



# Time Tracking in EBSuite

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## **Introduction**

Welcome to EBSuite's online on-demand service suite of business applications.

This <Time Tracking> guide provides information and instructions to help you plan, set up, submit, and report on Timesheets in EBSuite CRM.

### Introduction

[Welcome](#)

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[Date / Time / User](#)

[Customer/AR](#)

[Regarding / Owner](#)

[Other Information](#)

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## **Welcome To EBSuite**

### **What is EBSuite's Online OnDemand Services?**

The EBSuite.com hosted suite of CRM business tools is subdivided by business job/task function. Each application can be used as a stand-alone independent business solution or as an integrated complete CRM solution for your business. Applications include:

- Marketing Automation/Campaign Management,
- Sales Force Automation,
- Customer Support/Help Desk and
- Project Management.

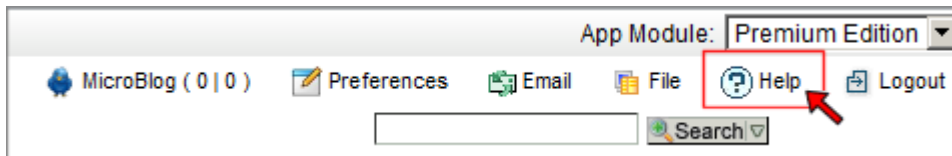
The Knowledge Management feature in this guide falls in the Support Module.

## Using EBSuite Online Help

### Using EBSuite Online Help

EBSuite's Online Help provides several options for accessing configuration and background information

- Our **Learning Center** is located: <http://www.ebsuite.com/iHelpLearn.jsp>
- The **Help** link is accessed in the upper right corner of the application.



- Search our **Knowledge Base** for solutions to “Frequently Asked Questions”, the URL is: <http://helpdesk.ebsuite.com/supportfaq.jsp>
- Submit a **service request** to our support staff, the URL is: <http://helpdesk.ebsuite.com/support.jsp>
- Email our Technical Support staff at: [support@ebsuite.com](mailto:support@ebsuite.com) or call our Technical Support staff at 888.276.3270 option #2 or 888.CRM.EBS0 option#2.

## **Timesheets**

### **Timesheets**

In EBSuite, **Timesheet** is the main entity type to track submitted time.

You may want to track submitted time for several reasons,

- (*Billing*) You may want to submit timesheets for a billable client ( Customer/AR ) so to generate a Quote / Invoice for billing purpose
- (*Productivity*) You may want to ask employees to submit timesheets to track their working hours
- (*Reporting*) Or you may want to track submitted time for reporting purpose, and have better insight into your business, like where are engineering time mostly spent on.

Whatever the reason, if you decide to track timesheets, you will want to

- ask your engineers / technicians to submit time whenever possible
- ask your engineers / technicians to submit weekly timesheet report,
- generate Quote / Invoice in the 'Time & Billing' module
- run reports when needed.

This chapter contains the following articles:

[Timesheet: Date / Time / User](#)

[Timesheet: Customer/AR](#)

[Timesheet: Regarding / Owner](#)

[Timesheet: Other Information](#)

[Timesheet: Hourly Rate / Dollar Amount](#)

## Date, Time, User

### Date, Time, User

The most important information about a timesheet is **Duration**, **When**, and **Who**.

**Submit Time**

Please enter/verify the time you spent on an Organization/Contact/Case/Bug/Project Task, and click the Submit button to **Submit Time**. You can click the ▲ to remove the seconds and round up to the next minute, or press ▼ to just remove the seconds. [Turn On/Off Explanations](#)

**Time Sheet**

\*Submit Time:  Hours,  Minutes,  Seconds ▲▼

\*Submit Date: 2010.JAN.25   Start Time: 04:05pm

\*Submit For User: Chat Agent ▼

**Optional**

Category:  ▼ TimeSheet #:

Billable:

Customer/AR:

Hourly Rate:  ▼ Please Specify Total:

Note:

**Time Clock**

00 : 00 : 00

**Previously Submitted Timesheets**

If the timesheet spans multiple work days, the Submit Date is the **start date** of the time submitted.

Timesheet report is often based on **Submit Date**, and **User**.

## Customer/AR

### Customer / AR

AR stands for **A**ccount **R**eceivable, and in EBSuite CRM it means those customers whom you intend to charge ( billing ).

A customer in EBSuite CRM can be Organization, or Contact. For example, you may have 5,000 Organization records, and 25,000 Contact records in your database. That is 30,000 Customers. If among them, 700 records are those whom you are currently billing, or planning to bill, those 700 would be your Customer/AR. They are not separate records from Org/Contact. Each Organization and Contact record has an AR ( Account Receivable ) flag which can be turned On/Off. So all your notes/appointments/tasks/calls logged against the customer is still there if you treat it as an AR.

