

MyriadApp

**On-Demand Business
Applications**

*How to create billable
activities*



Create Billable Activities

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How to Create a Billable Activity from Calendar

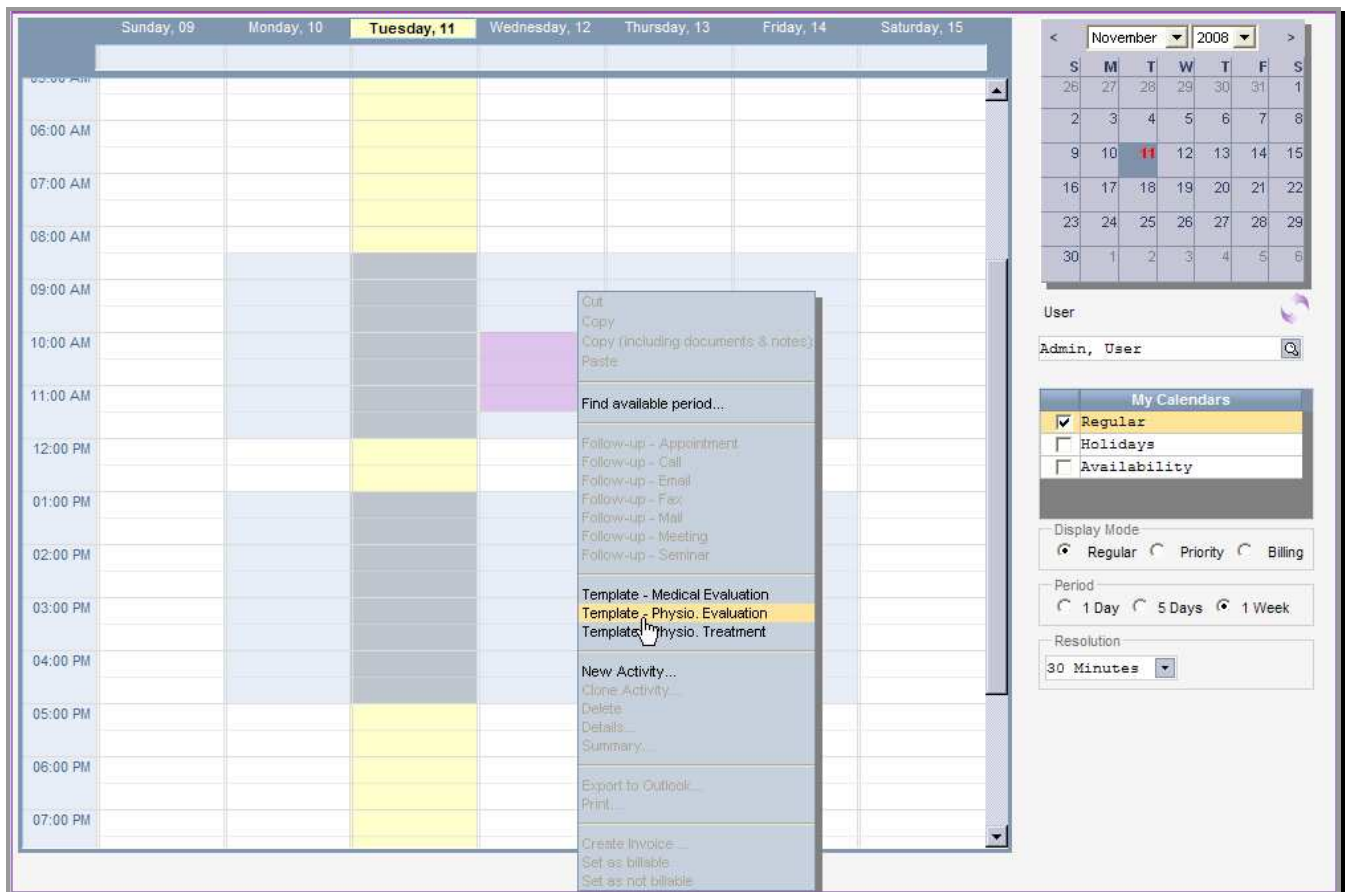
Go to Calendars application



Description

Select Sales process and then Calendars application.

