



Project Cloud: Additional Modules for the Business Model: Recurring Service Delivery Under a Single Project

Additional Modules for the Business Model: Recurring Service Delivery Under a Single Project

The customized modules are designed for businesses following a recurring service entitlement model, where:

You sell the **service product** (e.g., 'Monthly IT Support' or 'Ongoing Consulting Hours') to a customer multiple times via separate sales orders.

The service is delivered under the same ongoing project, rather than creating a new project or task for each sale.

Usage (e.g., hours spent) accumulates cumulatively across all sales orders, allowing a single project to track total entitlements and expenditures without fragmentation.

When to Install?

Install these modules if your business model involves:

- **Multiple Renewals for the Service to the Same Customer:** Selling the service product to the same client, all under one project.
- **Cumulative Entitlements:** Tracking total hours bought vs. spent in a single view, avoiding per-sale silos.
- **Simplified Project Management:** Avoiding task/project proliferation for recurring work, focusing on delivery efficiency.

Practical Example:

A managed IT services firm sells 'Support Package' (100 hours) to Client Z via Sales Order #1, linked to a primary project 'Client Z IT Support.' Three months later, the client wants to buy 50 additional hours via Sales Order #2. By the customized modules, the Sales Order #2 can be linked to the existing project 'Client Z IT Support' without the need of creating a new project. The customized modules

ensure one unified project view, accurate billing and time tracking without new setups.

Practical Example #2:

Consider a scenario where a Consultation service is sold to a customer, followed by the customer's interest in purchasing an Education package while continuing under the same project. In this case, the Education package product should be configured with the *Service Tracking* setting as 'Relate to a sales order's project'. and when selling this Education package the related Consultation service's project should be selected. This ensures that the Education package project continues from the Consultation project, allowing for seamless project continuity.

Note: The customized modules are optional for specialized recurring service models and require installation from the CloudOffix Apps app. For installation, CloudOffix support is needed. End-users cannot install these customized modules.

Which module to install?

The choice of module depends on your available cloud components.

Below is a guide to selecting the appropriate module based on your setup.

→ *If Only Project Cloud is Available on Your Database*

- Recommended Module: Cloudoffix Project Timesheet Order Link

→ *If Project + Sales Cloud is Available on Your Database*

- Recommended Module: Sales Timesheet - Project Ordered

Decision for Installing the Customized Modules

This section serves as a decision guide to determine if you need these modules, based on your cloud setup and business model

Step-by-Step Decision Flowchart

1. Do I Sell the Service Multiple Times to the Same Customer?

- No: Continue with core modules. Use standard project/task creation for each sale, linking timesheets to individual projects for billing.
- Yes,
 - and *Do I Want to Continue Delivery Under the Same Project?*
 - If Yes, proceed to **Step 2**
 - If No, New Project/Task per sale (no need for custom modules)

2. Which Clouds Are Installed in my CloudOffix Database?

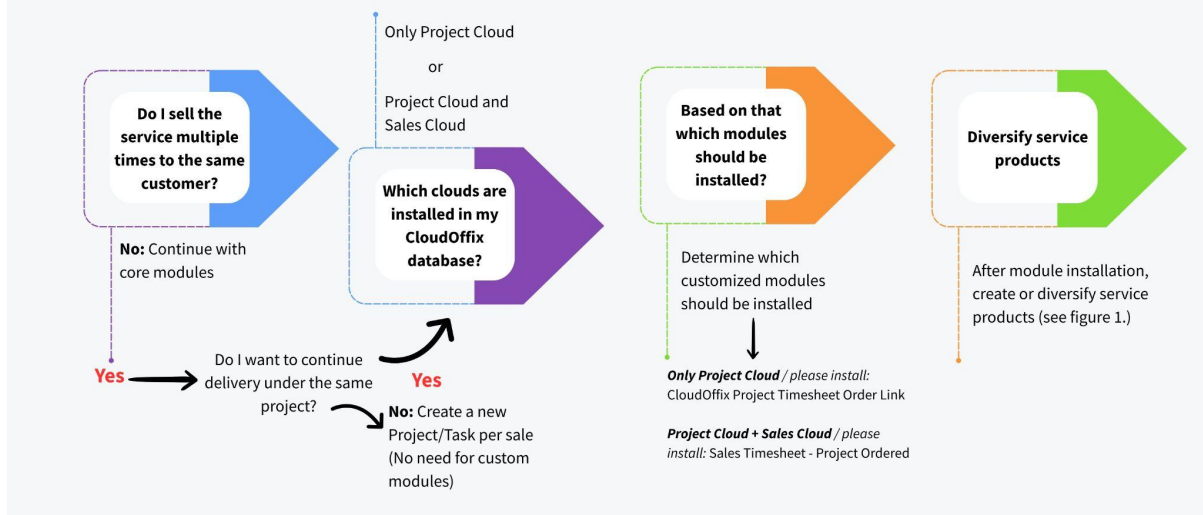
- *Only Project Cloud:*
 - Recommended Module: CloudOffix Project Timesheet Order Link
 - *Project Cloud + Sales Cloud*
 - Recommended Module: Sales Timesheet - Project Ordered
- Based on the available clouds, determine which module you should install.

