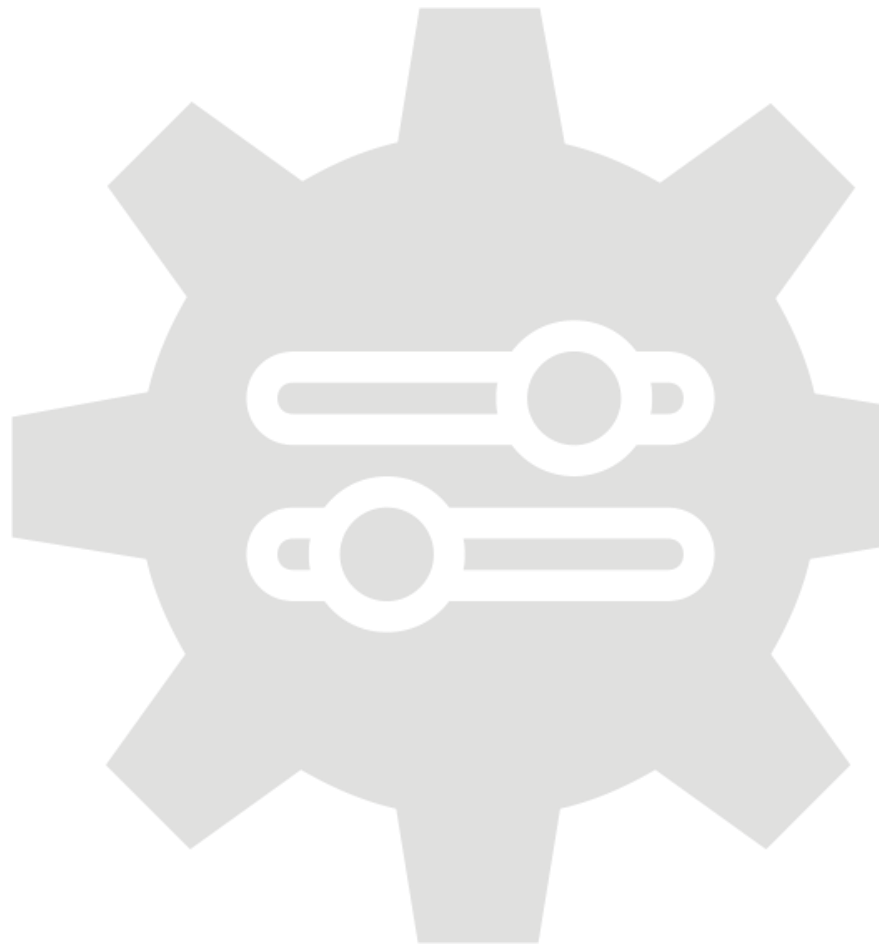# Client Hours Tracking – Billable vs Non-Billable

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Contents

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Billable vs Non-Billable Teamwork Tags and Hours –High Level

Billable Hours are for these categories:

- Professional Services Management: Work done on staging instances, certain Documentation, certain Meetings/Communication

- Engineering: Work done on any staging site, certain Documentation, certain Meetings/Communication

- L2/L3 Customer & Partner Care Team Support: All

Non-Billable Hours are for these categories:

- Professional Services Management: Bug fixes on production instances, certain Documentation, certain Meetings/Communication

- Engineering: Bug fixes on production instances, certain Documentation, certain Meetings/Communication

- L1 Customer & Partner Care Team Support: All

*For exact details, please see the following slides with proper task and tag descriptions

Waived Hours:

- In certain cases, a PSM may request a **fee waiver of billable hours** - in which a waiver form is filled out and submitted to Finance.

- Finance will review the form and send it back to the PSM (to get client sign-off) and ZINFI CEO for sign-off via Adobe sign.

- Once the form is signed by all parties, Finance will save the signed form into the MSA, addendum, etc…that describes the original SOW hours. (*Finance will also add the waived hours to the "Description" field in the Teamwork Project for this Account*)

- PSM/Engineering will mark the hours entered against these tasks as "Billable" in Teamwork (*which will be debited from the "SOW & Paid Hours" as increased by the addition of this waived hours amount*)

- This way the client is NOT charged for the waived hours -but will be able to provide reporting on "Total Waived Billable Hours" upon request.