**Customer/AR field in a timesheet indicate who is responsible to pay for this time.** So if you ever intend to include a timesheet as part of a Quote or Invoice, you should always pick a Customer/AR.

**Submit Time**  
Please enter/verify the time you spent on an Organization/Contact/Case/Bug/Project Task, and click the Submit button to **Submit Time**. You can click the ▲ to remove the seconds and round up to the next minute, or press ▼ to just remove the seconds. [Turn On/Off Explanations](#)

**Time Sheet**

\*Submit Time: [ ] Hours, [ ] Minutes, [ ] Seconds ▲▼  
\*Submit Date: 2010 JAN 25 Start Time: 04:05pm  
\*Submit For User: Chat Agent

**Time Clock**  
00 : 00 : 00  
Start Clear Ready To Submit

**Optional**  
Category: [ ] TimeSheet #: [ ]

Billable:   
**Customer/AR:** [ ] Go  
Hourly Rate: [ ] Please Specify Total: [ ]

Note: [ ]  
Submit

Previously Submitted Timesheets

As you can see, the Customer/AR field when submitting a timesheet is not a required field, but it is very important if you intend to charge money for this timesheet.

## **Regarding / Owner**

### **Regarding / Owner**

In the submit timesheet form you will not see this filed, but the CRM always keep a record of **what you are submitting time for**. Sometimes we call it (internally) the regarding / owner field. It tells the system what you are working on.

There are 7 entity types you can submit timesheet for:

Organization, Contact, Case, Calendar Task, Bug, Project, Project Task.

The general rule is if you are working on a specific item, like a Bug, or Case, or a Project Task, you should submit timesheet against that item.

If there is no appropriate detail item you can choose the customer ( Organization or Contact ).

To see how to submit time for each entity type, please see the chapter [Submitting Time](#).

## **Other Information**

### **Other Information**

When submitting a timesheet, you can also filling the following fields:

Category, Timesheet #, and Note.

If you do not fill in a timesheet #, a distinct positive integer ( from a number sequence ) will be auto generated.

## Hourly Rate & Dollar Amount

### Hourly Rate & Dollar Amount

While the Duration ( how many hours are submitted for a timesheet ) is a required filed, you can also optionally specify the **dollar value** for the timesheet.

For example, if you charge \$85/hour for level 3 technical work, \$125/hour for level 2 consulting, and \$210/hour for level 1 consulting, you can put in a dollar amount for each timesheet, depending on the rate / category for that timesheet.

The screenshot shows a web form titled "Submit Time". At the top, there is a green icon and the text "Submit Time". Below this is a green warning icon and a paragraph of instructions: "Please enter/verify the time you spent on an Organization/Contact/Case/Bug/Project Task, and click the Submit button to *Submit Time*. You can click the ▲ to remove the seconds and round up to the next minute, or press ▼ to just remove the seconds. >Turn On/Off Explanations".

The form is divided into several sections:

- Time Sheet**:
  - \*Submit Time: Three input fields for Hours, Minutes, and Seconds, with up and down arrows next to the Seconds field.
  - \*Submit Date: A date picker showing "2010 JAN 25" and a "Start Time" field showing "04:05pm".
  - \*Submit For User: A dropdown menu showing "Chat Agent".
- Optional**:
  - Category: A dropdown menu.
  - TimeSheet #: An input field.
  - Billable: A checked checkbox.
  - Customer/AR: An input field with a "Go" button next to it.
  - Hourly Rate: A dropdown menu with a "Please Specify" button next to it. This field and its associated "Please Specify" button are highlighted with a blue border.
  - Total: An input field.
- Note**: A large text area for entering a note, with a "Submit" button below it.
- Time Clock**: A separate box on the right containing a digital clock showing "00 : 00 : 00" and three buttons: "Start", "Clear", and "Ready To Submit".
- Previously Submitted Timesheets**: A box at the bottom right, currently empty.

You can setup the in different hourly rate charge levels in **Account -> Setup -> Timesheet -> Hourly Rate**.

Then we will automatically calculate the dollar amount once you choose the bill category dropdown.

