intervals Template is as follows (5 parameters):

```
//Interval: StartTime   EndTime     Function
//          Interval(In Minutes)    <OwnThread>
```

By default, Survey Questionnaires are configured to be sent (for those that have not yet been set for the Survey period) within Interval timeframes:

```
Interval: 00:01 23:59 SendQuestionnaires 15 True

//This line indicates that the SendQuestionnaires process inside
//the Service will run every 15 minutes from 1 minute after
//midnight, to 1 minute before midnight, every day. Having its
//own thread means the process will not interrupt or be
//interrupted by another process performing the same task.
```

The Events Template is as follows (4 parameters):

```
//Event:    Time        Function    OnStart     <OwnThread>
```

Events occur once a day, and by default, CalculatePrices and CalculateProjectStats are configured as events.

```
Event: 22:30 CalculatePrices False True
Event: 23:00 CalculateProjectStats False True

//This means the two processes will run, on their own threads,
// at 10:30 PM and 11:00PM, respectively, every day, and will not
// run when the service first starts
```

The Time & Billing 3.0 Windows Service is an advanced feature of the software and should be configured carefully.

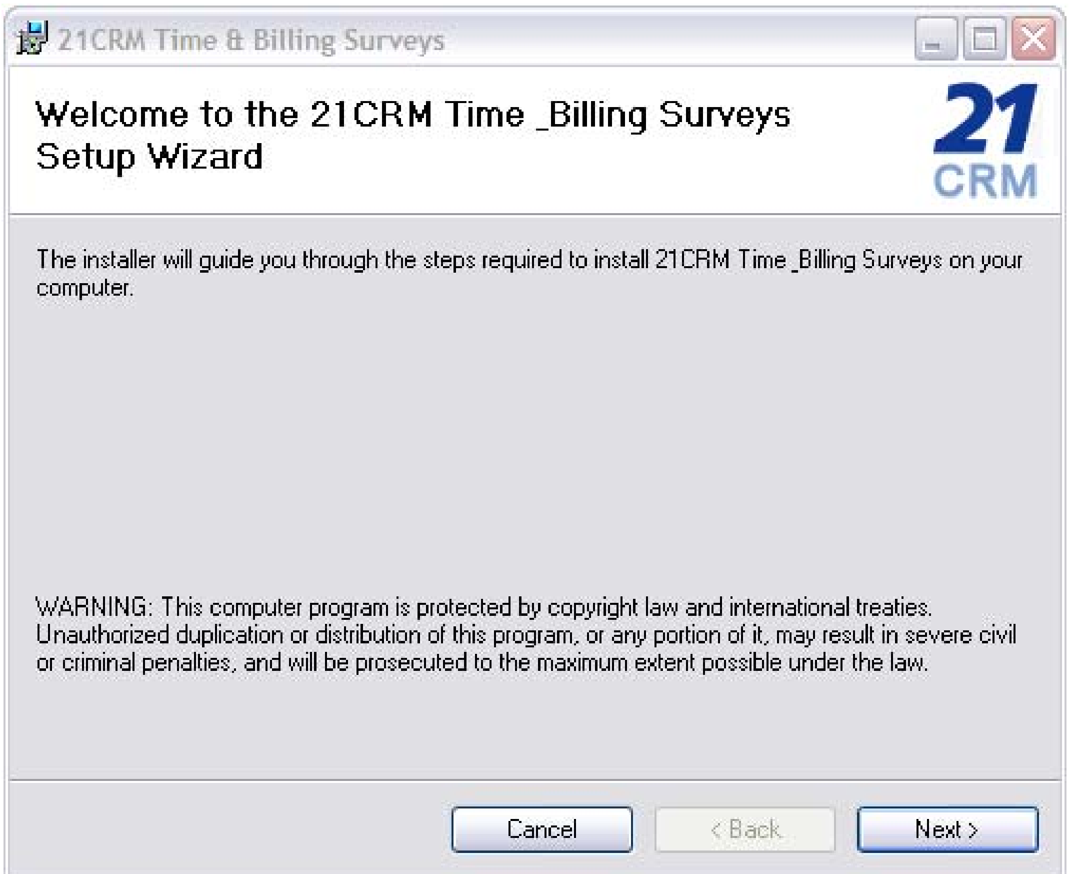
You have completed this activity.

Time and Billing Surveys

To utilize the Surveys aspect of Time & Billing v3.0 you must first install and configure the external site that the users will visit to complete their surveys.