Create Billable Activity



Description

Hold mouse left button to create an activity time block on schedule grid.

Right-click on selected activity time block to access contextual menu.

Select a Billable Activity Template from contextual menu (Template - ...).

Activities application then gets loaded with information from template already entered.

The screenshot displays the 'Create Billable Activity' form in the MyriadSuite application. The form is organized into several sections: 'Activity', 'Attendees', 'Tasks', 'Documents', 'Notes', 'Sub Activities', and 'History'. The 'Activity' section contains fields for 'Responsible' (Admin, User), 'Name' (Physio. Evaluation), 'Parent Activity', and 'Applies To' (Account, People, Project, Product, Calendar, Template). The 'Attendees' section shows a list of attendees with 'Smith' selected. The 'Tasks' section includes 'State', 'Type' (Appointment), 'Status' (Scheduled), 'Priority' (Normal), 'Billing Type' (Billable), 'Room', 'Location', 'Result', and 'Reminder'. The 'Dates And Times' section includes 'Start' (2008-11-12 10:00), 'Duration', and 'End' (2008-11-12 11:30). The 'Calendar' section includes 'Show in Regular' and 'Impact On Availability' (Available, Not Available). The form also has a 'Description' field and a set of buttons (Done, New, Modify, Delete, Save, Cancel) on the right side.

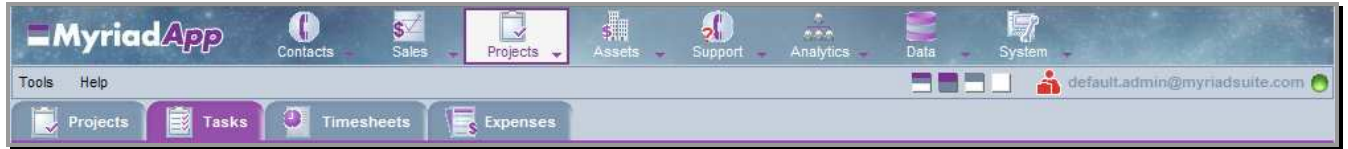
Make sure you provide all the mandatory fields (in red).

Use the **Save** button when information has been entered.

Billable Activity is now created in Calendar!

