



QuickBooks Online Integration Configuration and User's Guide

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Overview: How the QuickBooks Online for Office Timesheets Sync Works

The Office Timesheet QuickBooks Online Sync is a hosted app that, when configured, connects your Office Timesheets database to your QuickBooks Online account and syncs Employee and Item data used for tracking time; and employee/contractor timesheets once submitted and approved.

Items used for tracking time

First, the Office Timesheets QuickBooks Online Sync collects the Employees, Contractors, Clients, Service Items, Classes and Locations you wish to use for tracking time and syncs them between Office Timesheets and QuickBooks Online.

All of these items, with the exception of Vendors/Contractors* are synced in both directions, and can thus be created and/or modified from either application and synced/updated to the other.

**Contractors/Vendors must be created and modified in QuickBooks Online and then synced/updated to Office Timesheets.*

Timesheet and Time Entry Synchronization

Second, your employees and contractors enter time and/or or time entries notes, submit their timesheets to an approving manager and, once approved, an admin simply presses QuickBooks Online Sync App button, and the entries are synced and/or updated (if modified after a previous sync) over to your QuickBooks Online account where the entries will be available for generating professional services invoices in QuickBooks.

Before you Start

Before you start configuration of the QuickBooks Online sync, you'll need to define element tracking levels in Office Timesheets for mapping to QuickBooks Online time tracking levels, if you haven't done so already. You'll need to define an equivalent tracking level inside your Office Timesheets account to each of the tracking levels inside of QuickBooks Online, which include:

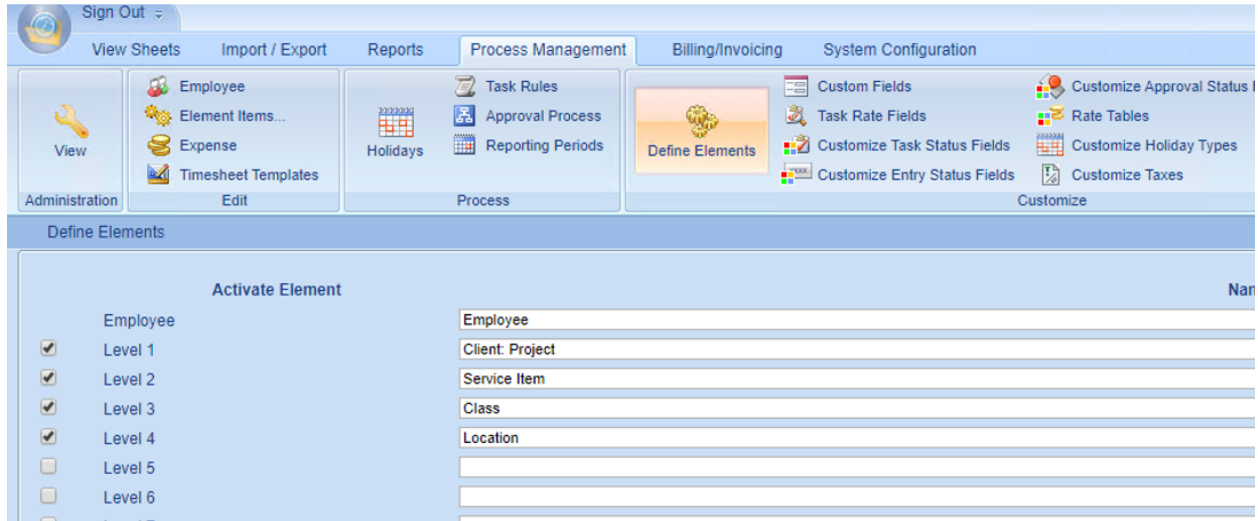
- Employee/Contractor/Vendor (Employees, Contractors and Vendors are all mapped to the same level in Office Timesheets)
- Customer
- Service Item
- Class
- Location

Each level must be mapped. However, you can turn off of the sync of items completely in your configuration's filter settings; or you may limit the sync of a particular level to only items you select.

To define tracking levels inside of Office Timesheets:

1. Click **Process Management -> Define Elements...**

2. Activate an equal number of tracking levels in Office Timesheets to that of QuickBooks Online (there should be a minimum of 4 active tracking levels in Office Timesheets, excluding the Employee level). In the example below, we've simply created 4 tracking levels, each with same name as the tracking levels in QuickBooks Online for simplicity...



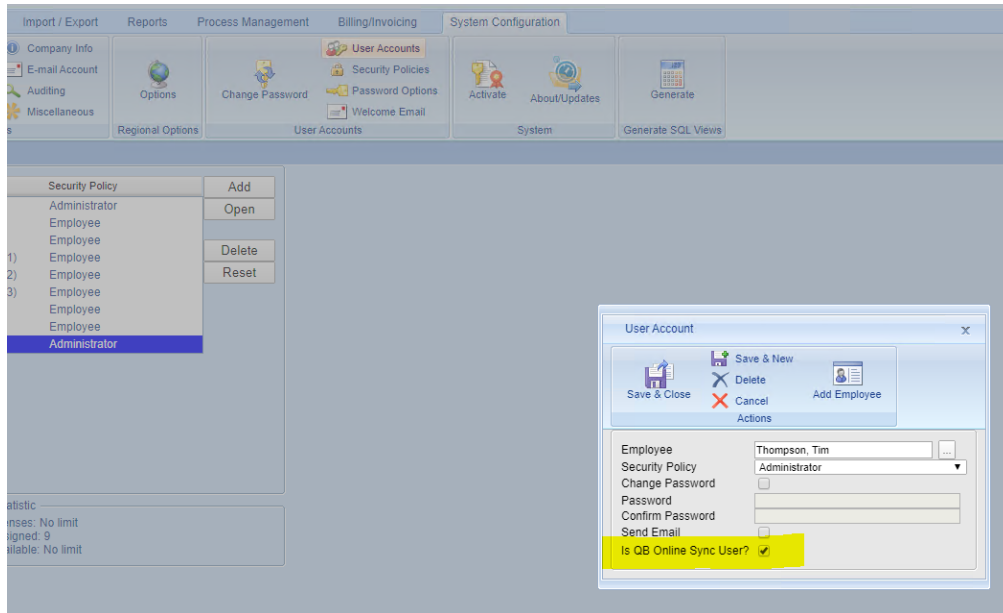
Setting up the QuickBooks Online Sync for Office Timesheets

While small modifications may likely be made from time to time, most of the setup and configuration of your QuickBooks Online Sync app is a one-time, set and then forget it effort. Follow the steps below to configure your QuickBooks Sync...

Step 1: Grant Access to the QuickBooks Online Sync App

The first step in setting up your sync configuration is to define which Office Timesheets users can access the QuickBooks Online Sync App for Office Timesheets. To do so:

1. Click System **Configuration** -> **Users Accounts...**
2. Select each user account you wish to grant access to the QuickBooks Online Sync App; and click the **Open** button...
3. Check the box **Is QB Online Sync User?**; and click **Save & Close**.
4. Repeat the above steps **2** and **3** for any other users you wish to grant access to the QuickBooks Online Sync App.