## **Submitting Time**

### **Submitting Time**

You can submit time for the following seven entity types:

[Organization](#)

[Contact](#)

[Calendar Task](#)

[Case](#)

[Bug](#)



[Project](#)

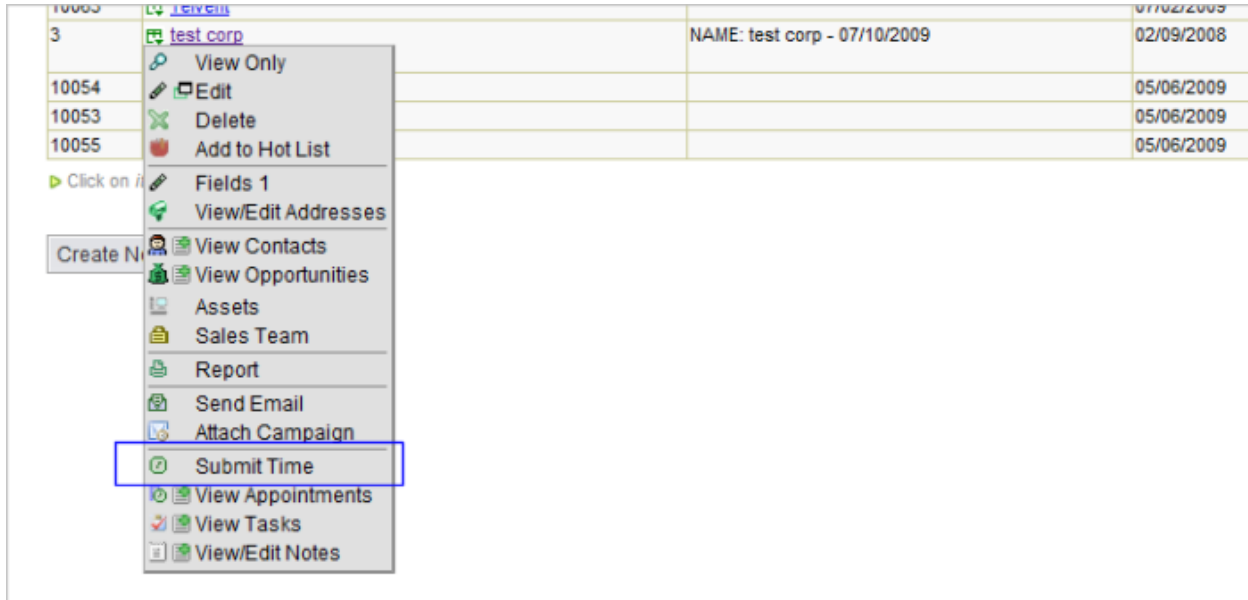
[Project Task](#)






## Organization














### Submit a timesheet for Organization

There are two ways to get to the time submission screen for an Organization.

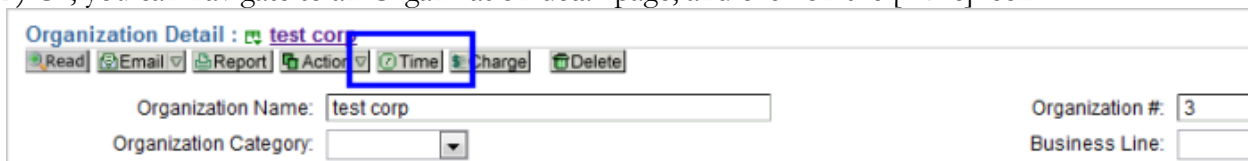
1) In any screen where there is Organization with a [context]  icon, you can click on the  icon, and choose Submit Time:











10053	 <a href="#">test corp</a>	NAME: test corp - 07/10/2009	07/02/2009
3	 View Only		02/09/2008
10054	 Edit		05/06/2009
10053	 Delete		05/06/2009
10055	 Add to Hot List		05/06/2009

- Click on  Fields 1
-  View/Edit Addresses
- Create New  View Contacts
-  View Opportunities
-  Assets
-  Sales Team
-  Report
-  Send Email
-  Attach Campaign
-  **Submit Time**
-  View Appointments
-  View Tasks
-  View/Edit Notes

2) Or, you can navigate to an Organization detail page, and click on the [Time] icon.



Organization Detail :  test corp



Organization Name:  Organization #:

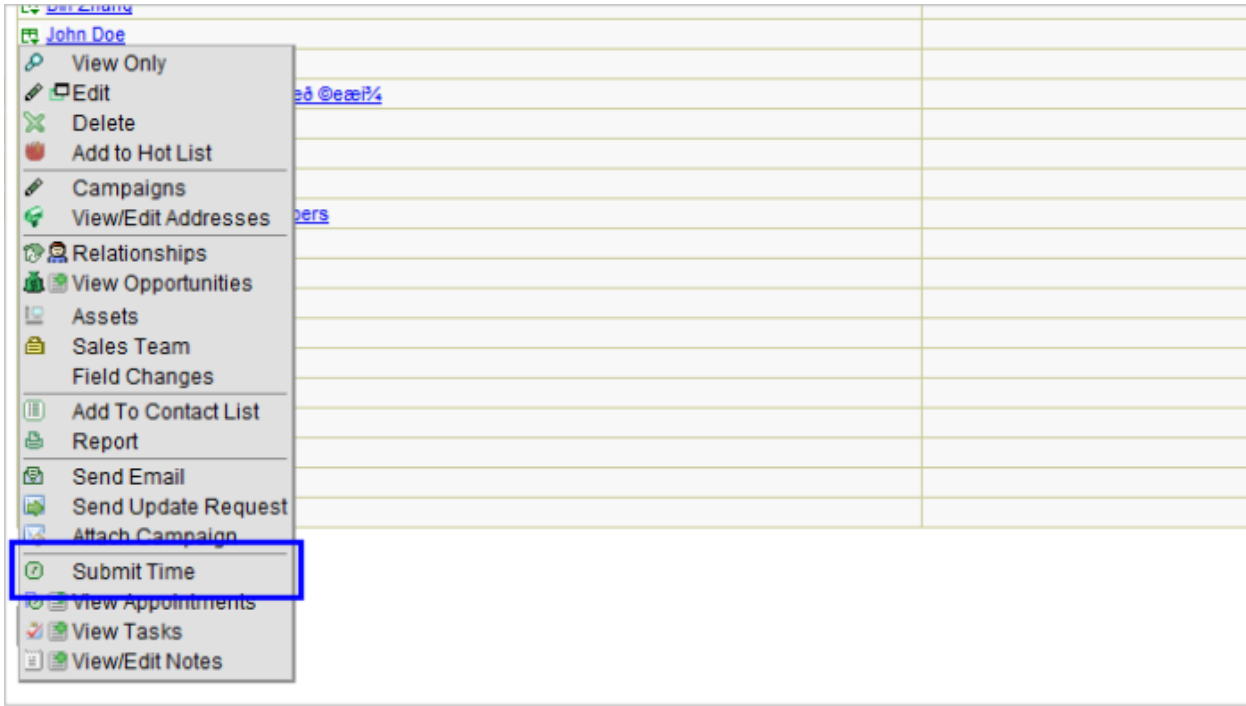
Organization Category:  Business Line:

## Contact

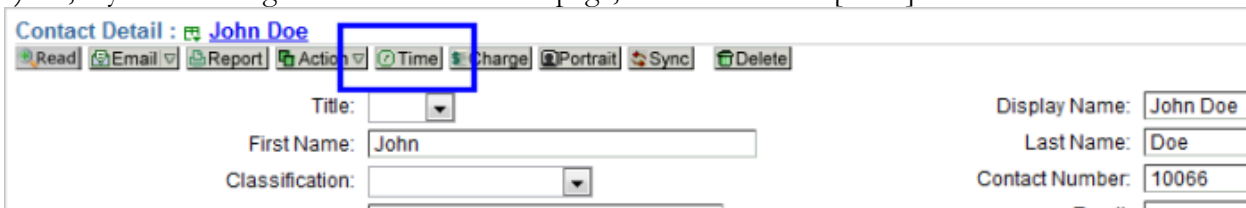
### Submit a timesheet for Contact

There are two ways to get to the time submission screen for a Contact.

1) In any screen where there is Contact with a [context]  icon, you can click on the  icon, and choose Submit Time:



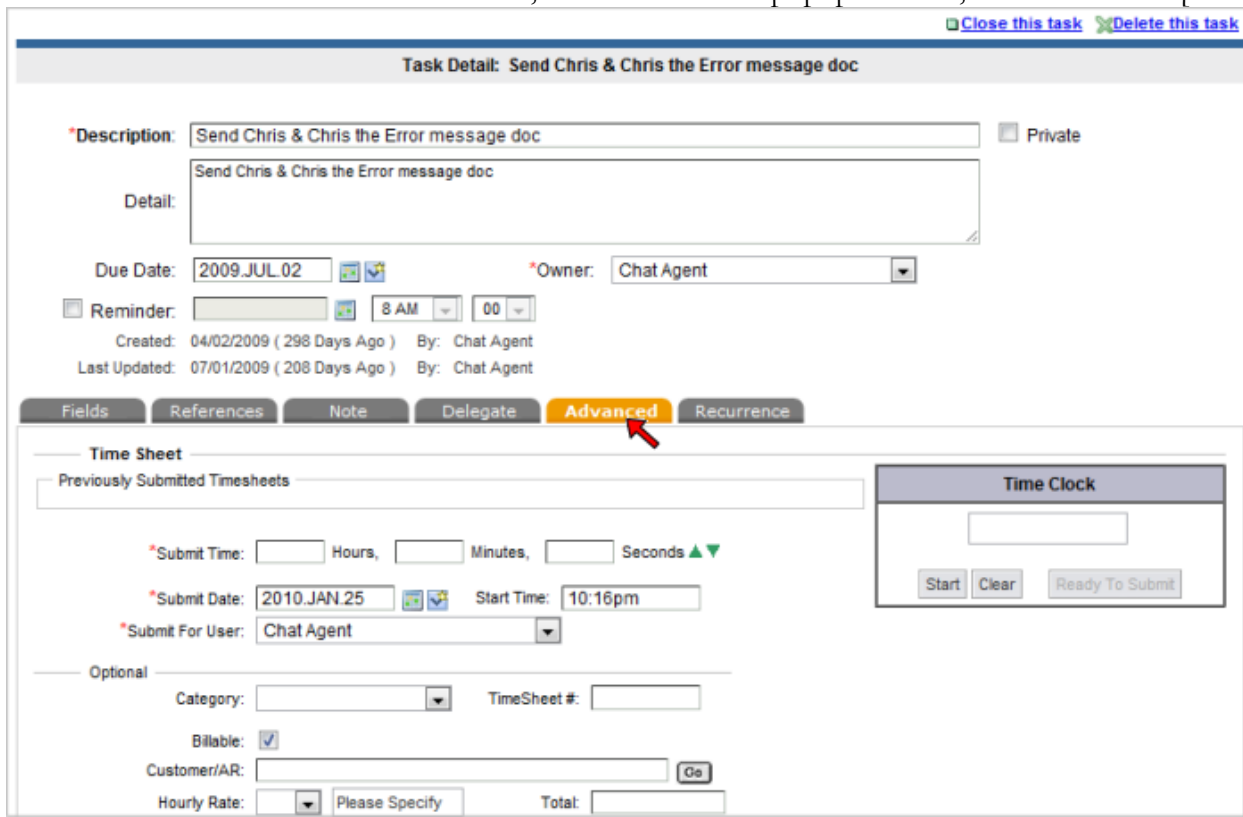
2) Or, you can navigate to a Contact detail page, and click on the [Time] icon.



