

# CrushBank App

The CrushBank App monitors time utilization and ensures your teams meet their allocated budget hours. The app's comprehensive and user-friendly dashboard provides easy visualization of crucial data, allowing you to identify insights into resource utilization and potential budget overruns. With the CrushBank App, you have a tool to check if human resources, time, and budget are efficiently utilized to achieve high productivity and accomplish goals.

The CrushBank App is available to ConnectWise Manage users and sends notifications to MS Teams. Before using this app, ensure you have ConnectWise Manage and MS Teams.

What's in this article

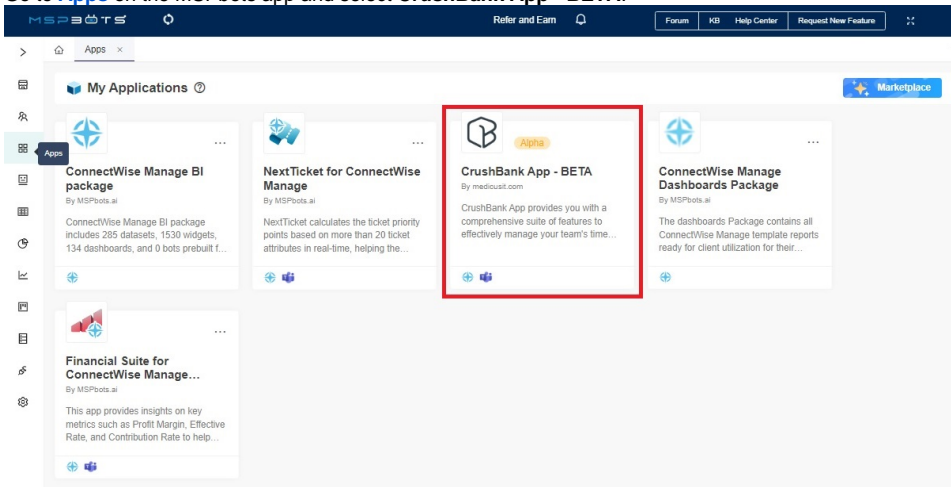
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## CrushBank Dashboard

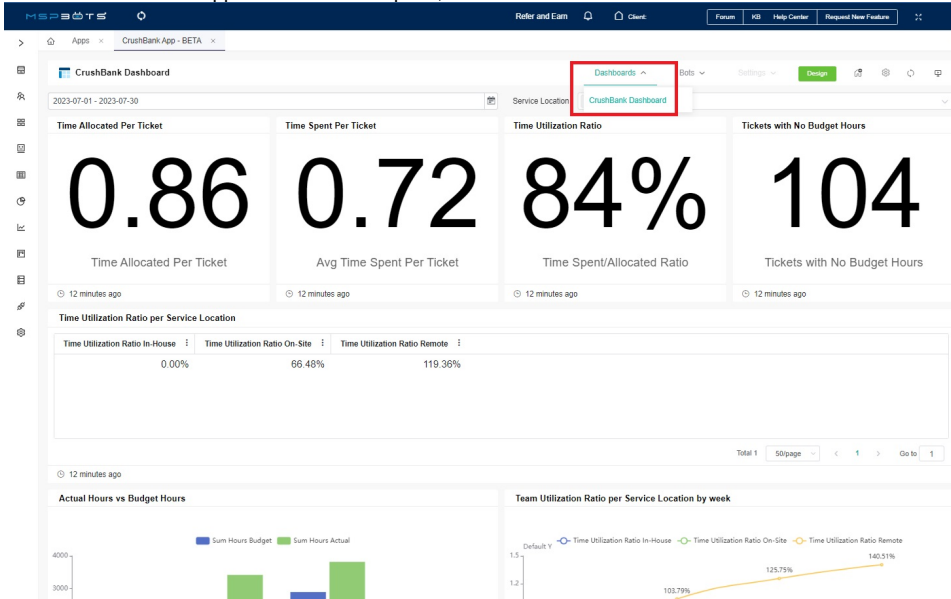
The CrushBank Dashboard has widgets that highlight real-time data for time allocation, utilization, and budget hours. You can filter the data by Date Range and Service Location.

### How to access the dashboard

1. Go to [Apps](#) on the MSPbots app and select **CrushBank App - BETA**.



2. When the CrushBank App - BETA window opens, hover over **Dashboards** and select **CrushBank Dashboard**.



## What are the widgets on the dashboard?

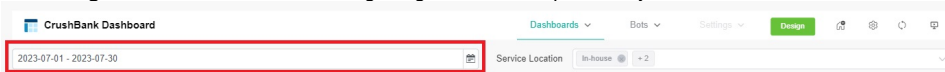
These are the data that is available from the CrushBank Dashboard:

- **Time Allocated Per Ticket** - This card number widget calculates and displays the average budget hours allocated per ticket.
- **Time Spent Per Ticket** - This card number widget calculates and displays the average actual hours spent per ticket.
- **Time Utilization Ratio** - This card number widget calculates and displays the average utilization ratio per ticket. The formula used to calculate is average actual hours / average budget hours.
- **Tickets with No Budget Hours** - This is also a card number displaying the count of service tickets with no budget hours.
- **Time Utilization per Service Location** - This grid widget calculates and displays the average utilization ratio per ticket per service location. The formula used to calculate is average actual hours / average budget hours.
- **Active Hours vs. Budget Hours** - This bar chart calculates and displays the sum of actual hours and budget hours per week.
- **Team Utilization Ratio per Service Location by Week** - This line chart shows the team utilization ratio per service location grouped by week.
- **All Tickets - Grid** - This is a grid widget that displays all service tickets and their corresponding details.

