Changes to Time Tracking System

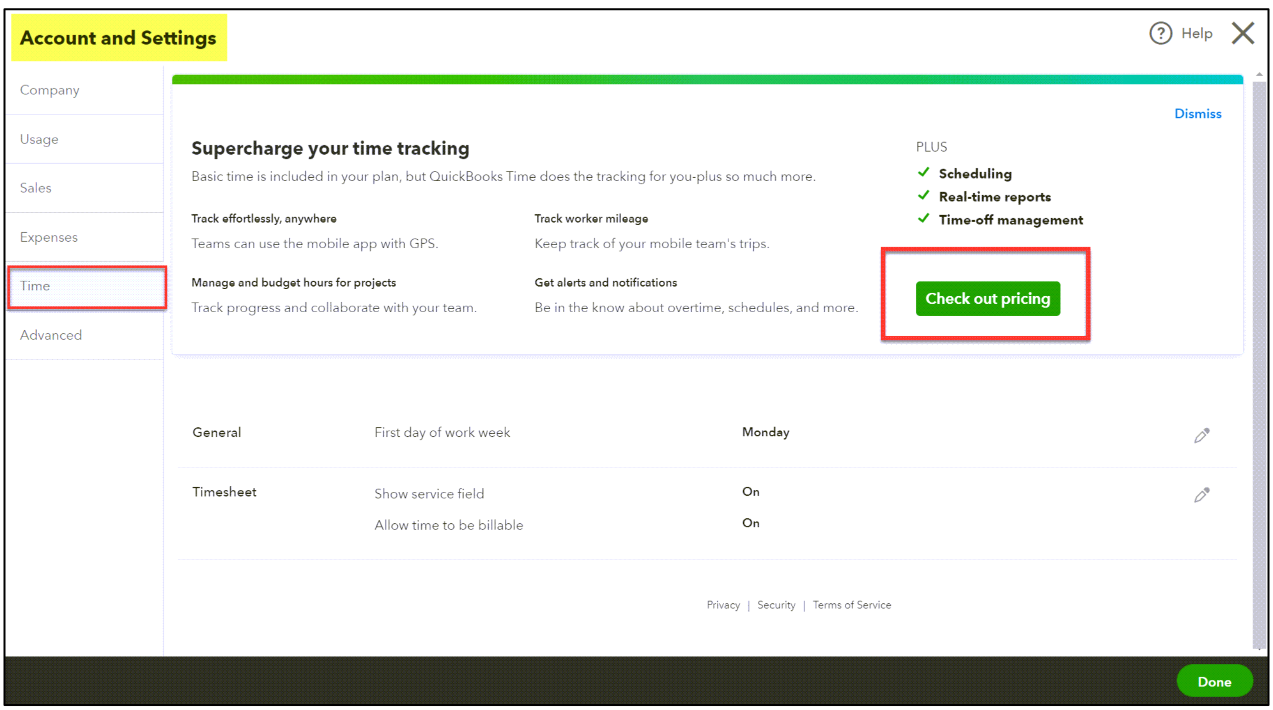
Chapter 10

This PDF replaces the **Setting Up Time Tracking** and **Entering Timesheet Data** sections of Chapter 10, starting on page 10-11. Reminder: Time tracking cannot be used in the test drive company, Craig's Design and Landscaping.