Step 2: Enable the QuickBooks Online Sync inside of your Office Timesheets interface and Create your Sync App Account

The second step in configuring the sync is to enable the QuickBooks Online Sync inside of your Office Timesheets Account; and to create a QuickBooks Online Sync App account along with the defined preferences for the sync to your Office Timesheets account database. To do so:

1. Click **Import/Export -> QuickBooks Preferences...**
2. From within the *QB Online Account* section, check the box **Use QB Online Integration...**
3. Next, enter a name for your sync app in the **Account Name** field; and then click the **Create** icon.

NOTE: the account should be a meaningful and easily memorized name as you will need to reference it in the future to log into your Sync App account.

4. Next, using the dropdown field selectors, ensure each of the **Map QB Online...** fields are correct.
5. Ignore the **QB Online name** field as this will auto-fill with the initiation of your first sync.
6. Check the box **Sync Only Time Entries with Status (Approved)** if you only wish to sync manager approved timesheets.

NOTE: If you don't select this checkbox then all time entries, regardless of approval status, will sync to QuickBooks Online with each sync.

7. Click the **Save** button.

Sign Out -

View Sheets | Import / Export | Reports | Process Management | Billing/Invoicing | System Configuration

Import / Export | Import / Export | Preferences | Import | Preferences

Generic | MS Project | QuickBooks | Active Directory | Sage

QuickBooks Preferences

Current Integration Status: **Disabled**

Use QuickBooks Integration

Map QuickBooks Customer:Job to Office Timesheets element level Client: Project (Client) ▼

Map QuickBooks Payroll to Office Timesheets element level Client: Project (Client) ▼

Map QuickBooks Service items to Office Timesheets element level Service Item (Task) ▼

Map QuickBooks Class to Office Timesheets element level Class (Category) ▼

Map QuickBooks Billable Status to Office Timesheets Entry Status Billable ▼

QuickBooks computer name




QuickBooks company file

Sync Only Time Entries with Status Approved ▼

Sync Hours Working Only ▼

Save

QB Online Account

Account Name: UNIQUEST   

Integration Settings

Current Integration Status: **Enabled**

Use QB Online Integration

Map QB Online Customer:Jobs to Office Timesheets element level Client: Project (Client) ▼

Map QB Online Service items to Office Timesheets element level Service Item (Task) ▼

Map QB Online Class items to Office Timesheets element level Class (Category) ▼

Map QB Online Location items to Office Timesheets element level Location (Additional) ▼

QB Online name Ja Company

Map QB Online Billable Status to Office Timesheets Entry Status Billable ▼

Map QB Online Taxable Status to Office Timesheets Entry Status Taxable ▼




Sync Only Time Entries with Status Approved ▼

Sync Hours Working Only ▼

Save

8. Lastly, click the **Update** icon to update all settings to your QuickBooks Online Sync App account.

QB Online Account

Account Name: UNIQUEST   

Integration Settings

Current Integration Status: **Enabled**

Use QB Online Integration

Map QB Online Customer:Jobs to Office Timesheets element level Client: Project (Client) ▼

Map QB Online Service items to Office Timesheets element level Service Item (Task) ▼

Map QB Online Class items to Office Timesheets element level Class (Category) ▼

Map QB Online Location items to Office Timesheets element level Location (Additional) ▼

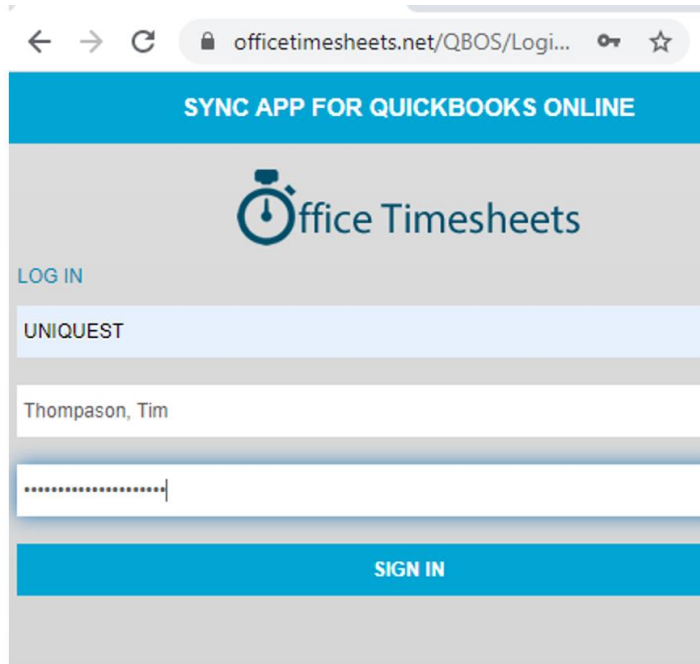
Step 3: Configure your QuickBooks Online Sync Application

Log into your Sync App following the steps below:

1. Open a web browser and browse to <https://www.officetimesheets.com/QBOS>
2. Enter your **Account Name**, **User Name** and **Password**; and click/press **SIGN IN**.

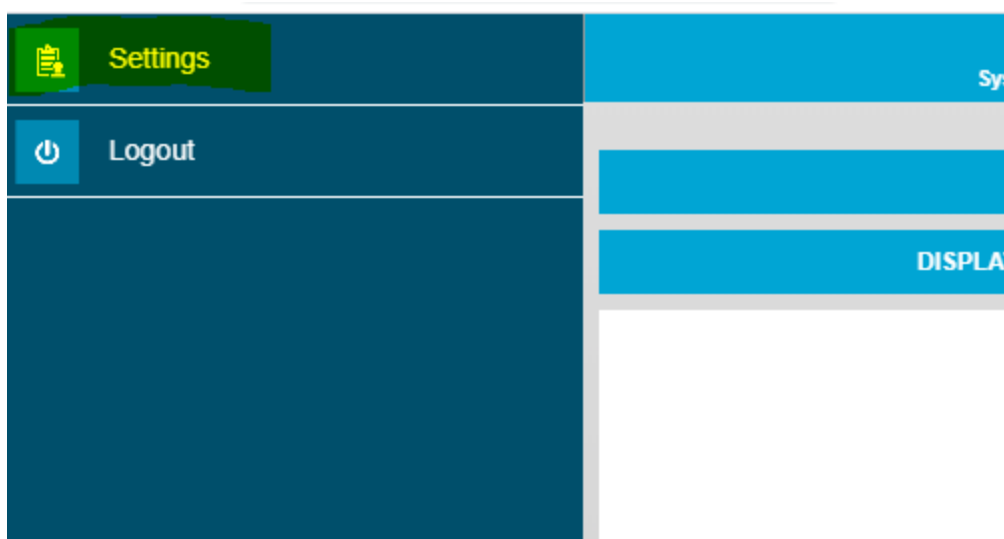
NOTE: To locate your account name simply look in Office Timesheets under Import/Export -> QuickBooks -> QuickBooks Online Account -> Account Name

Also, you'll want to bookmark the site <https://www.officetimesheets.com/QBOS> as you'll need to browse to this site to perform data syncs between Office Timesheets and your QuickBooks Online account, as well as modifying configuration data preferences for your sync.



