



BILLING AND SCHEDULING

AZ GLOBAL RESEARCH AND ENGINEERING

2006 - 2008



PREFACE

The billing and scheduling software application was developed as optional extension of the VisCMSE SCADA and modeling suite in order to support the facility operation and maintenance operations, and to be used by independent contractors for planning and billing. The software is developed with active support and advise of the USA Figure Skating Champion, and professional coach and choreographer, Mr. Chris Conte. Stand-alone implementation of the software. BILLTIME, is offered on the commercial basis and may be used by independent contractors, coaches, tutors, lawyers, and by small businesses that face the problem of managing complicated schedules and billing.

SOFTWARE FEATURES

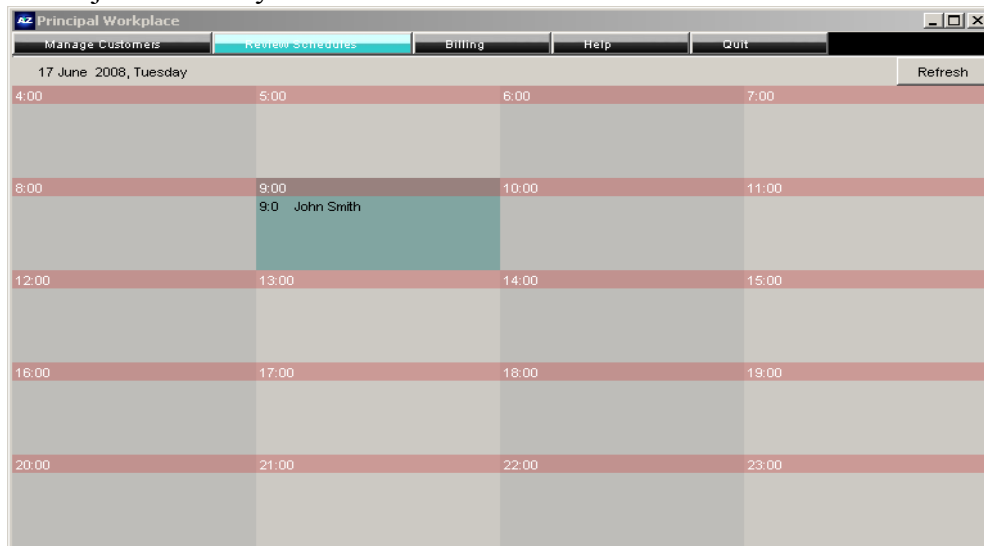
The software support the following functions:

1. Maintaining the customer contact and reference database
2. Scheduling the operations (lessons, phone calls, visits, maintenance operations, etc.)
3. Billing the customers
4. Generation of the electronic and paper (PDF) bills
5. Tracing the bill payments
6. Automated electronic bill delivery

Software also supports exports of the financial data in the MS Excel format, that allows flexible interaction with existing tax preparation and financial management software.

SOFTWARE OPERATION

The software operation is designed with simplicity of the software use in mind. We were trying to create the package that will be ideally suitable for busy professional and will become helpful immediately after it is installed on the customer's computer, without pushing the customer through the endless learning curve. The software start-up screen presents the today's schedule and pre-planned jobs for today:





From this screen our customer can:

- Manage customer data;
- Review and modify schedules;
- Mark tasks as “Done”
- Generate and send bills
- Trace bills.

