

# Quick Guide to Getting Started (with QuickBooks) INTERTEC TimePro

Before your Staff can start using your TimePro system, you (as the Administrator) need to complete the following simple steps. Log on to your TimePro system with the initial Admin Logon that has been provided.



## Step 1: Configure the Settings

Review [configuration options](#) in all categories as shown on the screen.



## Step 2: Define Staff Types - Admin, Contractor, Salary ...

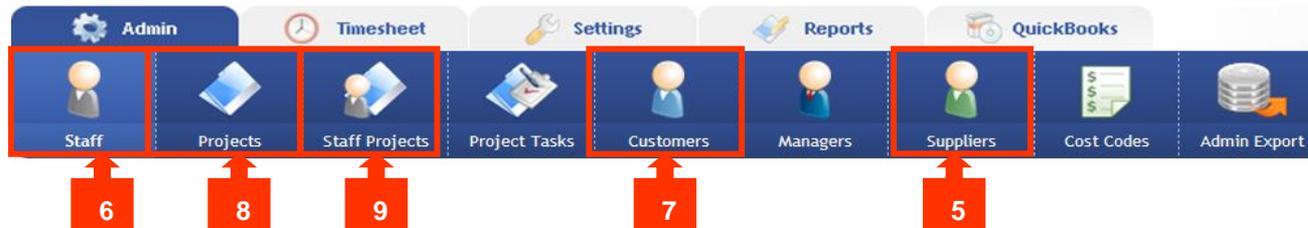
Review the default [Staff Type listings](#) and add new types if necessary.

## Step 3: Configure QuickBooks Settings

Set [configuration options](#) to match your requirements.

## Step 4: Add QuickBooks Service Items, Customers & Suppliers

The quickest way to set up these records is to import them into TimePro (using the [QuickBooks Import](#)) rather than adding them individually.



## Step 5: Add Suppliers ie. Contractor type staff

If you have any Staff who are Contractors (Staff Type), then you should add your [Suppliers](#) next. If you are using TimePro with QuickBooks integration then you should refer to the QuickBooks setup instructions before continuing.



## Step 7: Add Customers

Add your [Customers](#).



## Step 8: Add Projects

Add your [Projects](#).



## Step 6: Add Staff

Add your [Staff](#). *HINT - Make use of [Global Projects](#) and/or copy features to save time when setting up your Staff and Projects.*



## Step 9: Allocate your Staff to Projects

Allocate staff to your [Projects](#). *HINT - If you have used the Global Projects function when setting up your Staff and Project records, then this function would have already allocated Staff to your Global Projects.*

## Basic Setup is Now Complete!

You can now inform your Staff that they can start using the system. If you have entered email addresses for all your Staff, then you can use the Email notification facility in TimePro to send out a [customised welcome message](#).

**Additional set up steps may be required depending on what features you've activated. These are shown overleaf.**

# QuickBooks Integration Summary

## Step 1: Configure QuickBooks Settings

Set [configuration options](#) to match your requirements



## Steps 2: Add Service Items, Customers & Suppliers

The quickest way to set up these records is to import them into TimePro (using the [QB Import](#)) rather than adding them individually.



## Step 3: Match QuickBooks entries with TimePro Records

After adding these QuickBooks entries, you will need to link them with the appropriate TimePro [Customer](#), [Supplier](#), [Project](#) and [Staff Project](#) records located in the Admin tab.



## Step 4: Export TimePro data to a .csv file

The [QuickBooks export](#) facility gives you the ability to take the time records entered into TimePro and to export these records for generating [Invoices](#), [Bills](#) and/or [Timesheets & Expenses](#) in QuickBooks. These records are first exported in a text file which is then imported into MYOB. *Only Time records that have been marked as "Completed" are included as part of the export process. Therefore it is a good idea to use the [Check Timesheets screen](#) to check that staff have "Completed" their timesheets and to lock all timesheets before running an export.*



## Step 5: Download and install Intertec QBTI

To import data from TimePro into QuickBooks a plugin module is needed. This can be downloaded from the following link there are also instruction for setting up the connection contained in this file: [http://timesheets.com.au/downloads/IQBTI\\_Setup\\_32\\_v5.0.zip](http://timesheets.com.au/downloads/IQBTI_Setup_32_v5.0.zip)

**Important: perform a backup of your QuickBooks file before starting the import.**

# Additional Setup Steps

These steps can be undertaken in any order.

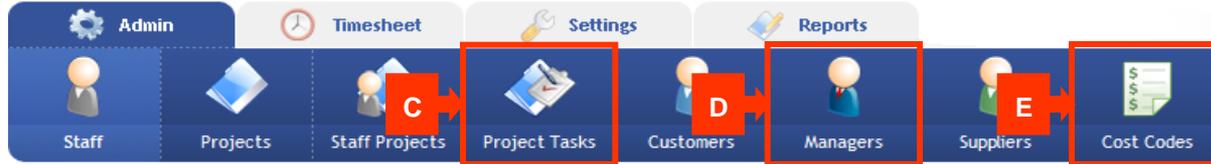


## A. Add Global Tasks

If you chose to use "global" Tasks in the "Time Entry Text Option" when configuring TimePro, then you can add your [Global Tasks](#) now.

