



Kaseya

**Business Management Solution (BMS)
Billing Setup Guide: Best Practices**

BMS™
by Kaseya

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1. Introduction

Implementing dedicated processes for your MSP business is the key to increasing profitability and customer satisfaction. Without a proper framework in place, you cannot create repeatable or scalable results using these processes.

Using the pricing models developed by truMethods™, we have created this step-by-step guide to assist you in creating the contracts and billing automation in support of your business.

2. Setting Up Roles

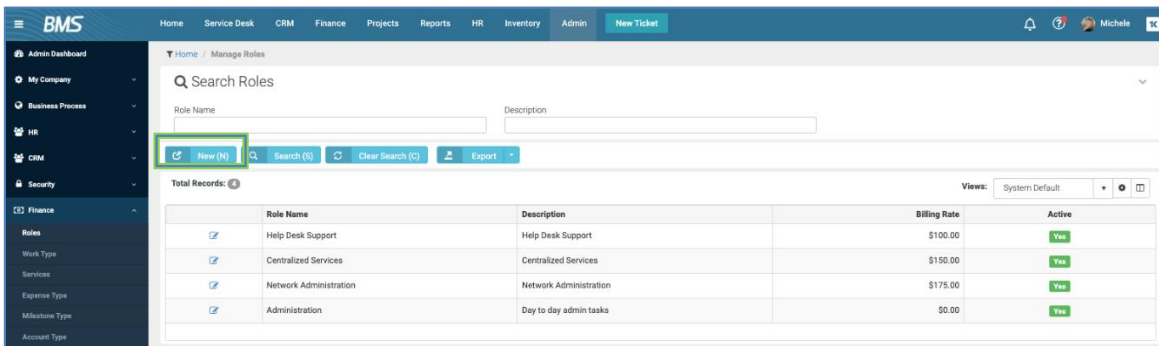
Roles are used by employees to classify the work time billed to customers.

- Each role has a defined default billing rate.
- Roles are applied when entering labor time on tickets or project tasks.
- Roles are assigned to employees.
- Employees who are assigned multiple roles can select any of their roles when working a task or ticket.
- In Projects, the project manager can lock down the role when assigning a task to an employee.
- You can override role rates by creating a Time and Material Contract for a specific customer.

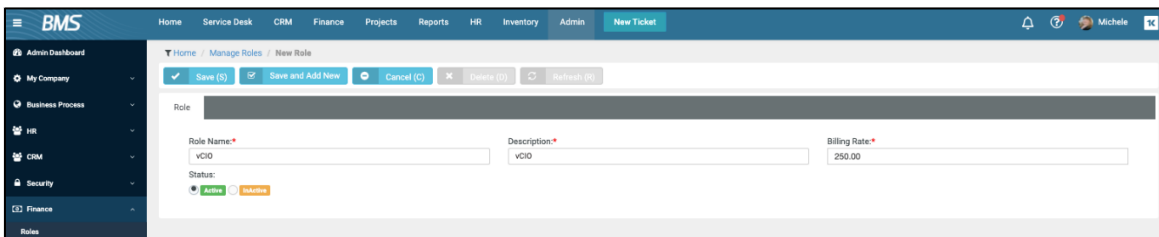
Based upon the three pricing methods (FFF, PFF, POC), there will be five defined roles:

- Helpdesk support
- Centralized services
- Network administration
- vCIO
- Professional services
- Administration (This role comes as default in the system and is used when no billing is needed to track time.)

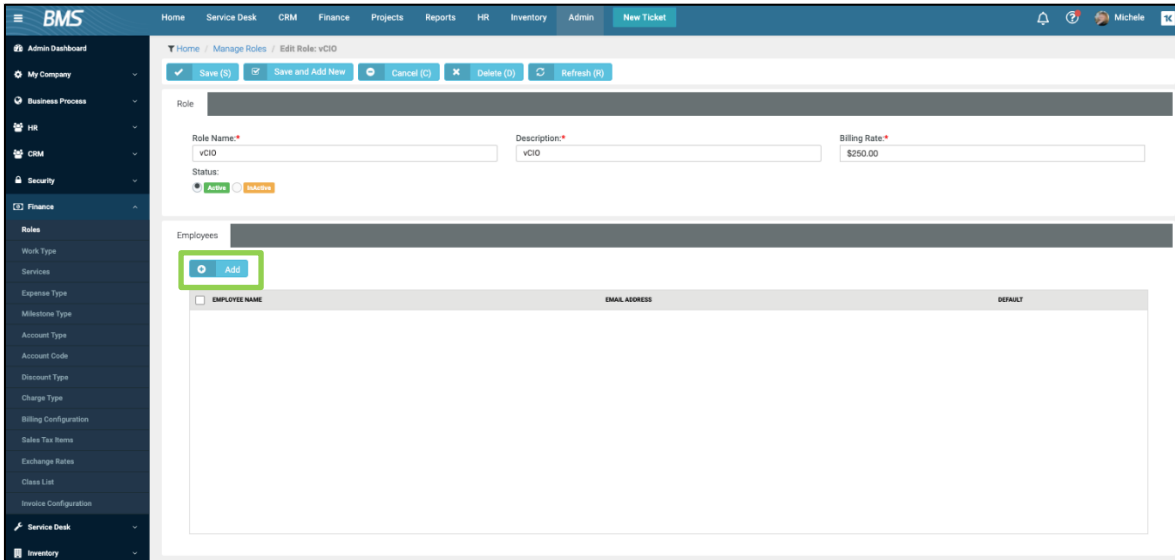
1. Go to **Admin** module > **My Company** > **Finance** > **Roles**.
2. Click on **New** to create your role(s).



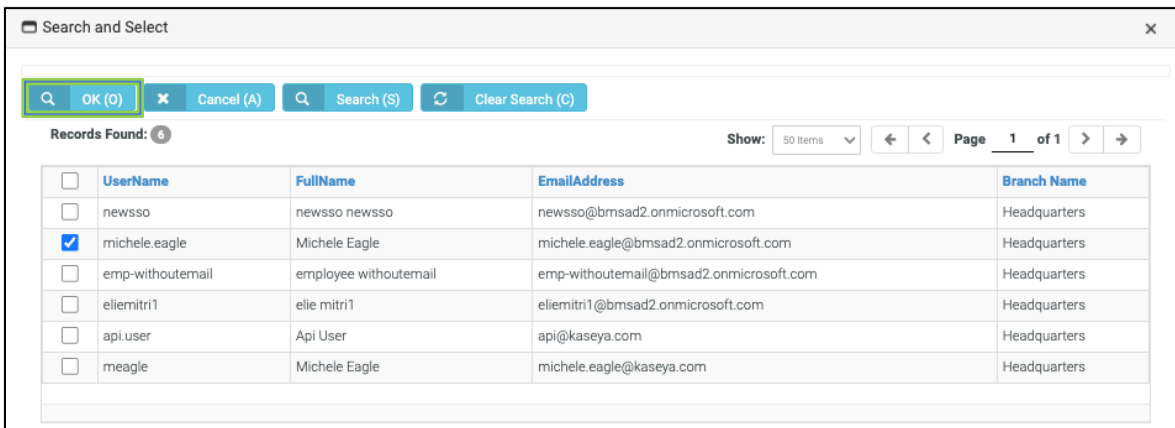
3. Fill in the required fields indicated by the *. You will see the role name when you add time.



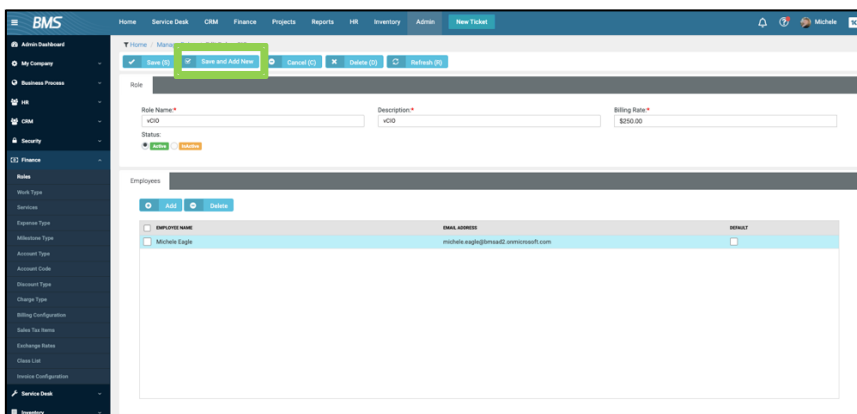
4. Click the **Save** button
5. When you click **Save**, you will then see an additional tab below where you can add the role to the employees who can use this role in time entry. Click on **Add**.



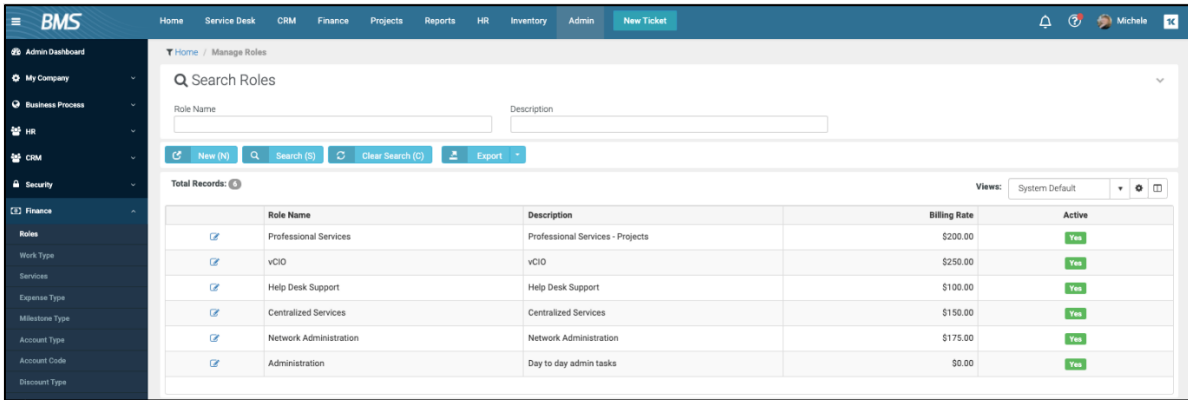
Select the employee(s) who can use the role and click on **OK**.



- Click on **Save and Add New** to create the rest of your roles and to assign to the appropriate employees.



