

Chapter 10 – New Timesheet Process

(for use in homework company file only)

USING TIMESHEETS TO TRACK HOURS (pages 10-9 through 10-13)

A new time tracking system was added to QBO in January 2021. The new system has not yet been rolled out in all company files.

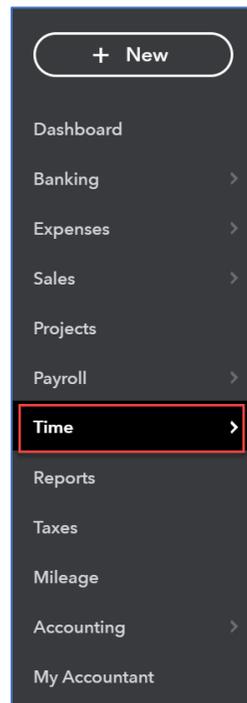
If you do **not** see a **Time** link in your homework company's navigation bar, the new system has not been activated. Continue to use the process described on pages 10-9 through 10-13 in your textbook. The homework assignment is not affected.

If you **do** see a **Time** link in your navigation bar, the new system has been activated. You will **not** need to activate time tracking in **Accounts and Settings**.

In your homework company, billable hours are worked by independent contractors. (Payroll is not covered until Chapter 12.) As of mid-February, however, time cannot be entered for **contractors** in the new time-tracking system. To track and bill time in your homework, you will need to:

- Enter contractors as employees through the Time Center in QBO.
- Enter time through the Time Center.

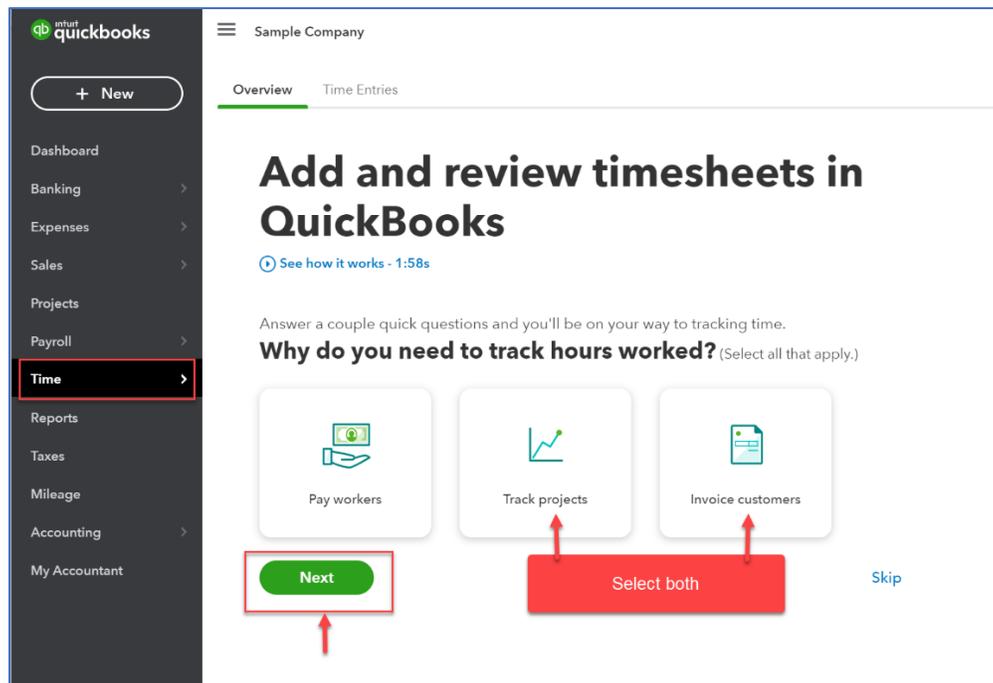
Set up contractors as employees



Click **Time** on the navigation bar.

