

Topic 3: Additional Transaction Types

ADDITIONAL TRANSACTIONS INITIATED USING THE +NEW MENU

There are other transaction types that can be accessed from the +New button. One such transaction type is time tracking. Time can be tracked using the Single Time Activity or the Weekly Timesheet function. This feature can be used even if you are not signed up for QuickBooks Online Payroll. You might also find a Time tab in the left navigation bar as well.

If Time tracking is not already enabled in your company, enable it via the **gear** icon → **Account and Settings** → **Advanced** → **Time tracking**.

Time tracking is available in QuickBooks Online Essentials, Plus, and Advanced.



Step by Step: Fill out a Single Time Activity

1. Select **+New** at the top of left navigation bar. (Note: you can also alternately select **Time > Overview** in the left navigation bar.)
2. If necessary, select **Show More**.
3. Under Employees, select **Time entry** (it may also appear as **Single time activity**).
4. If you see a window giving you options for time tracking, select **Stick with basic time**.

Time

Track time with QuickBooks Time

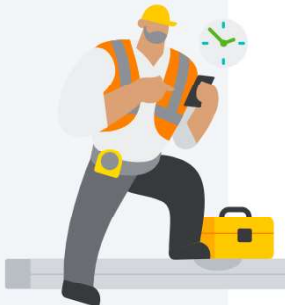
[See how it works - 1:58s](#)

Basic time is included in your plan, but QuickBooks Time does the tracking for you—plus so much more.

- See your team on the job with GPS
- Increase your billable time¹
- Track worker mileage
- Communicate with your team in the mobile app

[Compare options](#) [Stick with basic time](#)

¹ Based on a survey of 4,906 customers in the U.S. in December 2019. On average, businesses that report an increase in billable time added 11.46%




5. Select **Add time entry**.

How is your time tracking experience so far? [Tell us what you think](#)

Take time tracking for a spin

See how easy tracking hours can be for you and your team.

[See how it works - 1:58s](#)



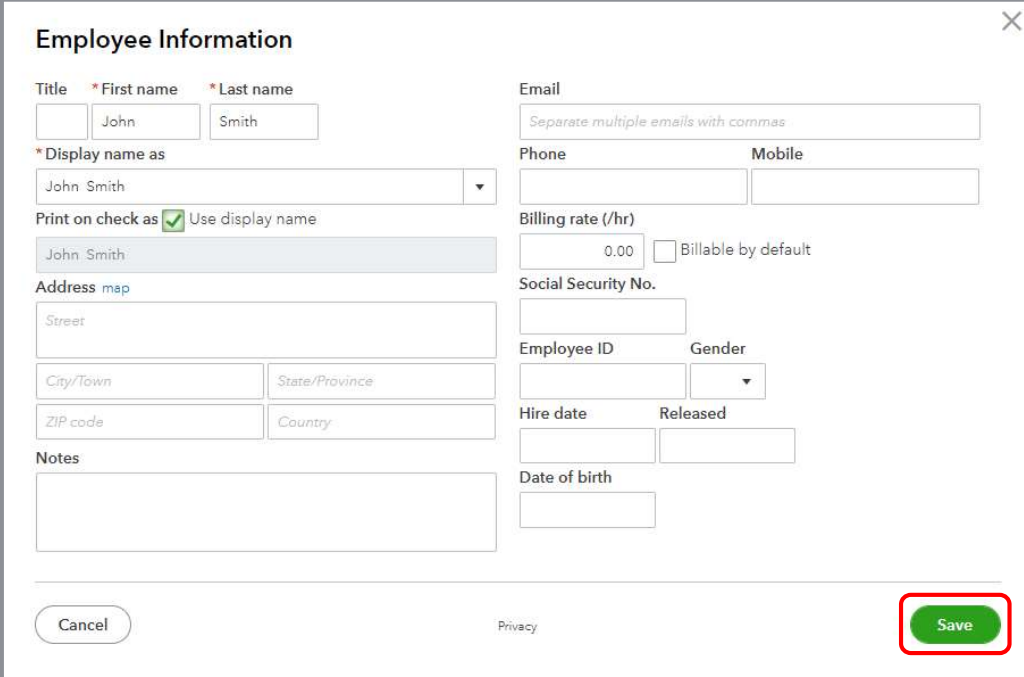
SHORTCUTS

- [Add time entry](#)
- [Add employee](#)
- [Approve time](#)
- [Run report](#) ✓

SETUP TASKS

- ✓ **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](#)

6. If no employees exist in this company, follow the prompts to add one or more employees. Make sure that the *First name*, *Last name*, and *Display name as* fields in the Employee Information pop-up window are populated. Click **Save**.