How to Create a Billable Activity Template

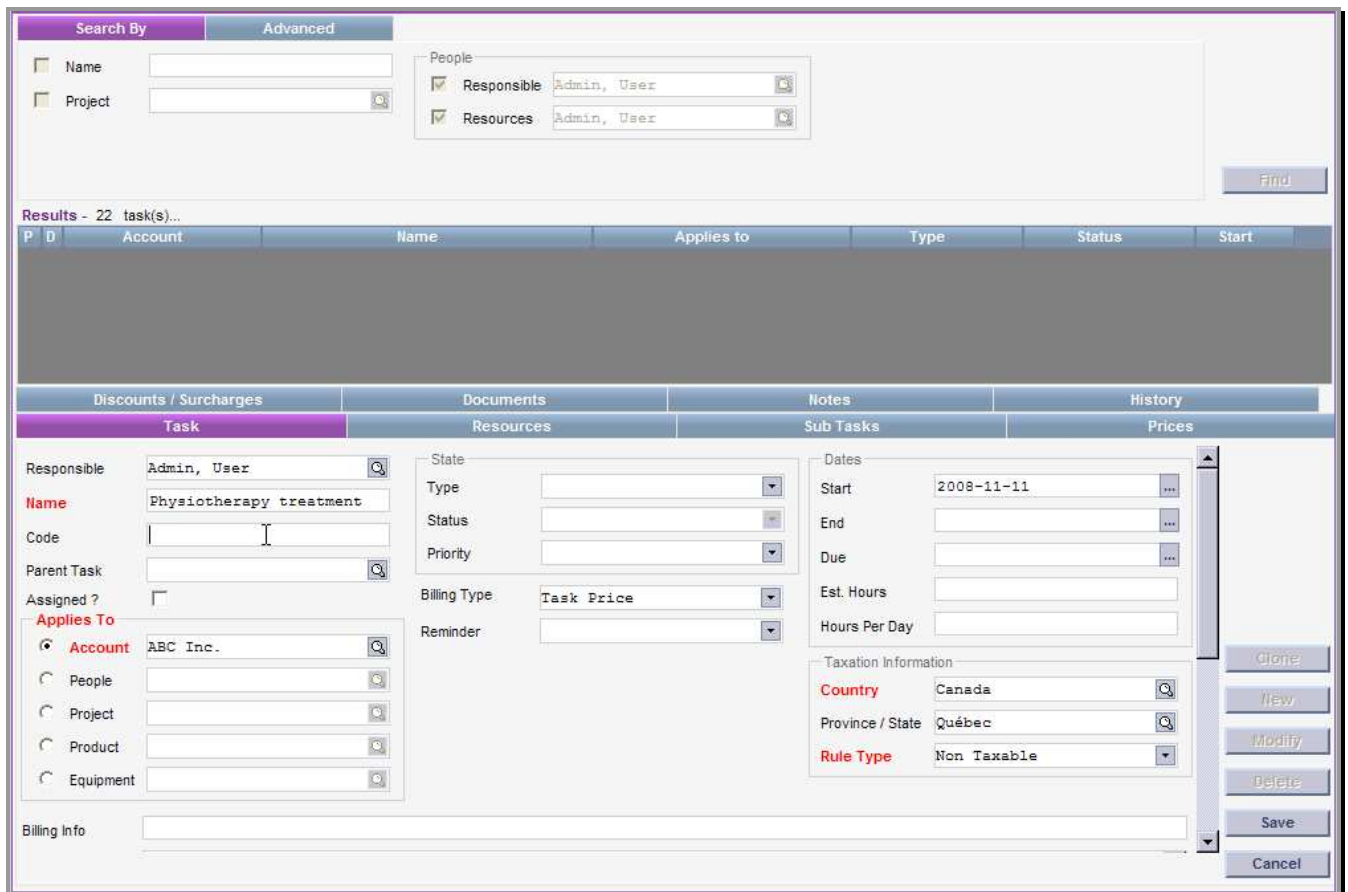
Go to Tasks application



Description

Select Projects process and then Tasks application.

Create Billable Task



The screenshot displays the 'Create Billable Task' form. At the top, there are search filters for Name and Project, and a 'People' section with checkboxes for 'Responsible' and 'Resources', both set to 'Admin, User'. Below this is a 'Results - 22 task(s)...' section with a table header including P, D, Account, Name, Applies to, Type, Status, and Start. The main form area is divided into several sections: 'Task' (with fields for Name: 'Physiotherapy treatment', Code, Parent Task, and Assigned?), 'Applies To' (with radio buttons for Account, People, Project, Product, and Equipment; 'Account' is selected and set to 'ABC Inc.'). Other sections include 'Documents' (State, Type, Status, Priority, Billing Type: 'Task Price', Reminder), 'Dates' (Start: '2008-11-11', End, Due, Est. Hours, Hours Per Day), and 'Taxation Information' (Country: 'Canada', Province/State: 'Québec', Rule Type: 'Non Taxable'). A 'Billing Info' field is at the bottom left. On the right side, there are buttons for 'Clone', 'New', 'Modify', 'Default', 'Save', and 'Cancel'.