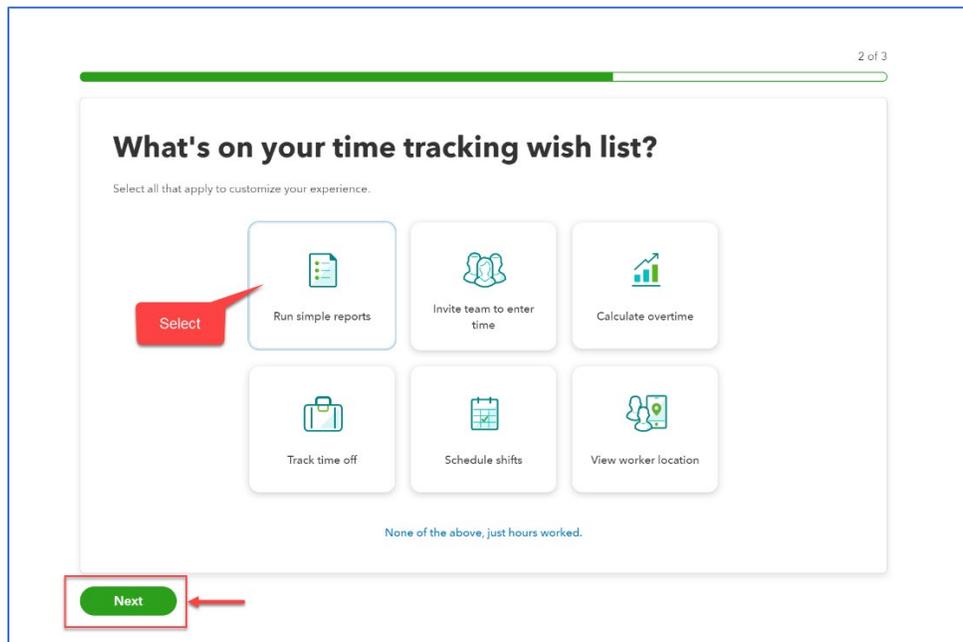
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In the **Overview** tab of the Time Center, select **Track projects** and **Invoice customers**.

Click **Next**.