7. When you have finished with your role, the list would look like this:



The screenshot shows the 'Manage Roles' interface in Kaseya BMS. It includes a search bar at the top, a table of roles, and a sidebar with navigation options. The table lists the following roles:

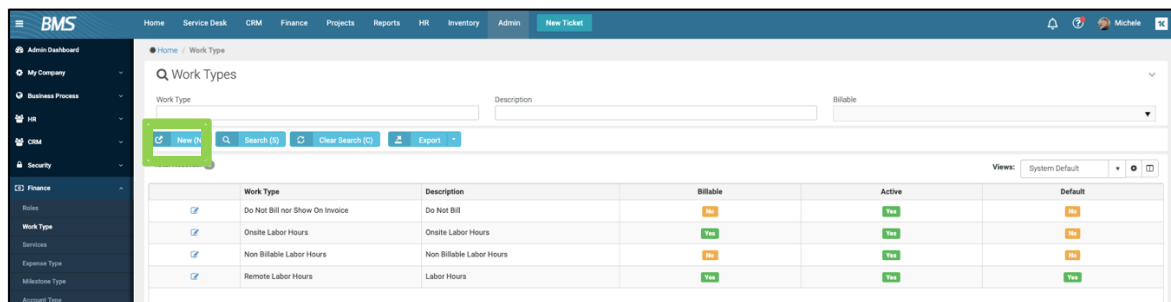
| Role Name | Description | Billing Rate | Active |
|------------------------|----------------------------------|--------------|--------|
| Professional Services | Professional Services - Projects | \$200.00 | Yes |
| vCIO | vCIO | \$250.00 | Yes |
| Help Desk Support | Help Desk Support | \$100.00 | Yes |
| Centralized Services | Centralized Services | \$150.00 | Yes |
| Network Administration | Network Administration | \$175.00 | Yes |
| Administration | Day to day admin tasks | \$0.00 | Yes |

3. Setting Up Work Types

The **Work Type** page maintains a list used to classify the work performed on tickets and tasks. You can optionally specify a custom billing rate by work type that overrides the billing rate specified by a user's selected role on a ticket or task.

- Work types are used for tracking and reporting purposes.
- Work types assign the correct general ledger codes for your accounting system.
- You can create additional work types to apply a *custom rate* to labor time entries on a ticket.

1. Go to **Admin module > My Company > Finance > Work Type.**



TIP: There are pre-built work types created for your use. Keep them as they are or rename them to the recommended ones shown here:

- Onsite Support
- Remote Support
- Non-billable labor hours
- Non-supported user

2. Edit one of the existing work types or click on **New**.

3. Fill in required fields indicated by the *.

Work Type Name *

Description *

Status – Active or Inactive

Income Account – Select the correct income account for this work type based upon your accounting system integration. If none is integrated, you can leave this blank.

Expense Account – Select the correct expense account for this work type based upon your accounting system integration. If none is integrated, you can leave this blank.

Invoice

- Non-billable do not show on invoice. These will not present in Billing Review in Finance module

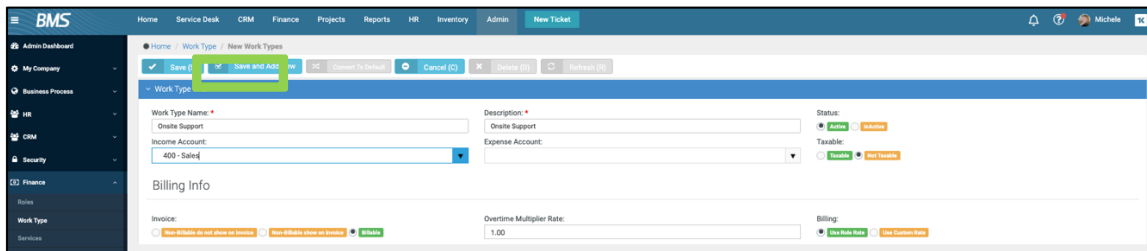
- Non-billable show on invoice. These will present in Billing Review in Finance module as 0.00 billing rate
- Billable. These will present in Billing Review in Finance module using correct role rate

Overtime Multiplier Rate - Multiplies the hourly billing rate for overtime. Defaults to 1.

TIP: Overtime is calculated based upon the employee entering the time and their shift hours. In the Employee record you set their working hours. If the Allow Overtime Box is checked, the system will then calculate overtime rates using their working hours.

Billing

- Use Role Rate - Billing uses the hourly rate specified for the role the user selects in a ticket or task.
- Use Custom Rate - If selected, the **Custom Rate** field displays. Enter a custom hourly billing rate for this work type.



4. Click on **Save**.
5. Rename and/or build your work types. When completed, you are ready to build your contracts.

4. Setting Up Services

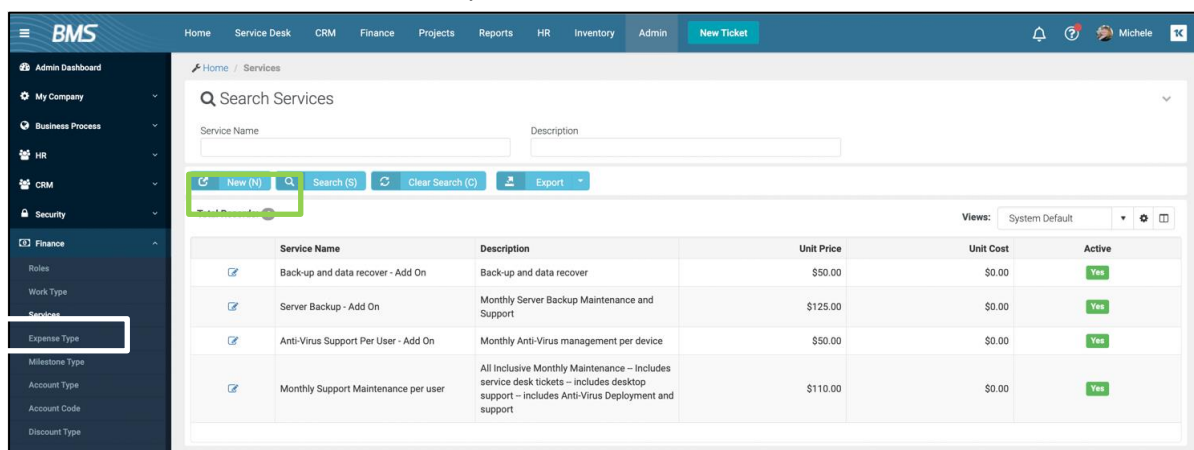
The **Services** page maintains a list of standard services as part of a recurring services contract. A flat fee is specified for each type of device or service that is supported in your client’s environment. These services are available in a drop-down list when building recurring services contracts using the **Finance** module > **Contracts** page.

The services you offer are your “company way” truMethods™ and would differ from MSP to MSP. In our example, we focus on the AISP and on having standard services across all customers. Our “company way” includes anti-virus and backup services as part of the monthly fee for all example variations (FFF, PFF, POC).

The AISP includes:

- Helpdesk support
- Centralized services
- Anti-virus deployment
- Backup up to 1 TB included

1. Go to **Admin** module > **My Company** > **Finance** > **Services**.
2. No services are pre-defined. You can export them from QuickBooks Online/Desktop and Xero or you can build them. To create one manually, click on **New**.



3. Fill in required fields indicated by the *.
- Service Name** * – Name of the service that is shown on contract and invoice (if desired).
- Description** * – Description is shown on contract and invoice. This description is the default and modifiable on the contract to meet specific customer needs.
- Unit Price** * – Your retail price. This price can be modified in the contract but should be built here as your default retail price.
- Unit Cost** * – This is for reporting purposes only but is a required field. If you have not calculated your costs, leave them at 0.0.
- Status** – Active or Inactive
- Category** – In support of the sales automation, you can categorize your services to group them together.

Sub-Category – Sub-category for the sales automation dashboard.

Unit of Measure – Select the correct unit measure for the sales automation dashboard.

Income Account - Select general ledger account to record postings.

Expense Account - Select general ledger account to record postings.

Taxable – Taxable or Non Taxable

The screenshot shows the 'New Services' form in the Kaseya BMS interface. The form is titled 'Service' and contains the following fields and values:

- Service Name:** Monthly Support (FFF)
- Unit Price:** \$110.00
- Unit Cost:** \$0.00
- Category:** Managed Networking
- Sub-Category:** (empty)
- Income Account:** 400 - Sales
- Expense Account:** (empty)
- Unit of Measure:** Per User
- Status:** Active
- Taxable:** Taxable

The description field contains the following text:

This description is what is shown on the invoice. This is the default language and can be modified when added to the contract to best meet the individual customers information.

Monthly Support includes the following on a per user basis

- Support Tickets (Remote and Onsite Included)
- Desktop Support
- Anti-Virus Installation and Support

4. Click on **Save**. Build all services required for recurring services billing and your customer contracts.

5. Contacts – Bill By User (Contact)

The Bill By User (Contact) feature enables billing managers to bill accounts for recurring services by the number of supported users. Managers can choose exactly which contacts are billable. The contacts billed are detailed in Billing Review and can appear on the invoice.

Proration is automatically applied for recurring services, whether you bill at the beginning or the end of the billing period. If a billable item is introduced in the middle of the period, a partial service charge is applied. If a billable item is removed in the middle of the billing period, a service credit is applied in the form of a negative partial charge.

For each contact that should be considered billable, you will need to enable its billing flag.

There are two methods:

- Batch Actions
- Individual Contacts

Update Via Batch Actions

1. Go to **CRM > Contacts**.
2. Search for the data and list of contacts you want to update. Select **Batch Actions > All Pages (max 500)**.

The screenshot shows the 'Contacts' page in the Kaseya CRM. At the top, there is a search bar labeled 'Search Contacts'. Below it are several filter fields: Contact Name, Account (with 'eagle' entered), Email, Phone, Has Client Portal Access, POC, Location, Receive Invoices, and Active. Below the filters is a toolbar with buttons for 'New (N)', 'Search (S)', 'Clear Search (C)', 'Export', and 'Batch Actions'. The 'Batch Actions' dropdown menu is open, showing 'Current Page' and 'All Pages(max 500)'. Below the toolbar, there is a table with columns: Contact Name, Account, Job Title, Email, Phone, MFA, and Referral. The table contains four rows of contact data.

| Contact Name | Account | Job Title | Email | Phone | MFA | Referral |
|---------------|-----------------------------------|-----------|---------------------------------|--------------|-----|----------|
| Son1 Owner | Eagle Consulting Home Improvement | | son1owner@eaglehomeimptreal.com | 415-694-5700 | | |
| Two Owner | Eagle Consulting Home Improvement | | twoowner@eaglehomeimptreal.com | 415-694-5700 | | |
| One Owner | Eagle Consulting Home Improvement | | oneowner@eaglehomeimptreal.com | 4156745700 | | |
| Michele Eagle | Michele Eagle | | michele.eagle@kaseya.com | 415-694-5700 | | |

3. The next screen shown is the confirmation screen where you select the contacts you want to be updated. Check the contacts desired or click the top box to select all and click **Next Step**.