Managing Customer Data

Managing customers is handled through the standard form, that carries minimal necessary data about the customer, and that allows to plan the appointments for the given customer. The user can set the customer data, and also set the schedule for the new customer in three steps:

1. Filling the data in the form:

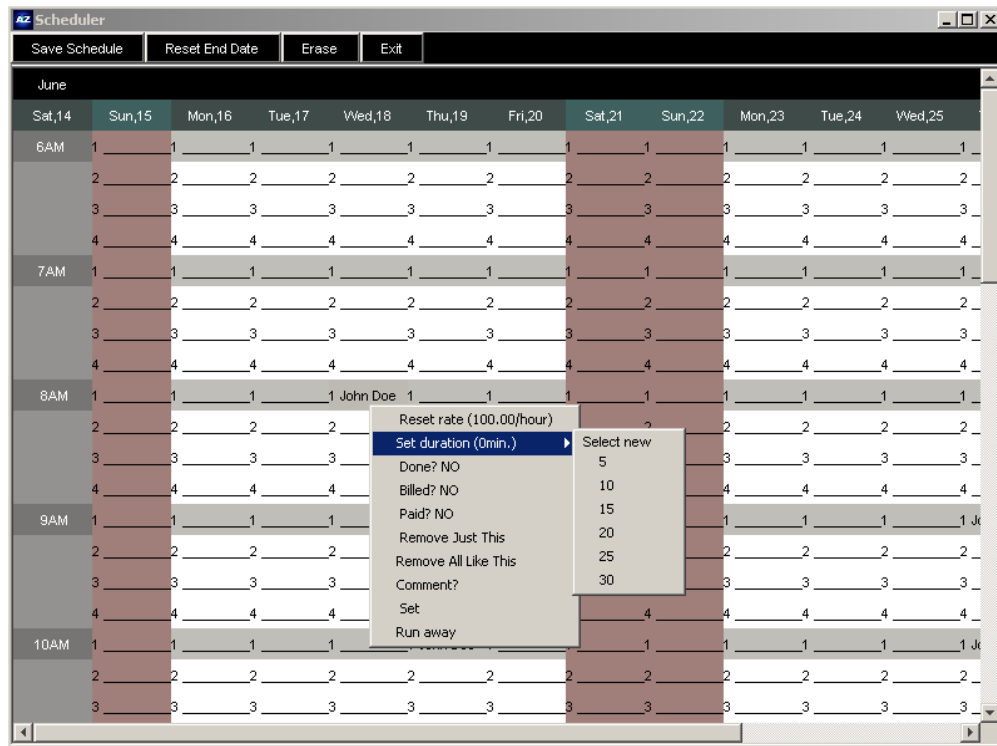
Field	Value	Notes
First or full name....	John	used for billing, required
Last name or company name	Doe	used for billing, required
Job reference.....	Skating lessons - Samantha Doe	used for billing, required
e-mail.....	username@provider.com	bill will be sent to this address
Rate per hour.....	100.00	used for billing, required
Telephone.....	(800)555-1212	for reference, optional
Cell.....	(800)555-1212	for reference, optional
Fax.....	(800)555-1212	for reference, optional
Street address.....	123 Undisclosed place	for reference, optional
City.....	Whatever	for reference, optional
State/Province.....	NA	for reference, optional
Zip code.....	TBA	for reference, optional

2. Selecting start and end dates (for recurring weekly arrangements only days and times within one week are required)

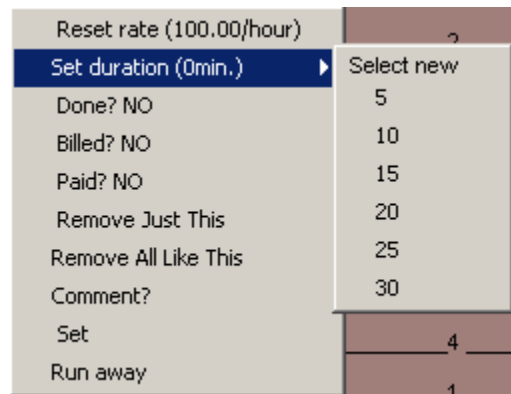
Field	Value	Notes
First or full name....	John	used for billing, required
Last name or company name	Doe	used for billing, required
Job reference.....	lessons - Samantha Doe	used for billing, required
e-mail.....	me@provider.com	bill will be sent to this address
Rate per hour.....		used for billing, required
Telephone.....	55-1212	for reference, optional
Cell.....	55-1212	for reference, optional
Fax.....	55-1212	for reference, optional
Street address.....	disclosed place	for reference, optional
City.....	ver	for reference, optional
State.....		for reference, optional
Zip code.....	TBA	for reference, optional