When you log into the QuickBooks Online Sync App for Office Timesheets the first screen you'll see is the sync screen. However, before you can begin syncing data between your QuickBooks Online and Office Timesheets Accounts you'll need to first perform some configuration. To open the configuration screens simply click on the menu selector in the top, right-hand corner of the app; and click **Settings...**

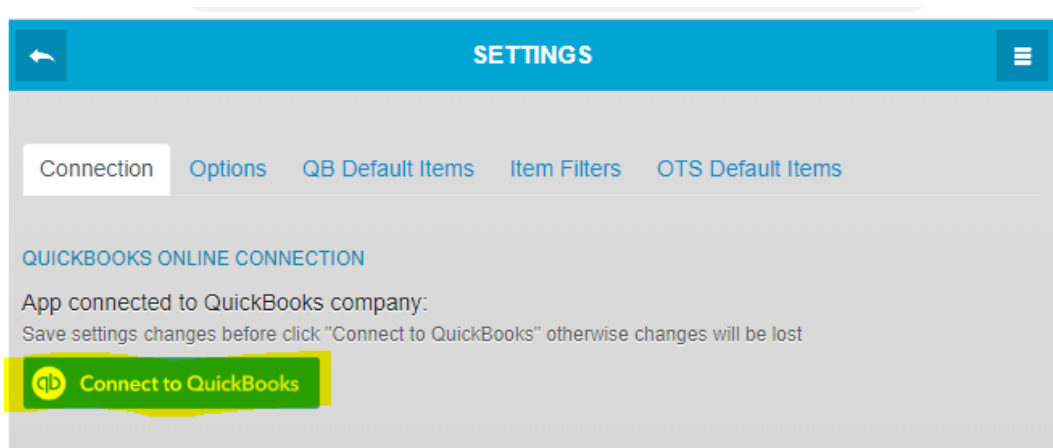




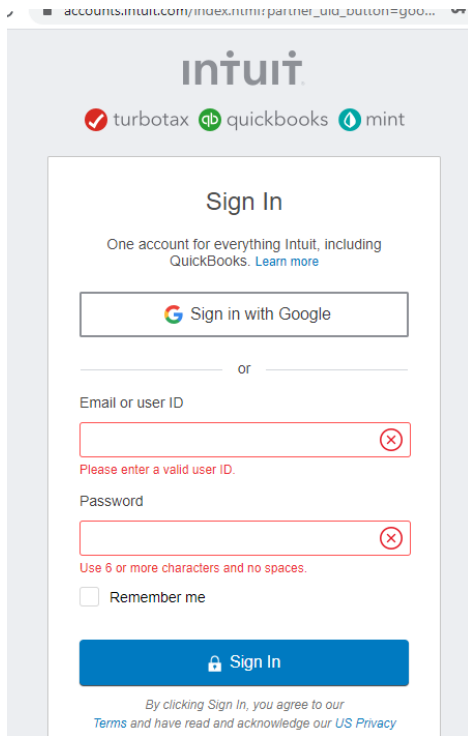
Enter your Connection Settings

There are two pieces to the connection puzzle: your QuickBooks Online Account and your Office Timesheets Accounts. The QuickBooks Online Sync App for Office Timesheets needs login details for both of these so it can access them and sync data between the two applications.

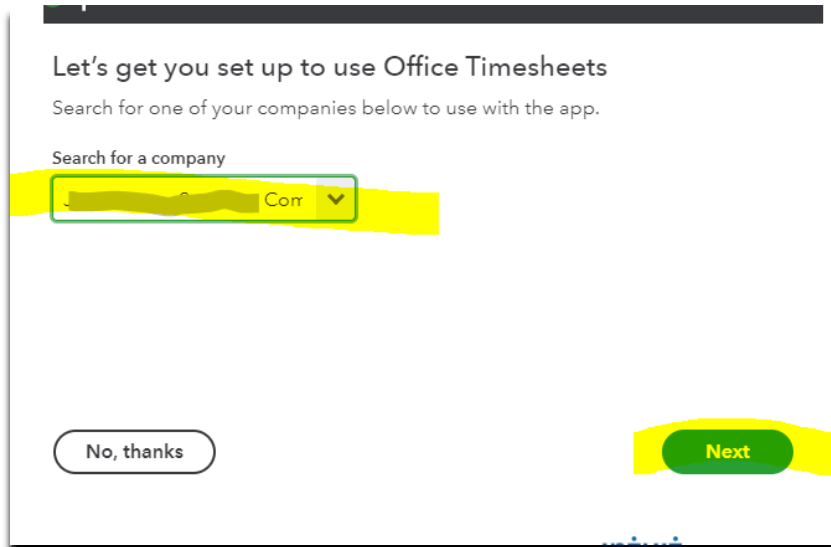
Start with the *QuickBooks Online Connection* by clicking the **Connect to QuickBooks** icon...



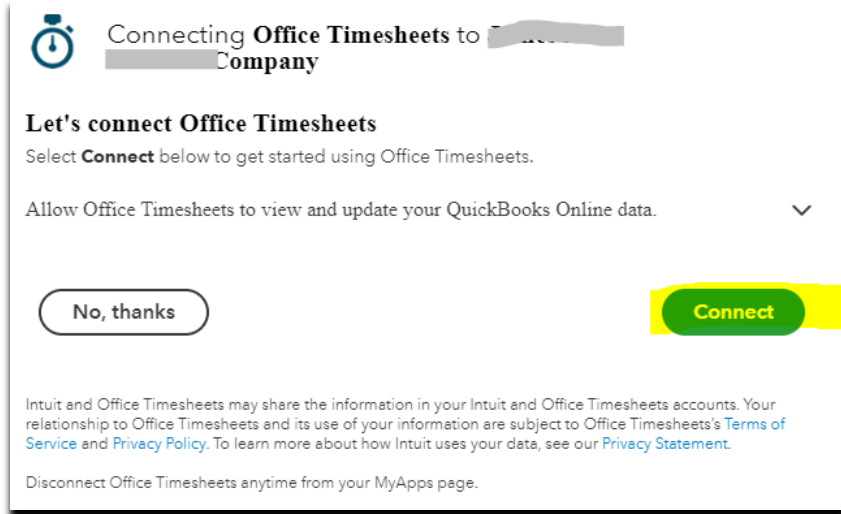
Your *Intuit Account Sign In* form will appear. Enter your **User ID** and **Password** and click the **Sign In** button...