- This process allows for financial compliance with any future client audit, since everything is tracked and documented on a weekly basis.

- Finance is the owner of this waiver process, but PSM has to manage the execution with internal approval (and client consent as required)

Billable vs Non-Billable Hours Tracking

Professional Services

Action Area	Task Type	Task Tag Name	Billable	Non-Billable
Pre-Sales	Pre-Sales - ANY Pre-Sales activity by ZINFI team member	**Pre-Sales**		x
Portal Set Up	Free Trial/Sandbox - Portal Set-Up for distribution	**Free Trial Set Up**		x
	Staging - Portal Set-Up for client delivery	**Staging Set Up**	x	
	Production - Portal Set-Up for client delivery	**Production Set Up**	x	
Configuration	New Configuration - Customer-Specific based on Use Case or Feature Request	**Client Config**	x	
	New Configuration - ZINFI Internal Only	**ZINFI Config**		x
	3rd Party system API or Connectors Configuration or Development, or SSO	**Integration**	x	
	Existing Configuration - Change Request to an existing configuration	**Client Change Request**	x	
	Any Configuration - Can Be Done by Client Using Provided Tools, but asking ZINFI to do	**Client Config**	x	
	Any Configuration - ZINFI-Required Assistance (cannot be done by Client)	**Client Config**	x	
	Portal Upgrade - Client Instance	**Client Portal Upgrade**		x
	Portal Performance Issue	**Portal Performance**		x
Bugs/Issues	Post-Launch Client Module Enablement (turning on remaining modules)	**Client Module PL Enablement**	x	

	Free Trial/Sandbox - Bug Discovered by either ZINFI or Prospect	**FT Bug/Issue**		x
	Customer-Specific Pre-Release - Bug Discovered during Staging Development or QA	**Client Bug/Issue Pre**		x
	Customer-Specific Post-Release - Client Reported in Production	**Client Bug/Issue Post**		x
Meetings / Communication	Customer-Specific Post-Release - Partner Reported in Production	**Partner Bug/Issue Post**		x
	Any ZINFI Generic or Internal Release	**ZINFI Bug/Issue**		x
	Customer/ZINFI Meeting Onboarding Kick-Off Call	**Client Mtg Kick Off**		x
	Customer/ZINFI Meeting - Bugs or Operational Errors in Platform	**Client Mtg Bug**		x
	Customer/ZINFI Meeting - Regularly Scheduled	**Client Mtg**	x	
	Customer/ZINFI Meeting - Training	**Client Mtg**	x	
	Customer/ZINFI Meeting - Requirement/Use Case Capturing	**Client Mtg**	x (key person)	x (if training)
	Customer/ZINFI Meeting - Report Delivery	**Client Mtg**	x	
	Customer/ZINFI Meeting - Status Review on Scope Progress	**Client Mtg**	x	
	Customer/ZINFI Meeting - ZINFI Roadmap Presentation	**Client Mtg Roadmap**		x
	Customer/ZINFI Meeting - Executive Escalation	**Client Mtg Escalation**		x
	Customer/ZINFI Email Response(s) - related to Client Project Work	**Client Email Response**	x	
	Internal Meeting - Customer Requirements	**Int Mtg Client**	x	
	Internal Meeting - Client Portal Bug (Post-Launch)	**Int Mtg Client Bug Post**		x

