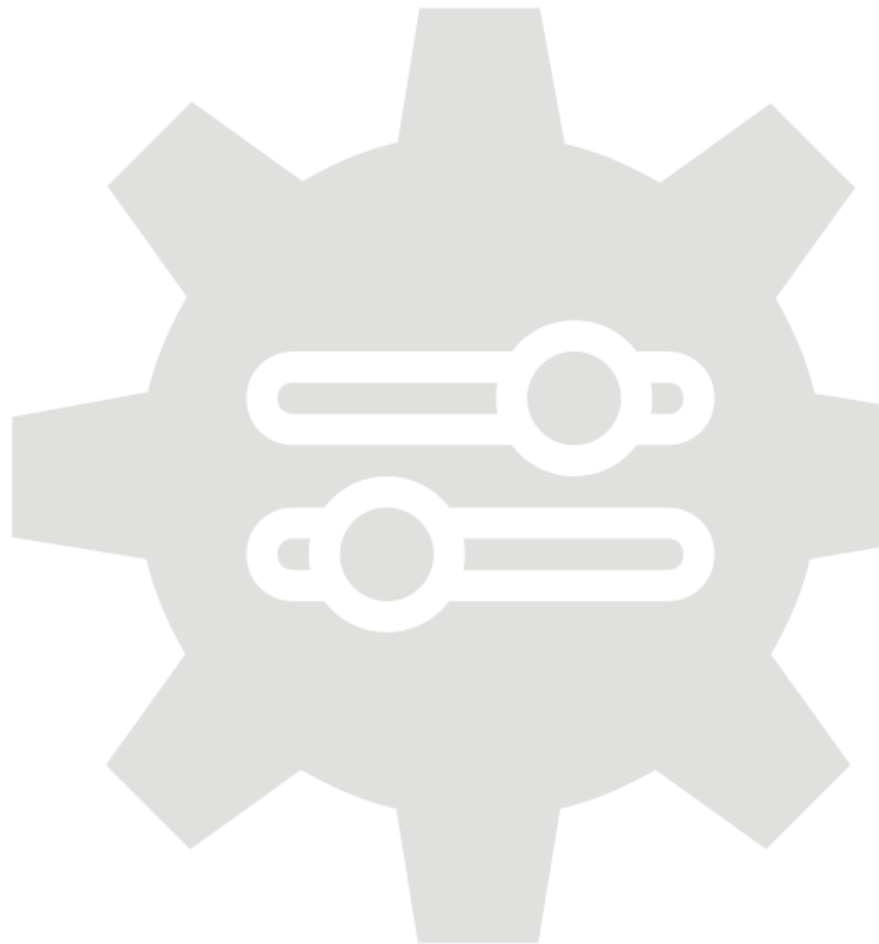


# Client Hours Tracking – Billable vs. Non-Billable

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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 Unified Channel Management Subscription Order Form (“Order Form”) executed by ZINFI and Client (and any and all exhibits attached thereto), and/or any amendment and/or addendum thereto (collectively “Agreement”) 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	<b>FT Bug/Issue</b>		x
	Customer-Specific Pre-Release - Bug Discovered during Staging Development or QA	<b>Client Bug/Issue Pre</b>		x
	Customer-Specific Post-Release - Client Reported in Production	<b>Client Bug/Issue Post</b>		x
<b>Meetings / Communication</b>	Customer-Specific Post-Release - Partner Reported in Production	<b>Partner Bug/Issue Post</b>		x
	Any ZINFI Generic or Internal Release	<b>ZINFI Bug/Issue</b>		x
	Customer/ZINFI Meeting Onboarding Kick-Off Call	<b>Client Mtg Kick Off</b>		x
	Customer/ZINFI Meeting - Bugs or Operational Errors in Platform	<b>Client Mtg Bug</b>		x
	Customer/ZINFI Meeting - Regularly Scheduled	<b>Client Mtg</b>	x	
	Customer/ZINFI Meeting - Training	<b>Client Mtg</b>	x	
	Customer/ZINFI Meeting - Requirement/Use Case Capturing	<b>Client Mtg</b>	x (key person)	x (if training)
	Customer/ZINFI Meeting - Report Delivery	<b>Client Mtg</b>	x	
	Customer/ZINFI Meeting - Status Review on Scope Progress	<b>Client Mtg</b>	x	
	Customer/ZINFI Meeting - ZINFI Roadmap Presentation	<b>Client Mtg Roadmap</b>		x
	Customer/ZINFI Meeting - Executive Escalation	<b>Client Mtg Escalation</b>		x
	Customer/ZINFI Email Response(s) - related to Client Project Work	<b>Client Email Response</b>	x	
	Internal Meeting - Customer Requirements	<b>Int Mtg Client</b>	x	
Internal Meeting - Client Portal Bug (Post-Launch)	<b>Int Mtg Client Bug Post</b>		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	<b>Client UI Translation</b>	x	
<b>SQA</b>	<b>FOR TIME ONLY (NOT FOR TASK)</b> - for any work done in existing 9.x Platform	<b>UCM 9.x</b>		
	UI Translation - Internal	<b>Int UI Translation</b>		
	Test Case Development - Customer-Specific	<b>Client Test Case</b>		
	Test Case Development - ZINFI Generic	<b>Int Test Case</b>		
	QA - Customer-Specific Development/Configuration	<b>Client SQA</b>	x	
<b>Web Work</b>	QA - ZINFI Generic Development/Configuration	<b>Int SQA</b>		x
	QA - ZINFI Standard Modules	<b>Int SQA</b>		x
	Campaign Development - Customer-Specific	<b>Client Content Creation</b>	x	
	Content Pages (Any Language) - Customer-Specific	<b>Client Content Creation</b>	x	