Start date	06-18-2008
End date	06-18-2008
Plan it	

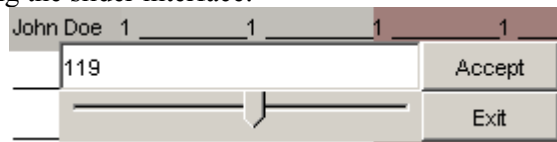
3. Setting the appointments within the selected time interval



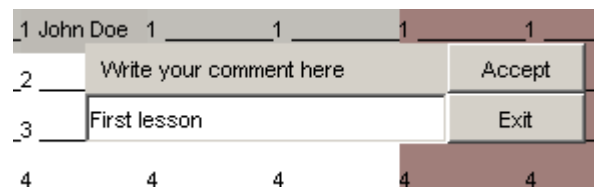
In order to set the appointment the user has to click on the time slot in the schedule, which corresponds to the planned job. The pop-up menu appears:



The user can set the rate using the slider interface:

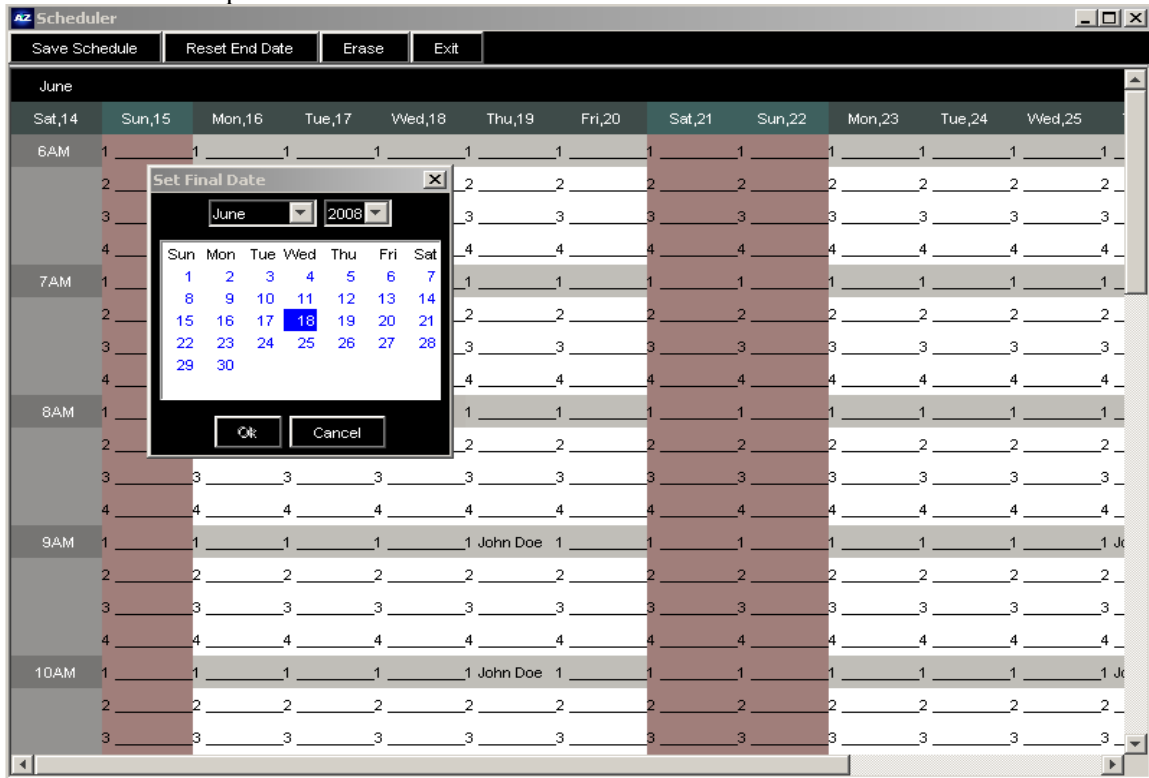


Set planned duration (in 5 min. increments), see above, and leave a brief memo:





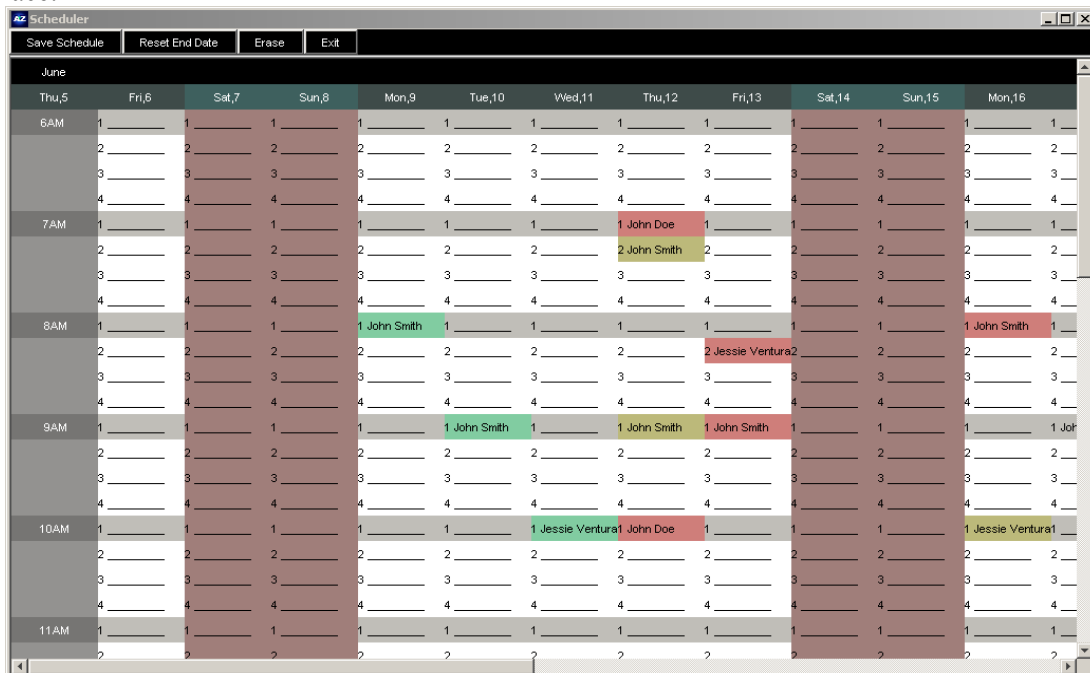
After the appointment is set, the user can either save the schedule “as is”, or set the similar repetitive appointments until the pre-defined date:



After the appointments are set, the master schedule is automatically updated.

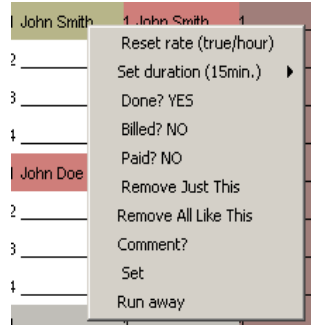
Managing Schedules

The BILLTIME software is schedule-centric, and the “Master schedule” is the most commonly used workplace.