Home / Batch Contacts / Batch Contact Actions

Bulk Operation

Choose Contacts > Choose Operation > Operation Details > Confirmation

Previous Step Next Step

Choose Contact(s) you want to perform action on.

| | CONTACT NAME | ACCOUNT | JOB TITLE | EMAIL | PHONE | MFA |
|-------------------------------------|---------------|-----------------------------------|-----------|----------------------------------|--------------|-----|
| <input checked="" type="checkbox"/> | Son 1 Owner | Eagle Consulting Home Improvement | | son1owner@eaglehomeimproreal.com | 415-694-5700 | |
| <input checked="" type="checkbox"/> | Two Owner | Eagle Consulting Home Improvement | | twoowner@eaglehomeimproreal.com | 415-694-5700 | |
| <input checked="" type="checkbox"/> | One Owner | Eagle Consulting Home Improvement | | oneowner@eaglehomeimproreal.com | 4156745700 | |
| <input type="checkbox"/> | Michele Eagle | Michele Eagle | | michele.eagle@kaseya.com | 415-694-5700 | |

Previous Step Next Step

4. Select **Update Contacts** and click **Next Step**.

Home / Batch Contacts / Batch Contact Actions

Bulk Operation

Choose Contacts > Choose Operation > Operation Details > Confirmation

Previous Step Next Step

Choose the action you wish to perform on the selected Contact(s).

Update Contacts Update Fields of one or multiple contacts

Delete Contacts Delete one or more of the selected contacts

Previous Step Next Step

5. Update the following fields and click **Next Step**.

- **Change Bill By Contact to Yes**
- **Change Billable Effective Date:** Change Billable Date is the date that billing should begin. For dates that occur in the middle of the billing period, the system will prorate the account automatically.

Home / Batch Contacts / Batch Contact Actions

Bulk Operation

Choose Contacts > Choose Operation > Operation Details > Confirmation

Previous Step Next Step

Choose the bulk action(s) you wish to perform on the selected Contact(s).

Enable Client Portal Access: [Dropdown]

Disable MFA: [Dropdown]

Change Active Status: [Dropdown]

Change External Auth Type: [Dropdown]

Change Receive Invoices: [Dropdown]

Change Bill By Contact: [Dropdown] Yes

Change Security Role: [Dropdown]

Change Point of Contact: [Dropdown]

Change Billable Effective Date: [Text] 04/01/2022

Previous Step Next Step

6. Confirm you want to continue to run the job. Click **Confirm**.

Home / Batch Contacts / Batch Contact Actions

Bulk Operation

Choose Contacts > Choose Operation > Operation Details > Confirmation

Previous Step Confirm

Updated Fields

| Field Name | Field Action | Field Value |
|----------------|--------------|-------------|
| Billable | Change To | Yes |
| Effective Date | Change To | 04/01/2022 |

Chosen Contact(s) to perform action on.

| CONTACT NAME | ACCOUNT | ACTIVE | IS BILLABLE | BILLABLE EFFECTIVE DATE | POC | RECEIVE INVOICES | HAS CLIENT PORTAL ACCESS | EXTERNAL AUTH TYPE | SECURITY ROLE | MFA |
|--------------|-----------------------------------|--------|-------------|-------------------------|-----|------------------|--------------------------|--------------------|---------------|-----|
| Son1 Owner | Eagle Consulting Home Improvement | Yes | Yes | 04/01/2022 | NO | NO | NO | | | |
| Two Owner | Eagle Consulting Home Improvement | Yes | Yes | 04/01/2022 | NO | NO | NO | | | |
| One Owner | Eagle Consulting Home Improvement | Yes | Yes | 04/01/2022 | NO | NO | NO | | | |

Previous Step Confirm

7. The job runs and you will receive a completed status where you can then review logs by clicking on **Show Transaction Logs**. Once reviewed, you can close the screen by clicking on **Acknowledge**.

Home / Batch Contacts / Batch Contact Actions

Bulk Operation

✓ (Job#17347776) - Your requested job was completed. Please check the logs for more information.

Show Transaction Logs

Home / Batch Contacts / Batch Contact Actions

Bulk Operation

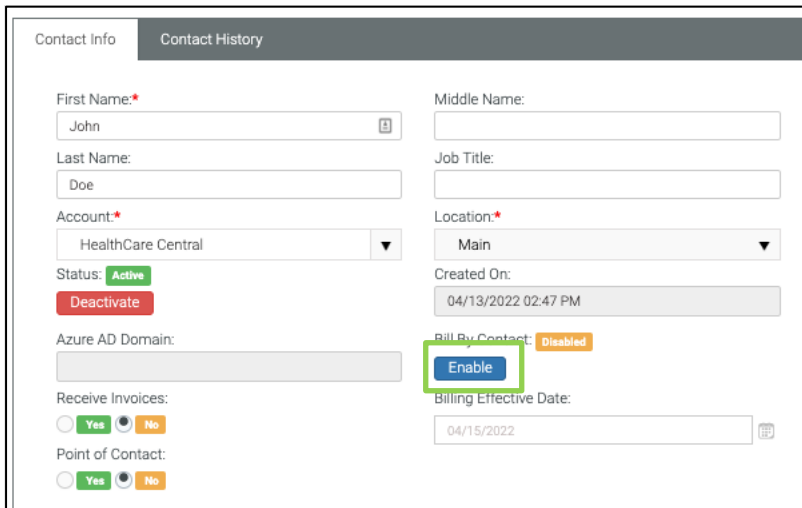
✓ (Job#17347203) - Your requested job was completed. Please check the logs for more information.

Acknowledge

| Date/Time | Message |
|-------------|--|
| - | (Job#17347203) - Job transaction logs. |
| 11:04:48 AM | Contact One Owner was successfully updated. |
| 11:04:48 AM | Contact Two Owner was successfully updated. |
| 11:04:48 AM | Contact Son1 Owner was successfully updated. |

Update Individual Contacts

1. Go to **CRM > Contacts**.
2. Search for the contact name and edit that contact.
3. **Contact Info Tab:** Update the following two fields:
 - **Update Bill By Contact:** Click on **Enable** and the Billing Effective Date pop-up will appear. Billing Effective Date is the date that billing should begin. For dates that occur in the middle of the billing period, the system will prorate the account automatically. Update the date and click on **Save**.



Contact Info | Contact History

First Name: *
John

Middle Name:

Last Name:
Doe

Job Title:

Account: *
HealthCare Central

Location: *
Main

Status: Active
Deactivate

Created On:
04/13/2022 02:47 PM

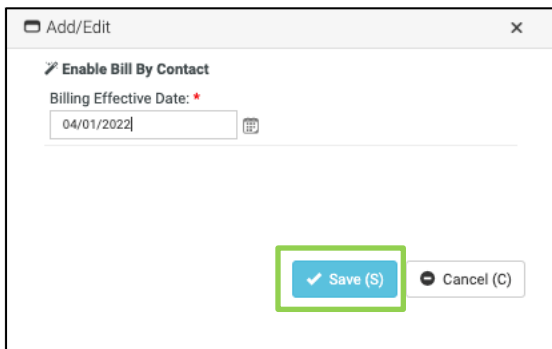
Azure AD Domain:

Bill By Contact: Disabled
Enable

Receive Invoices:
 Yes No

Point of Contact:
 Yes No

Billing Effective Date:
04/15/2022



Add/Edit

Enable Bill By Contact

Billing Effective Date: *
04/01/2022

Save (S) Cancel (C)

Once your services are built and your contacts are marked as billable, you are ready to create your contracts.

6. Building Contracts

In this section, you will see how contracts are built based upon the three pricing models identified above (FFF, PFF and POC). The way you differentiate among the three types of pricing is by using exclusions.

The **Contracts** page registers billing agreements between you and your clients. The selected **contract type** determines how billing is processed. There are five contract types.

- **Time and Material** - The customer is charged for all of hours of work performed, any direct expenses incurred, and all materials purchased to support the resolution of tickets and the completion of projects. Time entered on tickets and tasks generate billable amounts for labor on invoices. The role assigned on a labor time entry determines the rate charged for that labor. Default rates for roles can be adjusted on a per contract basis.
- **Recurring Services** - Services are billed on a contract length, weekly, monthly, quarterly, or yearly basis.
- **Fixed Price** - A fixed priced contract is not subject to any adjustment on the basis of the provider's cost experience in performing the contract. A fixed price contract is typically tied to a single project. In many contracts, the fixed price is divided into smaller milestone payments.
- **Retainer by Amount** - The total price of the contract is prepaid. Clients schedule services when needed. Billings decrement the contract amount purchased based upon hours worked and the role/work type (rate) applied. It does not decrement product or employees expenses from the prepaid amount.
- **Retainer by Hours** - Hours of service are prepaid. Clients schedule services when needed. Labor time entries decrement the retainer hours purchased. The total price of contract is calculated by multiplying the number of contract hours purchased by an average rate.

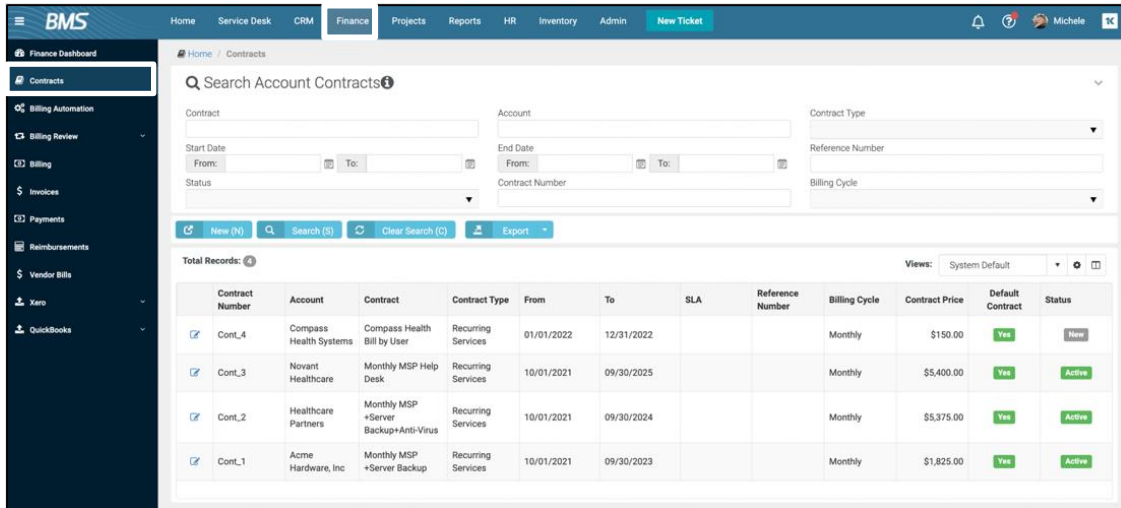
Additional guidelines:

- A customer can have multiple contracts.
- You can pick a default contract for service tickets for a client, thus eliminating the guess work if something is covered or not.
- You can link a service level agreement (SLA) to a contract.

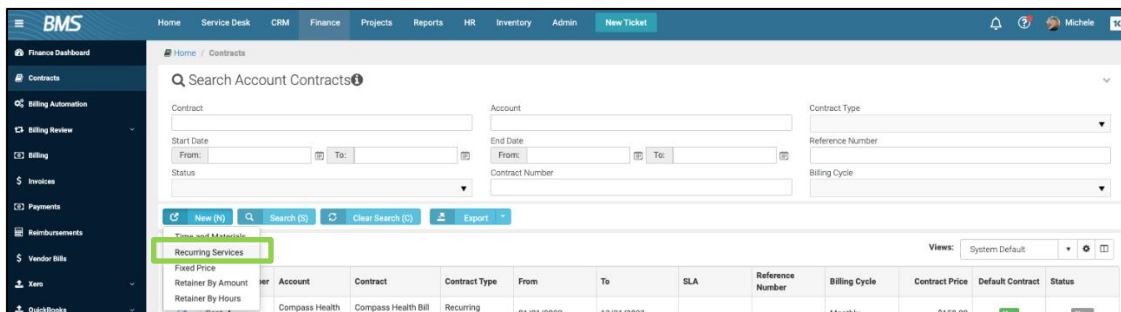
Scenario 1 – FFF (Full Fixed Fee)

In this scenario, we add an exclusion for professional services hours. Any service desk ticket or project that includes hours with a role of professional services will be billable.

