



## Web TimeSheet Integration Manager for QuickBooks Quick Start Guide

Welcome to the Quick Start Guide for Web TimeSheet Integration Manager 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 or payroll purposes.

For more information on using the integration module, including important concepts and considerations, refer to the [Web TimeSheet Integration Manager for QuickBooks User Guide](#).

### Downloading and Installing the Module

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

### Configuring QuickBooks Desktop Editions 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 set 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 – QuickBooks Desktop Editions

If you are connecting to a desktop edition of QuickBooks, to begin using the integration module:

1. Launch the module:
  - Double-click its desktop shortcut
  - Select **Web TimeSheet: Integration Manager** from the QuickBooks **File** menu, OR
  - Choose **Web TimeSheet Integration Manager 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.

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 Integration Manager for QuickBooks window displays.

## Launching the Module – QuickBooks Online

 Certain limitations exist when using the Integration Manager with the QuickBooks Online Edition, due to issues imposed by that edition of QuickBooks. Refer to the [Integration Manager for QuickBooks User Guide](#) for more information.

QuickBooks Online is compatible with version 5.5.5 and higher of the Integration Manager only.

 Before attempting to launch the integration manager, ensure you have a company set up in QuickBooks Online.

If you are connecting to QuickBooks Online Edition, you will have to set up a connection between Web TimeSheet and QuickBooks before you can log in.

### Setting Up a Connection to QuickBooks Online

You should only have to enable the connection to QuickBooks Online once.

To enable a connection:

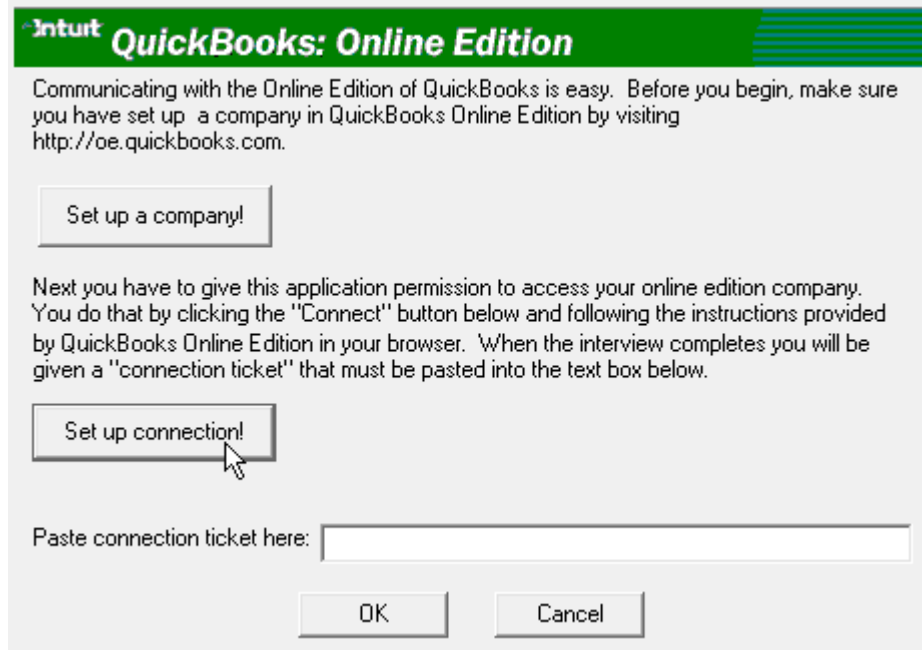
1. Launch the integration module (by either double-clicking its desktop shortcut icon, or by selecting **Web TimeSheet Integration Manager for QuickBooks** from your **Start** menu).

The **Web TimeSheet Security Login** pop-up displays.