Setting Up Time Tracking

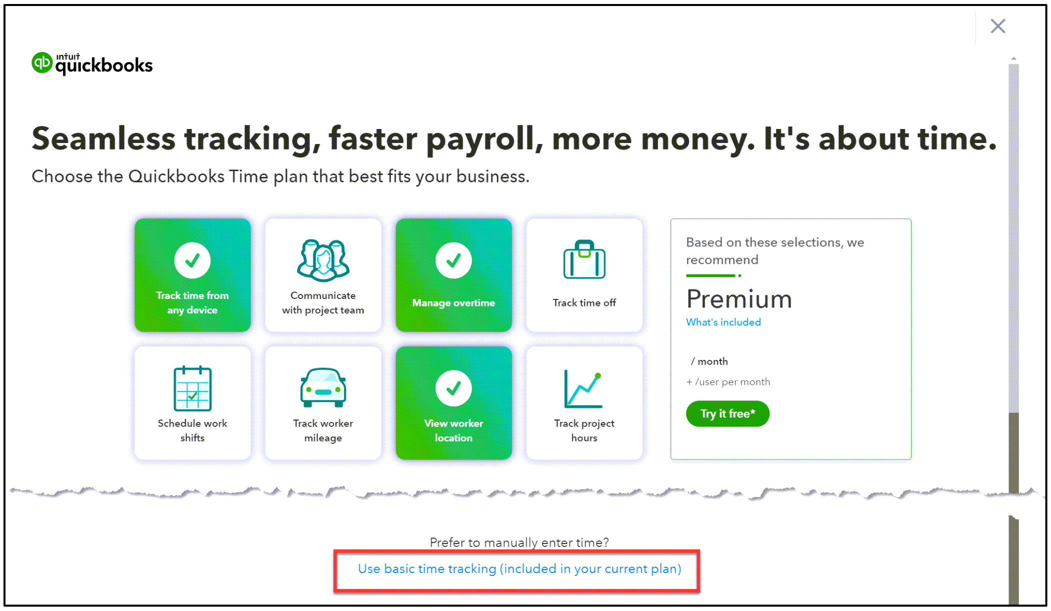
Certain QBO features must be activated to track hours by customer or project and identify billable hours. Time tracking is free in QBO, but you'll need to search a bit before taking advantage of that option!

Click the  icon on the icon bar and select **Account and settings**.



Click **Check out pricing**.

Scroll down to the **bottom** of the page.

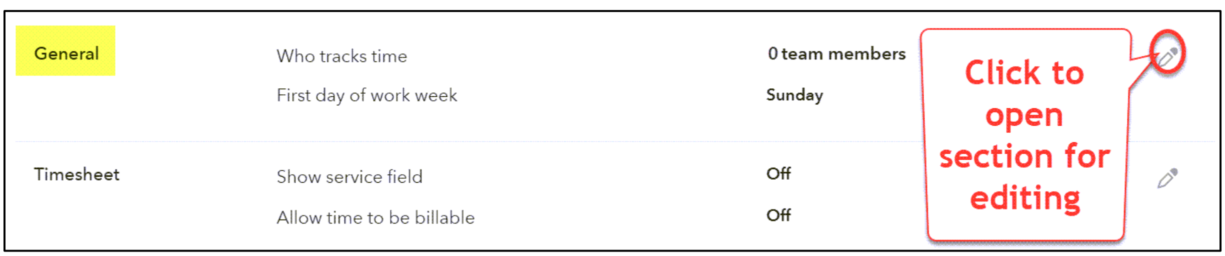


Select **Use basic time tracking (included in your current plan)**.

Before using the **time entries** feature, you'll need to edit a few settings.

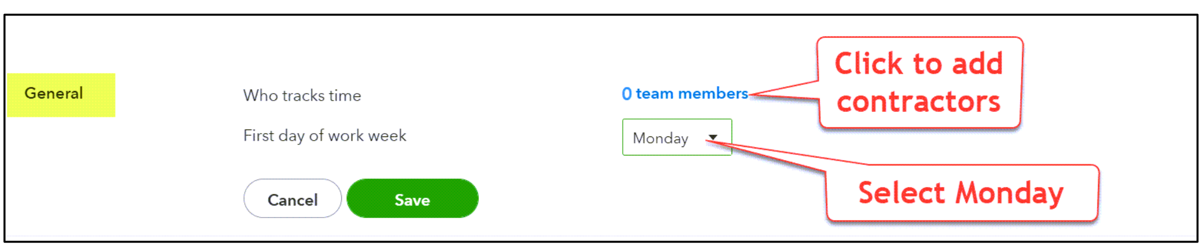
Click the icon on the icon bar and select **Account and settings**.

Open the **Time** tab.



In the **General** section, you can make time tracking available for independent contractors. (You'll be tracking time for contractors in your homework assignment for this chapter.)