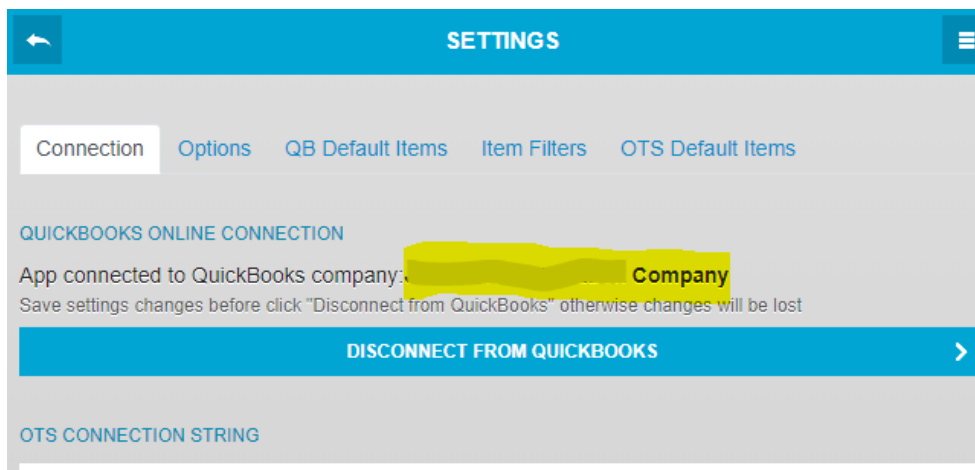
Next, click on the **Search for a company** dropdown box, select the company you wish to connect to; and click **Next...**



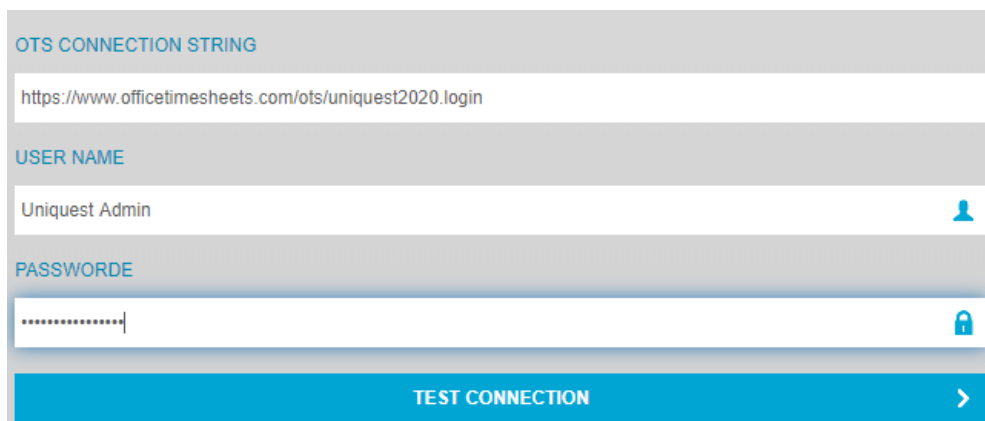
Next, confirm your details and click the **Connect** button...



Once your QuickBooks Online connection is completed you'll be returned back to the *Settings* screen and will now see your company name selected in the *QuickBooks Online Connection* area...



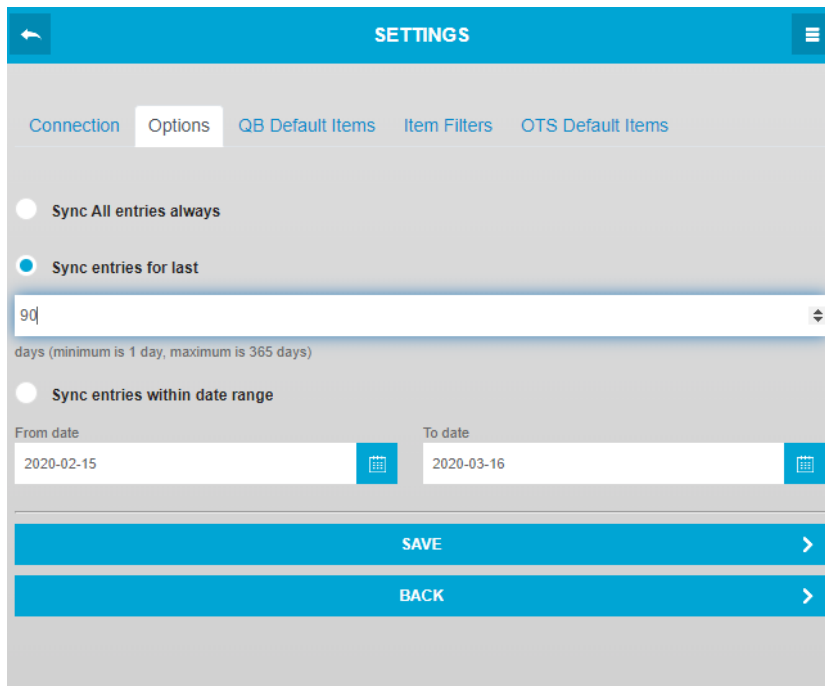
Next, enter your **Office Timesheets Account URL**, **User Name** and **Password** and click the **Test Connection** button...



Once you've successfully connected both your QuickBooks Online and Office Timesheets accounts; click the **Save** button; and click on the **Options** tab...

Enter your Options Settings

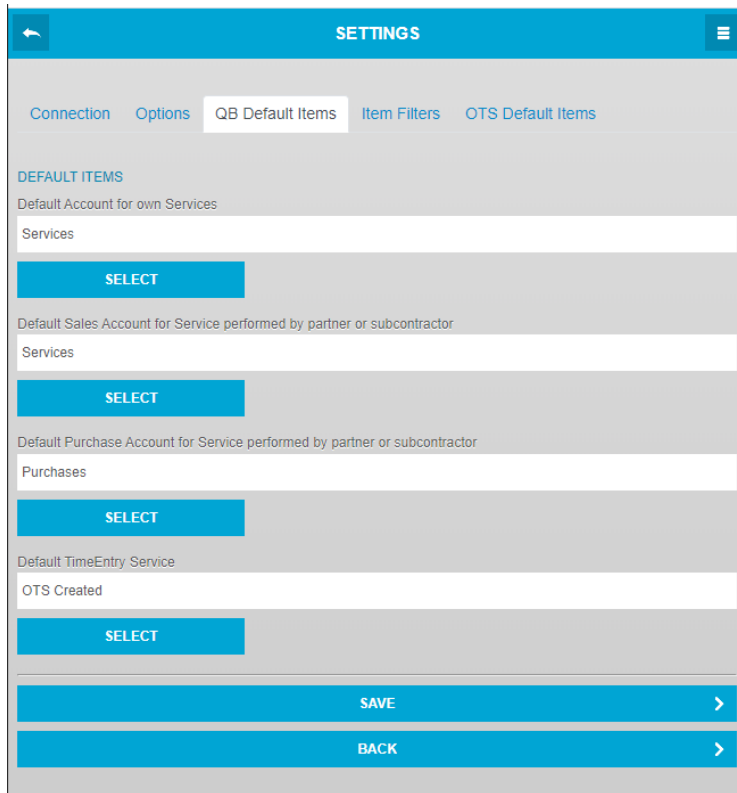
The Office Timesheets QuickBooks Online Sync App *Options* settings let you determine what range of time entries you wish to sync. By default, the App is set to **Sync All** entries, regardless of date. However, if you have a large number of users, then you'll incur longer sync times as time progresses. The recommend *Options* settings is to sync entries for the last **90 days**. Choose your *Options* settings; click the **Save** button; and then click on the **QB Default Items** tab...