Documentation	Internal Meeting - Deployment Process Meeting(s)	**Int Mtg Client Deployment**	x	
	Internal Meeting - Knowledge Transfer	**Int Mtg Knowledge Transfer**		x
	Internal Meeting - General	**Int Mtg General**		x
	Internal - Email Response (ZINFI topic only)	**Int Email Response**		x
	SOW creation and delivery	**Client SOW**		x
	Customer/ZINFI Onboarding - Documentation & Tools Completion	**Client Docs**	x	
	Customer/ZINFI Meeting Minutes	**Client Mtg Minutes**	x	
	Customer/ZINFI Report Creation	**Client Reports**	x	
	Client-Facing Documentation Creation/Editing	**Client Docs**	x	
Development	Any ZINFI Internal Documentation (Non-Client Facing) Creation/Editing	**Int Docs**		x
	New Component - Customer-Specific	**Client Dev**	x	
	New Component - ZINFI Internal or Customer-Generated adopted into ZINFI Roadmap	**Int Dev**		x
	New Development - Customer-Specific Request Prior to Release	**Client Dev**	x	
	Database Optimization - Scalability Issue	**Database**		x
	R&D - Customer-Specific	**Client R&D**	x	
	Data Migration - Customer-Specific	**Client Data Migration**		
	Portal Upgrade - Internal Instance	**Int Portal Upgrade**		

	UI Translation - Client-Specific	**Client UI Translation**	x	
SQA	*FOR TIME ONLY (NOT FOR TASK)* - for any work done in existing 9.x Platform	**UCM 9.x**		
	UI Translation - Internal	**Int UI Translation**		
	Test Case Development - Customer-Specific	**Client Test Case**		
	Test Case Development - ZINFI Generic	**Int Test Case**		
	QA - Customer-Specific Development/Configuration	**Client SQA**	x	
Web Work	QA - ZINFI Generic Development/Configuration	**Int SQA**		x
	QA - ZINFI Standard Modules	**Int SQA**		x
	Campaign Development - Customer-Specific	**Client Content Creation**	x	
	Content Pages (Any Language) - Customer-Specific	**Client Content Creation**	x	
	Web Support (HTML, CSS, etc…) - Customer-Specific	**Client Content Creation**	x	
	Design/Layout Customization - Customer-Specific	**Client Creative Creation**	x	
Services/Support	Custom Graphic Design - Customer-Specific	**Client Creative Creation**	x	
	Design Issues - Customer-Specific	**Client Creative Creation**	x	
	L1 - Answer/Resolve Issue for Partner or Client	**L1 Issue Resolved**		
	L2 or L3 - Daily Outbound Activities	**L2/L3 Outbound Activity**		
	L2 or L3 - Teleprospecting	**L2/L3 Teleprospecting**		

	L2 - Partner Onboarding	**L2 Partner Onboarding**		
	L2 - Partner Training	**L2 Partner Training**		
	L1 - Report Delivery to Client or Partner	**L1 Report Mtg**		
	L2 or L3 - Report Delivery to Client or Partner	**L2/L3 Report Mtg**		
Other	L1 - Report Creation for Partner or Client	**L1 Report Creation**	Additional Tag added to already existing Tag	
	L2 or L3 - Report Creation for Partner or Client	**L2/L3 Report Creation**		x
	Escalation	**Escalation**		x
	Internal - Time Track (PTO, Vacation, etc…)	**Int Time Track**		x
	Internal - Hiring	**Int Hiring**		x
	Internal - Training	**Int Training**		x

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Engineering

Action Area	Task Type	Task Tag Name	Billable	Non-Billable
Pre-Sales	Pre-Sales - ANY Pre-Sales activity by ZINFI team member	**Pre-Sales**		x
Portal Set Up	Free Trial/Sandbox - Portal Set-Up for distribution	**Free Trial Set Up**		x
	Staging - Portal Set-Up for client delivery	**Staging Set Up**	x	
	Production - Portal Set-Up for client delivery	**Production Set Up**	x	
Configuration	New Configuration - Customer-Specific based on Use Case or Feature Request	**Client Config**	x	
	New Configuration - ZINFI Internal Only	**ZINFI Config**		x
	3rd Party system API or Connectors Configuration or Development, or SSO	**Integration**	x	
	Existing Configuration - Change Request to an existing configuration	**Client Change Request**	x	
	Any Configuration - Can Be Done by Client Using Provided Tools, but asking ZINFI to do	**Client Config**	x	
	Any Configuration - ZINFI-Required Assistance (cannot be done by Client)	**Client Config**	x	
	Portal Upgrade - Client Instance	**Client Portal Upgrade**		x
	Portal Performance Issue	**Portal Performance**		x
Bugs/Issues	Post-Launch Client Module Enablement (turning on remaining modules)	**Client Module PL Enablement**	x	
	Free Trial/Sandbox - Bug Discovered by either ZINFI or Prospect	**FT Bug/Issue**		x

