

# 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.

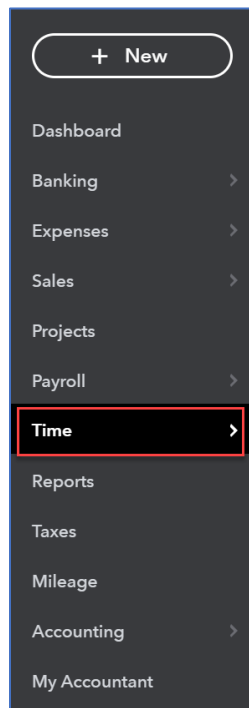
If you do **not** see a **Time** link in your homework company's navigation bar, the new system has not been activated. Continue to use the process described on pages 10-9 through 10-13 in your textbook. The homework assignment is not affected.

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.

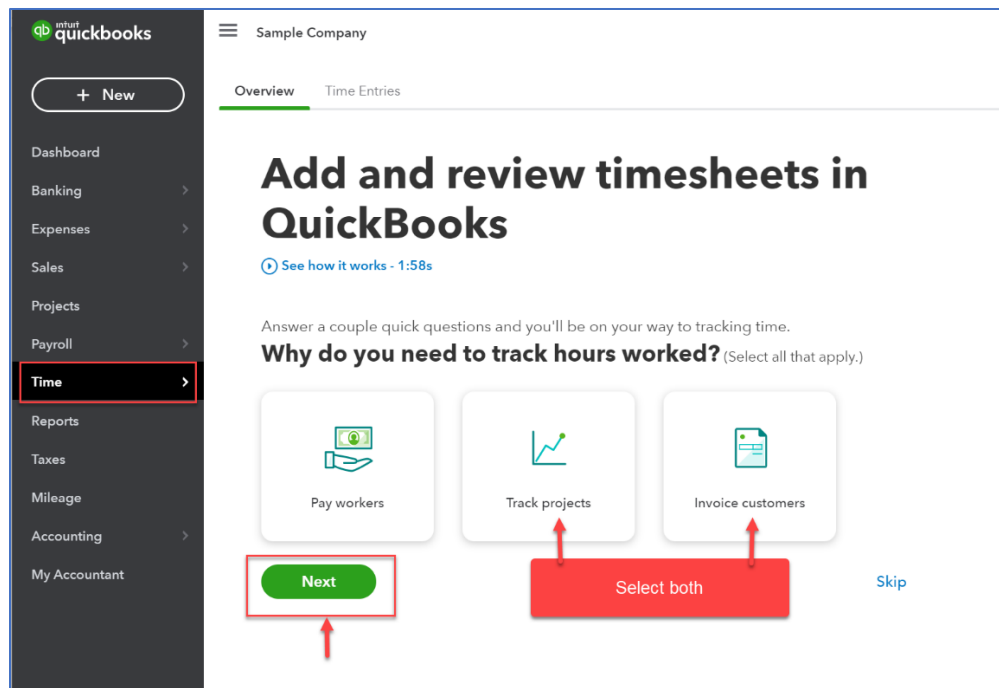
### Set up contractors as employees



Click **Time** on the navigation bar.

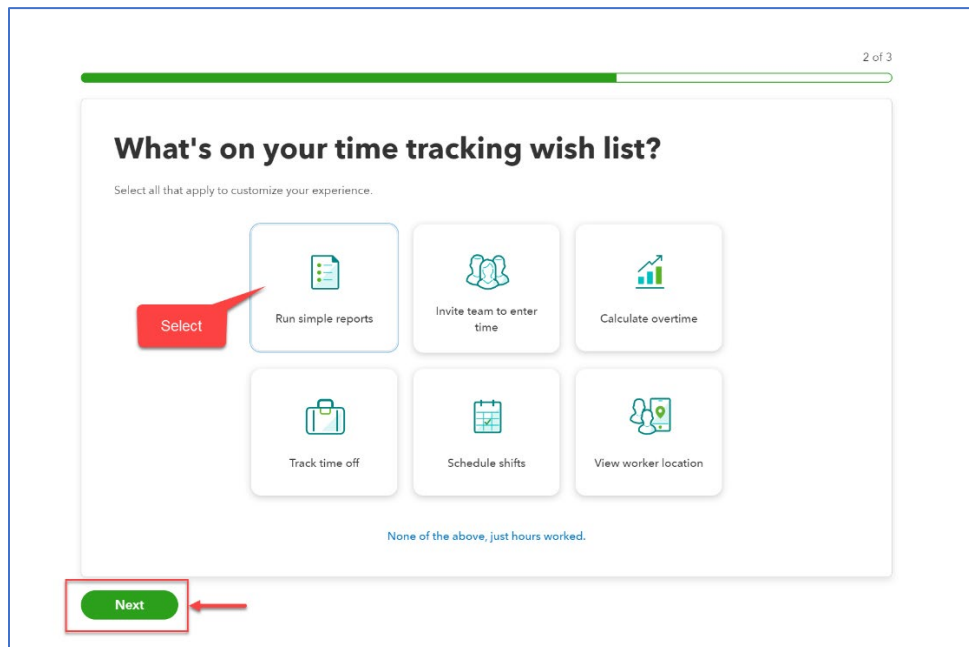
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In the **Overview** tab of the Time Center, select **Track projects** and **Invoice customers**.