## Calendar Task

### Submit a timesheet for Calendar Task

To submit a timesheet for a Calendar Task, click into the task popup window, and click on the [Advanced] tab.



The screenshot shows a web application interface for task management. At the top, there are two links: "Close this task" and "Delete this task". Below them is a header for "Task Detail: Send Chris & Chris the Error message doc".

The main content area includes a "Description" field with the text "Send Chris & Chris the Error message doc" and a "Private" checkbox. Below this is a "Detail" field. Further down, there are fields for "Due Date" (2009.JUL.02), "Owner" (Chat Agent), and "Reminder" (8 AM, 00). Metadata shows the task was "Created: 04/02/2009 (298 Days Ago) By: Chat Agent" and "Last Updated: 07/01/2009 (208 Days Ago) By: Chat Agent".

A horizontal menu contains tabs: "Fields", "References", "Note", "Delegate", "Advanced" (highlighted in orange with a red arrow pointing to it), and "Recurrence".

The "Advanced" tab is active, showing a "Time Sheet" section with a "Previously Submitted Timesheets" field. Below this are fields for "Submit Time" (Hours, Minutes, Seconds), "Submit Date" (2010.JAN.25), "Start Time" (10:16pm), and "Submit For User" (Chat Agent). An "Optional" section includes "Category", "TimeSheet #", "Billable" (checked), "Customer/AR" (with a "Go" button), and "Hourly Rate" (Please Specify) and "Total".

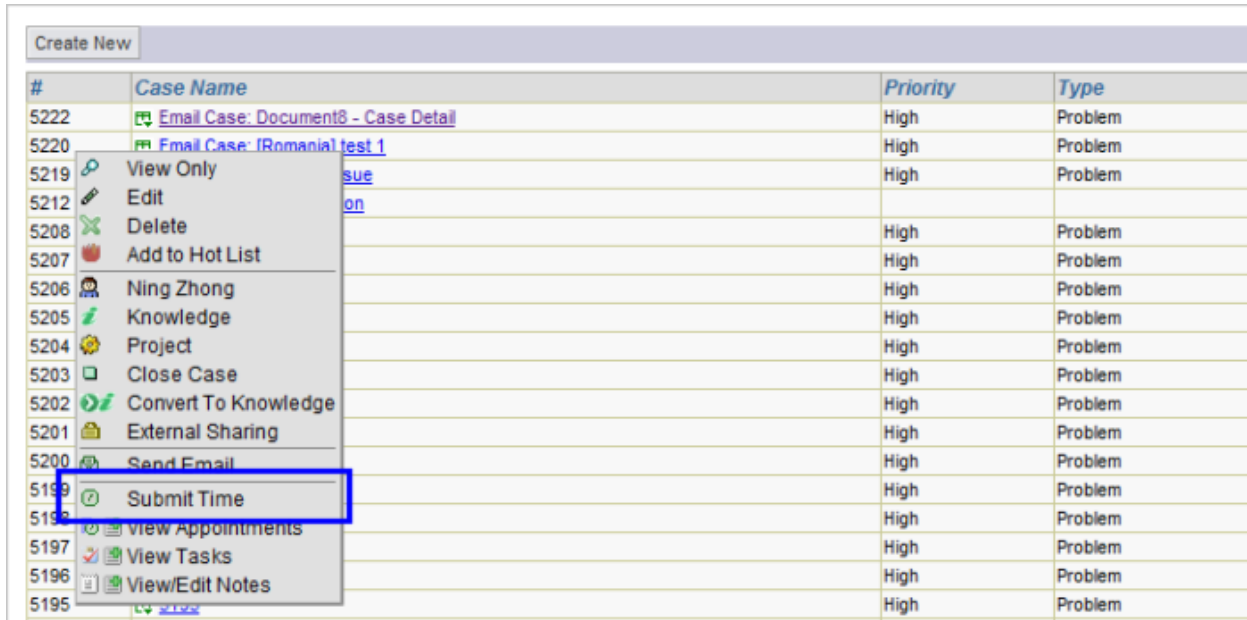
To the right of the "Time Sheet" section is a "Time Clock" box with a text input field and three buttons: "Start", "Clear", and "Ready To Submit".



