Description

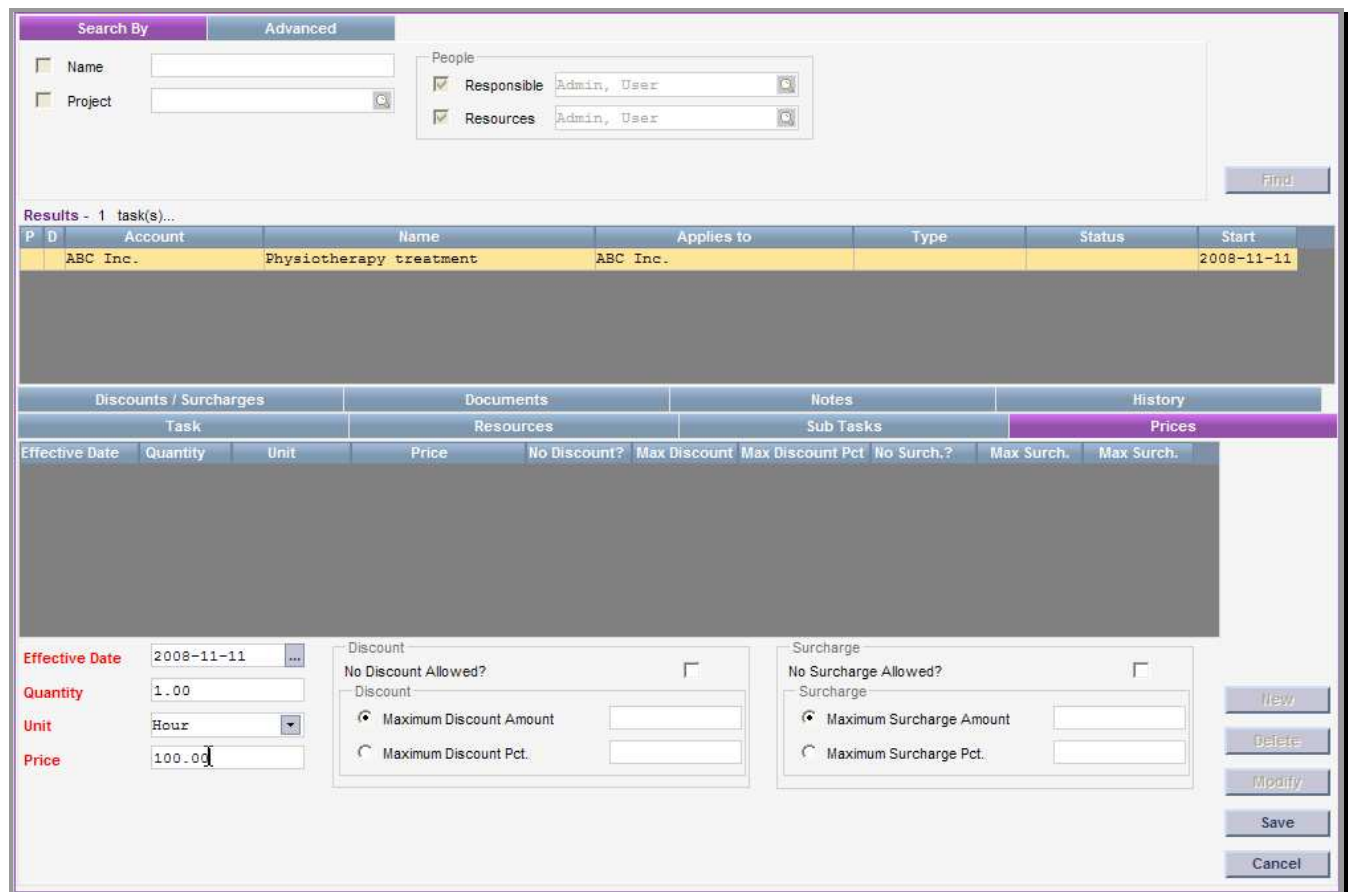
Use the **New** button to define and add a new Task.

Make sure you provide all the mandatory fields (in red).

Billing Type should be set to "Task Price".

Use the **Save** button when information has been entered.