Click **Next**.

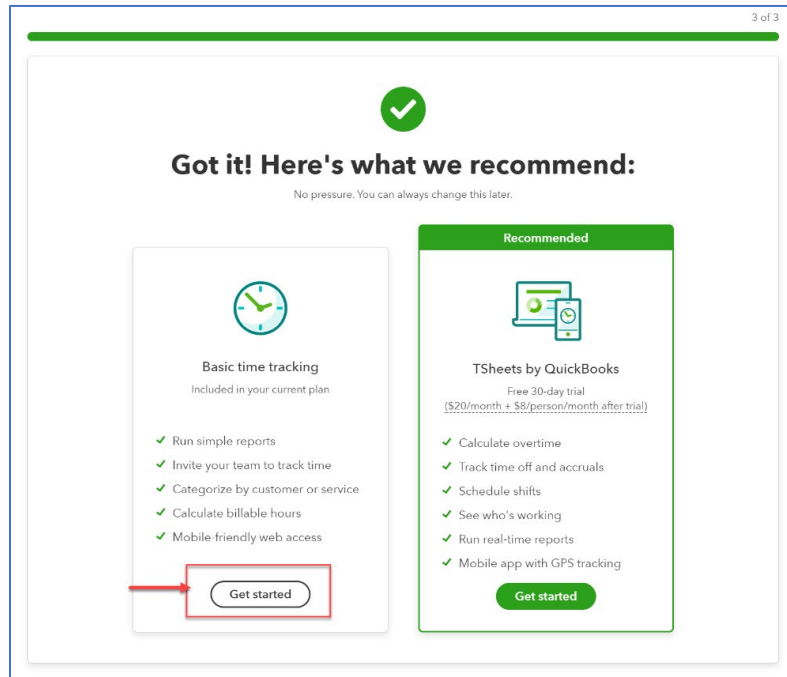


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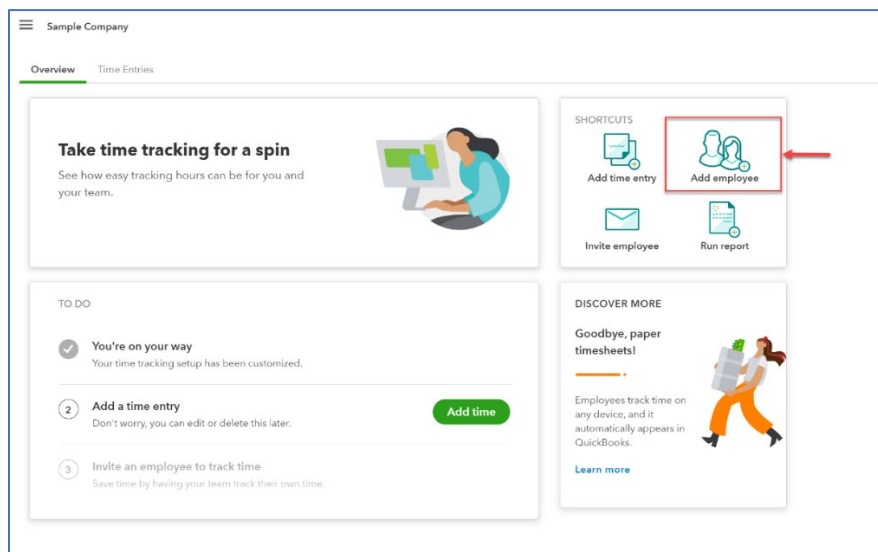
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Select **Run simple reports**.

Click **Next**.



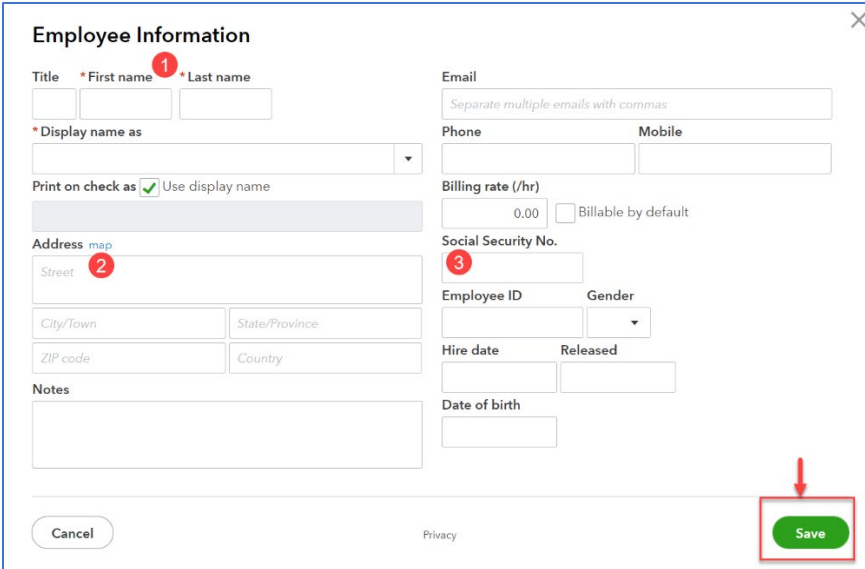
Click **Get started** under **Basic time tracking**.



