



# WORKOLOGY 6.0

workology® conference

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# THE WAY: TIME / EXPENSE AND BILLING



# WHY FOLLOW THE TIME / EXPENSE AND BILLING WAY?

- **Improve Accuracy and Accountability**
- **Manage task assignments to see real time status**
- **Notifies the next person that their task is on deck**
- **Traffic – Staff schedule screen will automatically adjust based on progress/status**
- **Tracking of budget vs. actuals for better estimating in the future**



# THE TIME / EXPENSE AND BILLING PROCESS



# TODAY CREATIVES

- **View your assignments and meetings in one place**
- **Add or confirm time spent on each assignment/meeting**
- **Get notified of project details and changes**
- **See remaining hours to complete assignment**
- **Update progress or completion of each assignment**
- **Add conversations and notes to communicate with the project team**



# GRID ENTRY TIMESHEETS

- For managers without specific assignments
- No need for resourcing or workflow (to notify next assignment)
- Recap time spent during the week
- No need to allocate hours to complete tasks
- Entering PTO hours



# EXPENSES

- **Create POs from approved estimates**
- **Enter all Vendor Invoices**
- **Use Credit Card Connector to account for company credit card expenses**
- **Create Expense Reports for reimbursable personal expenses**
- **Track Misc. Costs for consumables**



# MEDIA

- **Manage Media Planning in Strata**
- **Use Strata Integration to update orders and invoices into Workamajig**
- **Reconcile Media to make sure adjustments are billed and station invoices are closed**





# PROJECT BILLING

- **Generate Billing Worksheets to review billing actions before invoicing**
- **AE to see status of prior billings per the project budget and to update worksheet with any exceptions**
- **Accounting to conduct final review, generate invoices, and send to client**



# MASS BILLING

- **Use Mass Billing for T&M, Fixed Fee, Media, and Retainer billing**
- **If client billing is on needed on demand vs. scheduled, then use project ad hoc billing**
- **Note: This process skips the important step of review before invoicing your clients**



# BILLING OVERVIEW

- **Billing Manager - Today**
  - Quickly see conversations and daily feed across projects
  - Manage billing worksheets in various statuses
  - Quickly see what can be billed as T&M, Fixed Fee and Retainers
  - Manage unapproved and unprinted client invoices
  - Generate billing worksheets or create ad hoc invoice
- **Billing Manager - Dashboard**
  - Overview of aging and current open amounts