3. Diversify Service Products

After module installation, create or diversify service products to support recurring sales while maintaining a unified project structure .

Decision for Installing the Customized Modules

A breakdown to determine if you need these modules, based on your cloud setup and business model



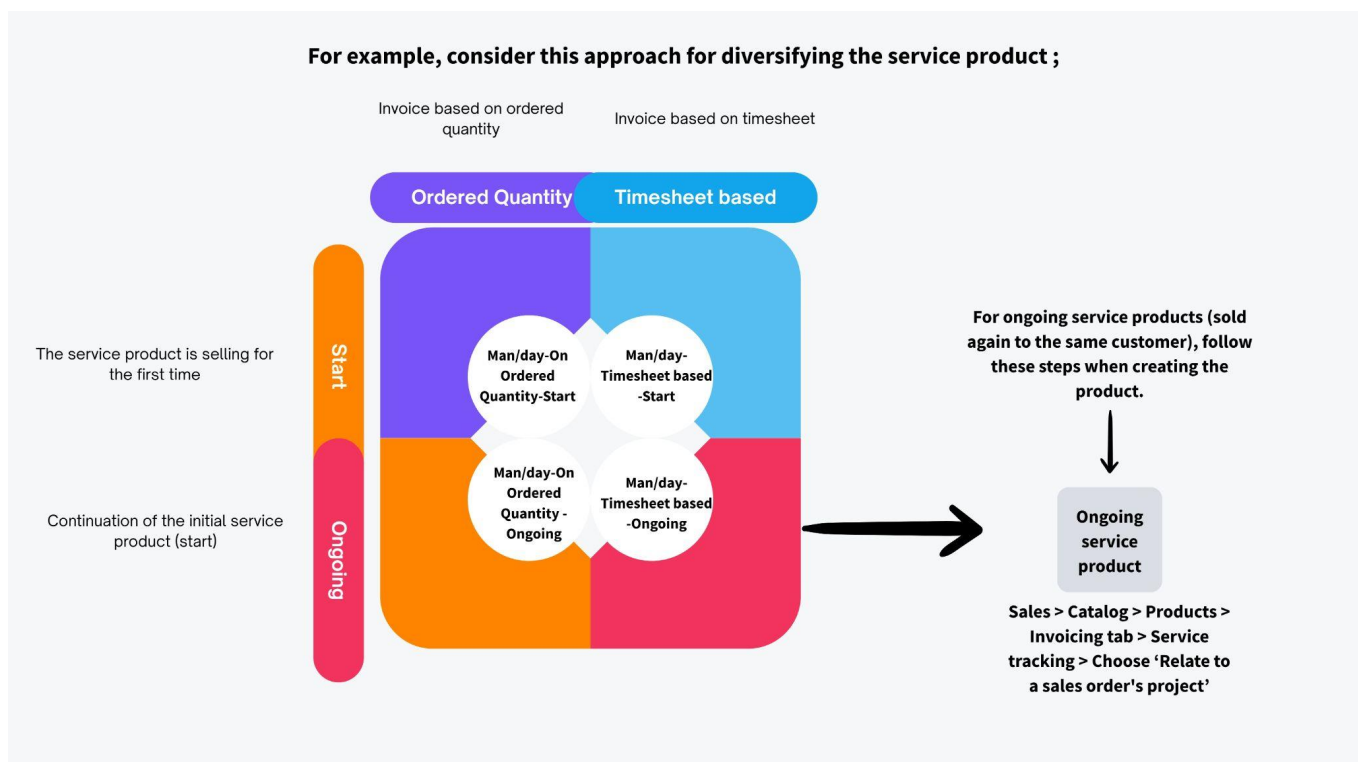
Demonstration Scenario

The following example provides a step-by-step example to demonstrate how the process works in practice.

- Let's imagine we have a *service product* called **Consultation**, which can be sold based on **ordered quantities** as well as **timesheet-based** billing.
 - Selling based on ordered quantities has certain advantages — for example, it allows for **clear upfront pricing** for the customer and the company.
- Before proceeding, a decision must be made whether this product will have a continuation version. This will determine **whether a new product needs to be created** and whether it will be **ordered quantity-based or timesheet-based** for the ongoing service.
- For the same service, we also offer an **ongoing version**. In this case, the product should first be sold as the initial **Consultation** service. If the customer wishes to continue with the same service later, it should then be sold again **as a separate product**, such as **Consultation – Ongoing**.
 - The ongoing version can be **ordered quantity-based** or **timesheet-based** — for example, you might start the initial service as ordered

quantity and then continue it as timesheet-based, depending on the project's needs and customer preference.

4. After deciding this, we also need to determine **whether the ongoing service product will be sold under the same project** to the customer or as a separate one.
 - This decision is important because it affects **how you configure the product settings**, and it also influences **which modules are required** to manage the process effectively.



Product Setup Demonstration