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

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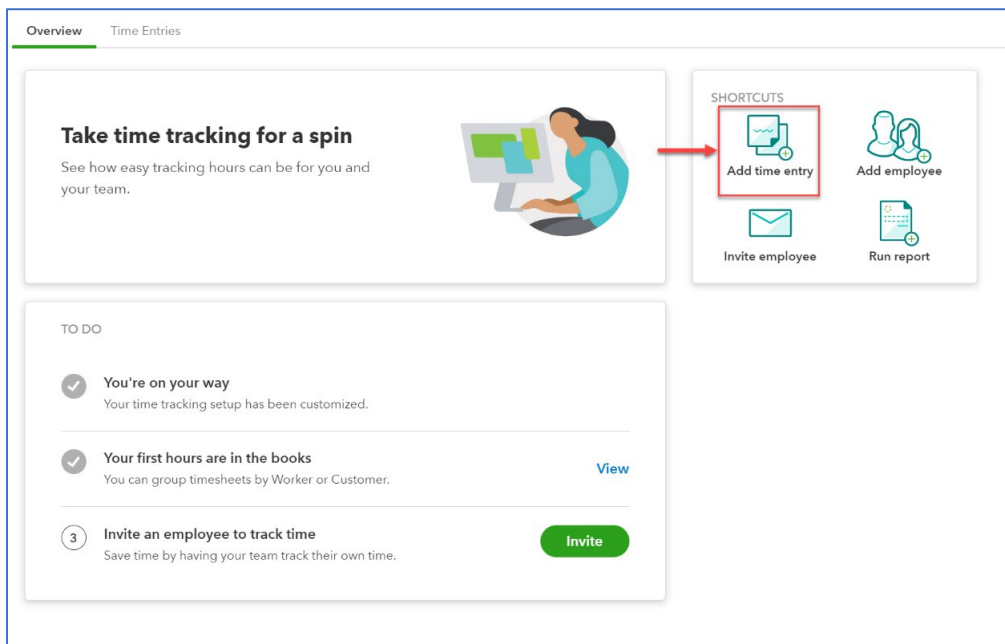
The form is titled "Employee Information" and contains the following fields:

- Title
- \* First name (marked with a red 1)
- \* Last name
- \* Display name as (dropdown menu)
- Print on check as ☒ Use display name
- Address (with a map icon and a red 2 next to the Street field)
- City/Town
- State/Province
- ZIP code
- Country
- Notes
- Email (with a note: "Separate multiple emails with commas")
- Phone
- Mobile
- Billing rate (/hr) (0.00)
- ☐ Billable by default
- Social Security No. (marked with a red 3)
- Employee ID
- Gender (dropdown menu)
- Hire date
- Released
- Date of birth

At the bottom, there are "Cancel" and "Save" buttons. The "Save" button is highlighted with a red box and a red arrow pointing to it.

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**



The screenshot shows the "Overview" tab of the Time Center. It features a "Take time tracking for a spin" section with an illustration of a person at a computer. Below this is a "TO DO" list with three items:

- ☒ 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. (with a "View" link)
- ☐ 3 Invite an employee to track time: Save time by having your team track their own time. (with an "Invite" button)

On the right, there is a "SHORTCUTS" section with four icons: "Add time entry" (highlighted with a red box and a red arrow), "Add employee", "Invite employee", and "Run report".

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

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The "employee" you just set up will appear here

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

Click the name.

Back Add time for [Employee Name]

**This week** Select the week TOTAL HOURS **0.00**

Select day

7 SUN 0.00	8 MON 0.00	9 TUE 0.00	10 WED 0.00	11 THU 0.00	12 FRI 0.00	13 SAT 0.00
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Click the day

Start/end times ☐

Duration

Enter number of hours

Add work details

Add

Close Save

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 a toggle switch:

- Worker**: A text input field.
- Start date**: A date input field.
- Duration**: A text input field.
- Start/end times**: A toggle switch.
- Customer**: A dropdown menu with a red callout box pointing to it labeled "Select customer".
- Service**: A dropdown menu with "(none)" selected and a red callout box pointing to it labeled "Select service".
- Class**: A dropdown menu with "(none)" selected and a red callout box pointing to it labeled "Verify class".
- Billable (/hr)**: A toggle switch with a red callout box pointing to it labeled "Toggle to activate".
- Notes**: A large text area.
- Delete**: A button at the bottom left.
- Done**: A green button at the bottom right, 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.