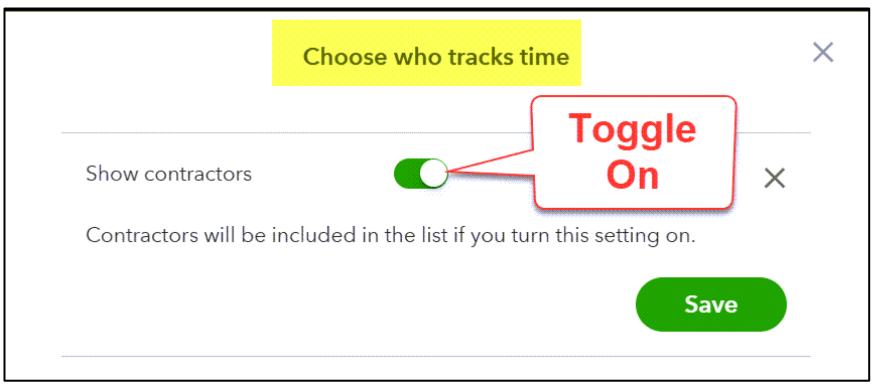
Click the pencil icon in the **General** section.



Select **Monday** in the **First day of work week** dropdown menu.

Click **0 team members**.

Click the pencil icon.

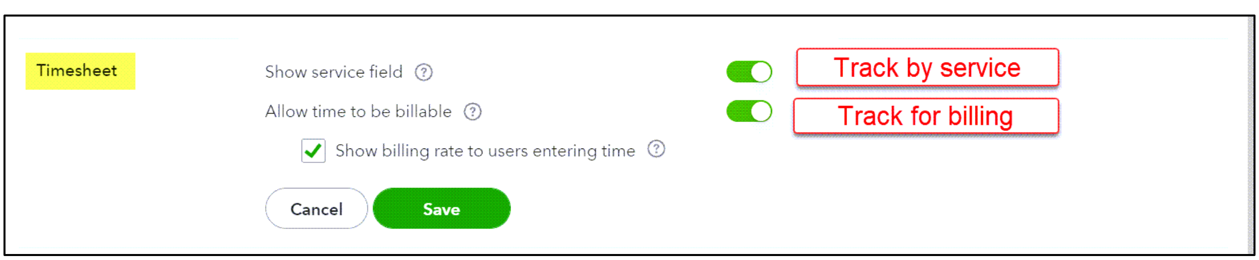


Toggle on **Show contractors** to On.

Click **Save**. You should be back on the **Time** tab in **Account and Settings.**

HINT: You may need to X out of the sidebar to return to the **Time** tab in **Account and Settings.**

Click the pencil icon in the **Timesheet** section.



Toggle **Show service field** and **Allow time to be billable** to On.

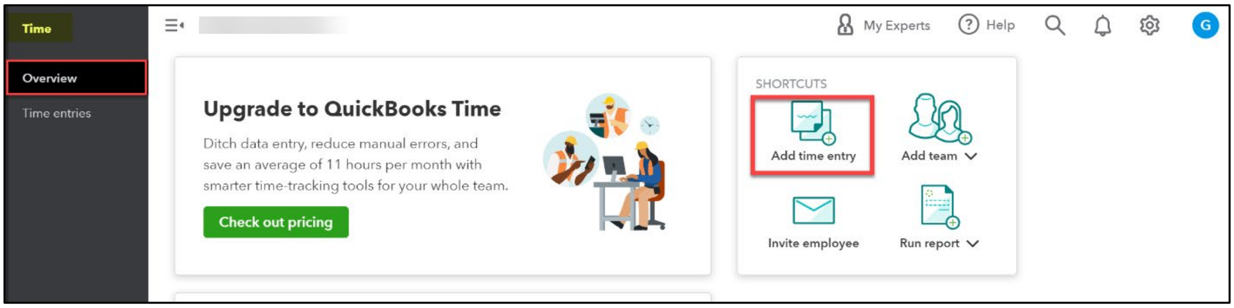
Check the box next to **Show billing rate to users entering time** and click **Save**.

Click **Done**.

Click **Dashboard** to close the **Time Entries** screen.