Set Task Price



The screenshot displays the 'Set Task Price' interface. At the top, there is a search section with 'Search By' and 'Advanced' tabs. Below this are search filters for 'Name', 'Project', and 'People' (with checkboxes for 'Responsible' and 'Resources'). A 'Find' button is located on the right. The main area shows 'Results - 1 task(s)...' with a table listing tasks. The table has columns: P, D, Account, Name, Applies to, Type, Status, and Start. One task is listed: 'ABC Inc.' with 'Physiotherapy treatment' as the name, 'ABC Inc.' as the account, and '2008-11-11' as the start date. Below the table are tabs for 'Discounts / Surcharges', 'Documents', 'Notes', and 'History'. The 'Prices' tab is active, showing a table with columns: Effective Date, Quantity, Unit, Price, No Discount?, Max Discount, Max Discount Pct, No Surch.?, Max Surch., and Max Surch. Below the table is a form for setting prices. The form includes fields for 'Effective Date' (2008-11-11), 'Quantity' (1.00), 'Unit' (Hour), and 'Price' (100.00). There are also sections for 'Discount' and 'Surcharge' with checkboxes for 'No Discount Allowed?' and 'No Surcharge Allowed?'. Each section has radio buttons for 'Maximum Discount Amount' and 'Maximum Discount Pct.' (or 'Maximum Surcharge Amount' and 'Maximum Surcharge Pct.'). On the right side of the form are buttons for 'New', 'Delete', 'Modify', 'Save', and 'Cancel'.

Description

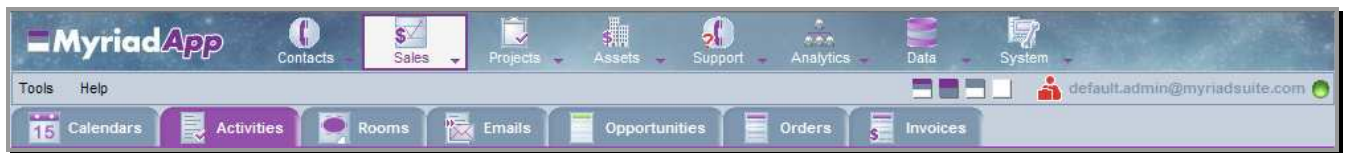
Go to Prices tab.

Use the **New** button to define and add a new Price.

Make sure you provide all the mandatory fields (in red).

Use the **Save** button when information has been entered.