1. Go to Finance module > Contracts.



2. Click on New and select Recurring Services.



3. Fill in required fields indicated by the *.

Contract Information Tab

Contract Number - Only displays when editing a contract.

Contract Name *

Account *

Start Date *

End Date * - End date is required. If you do not have a specific end date, set this date to something in the future where you know it's not a true end date and one that will remind you to review in the future for price changes.

SLA - A contract associated with an SLA overrides the **default SLA** when the ticket is linked to the contract.

Reference Number

Billing Cycle * - Contract Length, Weekly, Monthly, Quarterly, Yearly

Issue Invoice on * – Beginning of Billing Cycle, End of Billing Cycle

Default Contract for Service Desk – Yes or No – If default is set to **Yes**, the contract will automatically attach to Service Desk ticket for appropriate billing.

Billing Periods based on Calendar Year – Yes or No– For example, if you want to start a contract mid-month and pro-rate then you can select **Yes**. (I am using the calendar dates for billing). If you want a contract to start mid-month and have mid-month billing dates, you should set that to **No**.

TIP: Billing entries are not generated for hours reported on tickets and tasks linked to a recurring service contract except for exclusions. To prevent generating billing lines for labor hours independently, set the Default Contract option to Yes for that contract. When a new ticket or task is created, the default contract is linked to the ticket or task automatically.

Contract Description Tab

Enter contract description if desired.

The contract header would look like this:

The screenshot shows the 'New Contract' form in the BMS application. The 'Contract Description' tab is active. The form includes the following fields:

- Contract Name:** Monthly Managed Services - FFF
- Account:** Eagle Consulting Home Improvement
- SLA:** Company Standard SLA
- Reference Number:** (empty)
- Start Date:** 04/01/2022
- End Date:** 12/31/2023
- Billing Cycle:** Monthly
- Issue Invoice on:** Beginning of Billing Cycle
- Billing Periods based on Calendar Year:** (Yes/No buttons)
- Default Contract for Service Desk:** (Yes/No buttons)
- Custom Fields:** No Records Found!

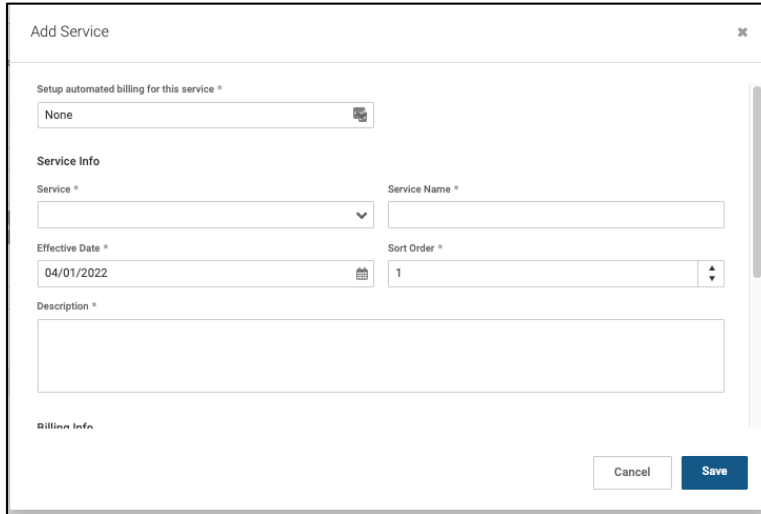
- Click on **Save**. Once saved, the contract details are presented in the second half of the screen.

The screenshot shows the 'Edit Contract' form in the BMS application. The 'Billing Information' tab is active. The form includes the following fields:

- Contract Number:** Cont5
- Contract Name:** Monthly Managed Services - FFF
- Account:** Eagle Consulting Home Improvement
- SLA:** Company Standard SLA
- Reference Number:** (empty)
- Start Date:** 04/01/2022
- End Date:** 12/31/2023
- Billing Cycle:** Monthly
- Issue Invoice on:** Beginning of Billing Cycle
- Billing Periods based on Calendar Year:** (Yes/No buttons)
- Default Contract for Service Desk:** (Yes/No buttons)
- Contract Billing Price:** \$0.00
- Buttons:** Add, Save (S), Cancel (C), Delete (D), Refresh (R), Activate, Close

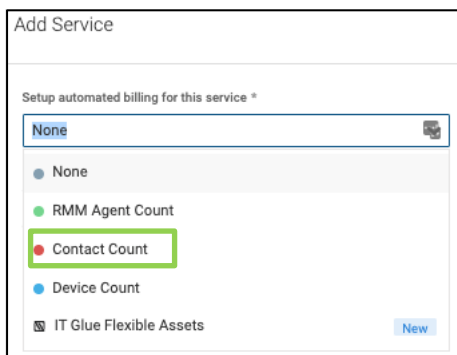
| SERVICE NAME | DESCRIPTION | EFFECTIVE DATE | UNITS | DEFAULT UNIT COST | UNIT COST | TOTAL COST | DEFAULT UNIT PRICE | UNIT PRICE | TOTAL PRICE | SORT ORDER |
|--------------|-------------|----------------|-------|-------------------|-----------|------------|--------------------|------------|-------------|------------|
| | | | | | | | | | | |

5. In the **Billing Information Tab**, click on **Add**.
6. The *Add Service* pop-up window is presented. This is where you add your billing items into your contract based upon the name of the service and in our example the automated billing.



Click in the *Setup automated billing for this service** box. You will see several methods for automated unit billing.

Select **Contact Count**. For information on how to configure Bill By User, refer to this KB article: <https://helpdesk.kaseya.com/hc/en-gb/articles/360010696337-Bill-By-User>.



When contact count is selected, you will then be able to select a location. If it is left blank, this will bring in contact counts for ALL locations for this account. In our example, we are leaving blank to bring in all contacts from all locations. (We bill the same for everyone in all locations.)

The screenshot shows the 'Add Service' window. At the top, it says 'Setup automated billing for this service *'. Below that is a 'Contact Count' field. A 'Contact Count Filter' section contains a 'Location' dropdown and an 'Update Units' button. The 'Main' section has a 'Service Name *' field. The 'Effective Date *' field is set to '04/01/2022'. The 'Sort Order *' dropdown is set to '1'. 'Cancel' and 'Save' buttons are at the bottom right.

Click on **Update Units**. This will pull in the counts as of now. Once contract is activated, the system will increase/decrease unit count and pro-rate the amount +/- each day.

Fill out the rest of the fields:

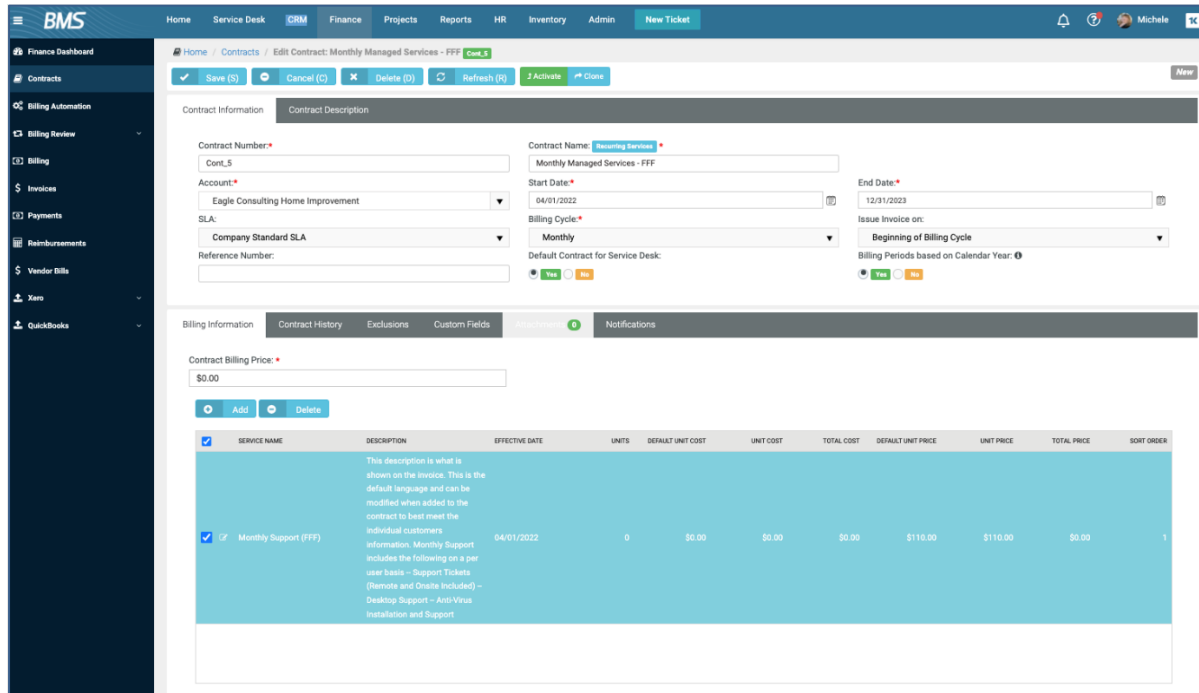
Service Info

- **Service *** - Service name you build in **Admin** module > **Finance** > **Services**.
- **Service Name *** – Description of service.
- **Effective Date ***
- **Sort Order *** - How you want presented on the invoice.
- **Description *** - Description built in **Admin** module > **Finance** > **Services** that can be modified to be specific to each account.