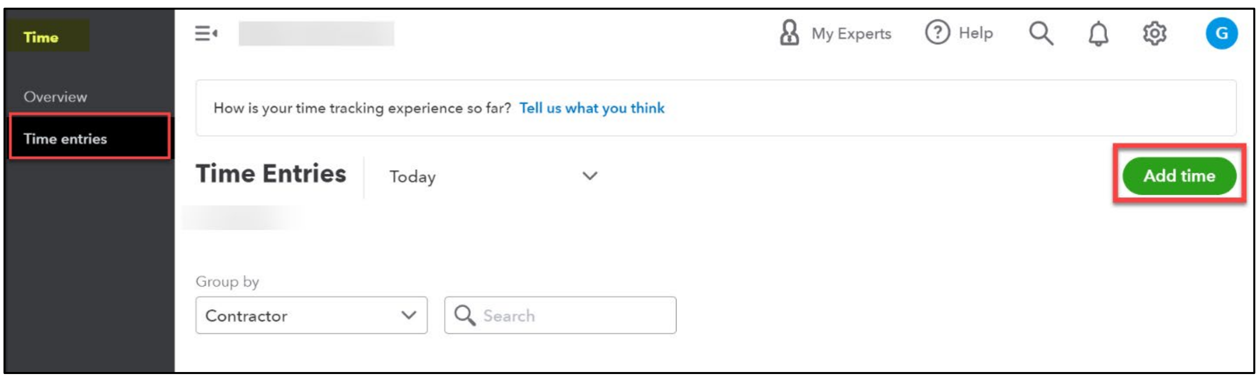
Entering Timesheet Data

There are several ways to access timesheets.



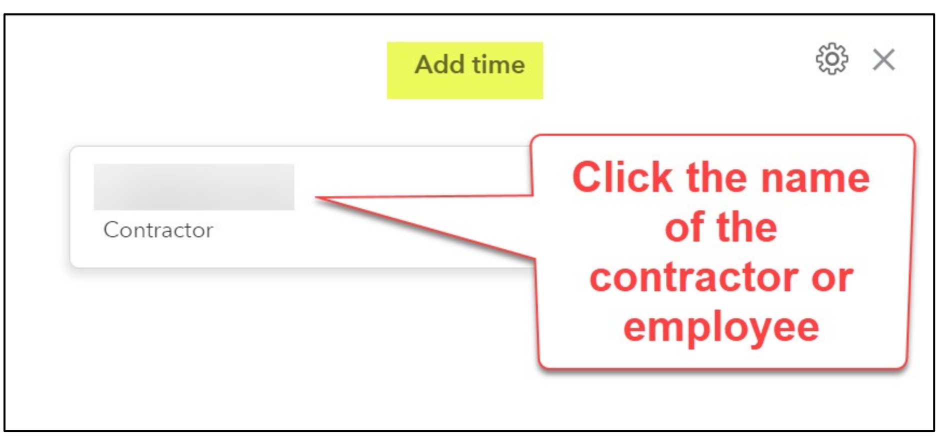
- You can click **Add time entry** in the **SHORTCUTS** section on the **Overview drawer** (or tab) in the Time Center.