Below is an example demonstration. This can be tailored to meet your specific requirements.

1. Initial Product (Ordered Quantity)

The service product was created, and the '**Invoicing Based On**' setting was configured as **Ordered Quantity**.

Since this is the initial product, the **Service Tracking** setting was selected accordingly > *Create a new project but no task*

→ The rationale for this selection is as follows:

For an initial (start) product, it is intended to initiate a new project. When this product is sold, a new project will be created automatically based on this configuration.


However, if the project tasks are associated with this service product are routine or predefined, a project can be automatically generated from a project template.

In such cases, after enabling this option, the appropriate template should be selected from the 'Project Template' field.

Sales
Orders
Invoicing
Catalog
Reporting
Configuration

Products / Consulting - Ordered-Start

SaveDiscard


Product Name

Consulting - Ordered-Start

☒ Can be Sold
☐ Can be Purchased
☐ Can be Expensed
☐ Is a Subscription
☐ Is Asset
☐ Is VM Platform

General Information
Variants
Sales
Invoicing
Notes
Images

Receivables

Customer Taxes
Income Account

Payables

Vendor Taxes
Expense Account
Price Difference Account

Invoicing

Invoice based on
Service Tracking

☒ Ordered quantities
☐ Timesheets on tasks
☐ Milestones (manually set quantities on order)
☐ Don't create task
☐ Create a task in an existing project
☐ Create a task in a new project
☒ Create a new project but no task
☐ Create a task in sale order's project
☐ Relate to a sales order's project

Consulting - Ordered-Start

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General Information

Variants

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Receivables

Customer Taxes

▼

Income Account

▼

Invoicing

Invoice based on

☒ Ordered quantities

☐ Timesheets on tasks

☐ Milestones (manually set quantities on order)