The screenshot shows the 'SETTINGS' screen of the Office Timesheets app. At the top, there is a blue header with a back arrow on the left and a menu icon on the right. Below the header, there are five tabs: 'Connection', 'Options', 'QB Default Items', 'Item Filters', and 'OTS Default Items'. The 'Options' tab is currently selected. Under the 'Options' tab, there are three radio button options: 'Sync All entries always' (unselected), 'Sync entries for last' (selected), and 'Sync entries within date range' (unselected). Below the 'Sync entries for last' option, there is a text input field containing the number '90' and a dropdown arrow. Below the input field, there is a small text label: 'days (minimum is 1 day, maximum is 365 days)'. Below the 'Sync entries within date range' option, there are two date pickers. The first is labeled 'From date' and shows '2020-02-15'. The second is labeled 'To date' and shows '2020-03-16'. At the bottom of the screen, there are two large blue buttons: 'SAVE' and 'BACK', both with right-pointing arrows.

Enter your QuickBooks Default Items Settings

When an item is first created in Office Timesheets and then synced to QuickBooks Online it requires a properly linked QuickBooks account. Thus, for each item type, you must select a default account to be selected for each item when created in QuickBooks by Office Timesheets. Select a default account for each item type; click the **Save** button; and then click on the **Item Filters** tab...



Enter your Item Filters Settings

Item filters let you choose the items at each level you wish to sync or not sync.

NOTE: Contractors in QuickBooks Online will appear in the Vendors item filters in the Item Filters below.

Choose the filter settings you want for each item type (Employees, Vendors/Contractors, Customers, Service Items, Classes and Locations); click the **Save** button; and then click on the **OTS Default Items** tab...

SETTINGS

Connection Options QB Default Items **Item Filters** OTS Default Items

ITEM FILTERS

EMPLOYEE

Do not Sync Employees

Sync All Employees

Sync Only Selected Employees

No Selected

SELECT

VENDOR

Do not Sync Vendors

Sync All Vendors

Sync Only Selected Vendors

Pence, Donald

SELECT

CUSTOMER:JOB

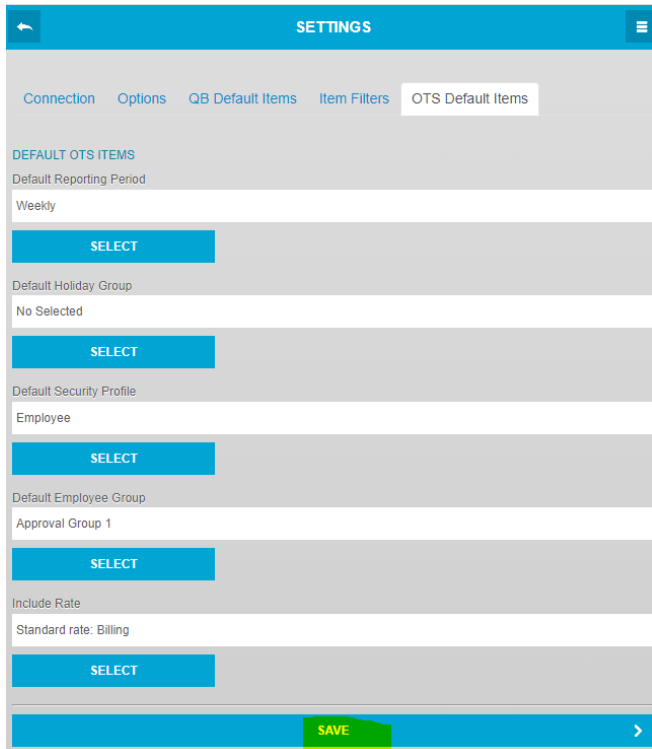
Do not Sync Customer:Job

Sync All Customer:Job

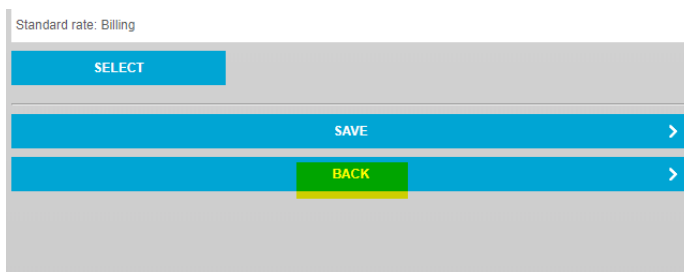
Enter your Office Timesheets Default Items Settings

When a new employee is synced over to Office Timesheets from QuickBooks Online, several items not defined in QuickBooks can be setup for you by default. Default item setup is not required, but highly recommended as it will save you additional time. Default item selections include:

1. **Reporting Period** – the frequency at which an employee submits a timesheet for approval. This can be weekly, bi-weekly, semi-monthly, monthly or even a custom period.
2. **Holiday Group** – each employee in Office Timesheets can be assigned to a group of holidays that can be shown and blocked off on the employee’s timesheets.
3. **Security Policy** – the security policy that will be assigned to a new employee when the sync over to Office Timesheets by QuickBooks Online.
4. **Employee Group** – default employee group in which to place new employees added to Office Timesheets from QuickBooks Online.
5. **Include Rate** – while QuickBooks Online contains one employee rate, Office Timesheets contains multiple employee rates. Here, you can choose which Office Timesheets rate field to which you wish to sync QuickBooks Online’s Employee Billing Rate.
6. Press the **Save** button to save your settings.



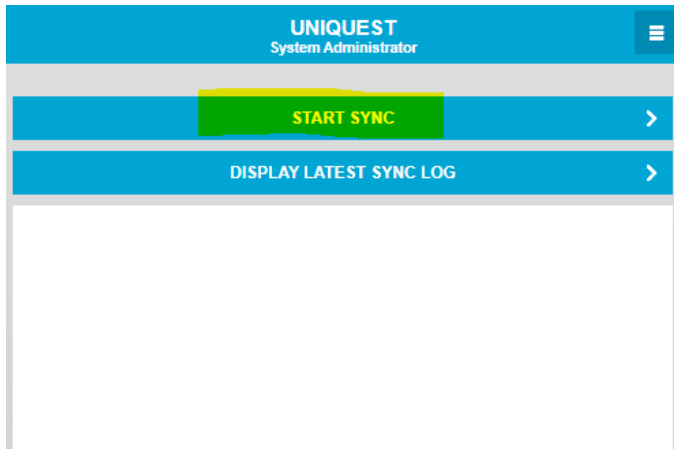
7. Once you've saved all your settings press the **Back** button to return to the main screen.