## Case

### Submit a timesheet for Case

There are two ways to get to the time submission screen for a Case.

1) In any screen where there is Case with a [context]  icon, you can click on the  icon, and choose Submit Time:



#	Case Name	Priority	Type
5222	 Email Case: Document8 - Case Detail	High	Problem
5220	 Email Case: IRomania test 1	High	Problem
5219	 View Only	High	Problem
5212	 Edit		
5208	 Delete		
5207	 Add to Hot List	High	Problem
5206	 Ning Zhong	High	Problem
5205	 Knowledge	High	Problem
5204	 Project	High	Problem
5203	 Close Case	High	Problem
5202	 Convert To Knowledge	High	Problem
5201	 External Sharing	High	Problem
5200	 Send Email	High	Problem
5199	 Submit Time	High	Problem
5198	 view Appointments	High	Problem
5197	 View Tasks	High	Problem
5196	 View/Edit Notes	High	Problem
5195		High	Problem

2) Or, you can navigate to a Case detail page, and click on the [Time] icon.



Case Detail           Externally Viewable

Case:  #:

## **Bug**

### **Submit a timesheet for Bug**









To submit a timesheet for a bug, click into a Bug detail page, and click on the [Time] icon.

<b>Bug Detail</b>  
Bug #: 1
Created: <a href="#">Chat Agent</a> (02/15/2008 11:08)
*Description: <input type="text" value="test bug"/>
*Status: <input type="text" value="(21) To Dev. Code Bug"/>

## Project

### Submit a timesheet for Project


In Project Summary page, click on the [context icon] , and select Submit Time:

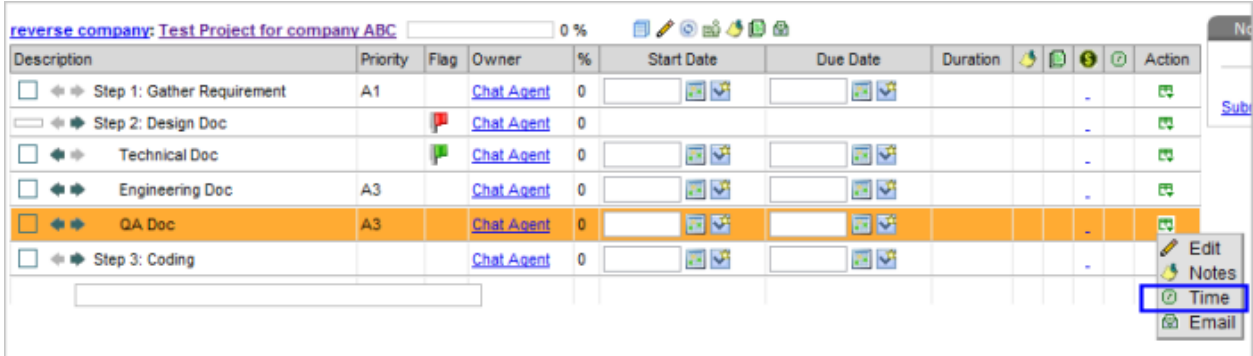
Manage Projects		Create New Project								Type: An
Project	Customer	ID	Type	Status	Priority	Users	Start Date	Due Date	Progress	
 Test Project for company ARC	 reverse company	8	Analysis	In Progress	A1		10/25/2009	10/26/2009	<input type="text"/> 0 %	
 View Only	 1 - EBSuite.com Test Drive Account	3	Analysis	In Progress	A2	<a href="#">Chat Agent</a>	02/01/2008	03/15/2008	<input checked="" type="text"/> 20 %	
 Edit										
 Delete										
 Access										
 Submit Time s										

Please note that we recommend that you submit time against [project task](#) when possible, and submit against project only when there is no appropriate task available.