## B. Add Expense Codes

If you turned on "Track Expenses" and if you wish to categorise/code your expenses, then you can add your [Expense Codes](#) now.



## C. Add Project-specific Tasks

If you turned on "Use Project-Specific Tasks" when configuring TimePro, then you can add your [Project-Specific Tasks](#) now.

## D. Add Managers

If you turned on "Use Authorisation" when configuring TimePro, then you can add your [Managers](#) now. *Note: once you have defined your Managers you should assign them to the [Projects](#) they are responsible for.*

## E. Add Cost Codes

If you turned on "Apply Cost Tracking to Staff Projects" when configuring TimePro, then you can add your Cost Codes now. *Note: once you have defined your Cost Codes you should apply them to the [Staff Project Records](#).*

## Hints & Tips

*If you have a significant volume of data to set up in the system, such as 50, 100 or even 200 or more staff, projects or customers, then it may be more economical to have your staff imported directly into the system for you by a TimePro consultant. The data to be imported should be provided to TimePro in a CSV or TAB delimited format. Note: There is usually a charge for this service.*

*Check out the [TimePro Logon Anywhere Feature](#) if you would like flexibility in how you log on to your TimePro system. This allows you to log on to TimePro directly from your existing web site or Intranet.*

# Further Information for Administrators

Now that you've got your TimePro system up and running what should you do next? You will be using the following key areas of TimePro on a regular basis to help ensure that your timesheet system is running efficiently with as little effort as possible. Follow the links to take you to our online help.



## Monitoring your TimePro system

 Use the [Check Timesheets](#) screen to keep an eye on who has entered and completed their timesheets and more importantly, you can also send reminder emails to Staff who have not.

 On the [View Timesheet](#) screen you can select any of your Staff members and enter or make adjustments to their time entries.

## Retrieving information from the system: Batch Print

 Use the [Timesheets Batch Print](#) facility to print out timesheets for your Staff to send out with your invoices. Timesheets can be printed for Staff on a project-by-project basis (ideal for invoicing) or on a consolidated Staff timesheet. You can also control the information that is displayed on the timesheet by choosing between the various Print templates.  
*Note: The View Timesheet screen can only print a timesheet for a single Project and a single Staff member at a time.*

## Retrieving information from the system: Exports

 Depending on your requirements you may find the [Data Export](#) useful if you need to export your timesheet or expenses information to another system or to analyse the data in a spreadsheet program such as MS Excel.

## TimePro Drill Down Data Viewer

 Use the [Drill Down Data Viewer](#) found on many of the screens and reports within TimePro for a quick check of the underlying data records behind any of the figures you see.

## TimePro Reports

Review the numerous reports available in the TimePro system to determine which ones best match your requirements.

- [Staff Reports](#)
- [Project Reports](#)
- [Cost Code Reports](#)
- [Task Reports](#)
- [Audit Trail Report](#)

Note : If you have a very specific reporting requirement that is not covered by the standard TimePro Reports, then you can contact the [TimePro Support](#) to have a custom report developed for your business.

## Giving non-Admin Staff Access to Certain Administrator Functions

If you wish to release some of the TimePro reports and or TimePro Admin screens to non-Admin users then you can do so on the [Custom Reports Setup](#) screen. This allows you to setup a separate level of access to non-admin users allowing them to access screens normally accessible only to admin staff.

## TimePro Compact Interface

This Compact Interface makes TimePro accessible to users of mobile PDA devices. It has a neat and reduced entry interface with all the core time entry functionality on the desktop. It operates on a Weekly timesheet view, with time entered on a daily basis and in worked hours format. *Note: There is no facility for submitting a timesheet via the Compact Interface. You will still need to log in to TimePro to submit a timesheet.*

# Intertec QBTI

Intertec QBTI is a plug-in module that lets you import the exported file created by TimePro into QuickBooks. Instructions for importing a file into QuickBooks using Intertec QBTI are as follows:

## Step 1: Browse for the File

Click on the **Import** tab. Locate the exported file to import using the **Browse** button.

## Step 2: Choose Text File Options

Select **Tab Delimited** under Text File Options

## Step 3: Choose the Mapping

Choose a mapping based on the type of file you exported from TimePro:

- QuickBooks Invoices -> TimePro Invoice
- QuickBooks Bills -> TimePro Bill
- QuickBooks Timesheets -> TimePro Timesheet
- QuickBooks Expenses -> TimePro Cheque

## Step 4: Click Import

**Note:** Leave the other settings as default as you may wish to change these as you become familiar with the integration.

A message will appear detailing how many records were imported.

**Intertec QuickBooks Transaction Importer 5.0**

Connections Import

Select a file

File to import:

Header row

Excel options

Choose a sheet in Excel:

Text file options

Tab delimited  Pipe() delimited

Comma delimited  Fixed width

Setup column mapping

Match the columns from the import file to the corresponding fields in QuickBooks

Choose a mapping:

Conflict options

If transaction already exists then:

Duplicate

Skip

Overwrite

Import options

Use auto numbering

Update address and contact details