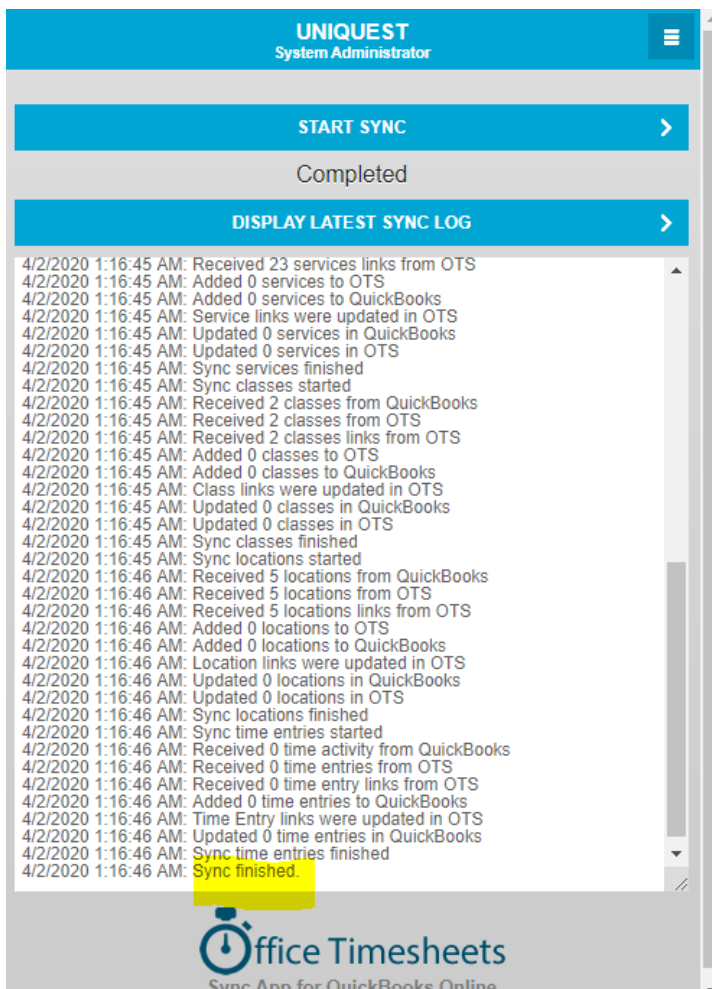
Running the Sync

Anytime you wish to Sync any new Employees, Contractors, Clients, Service Items, Classes, Locations or times entries simply press the **START SYNC** button...

Let's start your first sync...



You'll see logging of the sync as it progresses in the log Windows and, when the sync is completed, the last line item of the log should read **"Sync finished"**.



Employee and Element Item Syncing

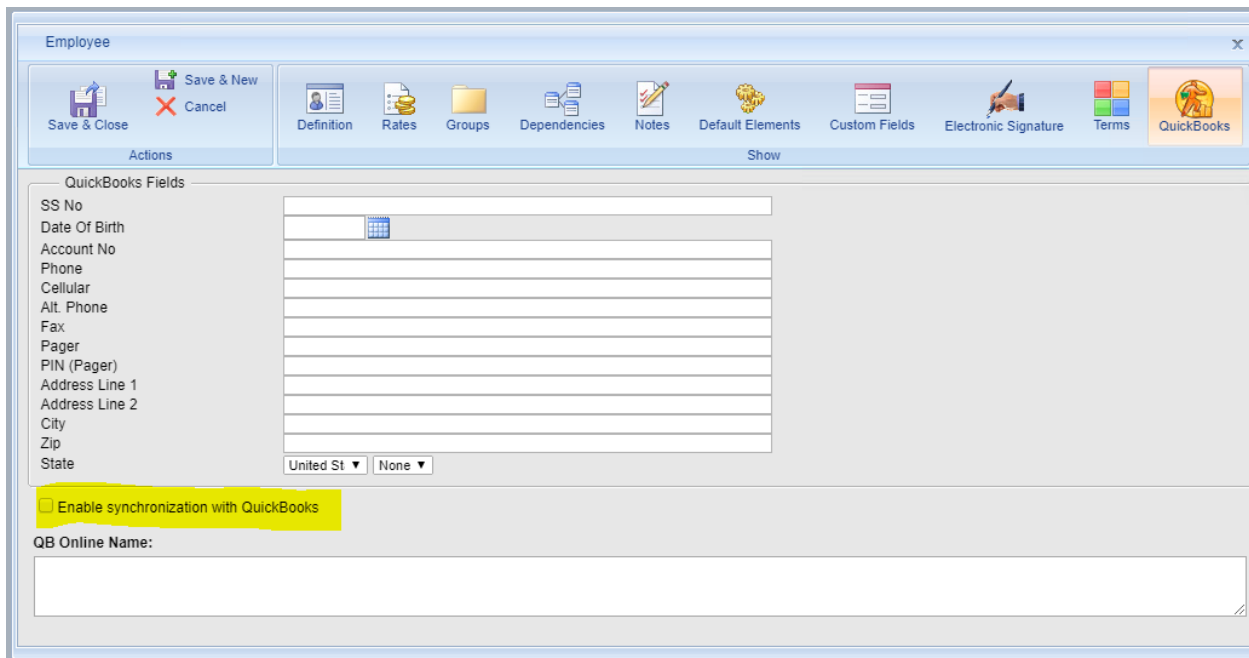
Employees & Contractors

Employees

Office Timesheets has the ability to sync Employees with QuickBooks Online. While we recommend adding employees in QuickBooks first, and then syncing the employee over to Office Timesheets, you can add an employee in Office Timesheets and sync the employee information over to QuickBooks.

What if I want to track time for an Employee in Office Timesheets, but don't want the employee and/or employee's data to sync to QuickBooks?

You can create employees in Office Timesheets that you wish to keep separate from QuickBooks Online by clicking on the **QuickBooks** icon panel of the *Employee* record; and unchecking the **Enable synchronization with QuickBooks** checkbox (highlighted below). If this option is unchecked, the specified employee record and none of the Employee's time data will sync to QuickBooks.



The screenshot shows the 'Employee' record form in Office Timesheets. The 'QuickBooks Fields' section includes fields for SS No, Date Of Birth, Account No, Phone, Cellular, Alt. Phone, Fax, Pager, PIN (Pager), Address Line 1, Address Line 2, City, Zip, and State. Below these fields, the checkbox 'Enable synchronization with QuickBooks' is highlighted in yellow and is currently unchecked. The 'QB Online Name' field is also visible below the checkbox.

What employee data syncs between Office Timesheets and QuickBooks Online?

The primary employee field records that sync from QuickBooks to Office Timesheets, and vice-versa are as follows:

- **First Name** - automatically mapped to **First Name** field in Office Timesheets' Employee record.
- **Last Name** - automatically mapped to **Last Name** field in Office Timesheets' Employee record.

- **Display name as** - automatically mapped to **QB Online Name** field in Office Timesheets' Employee (QuickBooks panel) record.
- **Email** – automatically mapped to **E-mail** field in Office Timesheets' Employee record.
- **Billing Rate** (Optional Mapping) – mapped to any of Office Timesheets 5 Employee rate field tabs.