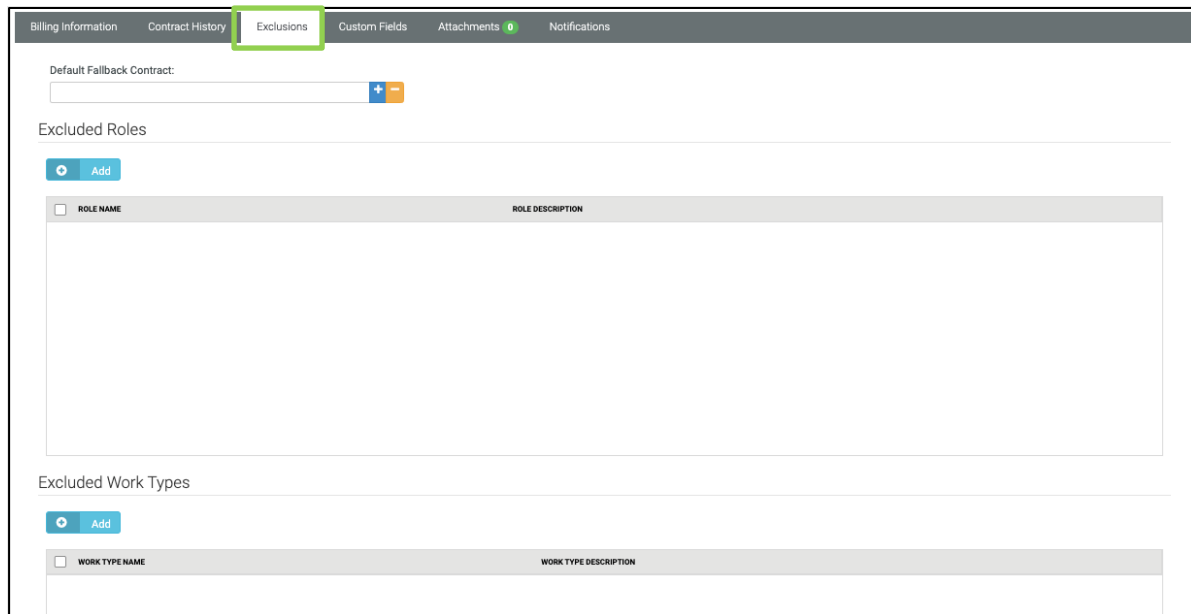
Billing Info

- **Units** – This will be pulled in based upon our billable contact count.
- **Original Unit Cost** – Cost created in the **Admin** module > **Finance** > **Services**.
- **Unit Cost *** - Default is the cost created in the **Admin** module > **Finance** > **Services** but can be modified.
- **Total Cost** – Calculated.
- **Original Unit Price** – Price created in the **Admin** module > **Finance** > **Services**.
- **Unit Price *** - Default is the price created in the **Admin** module > **Finance** > **Services** but can be modified.
- **Total Price** – Calculated.

When completed, it will look like this (1 line item added. See picture below). Continue to add all your recurring services and go to the next step when completed.



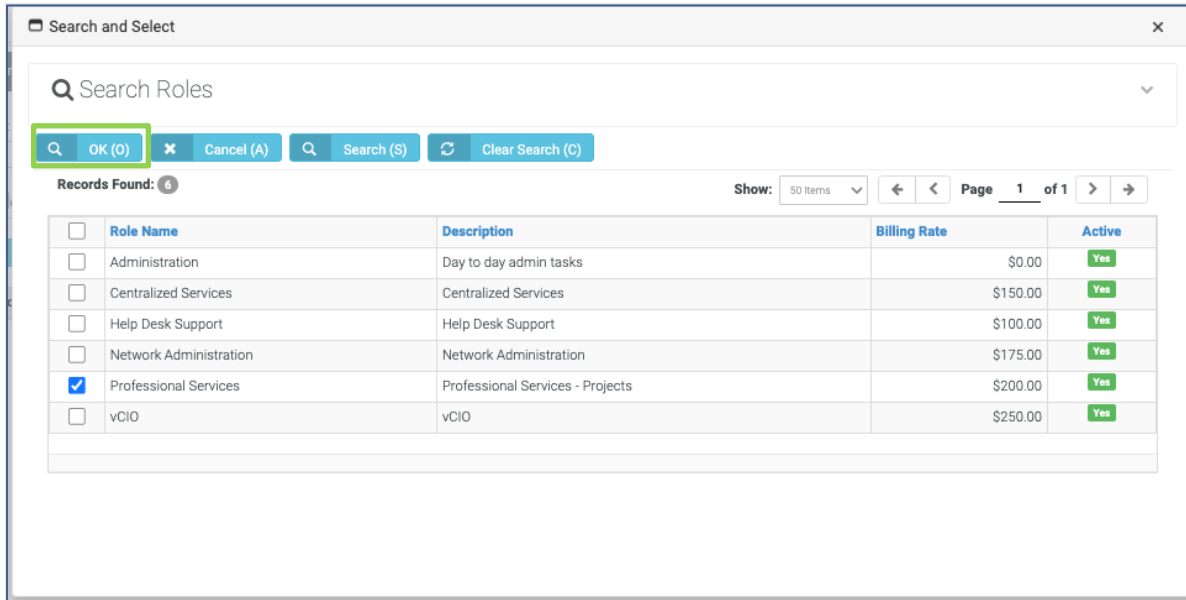
7. Click on Exclusions Tab.



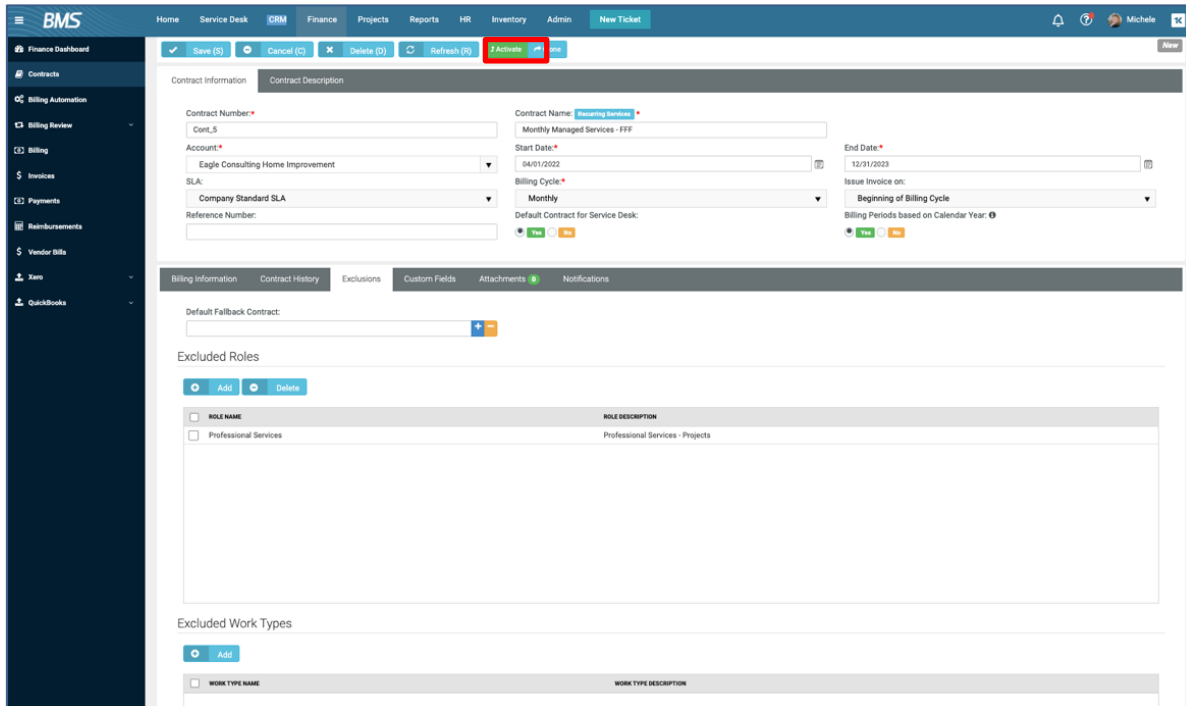
Exclusions are used to define conditions in a contract. You can use this when you want to have a specialized service and bill it out of the contract.

- When you add roles and work types under exclusions in a contract, entries using these types will not be billed under this contract.
- You can choose to either define a fallback contract or leave it blank to use rates defined in **Admin > Finance > Roles**. These items will show up to be posted under the billing review.
- The fallback contract can be any other type of contract. The **Default Fallback Contract** dropdown will list all contracts for the account it is associated with.
- Exclusions will be applied when you are posting the hours in billing.

To exclude a role (i.e. Professional Services), click on **Add** under the *Excluded Roles Section*. Select **Professional Services** from the list and click on **OK**.



Once it is added, your exclusions tab will look like this:



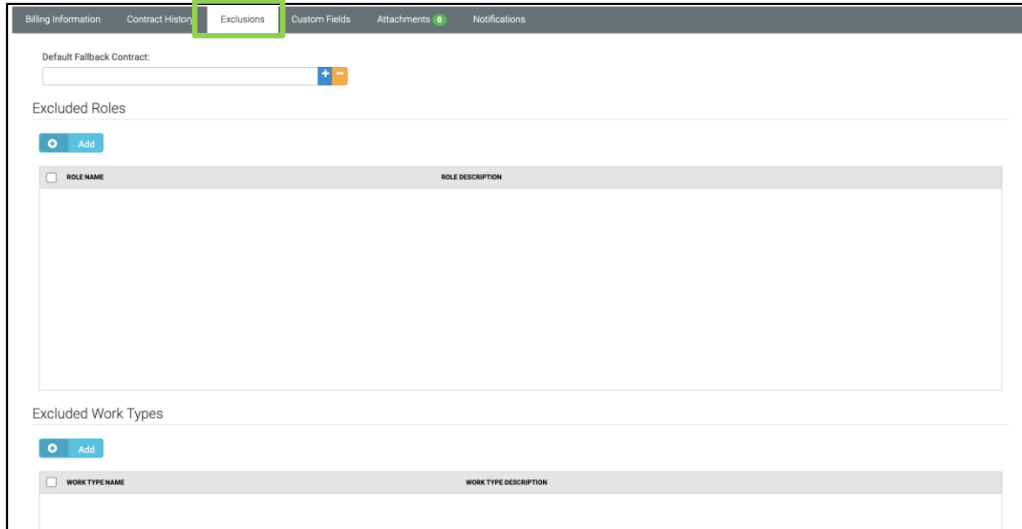
8. Review contract and click on **Activate**. Now, the contract is in effect. If it is not activated, nothing will happen.

Scenario 2 – PFF (Partial Fixed Fee)

In this scenario, we exclude Onsite Support & Professional Services hours. Any hours incurred for Onsite Support and Professional Services in tickets will be billable based upon the exclusion.

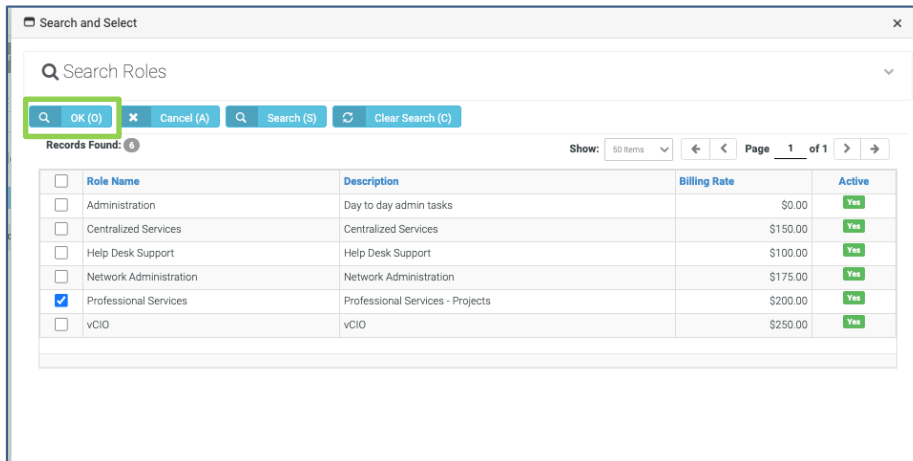
Follow **Steps 1 – 6** previously shown above in [Scenario 1 – FFF \(Full Fixed Fee\)](#) and then continue with the below steps.

