

# QuickBooks Connected Services Time & Billing Manager

## What is Time & Billing Manager?

Time & Billing Manager is a web-based time and invoicing solution that captures billable and non-billable time anywhere customers do their work and syncs directly with QuickBooks financial management software, appealing to QuickBooks users who track time for the purpose of invoicing their clients, managing payroll and/or job costing and who otherwise would either estimate time spent or manually track time for themselves and their employees.

## What are the Features & Benefits?

### ➤ Complete Time Management

Capture all of your time activities online for easy invoicing, payroll processing, reporting and job costing. Invite vendors and employees to track time online and easily review and approve timesheets. Create customizable time reports and set access restrictions to keep your data private while reducing the chances of data entry errors.

### ➤ Integrates with QuickBooks

Make invoicing and payroll a snap. Approved billable and non-billable time automatically syncs with QuickBooks, allowing you to easily invoice clients, pay vendors and employees, and conduct job costing.

### ➤ Integrates with Outlook

Easily keep track of time using Microsoft Outlook 2007<sup>1</sup>. Capture more billable hours by selecting meetings, e-mails and appointments right from the Outlook calendar and sending them to your online timesheet.

### ➤ Create Customized PDF Reports

Curious which customer was billed the most time this month? Want to compare billable hours for employees? Keep track of your business performance by creating time activity reports. Generate printer and e-mail friendly reports that allow you to summarize time activities by job, worker and time period.

### ➤ Administrator Access

Manage user access and approve timesheets to reduce errors and ensure privacy. Reject and approve submitted timesheets to record time accurately in QuickBooks.

## What are some good probing questions?

- What is your current process for tracking time spent on jobs?
- How often do you use Microsoft Outlook to schedule the work your company does?
- How often do you feel that you are leaving money on the table by not being able to track billable time more effectively?

<sup>1</sup> Outlook 2003 support expected Fall 2010

## What can Time & Billing Manager Do?

### The Administrator can perform the following activities in Time and Billing:

- Review and approve time sheets submitted by workers
- Review a total time summary by day, week and month
- Review a list of billable and non-billable hours for each customer/job
- Add billable time to invoices (Timing ~Sep 2010)
- Use the timer to add time for any worker
- Set the start day for the work week and set the length of the work week (1 to 7 days)
- Invite workers to the Time and Billing online application
  - Both employees and vendors can be invited to track time
  - A payroll item can be added to an employee
  - Login and access for employees and vendors can also be revoked as needed
- Create, view, submit, approve, and reject timesheets for employees and vendors
- Print time sheets
- Use the calendar to create time entries
- Review an error log (if errors occur during the write back process)
- Create, view, and print (as PDF) reports
  - Billing History for customer and time period
  - Time History for customer and time period
- Access Intuit Sync Manager to adjust automatic sync and run a manual sync as needed

### The Worker can perform the following activities in Time and Billing:

- Submit time
  - Time sheets in Pending status can be edited by the worker
  - Time sheets in Submitted status cannot be edited by the worker
    - If the Administrator “rejects” the time sheet, it is returned to Pending status and the worker can then edit it
  - Time sheets in Approved status cannot be edited by the worker
    - If a worker needs to make a correction to a Submitted or Approved timesheet, they must contact their Administrator
- Copy time sheets
- Print time sheets (PDF file)
- Use the Timer to track time against a specific customer/job and then save that time to enter the hours for the current day
- Use the Calendar to create time entries

## Terms and Conditions

Requires internet access, active subscription and QuickBooks Pro, Premier, and/or Enterprise 2009 or later (sold separately). If you are using QuickBooks, it must be updated to the latest release. Integrates with Microsoft Outlook 2007.<sup>1</sup> Not available to QuickBooks for Mac or QuickBooks Online users. You can cancel at any time by calling 800-450-8475. Terms, conditions, features, availability, pricing, fees, service and support options subject to change without notice.

Customer is permitted one 30 day free trial per subscription. Offer available for a limited time only. You will be required to present a valid credit card account for authorization before starting the free trial. After the first 30 days, your paid subscription will be activated and your account will be charged each month at the then current monthly fee for the service level you have selected. Offer is valid for all available plans. You can cancel at anytime. This offer cannot be combined with other offers.

<sup>1</sup> Outlook 2003 support expected Fall 2010

## Frequently Asked Questions

### **How do customers activate the services?**

Customers will receive a confirmation e-mail with a link. Clicking on the link will take them to the setup process for Time & Billing Manager.

### **What if a customer wants to cancel?**

Customers receive a 30 day free trial but can self-service cancel at anytime on IPP. The subscription will continue through the end of the current billing period, and there is no refund for the remainder of the period. Customers can also cancel by calling 800-450-8475.

### **How does a customer receive support?**

Customers can receive support by calling 800-450-8475 or e-mail us at [QBtimeandbilling@intuit.com](mailto:QBtimeandbilling@intuit.com).

### **What if the customer was a previous user of Time Tracker?**

Time & Billing Manager is meant to replace Time Tracker, which will be shut down in ~Nov 2010. Time Tracker users will be prompted with an in-product pop-up message to migrate to Time & Billing Manager starting ~Sep 2010. Due to differing platforms, migration will NOT be automatic – users must initiate the migration and cancel their Time Tracker subscription. We believe Time & Billing Manager will offer greatly improved performance and functionality over Time Tracker.

### **Are there any technical limitations?**

Users must have internet access. Time & Billing Manager works on Internet Explorer 6.0 and later, Firefox 1.5 and later, Safari 3.0 and later. Supported operating systems include Windows 7, Windows Vista, and Windows XP Service Pack 2. 32 or 64 bit only. Requires 500 megahertz (MHz) processor or higher and 512 megabytes (MB) RAM or higher.

### **How do I enter the order?**

Order entry in CRIS will be source code driven. Source codes can be found on Atlas, under “Offers” under “Connected Services.” The service will show up in CRIS under *Contracts not Agreements*.

### **What if a customer wants to enable more users to track time?**

We offer plans that support up to 200 users to track time.

### **Are there any other steps customers need to follow after the sale?**

They just need to follow the link in their confirmation e-mail to get started.

### **Where do I find information on the latest features and functionality in Time & Billing Manager?**

Agents can visit <http://teamrooms.reno.intuit.com/servicedelivery/SBG/default.aspx> or Atlas to stay updated on the newest features. Additional communication will be provided via e-mail as needed.

### **Since this is a new service, where can I direct customer feedback and questions?**

All non-urgent customer questions and feedback can be e-mailed to [QBtimeandbilling@intuit.com](mailto:QBtimeandbilling@intuit.com).

### **Can you explain the 30 day free trial?**

Agents will use a source code in CRIS to set up the free trial. When a customer signs up for the 30 day free trial, they will need to provide a credit card number. The card will not be charged until the end of the 30 day free trial. The customer will need to call if they wish to cancel the service.