Employee Information

Title	First name	Last name	Email	
<input type="text"/>	<input type="text" value="James"/>	<input type="text" value="Anderson"/>	<input type="text" value="janderson@looksolve.com"/>	
* Display name as			Phone	Mobile
<input type="text" value="Anderson, James"/>			<input type="text" value="(214) 329-4500"/>	<input type="text"/>
Print on check as <input checked="" type="checkbox"/> Use display name			Billing rate (/hr)	
<input type="text" value="Anderson, James"/>			<input type="text" value="85.00"/> <input type="checkbox"/> Billable by default	
Address map			Employee ID No.	
<input type="text" value="1201 Elm Street Suite 4080"/>			<input type="text"/>	
<input type="text" value="Dallas"/>		<input type="text" value="TX"/>	Employee ID	
<input type="text" value="75270"/>		<input type="text" value="United States"/>	<input type="text"/>	
Notes			Gender	
<input type="text"/>			<input type="text"/>	
			Hire date	
			<input type="text"/>	
			Released	
			<input type="text"/>	
			Date of birth	
			<input type="text"/>	

Privacy

Employee

Save & Close Save & New Cancel Definition Rates Groups Dependencies Notes Default Elements Custom Fields Electronic Signature Terms QuickBooks

Full Name
 First Name James
 M.I.
 Last Name Anderson
 Display Name/ID Anderson, James
 E-Mail janderson@looksolve.com
 Windows Login
 Status Active
 Reporting Period Weekly
 Holiday Group {No selection}
 Manager admin
 Company Code {No selection}
 ADP File Number / Pay ID

Lock Dates
 Time Entry 03/22/2020
 Expense Entry
 Do not allow Time and/or Expense Entries prior to these dates.
 Approval Start Date 03/16/2020
 Do not show Time and/or Expense Sheets prior to this date.

Employee

Save & Close Save & New Cancel Definition Rates Groups Dependencies Notes Default Elements Custom Fields Electronic Signature Terms QuickBooks

Rates

Pay rates Overhead Billing D E

Effective date	Standard rate	Overtime rate	
---	85.00	0.00	Clear
	0.00	0.00	Clear
	0.00	0.00	Clear
	0.00	0.00	Clear
	0.00	0.00	Clear
	0.00	0.00	Clear
	0.00	0.00	Clear
	0.00	0.00	Clear
	0.00	0.00	Clear
	0.00	0.00	Clear

IMPORTANT NOTES: 1. Employee rate sync only occurs with initial/first sync of an employee's record. This allows you to update the rate independently/separately from QuickBooks. 2. If an employee is first added to Office Timesheets and synced to QuickBooks, then the employee's rate will not sync to QuickBooks Online.

Vendors/Contractors

Vendors and/or Contractors in QuickBooks Online can be synced over to the Office Timesheets Employee list so that timesheets can be completed by the vendor/contractor. However, vendors and/or contractors can't be created in Office Timesheets and synced to QuickBooks Online. Thus, you must

create vendor and/or contractor records in QuickBooks Online first, and then sync them over to Office Timesheets.

*With the exception of **Default Rate** data, **Default Items** do not apply to vendors and/or contractor that are added as employees in Office Timesheets from QuickBooks Online. Thus, you must set the appropriate Reporting Period, Group Assignments, User Account and Security Policy manually for each vendor and/or contractor added to Office Timesheets by QuickBooks Online.

The primary Contractor field records that syncs from QuickBooks Online to Office Timesheets are as follows:

- **First** - automatically mapped to **First Name** field in Office Timesheets' Employee record.
- **Middle** - automatically mapped to **M.I.** field in Office Timesheets' Employee record.
- **Last** - automatically mapped to **Last Name** field in Office Timesheets' Employee record.
- **Display name** - automatically mapped to **QB Online Name** field in Office Timesheets' Employee (QuickBooks panel) record.
- **Email** - automatically mapped to **E-mail** field in Office Timesheets' Employee record.
- **Billing Rate** (Optional Mapping) – mapped to any of Office Timesheets 5 Employee rate field tabs.

The image shows a screenshot of the QuickBooks Online interface for a contractor named Donald Pence. The contractor's profile is displayed in a dark-themed sidebar on the left, with a 'Details' tab selected. The main content area shows a form for entering contractor information. The form includes fields for Contractor type (Individual selected), Title, First name (Donald), Middle name (L), Last name (Pence), Suffix (9856920), Display name (Pence, Donald), Social Security number (XXXX45-6788), Email (dpence@contractorcomplete.com), Address (6060 North Central Expressway, Suite 500), City (Dallas), State (TX), and ZIP code (75206).

Field	Value
Contractor type *	Individual - files taxes using a Social Security number (most common).
Title	
First *	Donald
Middle	L
Last *	Pence
Suffix	9856920
Display name *	Pence, Donald
Social Security number *	XXXX45-6788
Email	dpence@contractorcomplete.com
Address *	6060 North Central Expressway Suite 500
City *	Dallas
State *	TX
ZIP code *	75206

The screenshot shows the 'Employee' form with the following data:

Full Name	
First Name	Donald
M.I.	L
Last Name	Pence
Display Name/ID	Pence, Donald
E-Mail	dpence@contractorcomplete.com
Windows Login	
Status	Active
Reporting Period	{No selection}
Holiday Group	{No selection}
Manager	admin
Company Code	{No selection}
ADP File Number / Pay ID	

Lock Dates

Time Entry: [] []

Expense Entry: [] []

Do not allow Time and/or Expense Entries prior to these dates.

Approval Start Date: 03/18/2020

Do not show Time and/or Expense Sheets prior to this date.

Customers

Customers in QuickBooks Online can be synced over to the Office Timesheets Mapped Customer list. Also, customer records created in Office Timesheets' Mapped Customer list can be synced from Office Timesheets to QuickBooks Online.

The primary Customer field records that sync from QuickBooks Online to Office Timesheets are as follows:

- **Company** – automatically mapped to both **Name** and **Abbreviation** field in Office Timesheets' mapped element item record.
- **Display name** - automatically mapped to **QB Online Name** field in Office Timesheets' Mapped Element Item (QuickBooks panel) record.
- **First name** - automatically mapped to **First Name** field in Office Timesheets' Mapped Element Item (QuickBooks panel) record.
- **Last name** - automatically mapped to **Last Name** field in Office Timesheets' Mapped Element Item (QuickBooks panel) record.
- **Email** - automatically mapped to **E-Mail** field in Office Timesheets' Mapped Element Item (QuickBooks panel) record.

Customer information

Title	First name	Middle name	Last name	Suffix	Email
	Nicola		Weiskopf		Consulting@intuit.com
Company			Phone	Mobile	Fax
Weiskopf Consulting			(650) 555-1423		
* Display name as			Other	Website	
Weiskopf Consulting					
Print on check as <input checked="" type="checkbox"/> Use display name			<input type="checkbox"/> Is sub-customer		
Weiskopf Consulting			Enter parent customer		
			Bill with parent		

Address | Notes | Tax info | Payment and billing | Language | Attachments | Additional Info

Billing address map	Shipping address map <input checked="" type="checkbox"/> Same as billing address
45612 Main St	45612 Main St.
Bayshore CA	Bayshore CA
94326 Country	94326 Country

Privacy

Client: Project

Element	
Full Name	
Name	Weiskopf Consulting
Abbreviation	Weiskopf Consulting
Status	Active
Visibility	Visible
Client	{No selection}
Project	{No selection}
Company Code	{No selection}

Client: Project

Save & Close Save & New Cancel

Element Groups Dependencies Notes Custom Fields QuickBooks

QuickBooks Fields

Company Name

Salutation

First Name Nicola M.I.