1. Click on **Exclusions Tab**.



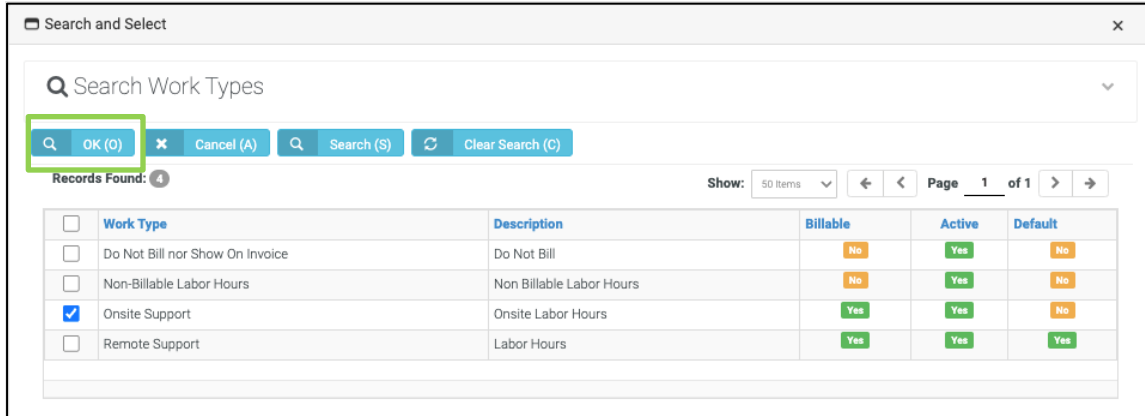
Stage 1

To exclude a role (i.e. Professional Services), click on **Add** under the *Excluded Roles Section*. Select **Professional Services** from the list and click on **OK**.

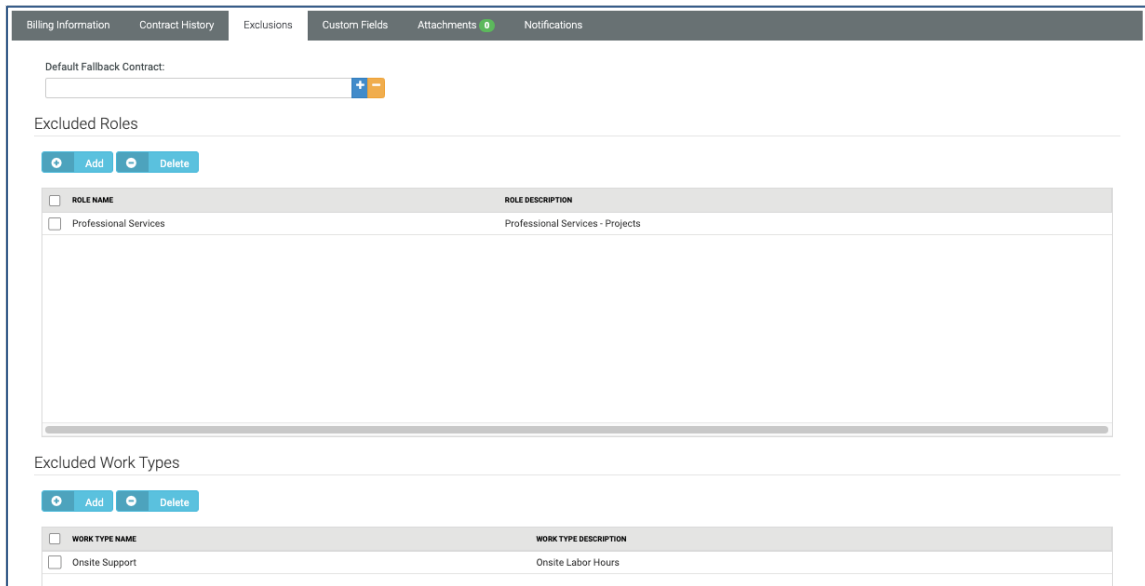


Stage 2

We are also excluding a work type (Onsite Support) and will need to add that work type to our exclusions. To exclude a work type, click on **Add** under the *Excluded Work Types* section. Select **Onsite Support** from the list and click on **OK**.



Once it is added, your exclusions tab will look like this:



- Review contract and click on **Activate**. Now, the contract is in effect. If it is not activated, nothing will happen.

The screenshot displays the 'Edit Contract' page for 'Monthly Managed Services (PFF)'. At the top right, the 'Active' button is highlighted with a red circle. The 'Contract Information' section contains the following fields:

- Contract Number: Cont_6
- Contract Name: Monthly Managed Services (PFF)
- Account: HealthCare Central
- Start Date: 04/01/2022
- End Date: 12/31/2023
- SLA: Company Standard SLA
- Billing Cycle: Monthly
- Issue Invoice on: Beginning of Billing Cycle
- Reference Number: (empty)
- Default Contract for Service Desk: Yes
- Billing Periods based on Calendar Year: Yes

The 'Billing Information' section shows a 'Contract Billing Price' of \$180.00. Below this is a table of services:

| SERVICE NAME | DESCRIPTION | EFFECTIVE DATE | UNITS | DEFAULT UNIT COST | UNIT COST | TOTAL COST | DEFAULT UNIT PRICE | UNIT PRICE | TOTAL PRICE | SORT ORDER |
|-------------------------------------|--|----------------|-------|-------------------|-----------|------------|--------------------|------------|-------------|------------|
| <input type="checkbox"/> | All Inclusive Monthly Maintenance – Includes | | | | | | | | | |
| <input checked="" type="checkbox"/> | Monthly Support Maintenance per user | 04/01/2022 | 2 | \$0.00 | \$0.00 | \$0.00 | \$110.00 | \$90.00 | \$180.00 | 1 |

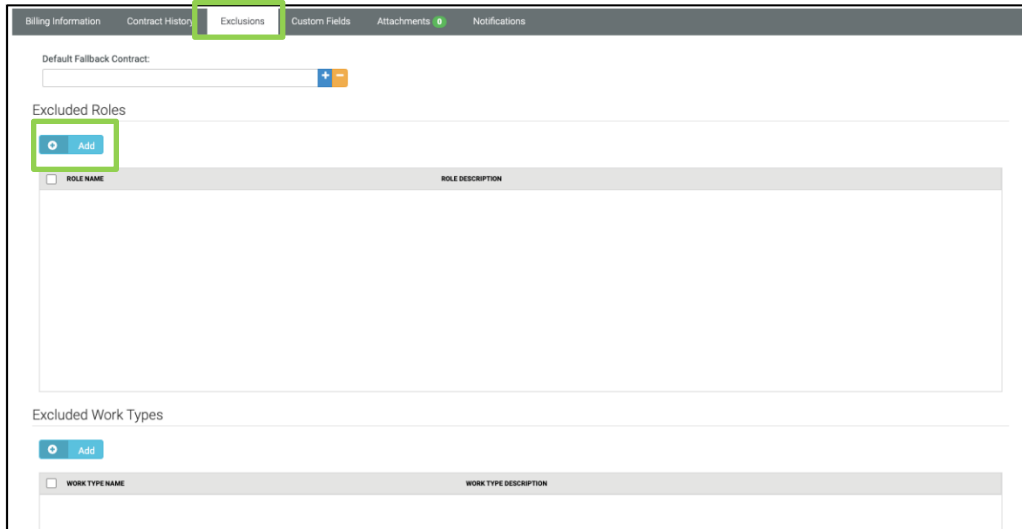
Scenario 3 – POC (Named Point of Contact)

In this scenario you only support designated contacts at your customers. Any hours incurred for Non-Supported User, Onsite Support and Professional Services in tickets and projects will be billable based upon the exclusion. The contract itself is similar to the PFF contract. The difference is that only contacts in your Contacts list in the account will get service and you will be required to use another work type called Non-Supported User.

This scenario requires you to pre-build all contacts that are supported and which have not set up email domain on the account. When an email comes in from an unsupported contact, it will go into the Unknown Ticket bucket for your review.

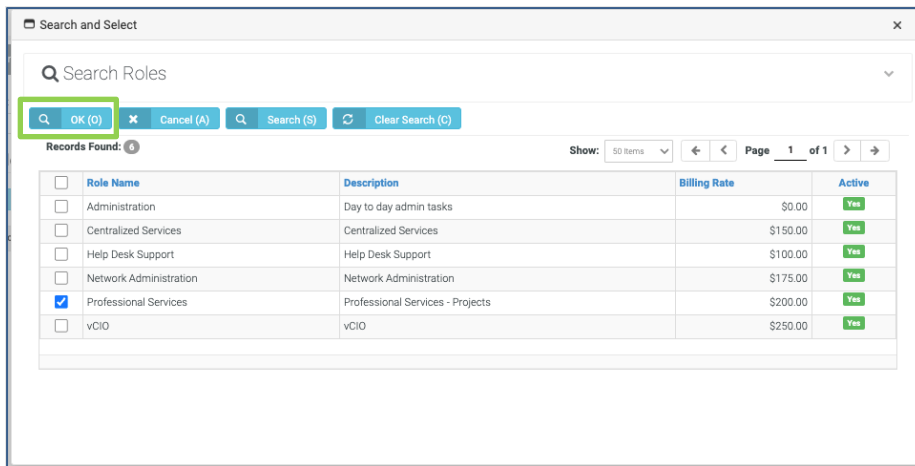
Follow **Steps 1 – 6** previously shown above in [Scenario 1 – FFF \(Full Fixed Fee\)](#).

1. Click on Exclusions Tab.



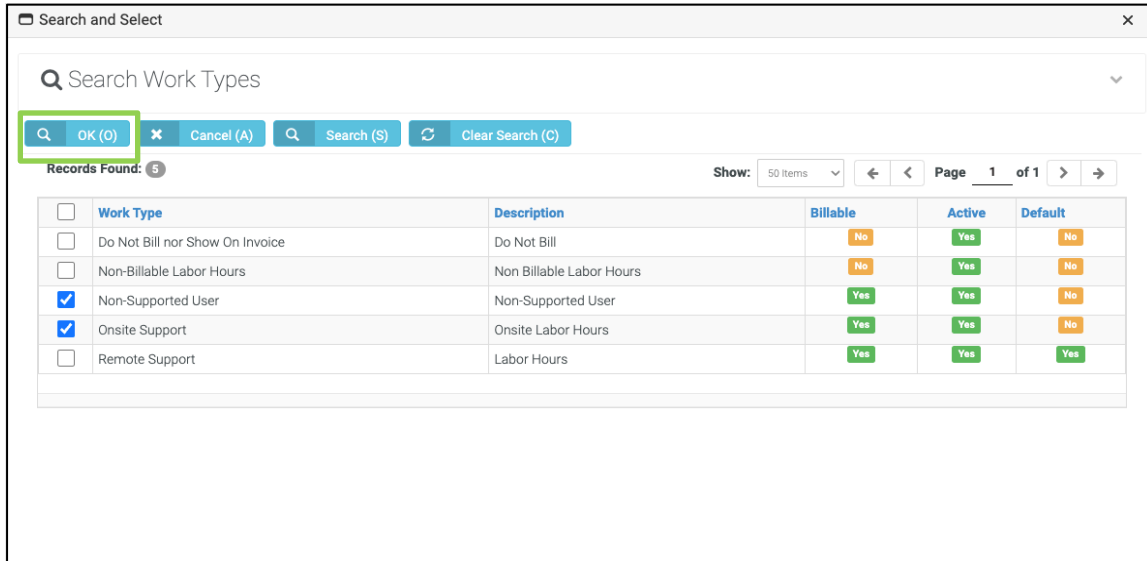
Stage 1

To exclude a role (i.e. Professional Services), click on **Add** under the *Excluded Roles Section*. Select **Professional Services** from the list and click on **OK**.

