Web TimeSheet Billing Integration for QuickBooks
Quick Start Guide

Welcome to the Quick Start Guide for Web TimeSheet Billing Integration for QuickBooks. This guide will help you set up the integration module and begin transferring time and expense data from Web TimeSheet to QuickBooks, where it can be used for billing purposes.

For more information on using the integration module, including important concepts and considerations, refer to the *Web TimeSheet Billing Integration for QuickBooks User Guide*.

Downloading the Module

If you are using Web TimeSheet Billing Integration for QuickBooks Version 4.2 or higher, the integration module should automatically upgrade when a new version becomes available.

If you want to upgrade to the latest version, but the update did not occur automatically, or if you want to install the integration module for the first time:

1. Open Web TimeSheet.
2. Select **Integration** from the top menu.
3. Select **Modules** > **QuickBooks** from the side menu.
4. Follow the instructions given on the page that displays.

Installing the Module

Installation of the module is a simple, wizard-guided process. Before beginning installation, ensure that:

- Your machine meets the integration module's minimum system requirements, as outlined in the *Web TimeSheet Installation Guide*.
- You are installing the integration module on the computer where QuickBooks is installed.
- Your version of QuickBooks is updated to include all available patches (recommended).
- The existing installation of the integration module (if upgrading) and QuickBooks are closed.
- The Integration Manager for QuickBooks (XML) is not currently installed on your system.

Configuring QuickBooks for use with the Module

Before attempting to integrate with Web TimeSheet, follow the steps below to ensure QuickBooks is properly configured for integration.

1. Launch QuickBooks
2. Open a company file.

   When you integrate with Web TimeSheet, you will transfer data to and from the open QuickBooks company file.

   ⚠ The integration module allows for a broad number of configurations to meet a variety of needs. Until you have finalized the configuration you wish to use, we recommend that you begin working with a sample QuickBooks file or, at a minimum, back up your QuickBooks company file prior to using the integration module.

3. If a dialog box displays indicating that Web TimeSheet is attempting to access the QuickBooks company file without a certificate:

a. Select the **Yes, Always** button or option, which allows Web TimeSheet to access the company file for data transfer purposes.

b. Select **Yes** if asked to confirm.

4. Select **Edit** > **Preferences…** and make the following configurations:
   - In the **Payroll & Employees** section, select **First Name** for the **Display Employee List by** field.
   - In the **Time Tracking** section, ensure **Yes** is selected for **Do You Track Time?**.
   - If you wish to use classes to organize your time and expense data, ensure **Use class tracking** is enabled in the **Accounting** section.

Launching the Module

To launch the integration module:

1. Launch the integration module, by:
   - Double-clicking a shortcut created during installation
   - Selecting **Web TimeSheet: Integration Manager** from the QuickBooks **File** menu.
   - Selecting **Web TimeSheet Billing Integration for QuickBooks** from the Windows **Start** menu.
2. When prompted, enter the **Web TimeSheet URL** (the address you use to access Web TimeSheet).

   The module will attempt to connect to Web TimeSheet.
3. When prompted:
   a. Enter the **Web TimeSheet URL**, and your Web TimeSheet **Login Name** and **Password**.

   b. Enable the **Automatically login to Web TimeSheet next time** field, if desired, to prevent this window from appearing next time you log in.

   c. Select **Connect**.
4. When prompted to authorize the connection, select **Yes**.

   This will enable the module, and it will then be listed on the **Integration Setup** page.
5. When a QuickBooks dialog box stating the module is attempting to access the company file displays:

   a. Enable the check box labeled **Allow this application to access…**.

   This will give Web TimeSheet permission to transfer employee and vendor data to the company file.

   b. Select the **Yes, Always** button or option.

   c. Select **Yes** if asked to confirm.

   The main Web TimeSheet Billing Integration for QuickBooks window displays.

Preparing to Transfer Data

To successfully transfer time and expense data, supporting data must be identical in both applications. For example, the capitalization and spelling of a Web TimeSheet user's name must exactly match that of the corresponding employee in QuickBooks.

To ensure all supporting data is available in and consistent between both applications, we recommend transferring data as follows:

1. Transfer **Employees**, **Vendors**, and **Customers** data from one application to the other.

2. Transfer **Jobs/Items** data from one application to the other.
3. Transfer **Time Entries** and **Expense Entries** data from Web TimeSheet to QuickBooks.

You can then use this data to complete your billing and invoicing functions.

Transferring Data

To transfer data using Web TimeSheet Billing Integration for QuickBooks:

1. Determine how the Web TimeSheet and QuickBooks data structures relate to one another.

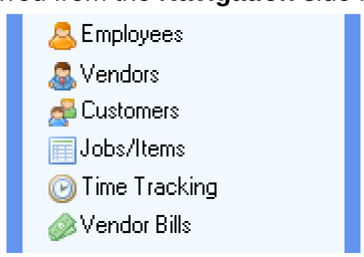
   Depending on the direction of transfer, the data structure relationship determines either:

   - Where Web TimeSheet projects and tasks will be placed in QuickBooks.
   - Where projects and tasks should come from in QuickBooks.

   For information on determining the relationship to use, refer to *Chapter 4* of the *User Guide*.
2. Ensure any prerequisites for transferring the data type, as outlined in *Chapter 5* of the *User Guide*, are met.

   Typical prerequisites involve configuring Web TimeSheet or QuickBooks, or ensuring supporting data is available in the destination application.

   For example, before transferring **Time Entries** to QuickBooks, you must first ensure the user that submitted the time entry exists in QuickBooks as an employee.
3. If you have made any changes or additions in either application since launching the integration module, select **Refresh Connection** from the **Options** side menu to ensure the data available for transfer is current.
4. Select the data type to be transferred from the **Navigation** side menu.



5. Follow the steps as guided by the transfer wizard. If prompted, specify the relationship selected in *Step 1*. A relationship must be defined if transferring **Jobs/Items** or **Time Tracking** data types.
6. Transfer the data.
7. Review the transfer results that the wizard provides.