	Web Support (HTML, CSS, etc...) - Customer-Specific	<b>Client Content Creation</b>	x	
	Design/Layout Customization - Customer-Specific	<b>Client Creative Creation</b>	x	
<b>Services/Support</b>	Custom Graphic Design - Customer-Specific	<b>Client Creative Creation</b>	x	
	Design Issues - Customer-Specific	<b>Client Creative Creation</b>	x	
	L1 - Answer/Resolve Issue for Partner or Client	<b>L1 Issue Resolved</b>		
	L2 or L3 - Daily Outbound Activities	<b>L2/L3 Outbound Activity</b>		
	L2 or L3 - Teleprospecting	<b>L2/L3 Teleprospecting</b>		

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



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

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

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

	L2 - Partner Training	<b>L2 Partner Training</b>		
	L1 - Report Delivery to Client or Partner	<b>L1 Report Mtg</b>		
	L2 or L3 - Report Delivery to Client or Partner	<b>L2/L3 Report Mtg</b>		
<b>Other</b>	L1 - Report Creation for Partner or Client	<b>L1 Report Creation</b>	Additional Tag added to already existing Tag	
	L2 or L3 - Report Creation for Partner or Client	<b>L2/L3 Report Creation</b>		x
	Escalation	<b>Escalation</b>		x
	Internal - Time Track (PTO, Vacation, etc...)	<b>Int Time Track</b>		x
	Internal - Hiring	<b>Int Hiring</b>		x
	Internal - Training	<b>Int Training</b>		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	<b>Pre-Sales</b>			
Portal Set Up	Free Trial/Sandbox - Portal Set-Up for distribution	<b>Free Trial Set Up</b>			
	Staging - Portal Set-Up for client delivery	<b>Staging Set Up</b>			
	Production - Portal Set-Up for client delivery	<b>Production Set Up</b>			
Configuration	New Configuration - Customer-Specific based on Use Case or Feature Request	<b>Client Config</b>			
	New Configuration - ZINFI Internal Only	<b>ZINFI Config</b>			
	3rd Party system API or Connectors Configuration or Development, or SSO	<b>Integration</b>			
	Existing Configuration - Change Request to an existing configuration	<b>Client Change Request</b>			
	Any Configuration - Can Be Done by Client Using Provided Tools, but asking ZINFI to do	<b>Client Config</b>			
	Any Configuration - ZINFI-Required Assistance (cannot be done by Client)	<b>Client Config</b>			
	Portal Upgrade - Client Instance	<b>Client Portal Upgrade</b>	x		
	Portal Performance Issue	<b>Portal Performance</b>	x		

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

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



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

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