## Project Task

### Submit a timesheet for Project Task

To submit time for a project task, first navigate to the project which the task belongs, and click on the [context icon]  for that task.



The screenshot shows a web application interface for project task management. At the top, there is a header bar with the text "reverse company: Test Project for company ABC" and a progress indicator "0 %". Below the header is a table with the following columns: Description, Priority, Flag, Owner, %, Start Date, Due Date, Duration, and Action. The table contains six rows of tasks. The "QA Doc" row is highlighted in orange. A context menu is open over the "QA Doc" row, showing options: Edit, Notes, Time (highlighted with a blue box), and Email.

Description	Priority	Flag	Owner	%	Start Date	Due Date	Duration	Action
<input type="checkbox"/> ⇄ ⇄ Step 1: Gather Requirement	A1		<a href="#">Chat Agent</a>	0				
<input type="checkbox"/> ⇄ ⇄ Step 2: Design Doc			<a href="#">Chat Agent</a>	0				
<input type="checkbox"/> ⇄ ⇄ Technical Doc			<a href="#">Chat Agent</a>	0				
<input type="checkbox"/> ⇄ ⇄ Engineering Doc	A3		<a href="#">Chat Agent</a>	0				
<input checked="" type="checkbox"/> ⇄ ⇄ QA Doc	A3		<a href="#">Chat Agent</a>	0				
<input type="checkbox"/> ⇄ ⇄ Step 3: Coding			<a href="#">Chat Agent</a>	0				

- Edit
- Notes
- Time**
- Email

## **View, Report, Approval**

View, Report, Approval

After your agents / technicians submit timesheet on a regular basis, you will want to view / report them from a higher level.

This chapter contains the following topics:

[Technician Viewing Their Timesheets](#)

[Approval of Weekly Timesheets](#)

[Report on Timesheets](#)

## Technician Viewing Their Timesheets

### Technician viewing their own timesheets

If a user want to check his/her own timesheets, the page is at

**Account -> Preferences -> ( Other ) Section -> Timesheet: My Timesheets**

My Timesheets						
Week	Actual Timesheets	For Approval				
01/24/2010 - 01/30/2010 ( this week )		<a href="#">Submit This Week</a>				
01/17/2010 - 01/23/2010 ( last week )		<a href="#">Submit This Week</a>				
01/10/2010 - 01/16/2010 ( 2 weeks ago )	<a href="#">8 timesheets, 41.00 hours, \$400.00</a>	✓ Approved				
01/03/2010 - 01/09/2010 ( 3 weeks ago )						
12/27/2009 - 01/02/2010 ( 4 weeks ago )						
12/20/2009 - 12/26/2009 ( 5 weeks ago )						
12/13/2009 - 12/19/2009 ( 6 weeks ago )						
12/06/2009 - 12/12/2009 ( 7 weeks ago )						
11/29/2009 - 12/05/2009 ( 8 weeks ago )						
11/22/2009 - 11/28/2009 ( 9 weeks ago )						
11/15/2009 - 11/21/2009 ( 10 weeks ago )						

Sun 01/10	Mon 01/11	Tue 01/12	Wed 01/13	Thu 01/14	Fri 01/15	Sat 01/16
	5 timesheets 22.00 hours \$0.00	3 timesheets 19.00 hours \$400.00				

#	Regarding	Category	Date	Duration	Amount
<a href="#">51</a>	(Organization) 1 - EBSuite.com Test Drive Account		01/12/2010	12.00	0.00
<a href="#">50</a>	(Case) 5205		01/12/2010	5.00	400.00
<a href="#">49</a>	(Case) 5205		01/12/2010	2.00	0.00
<a href="#">48</a>	(Case) 5204		01/11/2010	5.00	0.00
<a href="#">47</a>	(Case) 5204		01/11/2010	5.00	0.00
<a href="#">46</a>	(Case) 5204		01/11/2010	4.00	0.00
<a href="#">45</a>	(Case) 5204		01/11/2010	3.00	0.00
<a href="#">44</a>	(Case) 5206		01/11/2010	5.00	0.00

Here you can view your timesheets for the last 10 weeks. The second column is the timesheets submitted. By clicking on the actual timesheets link, you can view the timesheets by day, and also a list view.


## Approval of Weekly Timesheets

### Approval of Weekly Timesheets

In the same page where an agent can view his/her own timesheets,

**Account -> Preferences -> ( Other ) Section -> Timesheet: My Timesheets**

The agent can also submit a weekly (combined) timesheet report to his/her manager for approval.