The 'Employee Information' form is a window with a title bar and a close button. It contains several sections of input fields. The 'Name' section includes fields for Title, First name (John), and Last name (Smith), a dropdown for Display name as (John Smith), and a checkbox for 'Print on check as' (checked) with the text 'Use display name'. The 'Address' section has fields for Street, City/Town, State/Province, ZIP code, and Country. The 'Contact' section includes Email, Phone, and Mobile. The 'Billing' section has a field for Billing rate (/hr) (0.00) and a checkbox for 'Billable by default'. The 'Identification' section includes Social Security No., Employee ID, and Gender. The 'Dates' section includes Hire date, Released, and Date of birth. At the bottom, there are 'Cancel', 'Privacy', and 'Save' buttons. The 'Save' button is highlighted with a red rectangle.

Employee Information

Title * First name * Last name
[] John Smith

* Display name as
John Smith

Print on check as ☒ Use display name
John Smith

Address map
Street
City/Town State/Province
ZIP code Country

Notes

Email
Separate multiple emails with commas

Phone Mobile

Billing rate (/hr)
0.00 ☐ Billable by default

Social Security No.

Employee ID Gender

Hire date Released

Date of birth

Cancel Privacy **Save**

7. Select the name of the employee whose time is being tracked.

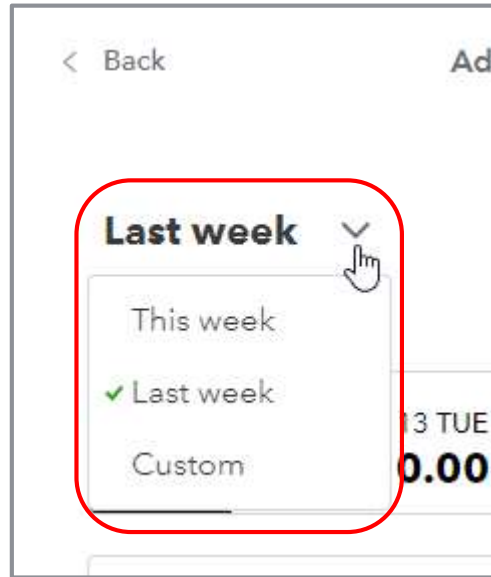


The 'Add time' window has a title bar with a settings gear and a close button. It contains a single large input field with the text 'Smith, John'. A hand cursor is pointing at the input field, and the entire field is highlighted with a red rectangle.

Add time

Smith, John

8. In the Add time window, select the **date** for which the time is being tracked. If the date is not displayed in the default week, select the drop-down next to Last week and choose another date.



9. Enter the **Duration** (number of hours) for this time entry. Alternately, slide the toggle for **Start/end times** and enter the Start time and End time. You can enter the duration (e.g., 3.5 hours) either in HH:MM format (3:30) or in decimal format (3.5).
10. Select **Add work details**.

11. In the Add work details window, enter the customer for whom the time is being tracked.
12. Enter the service being rendered during this time.
13. Optional: If the **Make Single-Time Activity Billable to Customer** preference is turned on in Account and Settings → **Advanced** → **Time Tracking**, then slide the **Billable (/hr)** toggle if this time entry is Billable.
14. Optional: If the preference to **Show billing rate to users entering time** is checked in Account and Settings → **Advanced** → **Time Tracking**, you can view and edit the billable rate that will appear on the invoice on which these billable hours appear.
15. Enter any extra description in the **Notes** field.
16. Select **Done**.

The screenshot shows the 'Add work details' window in QuickBooks Online. The window has a title bar with a close button (X). The main content area contains the following fields and controls:

- Worker:** John Smith
- Start date:** 07/11/2021
- Duration:** 8:30
- Start/end times:** A toggle switch that is currently turned off.
- Customer:** All City Library (with a dropdown arrow)
- Service:** Installation Labor (with a dropdown arrow)
- Billable (/hr):** A toggle switch that is currently turned on.
- Notes:** A text area containing the text 'Installed study pods'.

At the bottom of the window, there are two buttons: 'Delete' and 'Done'. The 'Done' button is highlighted with a red rectangular box.

17. Back in the Add time window, if there are any other days for which you want to track time for this employee during the displayed week, select the **Add** button.

< Back Add time for John X

Last week ▼ TOTAL HOURS 8.50

Select day

11 SUN	12 MON	13 TUE	14 WED	15 THU	16 FRI	17 SAT
8.50	0.00	0.00	0.00	0.00	0.00	0.00

☐ Start/end times Duration 8.50

All City Library Installation Labor >

Add

Close Save ▼

18. Once you are finished entering all the time for this employee during the displayed week, select **Save** (or choose the drop-down and select **Save and close**).