Insert

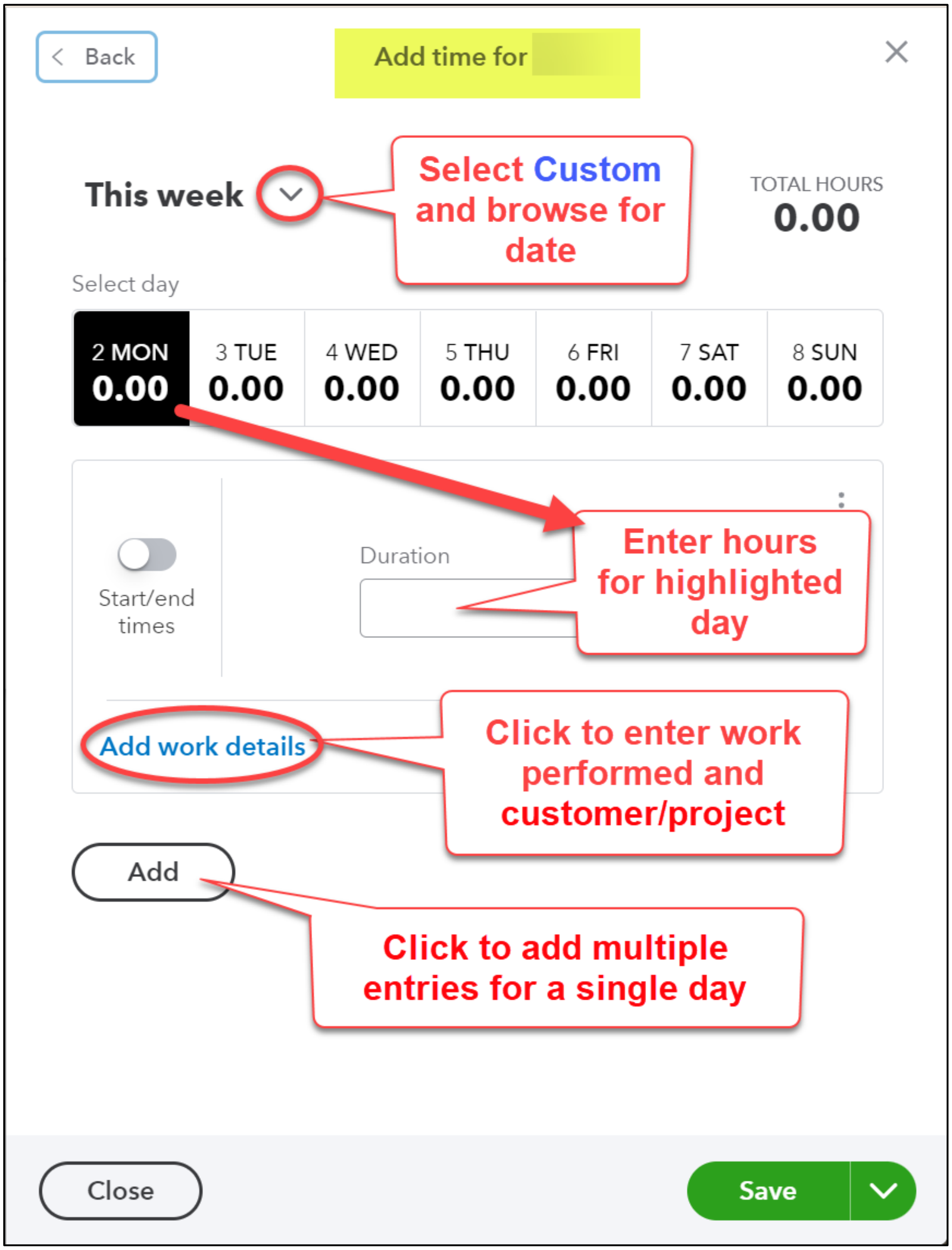


- Or you can click **Add time** on the **Time entries drawer** (tab) in the Time Center.

Both options will open a sidebar that lists all contractors or employees.



Select the appropriate name to open a timesheet.



Select the week. (Click **Custom** to select a week other than the current or prior week.)

Click the appropriate day. Enter hours worked in the **Duration** field. To add multiple entries for a single day, click **Add**. This would be necessary for companies whose employees or contractors work on more than one project in a single day.

If the hours should be tracked or billed, click **Add work details**.

A customer (or project) must be selected if the hours are being tracked. **Billable(/hr)** should be toggled on if the customer will be billed for the hours.

QBO automatically uses the rate associated with the item selected in the **Service** field for billing purposes. If the company selected **Show billing rate to users entering time** when time was activated (Figure 10.13), that rate could be changed by checking the **Use custom rate** box and entering a new rate. A **Class** field will appear if **class** tracking has been activated.

Click **Done**.
Hours are entered in the same fashion for each day of the week.

When all hours for the week have been entered, the individual's total hours will be displayed on the timesheet (**Add time for**) screen.

Click **Save**.

CHANGE TO ASSIGNMENT:

Since timesheets for contractors can now be recorded in QBO, you will **not** need to create an "employee" record for the independent contractor in your homework assignment.