	Customer-Specific Pre-Release - Bug Discovered during Staging Development or QA	**Client Bug/Issue Pre**		x
	Customer-Specific Post-Release - Client Reported in Production	**Client Bug/Issue Post**		x
Meetings / Communication	Customer-Specific Post-Release - Partner Reported in Production	**Partner Bug/Issue Post**		x
	Any ZINFI Generic or Internal Release	**ZINFI Bug/Issue**		x
	Customer/ZINFI Meeting Onboarding Kick-Off Call	**Client Mtg Kick Off**	x	
	Customer/ZINFI Meeting - Bugs or Operational Errors in Platform	**Client Mtg Bug**		x
	Customer/ZINFI Meeting - Regularly Scheduled	**Client Mtg**	x	
	Customer/ZINFI Meeting - Training	**Client Mtg**	x	
	Customer/ZINFI Meeting - Requirement/Use Case Capturing	**Client Mtg**	x (key person(s))	x (if training)
	Customer/ZINFI Meeting - Report Delivery	**Client Mtg**	x	
	Customer/ZINFI Meeting - Status Review on Scope Progress	**Client Mtg**	x	
	Customer/ZINFI Meeting - ZINFI Roadmap Presentation	**Client Mtg Roadmap**		x
	Customer/ZINFI Meeting - Executive Escalation	**Client Mtg Escalation**		x
	Customer/ZINFI Email Response(s) - related to Client Project Work	**Client Email Response**	x	
	Internal Meeting - Customer Requirements	**Int Mtg Client**	x	
	Internal Meeting - Client Portal Bug (Post-Launch)	**Int Mtg Client Bug Post**		x
Documentation	Internal Meeting - Deployment Process Meeting(s)	**Int Mtg Client Deployment**	x	

	Internal Meeting - Knowledge Transfer	**Int Mtg Knowledge Transfer**		x
	Internal Meeting - General	**Int Mtg General**		x
	Internal - Email Response (ZINFI topic only)	**Int Email Response**		x
	SOW creation and delivery	**Client SOW**		x
	Customer/ZINFI Onboarding - Documentation & Tools Completion	**Client Docs**	x	
	Customer/ZINFI Meeting Minutes	**Client Mtg Minutes**	x	
	Customer/ZINFI Report Creation	**Client Reports**	x	
	Client-Facing Documentation Creation/Editing	**Client Docs**	x	
Development	Any ZINFI Internal Documentation (Non-Client Facing) Creation/Editing	**Int Docs**		x
	New Component - Customer-Specific	**Client Dev**	x	
	New Component - ZINFI Internal or Customer-Generated adopted into ZINFI Roadmap	**Int Dev**		x
	New Development - Customer-Specific Request Prior to Release	**Client Dev**	x	
	Database Optimization - Scalability Issue	**Database**		x
	R&D - Customer-Specific	**Client R&D**	x	
	Data Migration - Customer-Specific	**Client Data Migration**	x	
	Portal Upgrade - Internal Instance	**Int Portal Upgrade**		x
	UI Translation - Client-Specific	**Client UI Translation**	x	

SQA	*FOR TIME ONLY (NOT FOR TASK)* - for any work done in existing 9.x Platform	**UCM 9.x**	x	
	UI Translation - Internal	**Int UI Translation**		x
	Test Case Development - Customer-Specific	**Client Test Case**	x	
	Test Case Development - ZINFI Generic	**Int Test Case**		x
	QA - Customer-Specific Development/Configuration	**Client SQA**	x	
Web Work	QA - ZINFI Generic Development/Configuration	**Int SQA**		x
	QA - ZINFI Standard Modules	**Int SQA**		x
	Campaign Development - Customer-Specific	**Client Content Creation**	x	
	Content Pages (Any Language) - Customer-Specific	**Client Content Creation**	x	
	Web Support (HTML, CSS, etc…) - Customer-Specific	**Client Content Creation**	x	
	Design/Layout Customization - Customer-Specific	**Client Creative Creation**	x	
Services/Support	Custom Graphic Design - Customer-Specific	**Client Creative Creation**	x	
	Design Issues - Customer-Specific	**Client Creative Creation**	x	
	L1 - Answer/Resolve Issue for Partner or Client	**L1 Issue Resolved**		
	L2 or L3 - Daily Outbound Activities	**L2/L3 Outbound Activity**		
	L2 or L3 - Teleprospecting	**L2/L3 Teleprospecting**		
	L2 - Partner Onboarding	**L2 Partner Onboarding**		