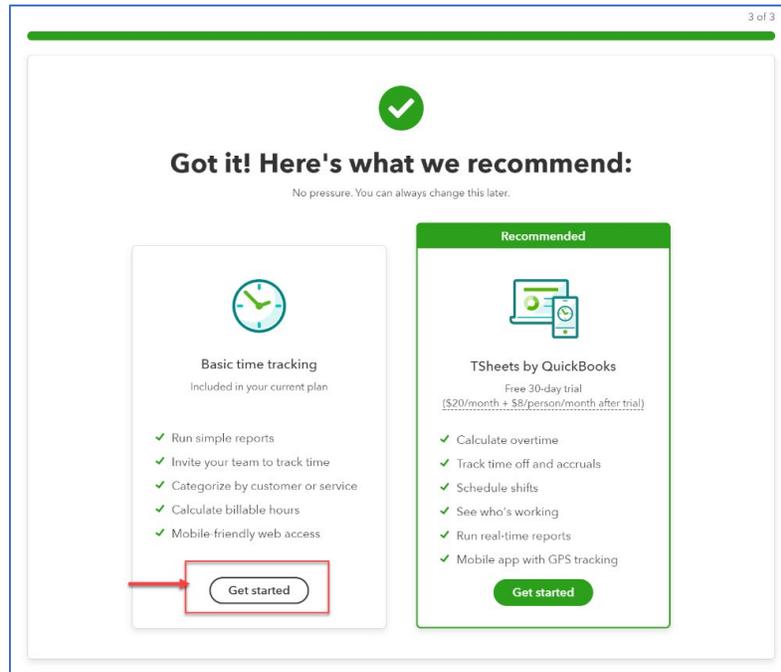


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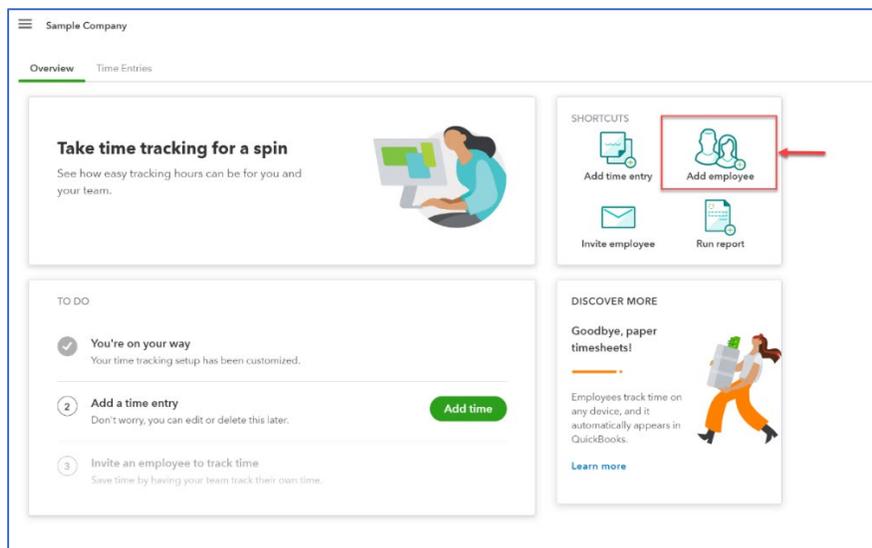
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Select **Run simple reports**.

Click **Next**.



Click **Get started** under **Basic time tracking**.



Click **Add employee** in the **Overview** tab of the Time Center.

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Employee Information

Title *First name **1** *Last name

*Display name as

Print on check as Use display name

Address **2**

Street

City/Town State/Province

ZIP code Country

Notes

Email

Phone Mobile

Billing rate (/hr) 0.00 Billable by default

Social Security No. **3**

Employee ID Gender

Hire date Released

Date of birth

Cancel Privacy **Save**

Use the information given in your homework assignment to complete the employee record. (You will be setting up either Kenny Chen (Math Revealed!) or Olivia Patel (Salish Software Solutions)).

Enter time for contractors (“employees”) using the timesheets in the homework assignment

Overview Time Entries

Take time tracking for a spin
See how easy tracking hours can be for you and your team.

SHORTCUTS

- Add time entry**
- Add employee
- Invite employee
- Run report

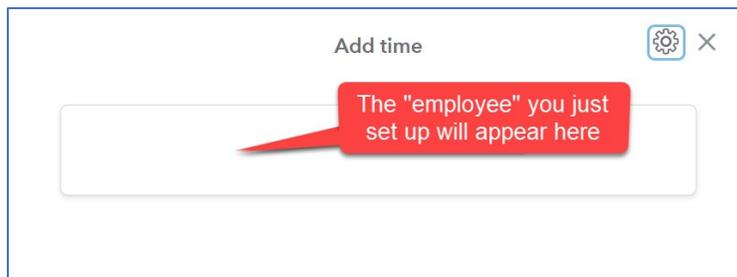
TO DO

- You're on your way**
Your time tracking setup has been customized.
- Your first hours are in the books**
You can group timesheets by Worker or Customer. [View](#)
- 3** **Invite an employee to track time**
Save time by having your team track their own time. **Invite**