Service Tracking

☐ Don't create task


☐ Create a task in an existing project

☐ Create a task in a new project

☒ Create a new project but no task

☐ Create a task in sale order's project

☐ Relate to a sales order's project

 Project Template

▼

2. Initial Product (Timesheet-Based)

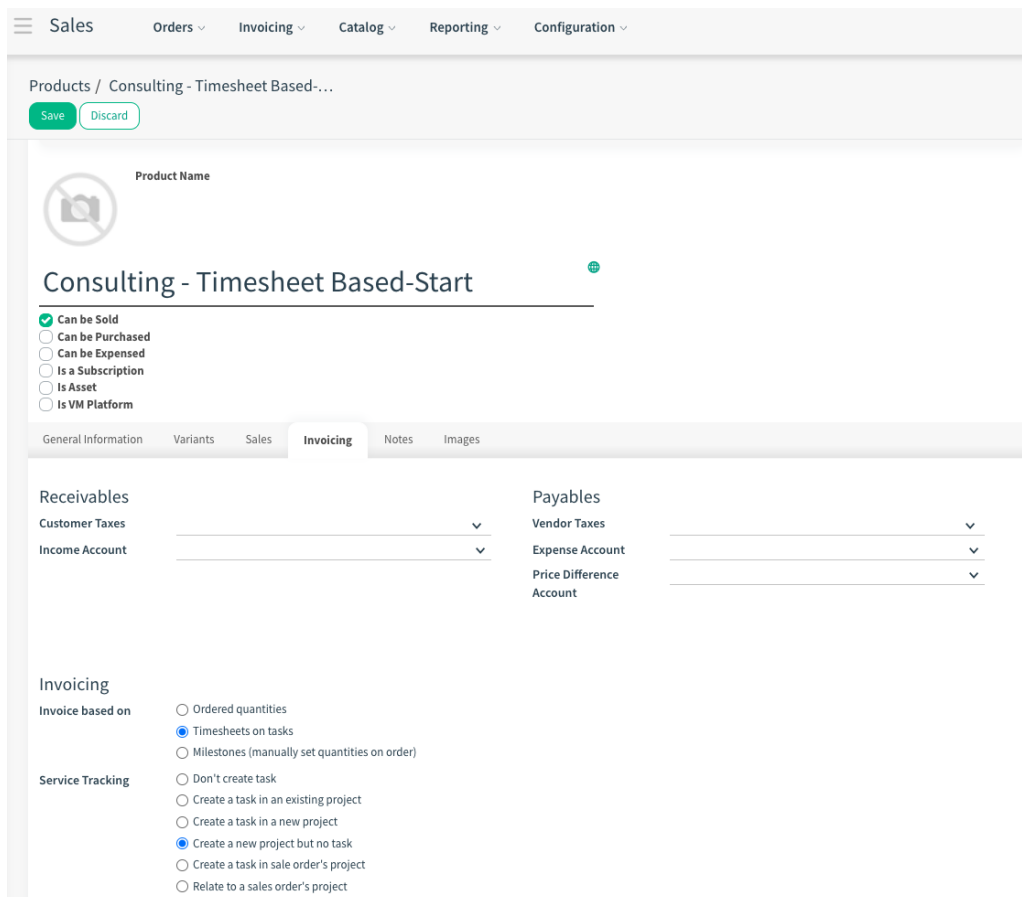
Another type for 'Consulting' product was also created for **Timesheet-Based billing**, and the '**Invoicing Based On**' setting was configured accordingly.

As this is the initial product, the **Service Tracking** setting was set based on this context > *Create a new project but no task*

→ The rationale for this selection is as follows:

For an initial (start) product, it is intended to initiate a new project. When this product is sold, a new project will be created automatically based on this configuration.

However, if the project tasks are associated with this service product are routine or predefined, a project can be automatically generated from a project template. In such cases, this option must be enabled, and the appropriate template should be selected from the '*Project Template*' field.



The screenshot shows the 'Consulting - Timesheet Based-Start' product configuration page in the CloudOffix system. The page is divided into several sections:

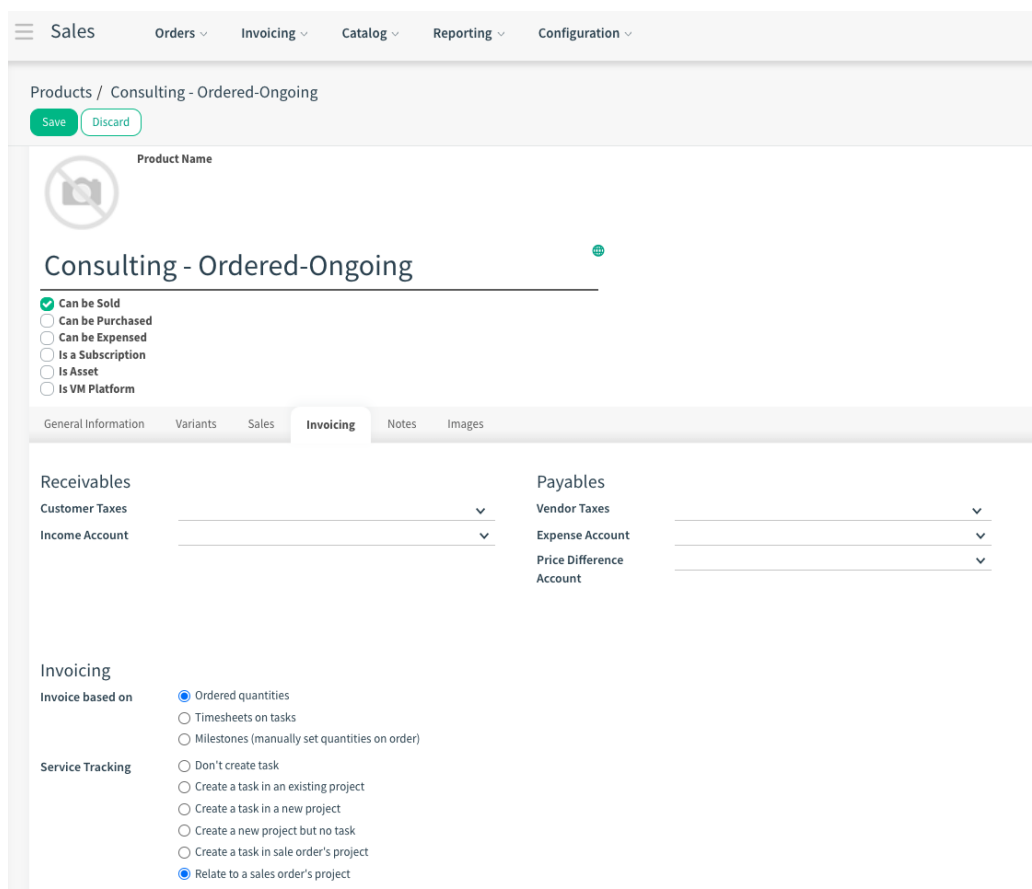
- Product Name:** Consulting - Timesheet Based-Start
- Product Status:**
 - ☒ Can be Sold
 - ☐ Can be Purchased
 - ☐ Can be Expensed
 - ☐ Is a Subscription
 - ☐ Is Asset
 - ☐ Is VM Platform
- General Information:**
 - Customer Taxes: [Dropdown]
 - Income Account: [Dropdown]
- Payables:**
 - Vendor Taxes: [Dropdown]
 - Expense Account: [Dropdown]
 - Price Difference Account: [Dropdown]
- Invoicing:**
 - Invoice based on:
 - ☐ Ordered quantities
 - ☒ Timesheets on tasks
 - ☐ Milestones (manually set quantities on order)
- Service Tracking:**
 - ☐ Don't create task
 - ☐ Create a task in an existing project
 - ☐ Create a task in a new project
 - ☒ Create a new project but no task
 - ☐ Create a task in sale order's project
 - ☐ Relate to a sales order's project

3. Ongoing Product (Ordered Quantity)

A decision was made that the product will have a continuation version. Accordingly, an **Ongoing Product** was created, and the 'Invoicing Based On' setting was configured as **Ordered Quantity**.