			Additional Tag added to already existing Tag
	L2 - Partner Training	**L2 Partner Training**	
	L1 - Report Delivery to Client or Partner	**L1 Report Mtg**	
	L2 or L3 - Report Delivery to Client or Partner	**L2/L3 Report Mtg**	
Other	L1 - Report Creation for Partner or Client	**L1 Report Creation**	
	L2 or L3 - Report Creation for Partner or Client	**L2/L3 Report Creation**	x
	Escalation	**Escalation**	x
	Internal - Time Track (PTO, Vacation, etc…)	**Int Time Track**	x
	Internal - Hiring	**Int Hiring**	x
	Internal - Training	**Int Training**	x

Customer Care

Action Area	Task Type	Task Tag Name	L1-Eng Non-Billable	L2 Billable	L3 Billable
Pre-Sales	Pre-Sales - ANY Pre-Sales activity by ZINFI team member	**Pre-Sales**			
Portal Set Up	Free Trial/Sandbox - Portal Set-Up for distribution	**Free Trial Set Up**			
	Staging - Portal Set-Up for client delivery	**Staging Set Up**			
	Production - Portal Set-Up for client delivery	**Production Set Up**			
Configuration	New Configuration - Customer-Specific based on Use Case or Feature Request	**Client Config**			
	New Configuration - ZINFI Internal Only	**ZINFI Config**			
	3rd Party system API or Connectors Configuration or Development, or SSO	**Integration**			
	Existing Configuration - Change Request to an existing configuration	**Client Change Request**			
	Any Configuration - Can Be Done by Client Using Provided Tools, but asking ZINFI to do	**Client Config**			
	Any Configuration - ZINFI-Required Assistance (cannot be done by Client)	**Client Config**			
	Portal Upgrade - Client Instance	**Client Portal Upgrade**	x		
	Portal Performance Issue	**Portal Performance**	x		

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Bugs/Issues	Post-Launch Client Module Enablement (turning on remaining modules)	**Client Module PL Enablement**			
	Free Trial/Sandbox - Bug Discovered by either ZINFI or Prospect	**FT Bug/Issue**			
	Customer-Specific Pre-Release - Bug Discovered during Staging Development or QA	**Client Bug/Issue Pre**			
	Customer-Specific Post-Release - Client Reported in Production	**Client Bug/Issue Post**			
Meetings / Communication	Customer-Specific Post-Release - Partner Reported in Production	**Partner Bug/Issue Post**			
	Any ZINFI Generic or Internal Release	**ZINFI Bug/Issue**			
	Customer/ZINFI Meeting Onboarding Kick-Off Call	**Client Mtg Kick Off**	x	x	x
	Customer/ZINFI Meeting - Bugs or Operational Errors in Platform	**Client Mtg Bug**	x		
	Customer/ZINFI Meeting - Regularly Scheduled	**Client Mtg**	x	x	x
	Customer/ZINFI Meeting - Training	**Client Mtg**	x	x	x
	Customer/ZINFI Meeting - Requirement/Use Case Capturing	**Client Mtg**			
	Customer/ZINFI Meeting - Report Delivery	**Client Mtg**	x	x	x
	Customer/ZINFI Meeting - Status Review on Scope Progress	**Client Mtg**	x	x	x
	Customer/ZINFI Meeting - ZINFI Roadmap Presentation	**Client Mtg Roadmap**			
	Customer/ZINFI Meeting - Executive Escalation	**Client Mtg Escalation**	x		
	Customer/ZINFI Email Response(s) - related to Client Project Work	**Client Email Response**	x	x	x