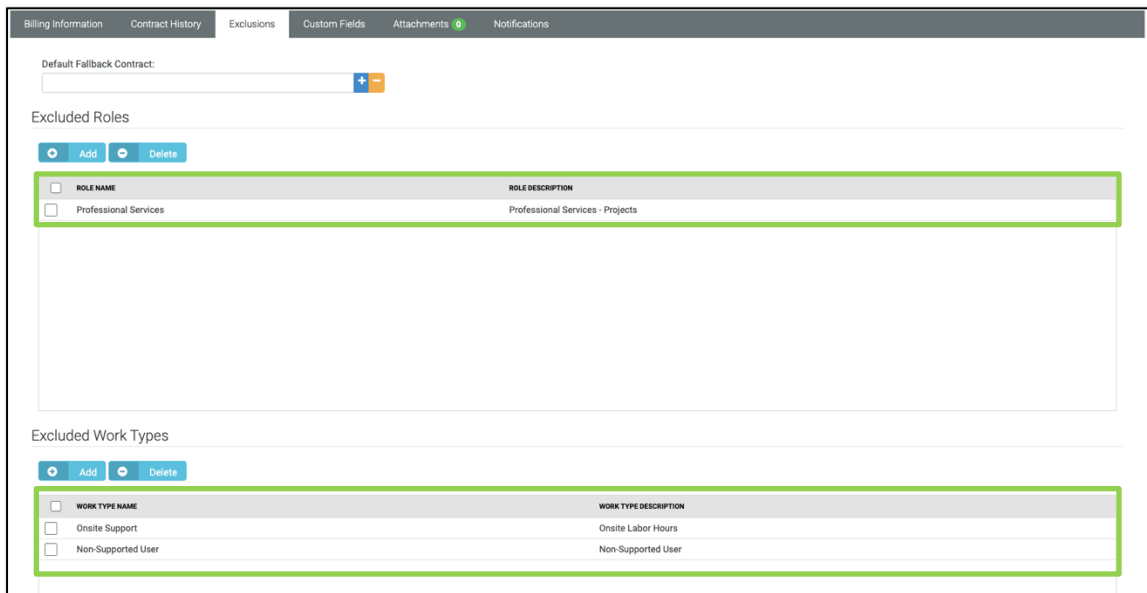


Stage 2

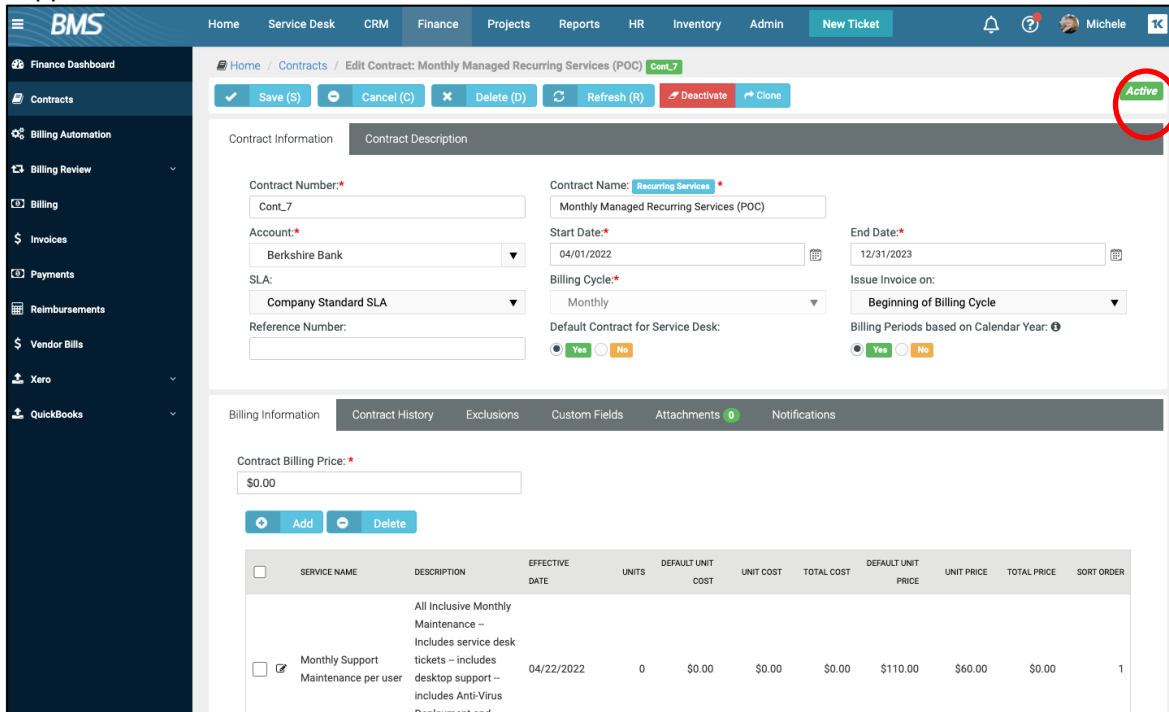
We are also excluding two work types (Onsite Support and Non-Supported User) and will need to add those work types to our exclusions. To exclude a work type, click on **Add** under the *Excluded Work Types* section. Select **Onsite Support** and **Non-Supported User** from the list and click on **OK**.



Once it is added, your **Exclusions** tab will look like this:



- Review contract and click on **Activate**. Now, the contract is in effect. If it is not activated, nothing will happen.



TIP: If a contact is unsupported and sends an email, that email goes into an unknown ticket. Based upon your agreement with the customer, do you support the customer and then bill for the work or do you send a notification? You would handle the situation depending on your agreement.

RECOMMENDATION: Have a default contact that is supported in this account, then attach it to the ticket and add the person who emailed as a CC on the ticket. A CC on a ticket does not have to be built as a contact but can receive notifications. Using workflow, send the email. Then, based upon the response, bill for that contact or bill for the time on the ticket. If you are billing for the time on the ticket, use the Non-Supported User work type.

7. Billing Automation

You will have two billing automation jobs with the above billing scenarios - one job to run your recurring services and one job to run your billable labor hours and any other product or employee billable expenses.

Prior to building your automation jobs, create your invoice template.

Creating Invoice Email Template

The emails you create and send to customers or employees are based on standard templates you maintain using the **Email Templates** page. Email templates are classified by the *module* they apply to.

Email template examples include:

- **Service Desk** - Sending communications based on ticket creation, assignment, status changes, requests for information and closure
- **CRM** - Sending quotations to prospects or customers
- **HR** - Welcoming new employees to logon for the first time.
- **Inventory** - Sending a purchase order to suppliers
- **Finance** - Sending invoice to your customers
- **Client Portal** - Sending new client portal user and reset client portal user password emails to your customers.

Editable Header Fields

Email Template Name * - The name of the email template.

Description * - A longer description of the email template.

Module * - The module using this email template.

Status - If Active, this email template can be used.

Editable Email Template Details

From * - Defaults from the **Admin > My Company > Company Settings > General > Business Email** field.

CC - Additional recipients to copy.

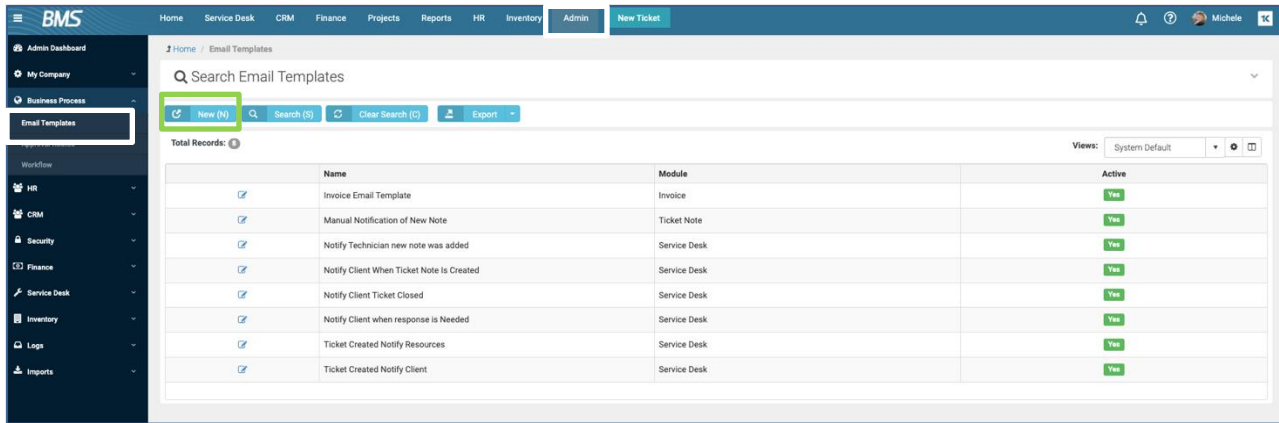
BCC - Additional recipients to blind copy.

Subject * - The subject of the message.