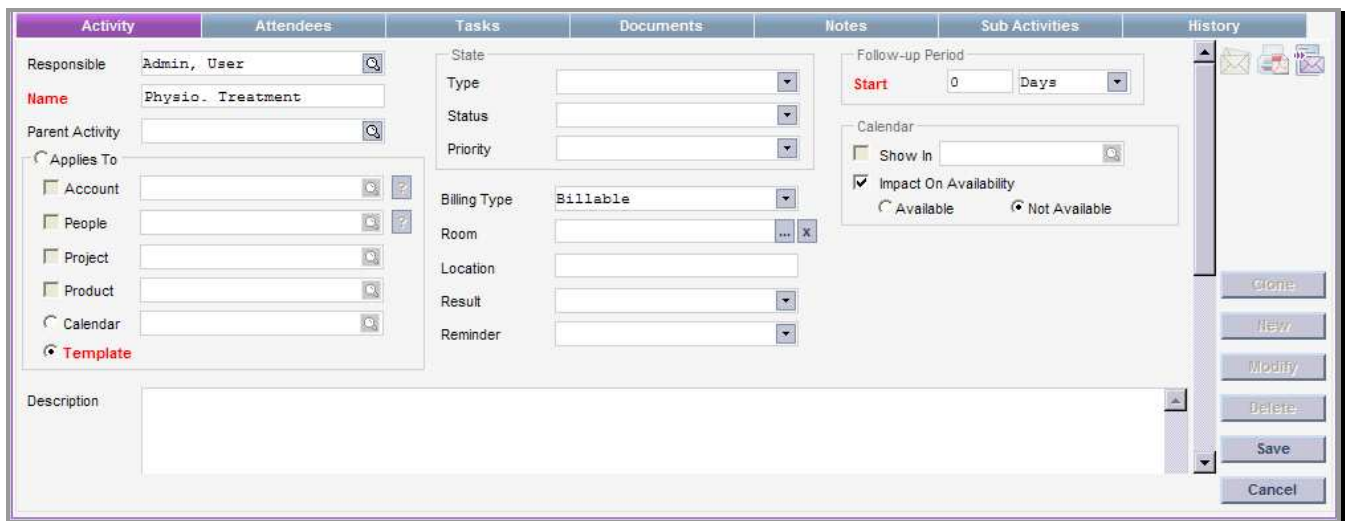
Go to Activities application



Description

Select Sales process and then Activities application.

Create Activity Template



Description

Use the **New** button to define and add a new Activity.

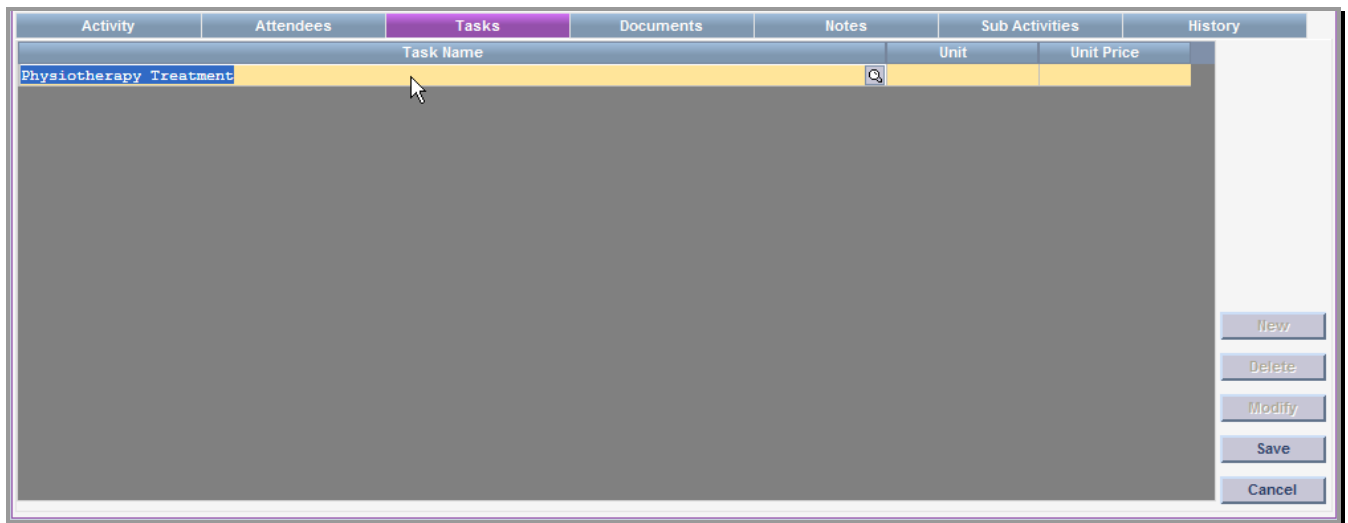
Enter **Name** for activity template.

Make sure the activity is set as **Template** and **Billing Type** is set to Billable.

Follow-up Period should be set to 0 days.

Use the **Save** button when information has been entered.

Add Task to Activity Template



Description

Go to Tasks tab.

Use the **New** button to define and add a Task.

Enter main letters of Task name and click search button  to find it and select it.

Use the **Save** button when information has been entered.

The task price will be determined from task price's effective date when invoicing activity.

Billable Activity Template is now ready to be used!

Calendar can be refreshed  so that Activity Template gets added to contextual menu.