	Internal Meeting - Customer Requirements	**Int Mtg Client**	x	x	x
	Internal Meeting - Client Portal Bug (Post-Launch)	**Int Mtg Client Bug Post**	x		
Documentation	Internal Meeting - Deployment Process Meeting(s)	**Int Mtg Client Deployment**	x	x	x
	Internal Meeting - Knowledge Transfer	**Int Mtg Knowledge Transfer**	x		
	Internal Meeting - General	**Int Mtg General**	x		
	Internal - Email Response (ZINFI topic only)	**Int Email Response**	x		
	SOW creation and delivery	**Client SOW**	x		
	Customer/ZINFI Onboarding - Documentation & Tools Completion	**Client Docs**	x	x	x
	Customer/ZINFI Meeting Minutes	**Client Mtg Minutes**	x	x	x
	Customer/ZINFI Report Creation	**Client Reports**			
	Client-Facing Documentation Creation/Editing	**Client Docs**	x	x	x
Development	Any ZINFI Internal Documentation (Non-Client Facing) Creation/Editing	**Int Docs**			
	New Component - Customer-Specific	**Client Dev**			
	New Component - ZINFI Internal or Customer-Generated adopted into ZINFI Roadmap	**Int Dev**			
	New Development - Customer-Specific Request Prior to Release	**Client Dev**			
	Database Optimization - Scalability Issue	**Database**			
	R&D - Customer-Specific	**Client R&D**		x	x

	Data Migration - Customer-Specific	**Client Data Migration**			
	Portal Upgrade - Internal Instance	**Int Portal Upgrade**			
	UI Translation - Client-Specific	**Client UI Translation**		x	x
SQA	***FOR TIME ONLY (NOT FOR TASK)*** - for any work done in existing 9.x Platform	**UCM 9.x**			
	UI Translation - Internal	**Int UI Translation**			
	Test Case Development - Customer-Specific	**Client Test Case**			
	Test Case Development - ZINFI Generic	**Int Test Case**			
	QA - Customer-Specific Development/Configuration	**Client SQA**	x		
Web Work	QA - ZINFI Generic Development/Configuration	**Int SQA**	x		
	QA - ZINFI Standard Modules	**Int SQA**			
	Campaign Development - Customer-Specific	**Client Content Creation**			x
	Content Pages (Any Language) - Customer-Specific	**Client Content Creation**			x
	Web Support (HTML, CSS, etc…) - Customer-Specific	**Client Content Creation**			x
	Design/Layout Customization - Customer-Specific	**Client Creative Creation**			x
Services/ Support	Custom Graphic Design - Customer-Specific	**Client Creative Creation**			x
	Design Issues - Customer-Specific	**Client Creative Creation**			x

	L1 - Answer/Resolve Issue for Partner or Client	**L1 Issue Resolved**	x		
	L2 or L3 - Daily Outbound Activities	**L2/L3 Outbound Activity**		x	x
	L2 or L3 - Teleprospecting	**L2/L3 Teleprospecting**		x	x
	L2 - Partner Onboarding	**L2 Partner Onboarding**		x	
	L2 - Partner Training	**L2 Partner Training**		x	
	L1 - Report Delivery to Client or Partner	**L1 Report Mtg**	x		
	L2 or L3 - Report Delivery to Client or Partner	**L2/L3 Report Mtg**		x	x
Other	L1 - Report Creation for Partner or Client	**L1 Report Creation**	Additional Tag added to already existing Tag		
	L2 or L3 - Report Creation for Partner or Client	**L2/L3 Report Creation**	x	x (non-billable)	x (non-billable)
	Escalation	**Escalation**	x	x (non-billable)	x (non-billable)
	Internal - Time Track (PTO, Vacation, etc…)	**Int Time Track**	x	x (non-billable)	x (non-billable)
	Internal - Hiring	**Int Hiring**	x	x (non-billable)	x (non-billable)
	Internal - Training	**Int Training**	x	x (non-billable)	x (non-billable)