2. Enter your Web TimeSheet URL, login name, and password.

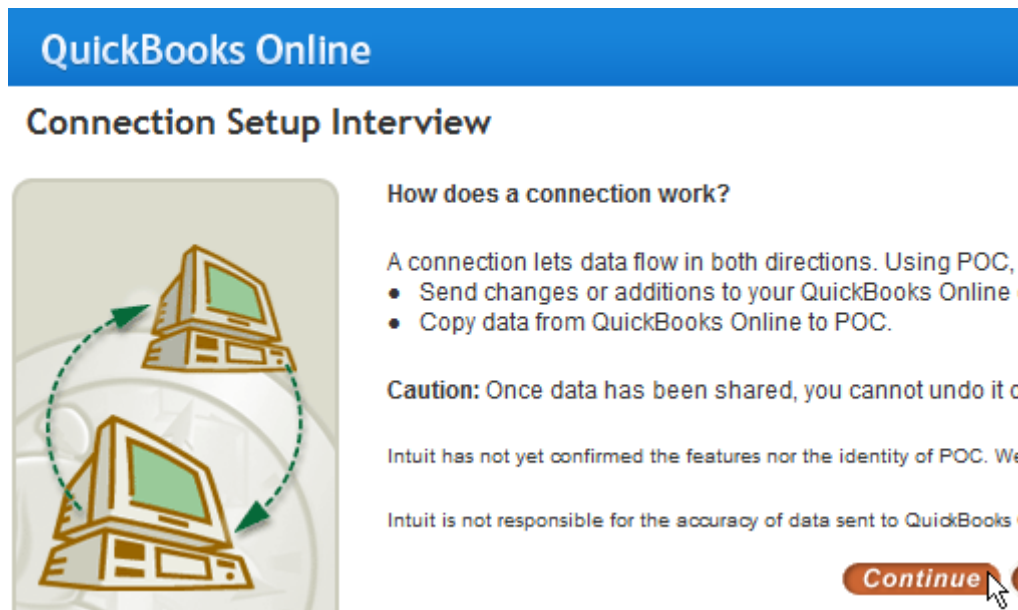
A **QuickBooks: Online Edition** pop-up box displays.

3. Click **Set up connection!**.



**QuickBooks Online: Connection Setup Interview** displays in a browser window.

4. Click **Continue**.



A page with a **Connection Key** displays.

5. Copy the key by pressing the button provided.

### Connection Setup Interview



#### Copy and paste the connection key.

The connection key is a private code that lets your cc connect to QuickBooks Online. This is the type of key once for each connection you set up.

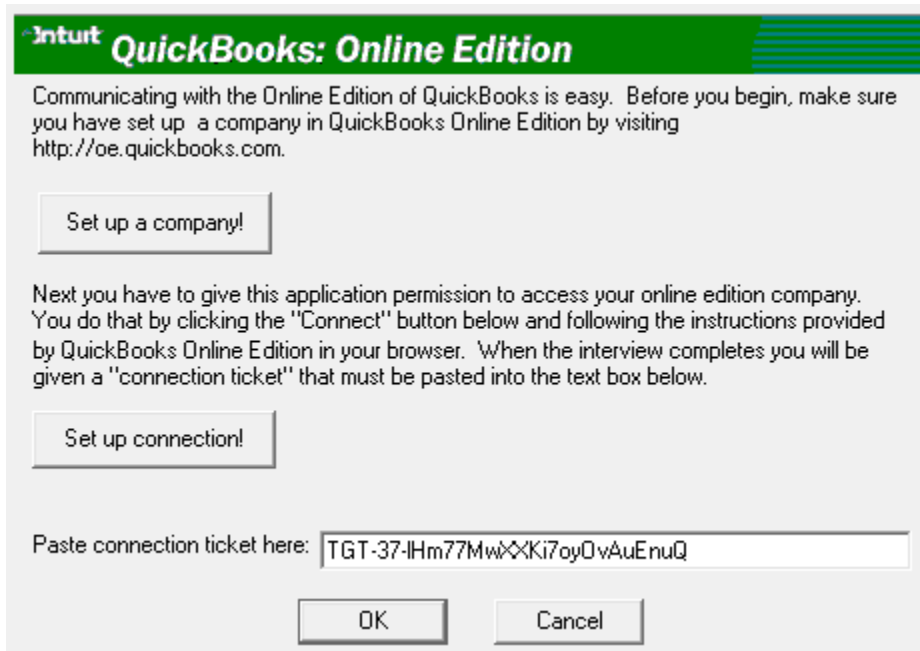
1. Click **Copy to Clipboard**
2. Keep this window open and follow instructions from the key.  
(You can use Ctrl+V to paste.)

#### Connection Key:

TGT-37-IHm77MwXXKi7oyOvAuEnuQ

**Copy to Clipboard**

6. Return to the pop-up window, and paste (*Ctrl+V*) the key into the **Paste connection ticket here** field.



7. Click **OK**.


### Logging in to the Integration Module

Each time you use the integration module with QuickBooks Online, you'll have to log in and enter a session key. This key is different from the connection key you entered earlier.

To log in to the integration module after you've established a connection:



1. Launch the Integration Manager (by either double-clicking its desktop shortcut icon, or by selecting **Web TimeSheet Integration Manager for QuickBooks** from your **Start** menu).