Week	Actual Timesheets	For Approval
01/24/2010 - 01/30/2010 ( this week )		<a href="#">Submit This Week</a>
01/17/2010 - 01/23/2010 ( last week )		<a href="#">Submit This Week</a>
01/10/2010 - 01/16/2010 ( 2 weeks ago )	<a href="#">8 timesheets, 41.00 hours, \$400.00</a>	✓ Approved
01/03/2010 - 01/09/2010 ( 3 weeks ago )	<a href="#">4 timesheets, 7.50 hours, \$40.00</a>	<a href="#">Submit This Week</a> 
12/27/2009 - 01/02/2010 ( 4 weeks ago )		<a href="#">Submit This Week</a>
12/20/2009 - 12/26/2009 ( 5 weeks ago )		<a href="#">Submit This Week</a>
12/13/2009 - 12/19/2009 ( 6 weeks ago )		<a href="#">Submit This Week</a>
12/06/2009 - 12/12/2009 ( 7 weeks ago )		<a href="#">Submit This Week</a>
11/29/2009 - 12/05/2009 ( 8 weeks ago )		<a href="#">Submit This Week</a>
11/22/2009 - 11/28/2009 ( 9 weeks ago )		<a href="#">Submit This Week</a>
11/15/2009 - 11/21/2009 ( 10 weeks ago )		<a href="#">Submit This Week</a>

Just click on the 'Submit This Week' under the **For Approval** column. In the next screen you can make some adjustments for the numbers.

My Timesheets for the week of 01/03/2010 - 01/09/2010							<a href="#">Back to My Timesheets</a>
	Sun 01/03	Mon 01/04	Tue 01/05	Wed 01/06	Thu 01/07	Fri 01/08	Sat 01/09
				<input checked="" type="checkbox"/> ( 42 ) 5.00 hours / \$0.00	<input checked="" type="checkbox"/> ( 43 ) 1.00 hours / \$0.00		
				<input checked="" type="checkbox"/> ( 41 ) 1.00 hours / \$0.00			
				<input checked="" type="checkbox"/> ( 40 ) 0.50 hours / \$40.00			
# Timesheets	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="3"/>	<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Hours	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="6.50"/>	<input type="text" value="1.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Amount (\$)	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="40.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Note	<input type="text"/>						
Approval Manager	Chat Agent <input type="button" value="v"/>						
<input type="button" value="Submit"/>							

If you hit [Submit], an email will be sent to the Approval Manager, where he/she can click on the link in the email, and approve your weekly timesheet report.

Back in the first screenshot on this page, you will see "✓ Approved" if the manager has approved your weekly report.

## Report on Timesheets

### Report on Timesheets

( Time & Billing Module ) Time -> Reports,  
 ( Other Module ) Main -> Reports

You can find several timesheet reports. You can group them by Customer/AR, or by users. All report can be CSV exported to an excel file.

#### Timesheet : Week

01/10/2010 - 01/16/2010  
 8 Timesheets

	Sun 01/10	Mon 01/11	Tue 01/12	Wed 01/13	Thu 01/14	Fri 01/15	Sat 01/16	Total
	# Hours Dollars	# Hours Dollars	# Hours Dollars	# Hours Dollars	# Hours Dollars	# Hours Dollars	# Hours Dollars	# Hours Dollars
Chat Agent		5 22.00 0.00	3 19.00 400.00					8 41.00 400.00
<b>Total</b>	0 0.00 0.00	5 22.00 0.00	3 19.00 400.00	0 0.00 0.00	0 0.00 0.00	0 0.00 0.00	0 0.00 0.00	8 41.00 400.00

[Export CSV File](#)

#### Timesheet: By AR:

**Time Sheet - By Accounts:**

Custoemr/AR	# of entries	Total Duration	Total Amount	Users
<a href="#">Real Corp 2</a>	2	5.00	240.00	Chat Agent
<a href="#">Akash</a>	4	8.50	720.00	Chat Agent
<a href="#">1 - ESDuke.com Test Drive Account</a>	10	42.00	700.00	Chat Agent
<a href="#">Ning Zhong</a>	10	22.50	360.00	Chat Agent
Not Specified	6	130.00	12.00	Chat Agent
<a href="#">Guru Bandhatmakur</a>	19	18.63	1304.33	Chat Agent

[Export CSV File](#)

#### Timesheet: By User

**Time Sheet - by Users:**

Click on the user link to expand and see all his/her timesheets.

Users	# of entries	Total Duration	Total Amount	Accounts ( Concatenated )
<a href="#">Chat Agent</a> <a href="#">51</a>	226.63 Hours	3336.33		<a href="#">Real Corp 2</a> , <a href="#">Akash</a> , <a href="#">1 - ESDuke.com Test Drive Account</a> , <a href="#">Ning Zhong</a> , <a href="#">NA</a> , <a href="#">Guru Bandhatmakur</a>

[Export CSV File](#)