Last Name Weiskopf

Contact

Phone Fax

Alt. Phone

Alt. Contact

E-Mail Consulting@intuit.com

Address Line 1

Address Line 2

City State United Sta None

Zip Country

Note

Account Number

Enable synchronization with QuickBooks

QB Online Name:

Weiskopf Consulting

Service Items

Service Items in QuickBooks Online can be synced over to the Office Timesheets Mapped Service Items list. Also, Service Item records created in Office Timesheets' Mapped Service Item list can be synced from Office Timesheets to QuickBooks Online.

The primary Service Item field records that sync from QuickBooks Online to Office Timesheets are as follows:

- **Name** – automatically mapped to both **Name** and **Abbreviation** field in Office Timesheets' mapped element item record.
- **Description** - automatically mapped to **Description** field in Office Timesheets' Mapped Element Item (QuickBooks panel) record.
- **Rate** - automatically mapped to **Rate** field in Office Timesheets' Mapped Element Item (QuickBooks panel) record.

Service [Change type](#)

Name*
 Installation

SKU

Category
 Choose a category

Class
 Assign a class

Description
 I sell this product/service to my customers.
 Installation of landscape design

Sales price/rate 50 **Income account** Landscaping Services:Labor:Installe

Let QuickBooks calculate your sales tax
Sales tax category ?
 Taxable - stan... ▾

Purchasing information
 I purchase this product/service from a vendor.

Service Item

Save & Close Save & New Cancel Element Groups Dependencies Notes Custom Fields QuickBooks

Actions Show

Element

Full Name
 Name Installation
 Abbreviation Installation
 Status Active ▾
 Visibility Visible ▾
 Client {No selection} ▾
 Project {No selection} ▾
 Company Code {No selection} ▾

Service Item

Save & Close Save & New Cancel

Element Groups Dependencies Notes Custom Fields QuickBooks

QuickBooks Fields

This service is used in assemblies or is performed by subcontractor or partner

Description Installation of landscape design

Rate 50.00

Rate is in Percents

Enable synchronization with QuickBooks

QB Online Name:

Installation

Classes

Classes in QuickBooks Online can be synced over to the Office Timesheets Mapped Class Items list. Also, Class records created in Office Timesheets' Mapped Class list can be synced from Office Timesheets to QuickBooks Online.

The primary Class field records that sync from QuickBooks Online to Office Timesheets are as follows:

- **Name** – automatically mapped to both **Name** and **Abbreviation** field in Office Timesheets' mapped element item record.

Class

Save & Close Save & New Cancel

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Element

Full Name

Name Team 1

Abbreviation Team 1

Status Active

Visibility Visible

Client {No selection}

Project {No selection}

Company Code {No selection}

Locations

Locations in QuickBooks Online can be synced over to the Office Timesheets Mapped Location list. Also, Location records created in Office Timesheets' Mapped Location list can be synced from Office Timesheets to QuickBooks Online.

The primary Location field records that sync from QuickBooks Online to Office Timesheets are as follows:

- **Name** – automatically mapped to both **Name** and **Abbreviation** field in Office Timesheets' mapped element item record.

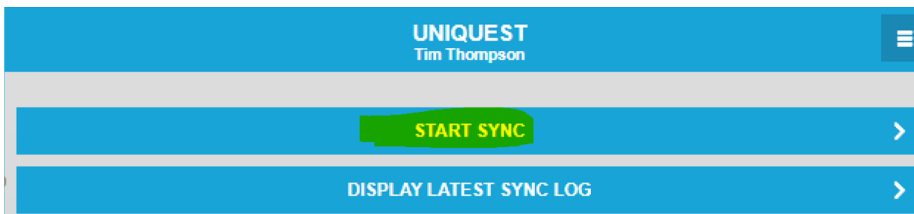
The screenshot shows the 'Location' form in Office Timesheets. The 'Name' field is highlighted in yellow and contains 'Dallas'. The 'Abbreviation' field is also highlighted in yellow and contains 'Dallas'. Other fields include 'Full Name', 'Status' (Active), 'Visibility' (Visible), 'Client', 'Project', and 'Company Code', all with dropdown menus.

Syncing Time Entries

Once a timesheet has been completed and approved, log into the Office Timesheets QuickBooks Online Sync App and press the Start Sync button...

The screenshot shows the Office Timesheets interface. The timesheet is for L. James Anderson, approved, with a start date of 03/16/2020 and an end date of 03/22/2020. The location is Dallas. The timesheet shows 4.00 hours on Mon 16 Mar, 3.50 hours on Tue 17 Mar, 3.00 hours on Wed 18 Mar, 4.00 hours on Thu 19 Mar, and 4.00 hours on Fri 20 Mar. The total hours are 18.50.

Client: Project	Service Item	Class	Location	Mon 16 Mar	Tue 17 Mar	Wed 18 Mar	Thu 19 Mar	Fri 20 Mar	Sat 21 Mar	Sun 22 Mar	Total
Project 121	Design	OBO-Class-1	Dallas	4.00	3.50	3.00	4.00	4.00			18.50
[Non-task-based]											0.00



When the sync is completed, next log into your QuickBooks Online Account and check the employee timesheet. You'll see all the timesheet data has been synced over to your QuickBooks Online account.

Weekly Timesheet

L James Anderson 3/16/2020 to 3/22/2020 TOTAL HOURS 18:30

#	DETAILS	MON 16	TUE 17	WED 18	THU 19	FRI 20	SAT 21	SUN 22	TOTAL
1	<p>Weiskopf Consulting:Project 121</p> <p>Design</p> <p>Description</p> <p><input checked="" type="checkbox"/> Billable (/hr) 75.00 <input type="checkbox"/> Taxable</p>	4:00	3:30	3:00	4:00	4:00			18:30 Billable \$1,387.50
2	<p>Choose a customer</p> <p>Choose the service worked on</p> <p>Description</p> <p><input type="checkbox"/> Billable (/hr)</p>								
3	<p>Choose a customer</p> <p>Choose the service worked on</p> <p>Description</p> <p><input type="checkbox"/> Billable (/hr)</p>								
TOTAL		4:00	3:30	3:00	4:00	4:00			18:30

Add lines Clear all lines

Cancel Copy last timesheet Save Save and new

Items of Note

Syncing Payroll Items

Unfortunately, Intuit does not currently make payroll time tracking elements (Payroll Items) available to 3rd party developers with their API. Thus, Office Timesheets cannot be used to track time against Payroll items like with QuickBooks desktop version.

Entry Billing Rates in QuickBooks

The rate that is always synced to entries in QuickBooks Online from Office Timesheets is the time entry rate in Office Timesheets. There are many options to auto-populate the entry/billing rate in Office Timesheets using defaults and multi-conditional billing rate rules.

If you update a time entry/billing rate after the initial sync of a time entry, the updated rate will sync to the linked entry in QuickBooks on subsequent syncs.

Entry sync is one-way: entries sync from Office Timesheets to QuickBooks. Any updates/modifications to time entries should be made in Office Timesheets and then synced to QuickBooks. Office Timesheets will update the entry without creating duplicate entry items.