The user can add or remove appointments, modify data for individual appointment, and also mark appointments/jobs as “Done” for the future billing. The color coding is used to point to the “status” of the appointment: Gray corresponds to planned or missed, Yellow corresponds to completed, but not billed; Red – to done and billed, but not paid, and Green – to done, billed and paid. In order to mark appointment as completed, the user has to click the appointment on the schedule, and mark it as “Done” on the pop-up menu:



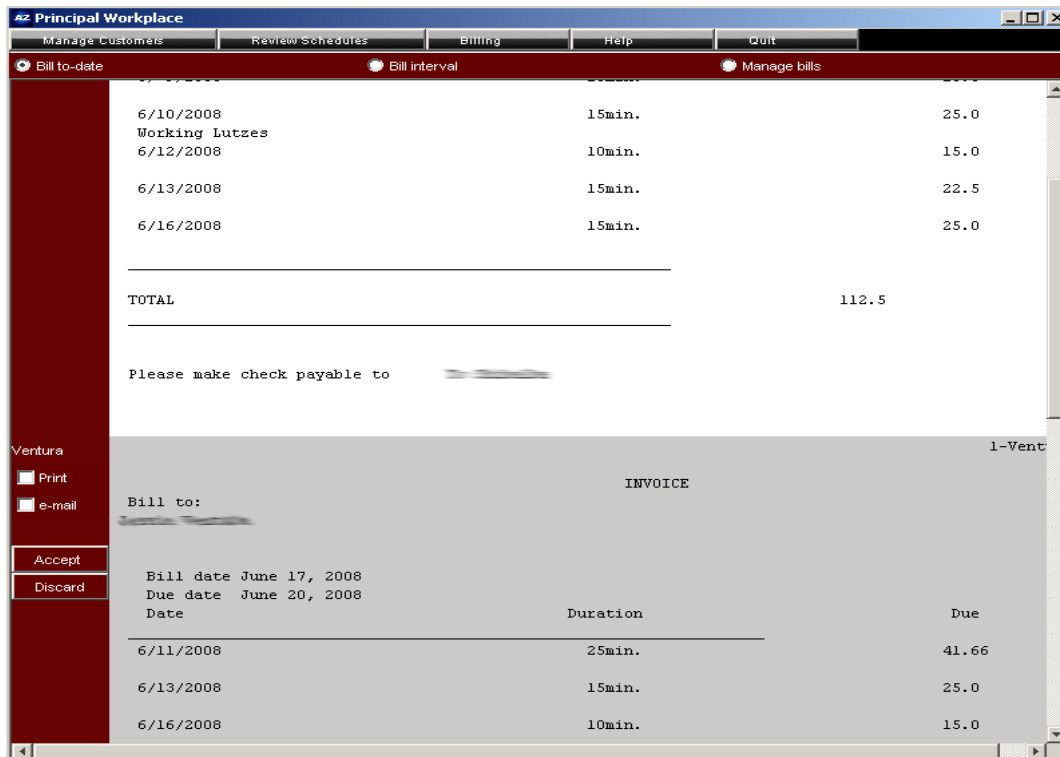
Billing and payment status of the appointments is managed automatically through the Billing.

Billing

The user has four principal options for billing:

1. Bulling all unpaid completed appointments to-date for the individual customer
2. Bulling all unpaid completed appointments to-date for all customers
3. Bulling all unpaid completed appointments for the pre-selected interval for the individual customer
4. Bulling all unpaid completed appointments for the pre-selected interval for all customers.

Upon selecting the option (and the customer, if required), the software generates individual bills. The customer can preview them, discard them, print them, and/or automatically mail them to the customer using the billing workplace:





If the user accepts the computer-generated bill, he/she shall press “Accept” button, and all the operations (generation of the bill in the Adobe PDF format, e-mailing, updating of the individual and master schedules, and archiving the bill will be executed automatically.

The “Manage Bills” option allows the user to mark bills as “paid” (which fact is immediately reflected at the individual and Master schedules), or delete bills from the internal archive, and to export bills as the MS Excel Worksheets.

COMPUTER REQUIREMENTS AND SOFTWARE DELIVERY

The software may be used for MS Windows-2000, -XP and -Vista operational systems, and does not require any pre-installed applications. The delivery mode is either by download, or on the single CD, with all the necessary applications bundled with it. Trial version (with limited use duration) is also available.