



Invoicing
Manager

proRM *Invoicing* *Manager*

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What is proRM Invoicing Manager?

proRM Invoicing Manager Overview

The final important step in the project management process is creating a precise invoice for your customer. Preparing this document usually takes a lot of time. It is coupled with additional efforts and spending redundant costs or surplus labor. Often, this key operation turns into a big inconvenience and problem.

proRM Invoicing Manager is an extremely useful solution that transforms your usual invoice troubles into an easy, fast, and hassle-free process. The interface of the application allows you to move intuitively through all the stages of invoice creation.

As soon as you approve bookings or other kinds of entries, it is possible to create an invoice. The application shows only those items that were checked and agreed to by you. There are also several possibilities to make final changes before the information passes to the final version of the invoice. This allows you to make sure that the final invoice is absolutely correct.

Thanks to the seamless integration between proRM and Microsoft Dynamics CRM, the invoicing process is very clear and transparent. All changes, which were made within the CRM, are reflected in proRM Invoicing Manager and vice versa. As a result you receive a completely integrated invoice.

It is possible to calculate all kinds of contracts - including those with fixed pricing. The process of invoicing is divided into the following phases: Draft, Approved, Sent, Booked, Paid and Cancelled.

You will enjoy the process of invoicing because it has been developed to be multifunctional and convenient, while meeting all your needs.

proRM Invoicing Manager.
The standard CRM accounts have been added to the relevant proRM information.

The screenshot displays the proRM Invoicing Manager interface. On the left, there is a list of bookings with columns for Description, Booking Date, Type, Booking Type, and Booking state. On the right, a detailed view of a selected invoice is shown, including columns for Description, Booking Date, Display in report, Type, Amount, Discount, Tax rate, Total amount, and Invoice state. Below the invoice details, there is a section for 'Records to delete' and an 'Invoice discount' section.

Description	Booking Date	Type	Booking Type	Booking state
Implementing ERP system on C...		Time and material		
New Event	12/18/2013	Time and material	Biliable	Booked
Travel to customer	12/18/2013	Time and material	Biliable	Approved
Accessing and measuring	12/23/2013	Time and material	Biliable	Booked
Implementing project str	12/23/2013	Time and material	Biliable	Booked
Last Booking	12/26/2013	Time and material	Biliable	Booked
Localisation testing	12/18/2013	Time and material	Biliable	Booked
Project Initiation	12/18/2013	Time and material	Biliable	Booked
Project Planning	12/18/2013	Time and material	Not biliable	Booked
Travel to root office	12/18/2013			Booked

Description	Booking Date	Display in report	Type	Amount	Discount	Tax rate	Total amount	Invoice state
First project phase	12/1/2013			€1,070.00	0.00 €		1,070.00 €	Op
Expenses	12/10/2013		CSI Fixed Type	€0.00	0.00 €	10 %	0.00 €	
Prokopenko, Sergey - In	12/18/2013		CSI Fixed Type	€1,070.00	0.00 €		1,070.00 €	
Project controlling	12/18/2013			€30.00	0.00 €		30.00 €	
Project training	12/24/2013			€330.00	0.00 €		330.00 €	
Project walkthrough	12/26/2013			€235.00	0.00 €		235.00 €	
Validating business n	12/16/2013			€135.00	0.00 €		135.00 €	
Validating requireme	12/25/2013			€15.00	0.00 €		15.00 €	
Workflow inspection	12/2/2013			€230.00	0.00 €		230.00 €	
Writing documentati	12/17/2013			€95.00	0.00 €		95.00 €	

The Advantages of proRM Invoicing Manager

General Concept

proRM Invoicing Manager was specially developed to make the last stage of project management easier, quicker, and multi-functional. Since the first version of the application, it has been significantly improved according to the urgent needs, requirements, and advice of our clients and best business consultants. If your projects were successfully fulfilled it is time to use this perfect invoicing solution.

Easy Preparation for Using proRM Invoicing Manager

In order to start working with proRM Invoicing Manager you need to make only a few simple preparations. You should fill the short form with name and consumer, choose the currency for your operations, and create the price list that describes your billable services. After approving necessary entries you are able to begin the invoice creation process.

Changes within proRM Invoicing Manager

The application was developed with the understanding that the invoice process should be flexible according to different business situations and allow "last moment" changes. Thus you have the possibility to change billable hours, correcting them individually. Such values as Hourly Rate and Discount can also be amended before approving the final version of the invoice.

If you have not set an applicable tax in the invoicing form, you can add the applicable tax rate within the application. The other way for such changes is to make them in the CRM System. The tax will be automatically added to the sum of the service positions and to the total sum of the invoice.

Creating the Invoice

proRM Invoicing Manager shows you a project tree which consists of approved items. You just need to choose desired bookings and select the service item type for sending it to invoicing. You can then print the invoice or to save it in any suitable format. Invoices already funded by your consumer can be marked as paid.

The Usability of proRM Invoicing Manager

The design and all necessary forms of proRM Invoicing Manager were created to make this important stage of the management process as easy-to-use and helpful as possible. It minimizes the possibility of invoicing errors by giving you only the information that was checked and approved by you. Additionally non-approved data is highlighted in red. Thus you always understand what changes should be made in order to successfully finish your invoicing process.