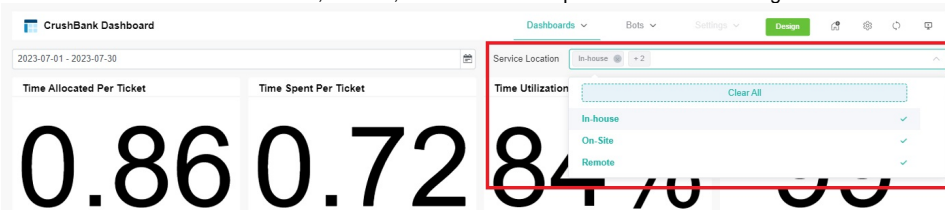
## What are the options for filtering data?

The CrushBank Dashboards has two slicers to help you filter data:

- **Date Range** - Select the date or date range to generate data specific to your chosen time.



- **Service Location** - Select In-house, On-site, or Remote to compare utilization and budget hours for the different locations.



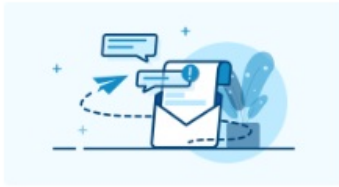
## What are the CrushBank bots?

The CrushBank Bots notify ticket owners when a technician or team works under or over budget hours and when teams or locations meet specific budget hours.

### Ticket Percentage Budget Monitoring

This bot monitors the budget allocated per ticket and notifies the ticket owner if the actual hours reach a specific % of the budget hours. Below is the notification template for this bot.

## Alert



### Alert Script:

Define the messaging specifications (Who, What, When, Where) for intended recipients. Customize the template, or compose your own message for notifying to make corrections to a previous action, to perform tasks, or inform/ commend the results of their work.

### Microsoft Teams Private Chat

Add and edit the content you want to send, and select the teams chat to receive the content.



☐ Hide the message footer

To Ticket Owner

Rich text editor toolbar with icons for bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent, link, unlink, image, video, table, emoji, text color, background color, font size, and code. A word count indicator shows 34 WORDS.

Hi, {{USER\_FIRSTNAME}}! Your ticket {{Ticket Number}} has reached {{Budget %}} of the total budget hours set. The total actual hours logged so far is {{Hours Actual}} hours while the budget set is {{Hours Budget}} hours.

☐ Preview

Choose Template: [Choose Template](#)

[Save as a template](#)

### Microsoft Teams Public Channel

Add and edit the content you want to send, and select the teams channel to receive the content.



### Email



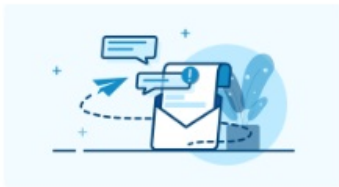
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### Ticket Closing Below Budget

This bot monitors tickets that are closed even if the target budget hours are not met. Below is the notification template for this bot.

## Alert



### Alert Script:

Define the messaging specifications (Who, What, When, Where) for intended recipients. Customize the template, or compose your own message for notifying to make corrections to a previous action, to perform tasks, or inform/ commend the results of their work.

### Microsoft Teams Private Chat



Add and edit the content you want to send, and select the teams chat to receive the content.

☐ Hide the message footer

To Ticket Owner

Rich text editor toolbar with icons for Bold, Italic, Underline, Strikethrough, Bulleted List, Numbered List, Indent, Outdent, Quote, Unquote, Link, Unlink, Image, Video, Table, Smiley, Text Color, Background Color, Font Size (11pt), and a plus icon for more options.

Hi, {{USER\_FIRSTNAME}}! Your ticket {{Ticket Number}} was closed way below the budgeted hours. Please see the details below:

Logged hours: {{Hours Actual}}  
Budget hours: {{Hours Budget}}  
Company Name: {{Company Name}}  
Last Update timestamp on the ticket: {{Last Update}}

38 WORDS

☐ Preview

Choose Template: Choose Template

Save as a template

### Microsoft Teams Public Channel



Add and edit the content you want to send, and select the teams channel to receive the content.

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The CrushBank bots are set to send escalation messages to the ticket owner by default. To modify the escalation settings, refer to [Set the escalation script](#) section of the article [How to Create a Bot](#).

The CrushBank app is currently in the Beta phase. To install, send your request to [product@mspbots.ai](mailto:product@mspbots.ai).