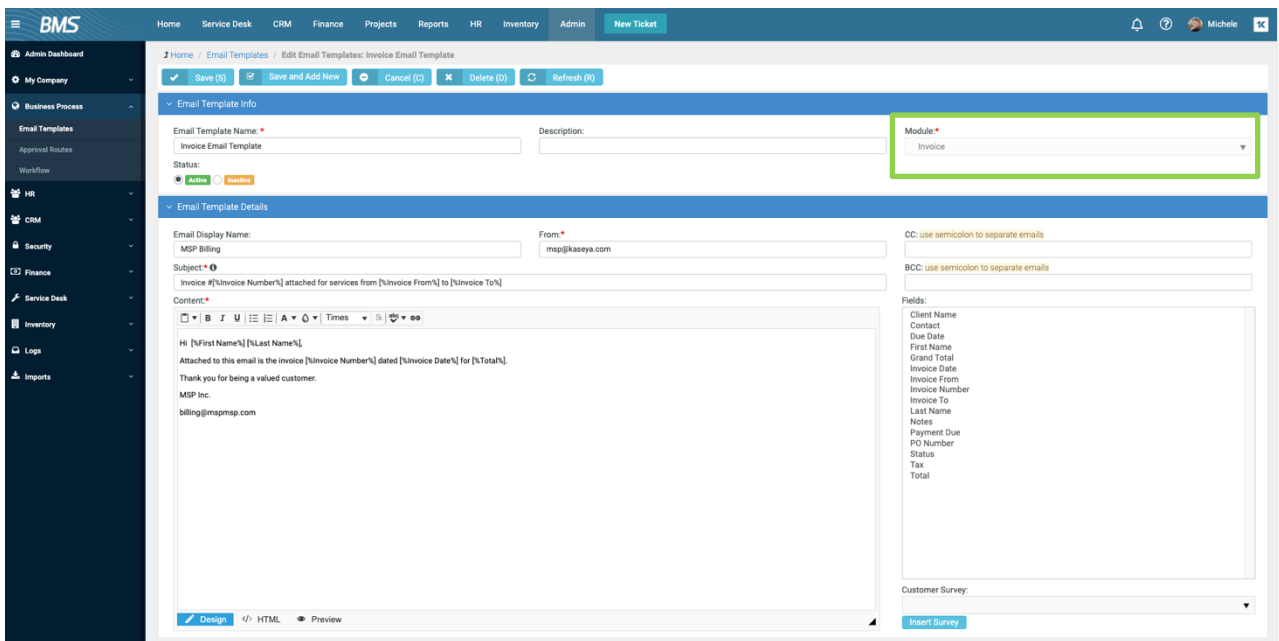
Content * - The body text of the message.

Fields - Insert your cursor anywhere in the body text area of your message, then click any field listed in the **Fields** list. A *field placeholder* will be inserted into the body text. When a message is sent, these field placeholders are resolved to specific values. The list of fields available to select is based on the module you select in the **Module** field in the header.

1. Go to **Admin** module > **Business Process > Email Templates**.
2. Click on **New**.



3. Fill in required fields indicated by the *. Select the module **Invoice**.



4. Click on **Save**.

Now that your email template has been created, you can now create your billing automation jobs.

Billing Automation Job One – Recurring Services

You should bill monthly managed recurring services in advance and the below scenarios reflect that billing practice.

The most important areas of billing automation are Billable Date Range and the Job Schedule Date/Time. These two settings work together to pull in the data for the invoice. If this selection is wrong, it will result in the wrong data or no data being pulled into the invoice.

1. Go to **Finance module > Billing Automation**. Click on the **New** button.

Fill out the header as shown above. Click **Save**. Once saved, the detail section tabs at the bottom will appear.

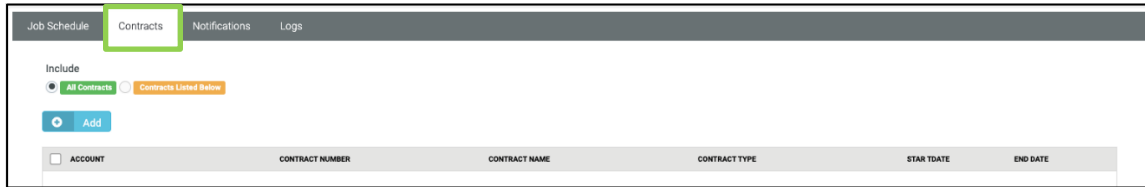
2. Job Schedule Tab

This job would run on the first day of the month bringing in the pro-rated Recurring Services transactions incurred during previous month and this month’s contractual billing based upon the date range criteria shown above.

3. Contracts Tab (Applies to all billing automation jobs)

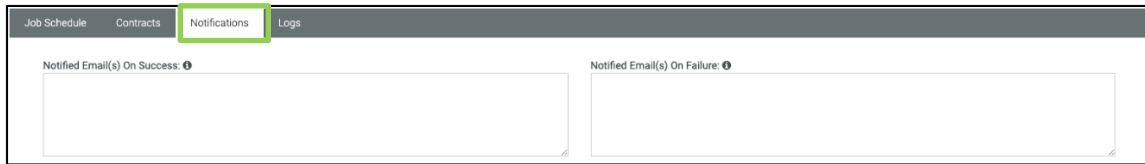
Include all contracts.

You can specify contracts, but you have to remember to update each time you add a new contract (not recommended).



4. Notifications Tab (Applies to all billing automation jobs)

Add your email address. Press Enter after each address if more than one is included. Not recommended to set up notifications as the logs will show you all details but is available to you.

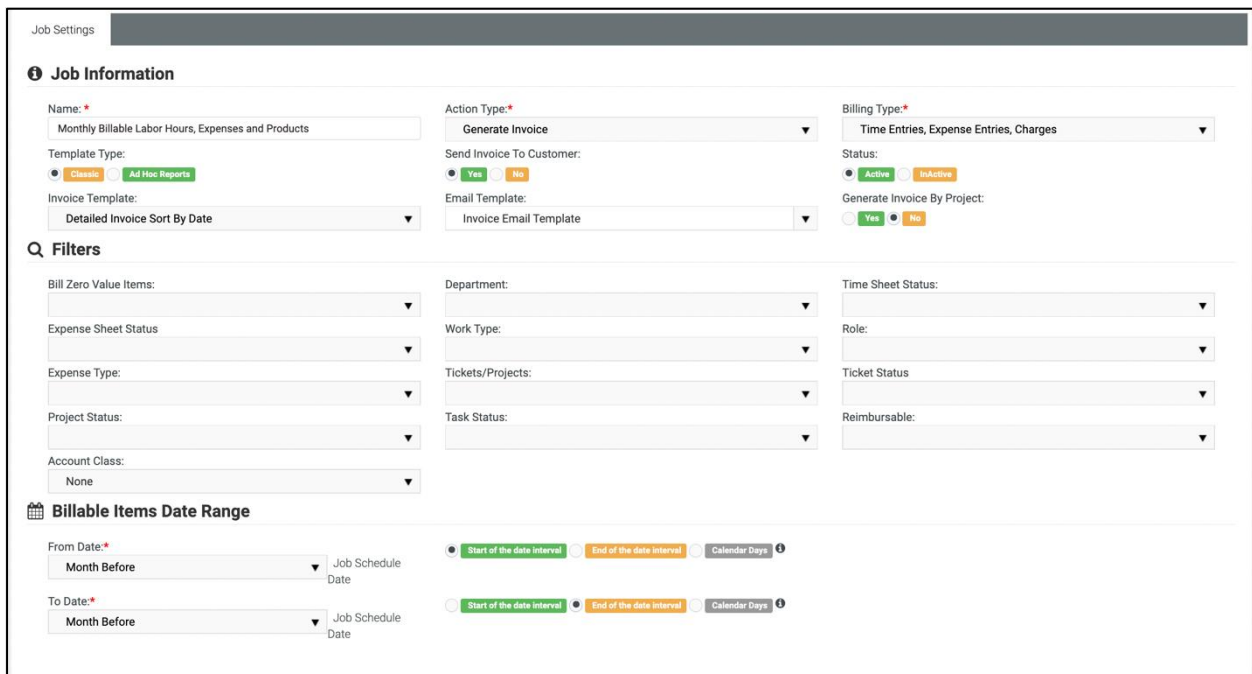


5. Logs Tab

Every time a job runs a detailed log is shown providing the details of all invoices created.

Billing Automation Job Two – Time Entries (Labor Hours), Employee Billable Expenses and Product Charges

1. Go to **Finance** module > **Billing Automation**. Click on the **New** button.



Fill out the header as shown above. Click **Save**. Once saved, the detail section tabs at the bottom will appear.

2. Job Schedule Tab

This job would run on the first day of the month bringing in the previous months' unbilled labor hours, expenses and product charges.

Job Schedule | Contracts | Notifications | Logs

Enable Scheduler:
 Yes No

Recurrence:

Repeats: Monthly

Repeat every: 1 month(s)

Repeat on:
 Day 1 of the month
 The First Sunday of the month

Time:
Time:* 05:00 AM

3. Contracts Tab

Include all contracts.

You can specify contracts, but you have to remember to update each time you add a new contract (not recommended).

Job Schedule | **Contracts** | Notifications | Logs

Include
 All Contracts Contracts Listed Below

| ACCOUNT | CONTRACT NUMBER | CONTRACT NAME | CONTRACT TYPE | START DATE | END DATE |
|---------|-----------------|---------------|---------------|------------|----------|
|---------|-----------------|---------------|---------------|------------|----------|

Notifications and Logs tabs are the same as in Job One.

TIP: Each customer can have up to at least two invoices monthly: Recurring Services & Billable Labor Hours, Expenses and Product Charges.

You should always have at least two billing automation jobs scheduled to run to produce the required invoices. If there are no billable hours, expenses or product charges, no invoice will be generated. However, once you have set them up, you don't need to worry about them. Let the system do the work.

8. Glossary of Terms

Role – Classifies the type of work performed for time entries on tickets and tasks. For example, Helpdesk, vCIO.

Work Type – Classifies the work performed on tickets and tasks assigning the general ledger code. Was this work performed remotely or on-site? Role plus Work Type is needed for all Time Entries.

Contract Billing Examples

FFF – Full Fixed Fee – All included pricing.

- Unlimited remote and onsite support
- Centralized services
- Network administration
- vCIO
- Professional services (possibly included)

PFF – Partial Fixed Fee – Onsite and Professional Services not included.

- Unlimited Remote
- Centralized Services
- Network Administration
- vCIO
- Professional services not included

POC – Point of Contact – Designated Point of Contact (Escalation Model)

- Unlimited remote (designated contact only)
- Centralized services
- Network administration
- vCIO
- Professional services not included

AISP – All in Seat Price – Based upon people you support, not devices. How much you are charging for your services per seat.

truMethods™ – A framework developed with software and strategy for a continuously evolving industry.

Further Resources

Kaseya has a wealth of resources available to help you maximize your investment in the Kaseya platform including:

The online **Kaseya Learning Center** includes a vast selection of computer-based training on all the Kaseya modules: <http://university.kaseya.com>

The **Knowledge Base** is a repository for our Kaseya processes and troubleshooting recommendations: <https://helpdesk.kaseya.com/home>

We have a vibrant community within **Forums** where ideas are exchanged on how to get more from the Kaseya platform:
<http://community.kaseya.com/xsp/f/default.aspx>

A large selection of Kaseya documentation can be found in the **Resources** section of the Kaseya community:
<http://community.kaseya.com/resources/m/docandguides/default.aspx>

ABOUT KASEYA

Kaseya® is the leading provider of complete IT management solutions for Managed Service Providers and small to mid-sized businesses. Kaseya allows organizations to efficiently manage and secure IT in order to drive IT service and business success. Offered as both an industry-leading cloud solution and on-premise software, Kaseya solutions empower businesses to command all of IT centrally, manage remote and distributed environments with ease, and automate across IT management functions. Kaseya solutions currently manage over 10 million endpoints worldwide and are in use by customers in a wide variety of industries, including retail, manufacturing, healthcare, education, government, media, technology, finance, and more. Kaseya, headquartered in Dublin, Ireland is privately held with a presence in over 20 countries. To learn more, please visit www.kaseya.com

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