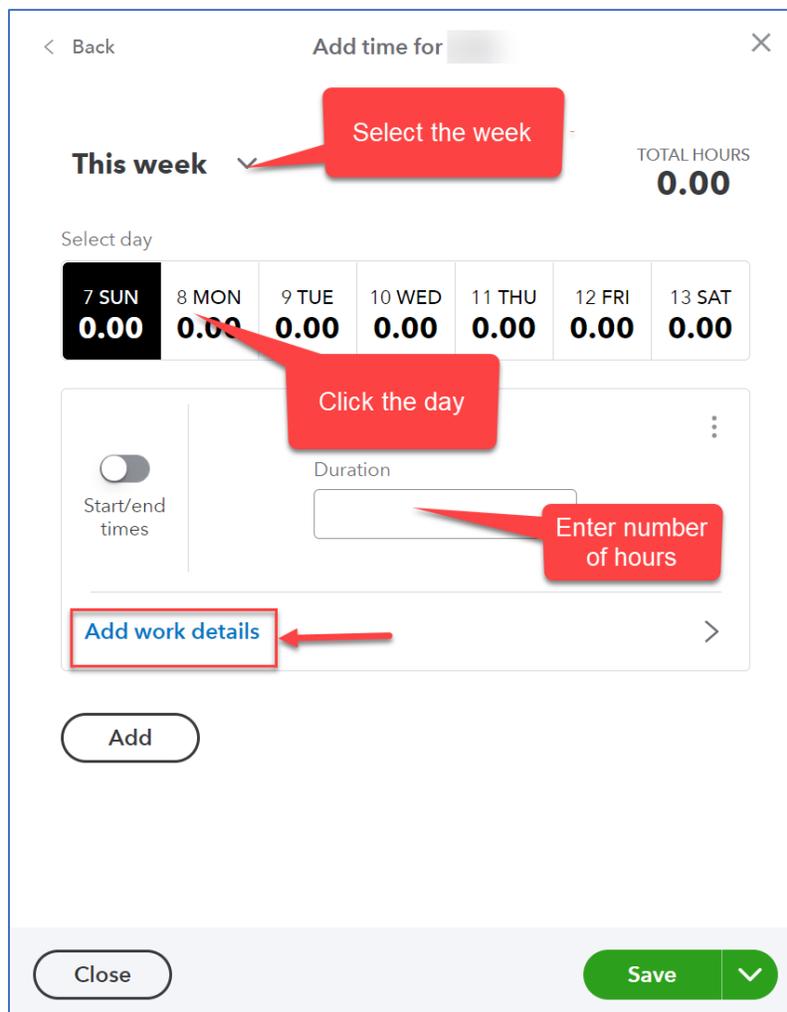
Click **Add time entry** in the **Overview** tab of the Time Center.

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The name of the “employee” you just set up will appear on the **Add time** screen.
Click the name.



Select the week.

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Click the day and enter the number of hours worked in the **Duration** field.

Click **Add work details**.

The screenshot shows a dialog box titled "Add work details" with a close button (X) in the top right corner. The dialog contains several input fields and controls:

- Worker**: A text input field.
- Start date**: A date input field.
- Duration**: A text input field.
- Start/end times**: A toggle switch, currently turned off.
- Customer**: A dropdown menu with a red callout box labeled "Select customer" pointing to the dropdown arrow.
- Service**: A dropdown menu with "(none)" selected and a red callout box labeled "Select service" pointing to the dropdown arrow.
- Class**: A dropdown menu with "(none)" selected and a red callout box labeled "Verify class" pointing to the dropdown arrow.
- Billable (/hr)**: A toggle switch, currently turned on, with a red callout box labeled "Toggle to activate" pointing to the switch.
- Notes**: A large text area for entering notes.
- Buttons**: A "Delete" button and a "Done" button (highlighted with a red box and a red arrow pointing to it).

Select the **Project** in the **Customer** dropdown menu, the **service** performed in the **Service** dropdown menu, and the **Class** in the **Class** dropdown menu. (**Class** should automatically appear if it has been set up in the item record.)

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Toggle the **Billable (/hr)** button.

Click **Done**.

Bill for time

Billing for time, as described on pages 10-21 through 10-23, has not changed. The hours you entered will appear in the sidebar when you start to create the **invoice**. The rate used will correspond to the rate entered in the **service** item record.