Installing

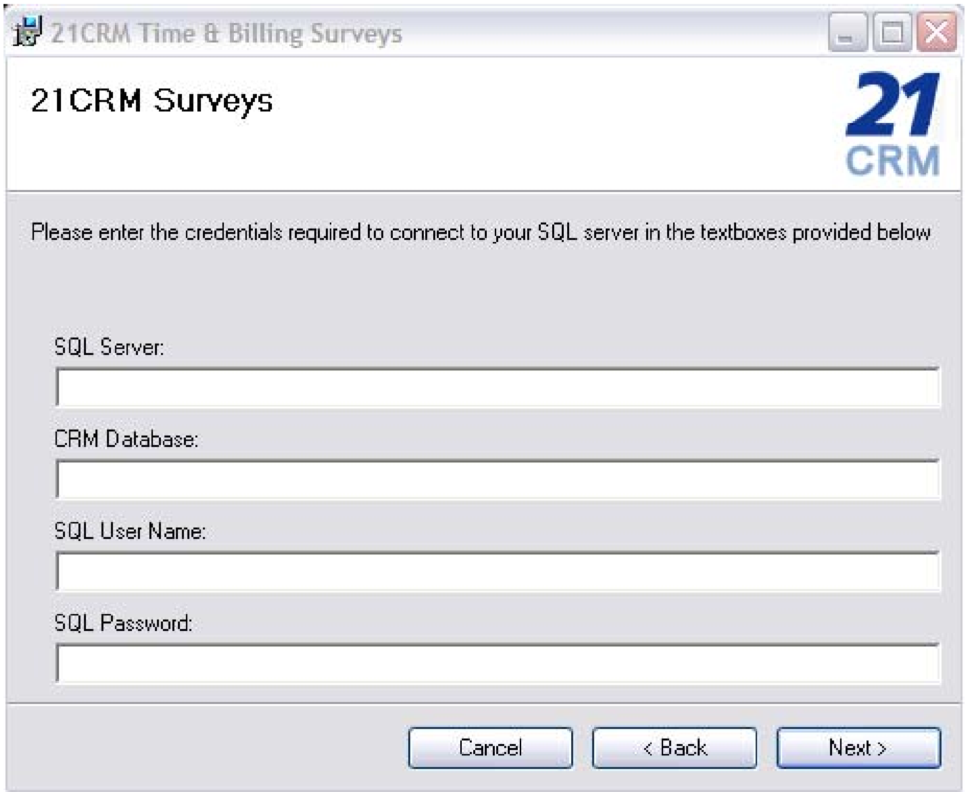
To begin the installation execute (double click) the installation file "21CRM Time and Billing Surveys Setup.msi". This will launch the installation wizard and display the welcome message.



To continue with the installation click the Next button and the EULA (End User Licensing Agreement) is displayed.

Take a moment to read the agreement and if you accept the terms and conditions outlined in the EULA tick the “I Agree” option and click Next. By checking “I Agree”, you agree to the terms and conditions outlined in the EULA. You cannot install this software without accepting the EULA.

Next you will need to enter your SQL Server credentials; this is the SQL Server that currently contains your CRM database. This SQL Server is where all of the configuration settings for the Surveys are kept, so it is important that the machine running the externally accessible site also has access to the SQL Server which contains your CRM database.



Next you will be asked to supply the name of the virtual directory to install the website to. The default is "Surveys" but this is completely customizable. You will also be asked to supply a port which the external users will have to use to connect to your site, the default of port 80 is highly recommended so the user does not have to append the port to the URL i.e. http://www.mycompany.com:90

Note: The surveys installer will only allow installation into the default web site on your web server. For instructions on moving this installation to another virtual web, please contact us.

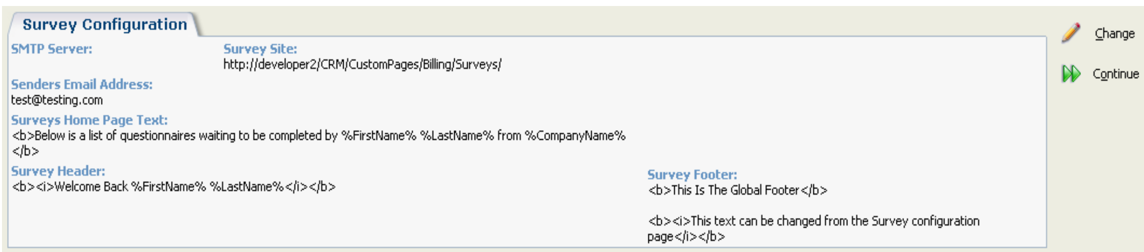
NOTE:

This is where you should take note of the external URL that users will need to connect to the site i.e. http://www.mycompany.com/Surveys/. You will need this during the configuration of the surveys in CRM.

The next screen you see will be the confirmation of the installation. Click Next and wait for the installation to complete. Once the installation is complete the site is NOT yet ready to use. You must first completely install 21CRM Time & Billing 3.0 with a valid product key, and configure the surveys.

Configuration

An administrator will be able to configure the surveys from the Time & Billing administration menu by clicking the Survey Config button which will display the following screen.



The following is a description of the fields on the above screen:

- SMTP Server – The name of the local exchange server that will email the Surveys to clients.
- Survey Site – the externally accessible website where completed Surveys will be submitted, This is simply the URL to the virtual directory the Time and Billing service will append the appropriate page to the URL.
- Senders Email Address – The email address to use for sending Surveys.
- Surveys Home Page Text – Clients are sent emails with links to your Survey site. Once the survey is completed, they are taken to a generic page that will show any additional surveys that need to be completed. This field is the text/HTML that will display on the top of that page. You can use this field to include external images, links and information.
- Survey Header and Survey Footer – Displayed as header and footer of every survey you send out. This field will accept both HTML and text. This is displayed at the top of each surveys page above the Page Header.

Note: You can use merge fields in your Survey Header/Footer Text. These are as follows:

- %CompanyName% - The name of the client company
- %FirstName% - The primary person's first name for the client company
- %MiddleName% - The primary person's middle name
- %LastName% - The primary person's last name

After you have completed the configuration of the surveys system all that is left to do is create and configure individual surveys. The creation and configuration of individual surveys is covered in the User's Guide under the section labeled Time & Billing Survey.

You have completed this activity.