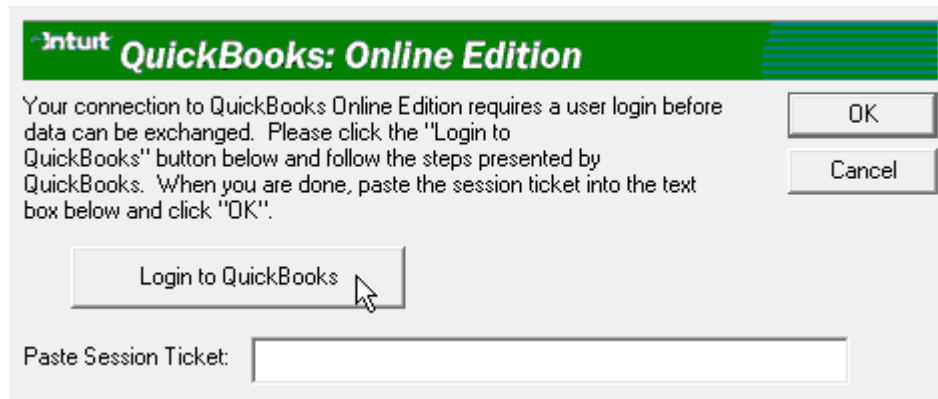
 You may be able to skip this step if you've just completed the **Enabling the Connection** procedure above.

The **Web TimeSheet Security Login** pop-up displays.

2. Enter your Web TimeSheet URL, login name, and password.

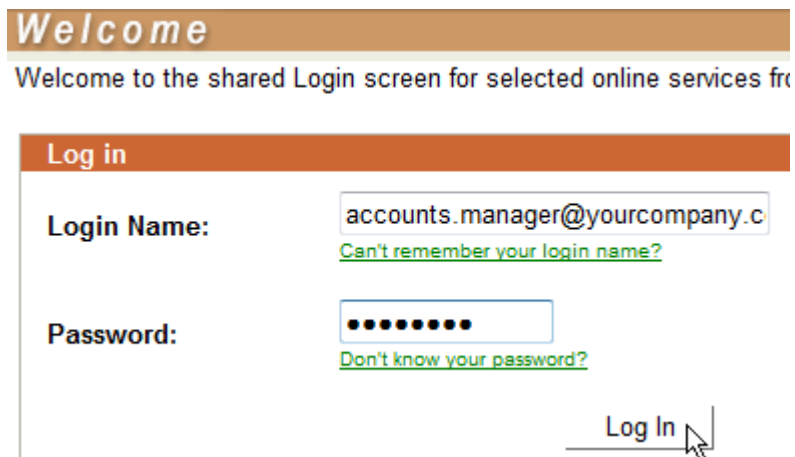
A **QuickBooks: Online Edition** pop-up box displays.

3. Click the **Login to QuickBooks** button.



The QuickBooks Online shared Login screen displays.

4. Enter your QuickBooks Online user **Login Name** and **Password**, and click **Log In**.



Another page displays, with a **Login Key**.

5. Copy the key by pressing the button provided.

Click **Copy To Clipboard** and paste the login key to the lo

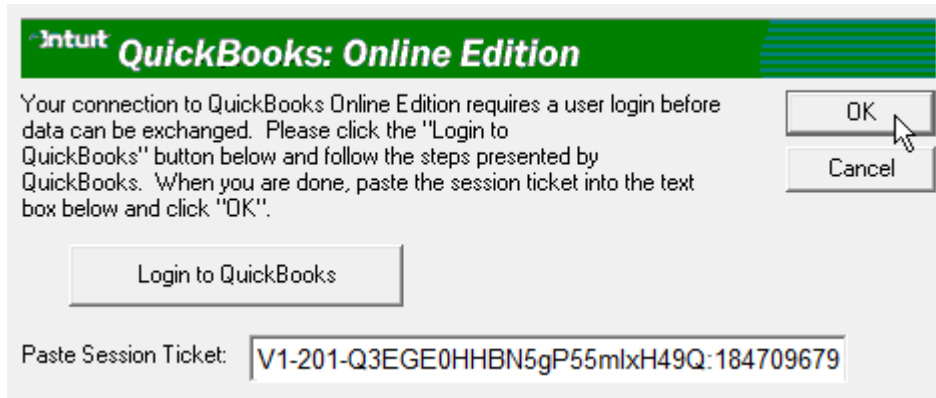
**Login Key:**

V1-201-Q3EGE0HHBN5gP55mlxH49Q:184709679

**Copy to Clipboard**



- Return to the pop-up window, and paste this key into the **Paste Session Ticket** field.



- Click **OK**. The integration manager launches. This may take a few moments.

## 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:

- Transfer **Employees**, **Vendors**, and **Customers** data from one application to the other.
- Transfer **Jobs/Items** data from one application to the other, and ensure any required **Payroll Items** exist in QuickBooks.
- Transfer **Time Entries** and **Expense Entries** data from Web TimeSheet to QuickBooks.

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

## Transferring Data

To transfer data using Web TimeSheet Integration Manager for QuickBooks:

- 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](#).

- 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.