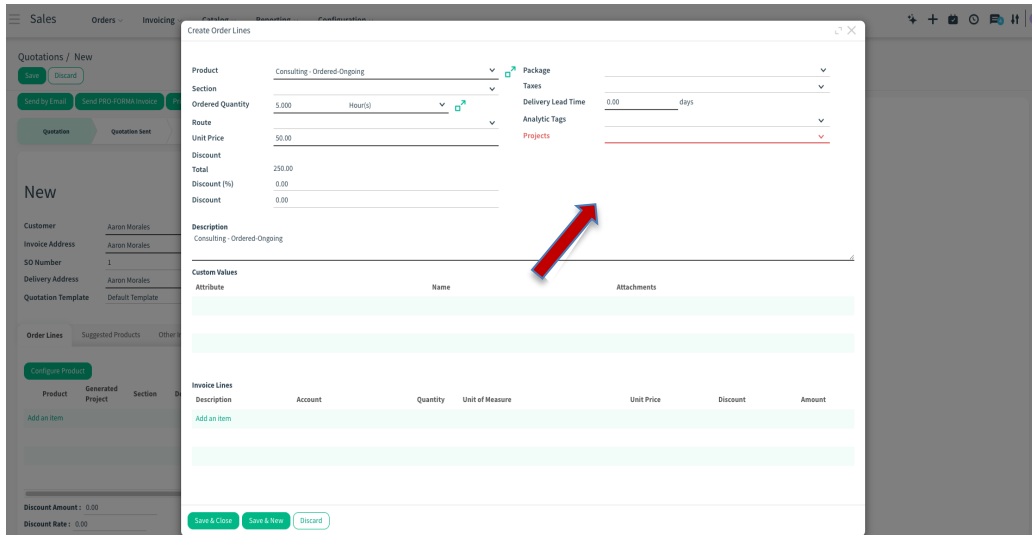
Important: Because this is a continuation product, the **Service Tracking** setting must be configured correctly > *Relate to a sales order's project*. This ensures that the product can be **sold multiple times to the same customer** and **all usage/tasks are tracked under the same project**.

Note: The project selection will be made *during the creation of the ongoing product's sales order* (i.e., when selling this product).



The screenshot displays the configuration page for a product named 'Consulting - Ordered-Ongoing'. The page is divided into several sections:

- Product Name:** Consulting - Ordered-Ongoing
- Product Type:** Consulting - Ordered-Ongoing
- Product Status:** Can be Sold (checked), Can be Purchased, Can be Expensed, Is a Subscription, Is Asset, Is VM Platform.
- General Information:** Includes fields for Customer Taxes, Income Account, Vendor Taxes, Expense Account, Price Difference Account, and Service Tracking.
- Invoicing:** Includes a section for 'Invoice based on' with options: Ordered quantities (selected), Timesheets on tasks, and Milestones (manually set quantities on order).
- Service Tracking:** Includes a section for 'Service Tracking' with options: Don't create task, Create a task in an existing project, Create a task in a new project, Create a new project but no task, Create a task in sale order's project, and Relate to a sales order's project (selected).




4. Ongoing Product (Timesheet-Based)

Similarly, the **Ongoing Product** was created for **Timesheet-Based billing**, with the **"Invoicing Based On"** setting configured accordingly.

Important: As this is also a continuation product, the **Service Tracking** setting must be correctly selected > *Relate to a sales order's project*. This allows **multiple sales to the same customer and consolidates all usage/tasks under a single project**.

Sales
Orders
Invoicing
Catalog
Reporting
Configuration

Products / Consulting - Timesheet Based-...
Save Discard


Product Name

Consulting - Timesheet Based-Ongoing

☒ Can be Sold
☐ Can be Purchased
☐ Can be Expensed
☐ Is a Subscription
☐ Is Asset
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General Information Variants Sales **Invoicing** Notes Images

Receivables

Customer Taxes
Income Account

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Vendor Taxes
Expense Account
Price Difference Account

Invoicing
Invoice based on

☐ Ordered quantities
☒ Timesheets on tasks
☐ Milestones (manually set quantities on order)

Service Tracking

☐ Don't create task
☐ Create a task in an existing project
☐ Create a task in a new project
☐ Create a new project but no task
☐ Create a task in sale order's project
☒ Relate to a sales order's project

- ★ With these four product variations, you can now sell the service multiple times to the same customer. For example, a customer may start with a Timesheet-Based initial product and continue with an Ongoing - Ordered product and vice versa. This setup allows you to track all entitlements and usage within a single project and ensures accurate invoicing.

Note: Before creating products, it is crucial to analyze your business model and decide on the required modules. The settings you configure on a product depend on whether the necessary modules are installed, so this analysis is essential.