

This guide will assist in importing your timesheets from TimePro to Xero for payroll processing.

### Checklist for Xero

- Assign each Staff member an Earnings Rate and a Payroll Calendar.
- Setup a corresponding Payroll Run in Xero prior to running the export.
- A Payroll Run is required for each Payroll Calendar i.e. Weekly, Fortnightly and Monthly.
- Ensure that no timesheets exist in Xero for the staff for the date range of the Payroll Run.
- Assign the relevant Tracking Category under Payroll Tracking if you are using Tracking Categories.

The screenshot shows the Xero Payroll interface. At the top, there's a navigation bar with 'Intertec' logo and user 'Emma Lawlor'. Below it are tabs for 'Dashboard', 'Accounts', 'Payroll', 'Reports', 'Contacts', and 'Settings'. The main content area is titled 'Pay Runs' and includes a video player with a play button. To the right of the video, there's instructional text: 'Add and post a pay run with a couple of clicks!', 'You also have the ability to email payslips and the ability to revert posted payruns.', and 'If in doubt, check out our [help guide for Xero Payroll](#).' Below this is a table titled 'Draft Pay Runs' with columns: Calendar, Period, Payment Date, Wages, Tax, Super, and Net Pay. The table contains two rows: 'Weekly -' for 'Week ending 14 Mar 2015' with a payment date of '08 Mar 2015', wages of '1,078.00', tax of '528.00', super of '0.00', and net pay of '550.00'; and 'Fortnightly -' for 'Fortnight ending 28 Mar 2015' with a payment date of '15 Mar 2015', wages of '0.00', tax of '0.00', super of '0.00', and net pay of '0.00'. At the bottom left of the table area is a '+ Add Pay Run' button.

Calendar	Period	Payment Date	Wages	Tax	Super	Net Pay
Weekly -	Week ending 14 Mar 2015	08 Mar 2015	1,078.00	528.00	0.00	550.00
Fortnightly -	Fortnight ending 28 Mar 2015	15 Mar 2015	0.00	0.00	0.00	0.00

### Checklist for TimePro

- Ensure all Staff names in TimePro and in Xero match. Differences in spelling will result in errors.
- All timesheets required for payroll for that period should be completed.
- Decide at which level the Earnings Rate is to be applied e.g. Staff, Project, and Task etc. There are spare fields at each level in TimePro to record this information. A TimePro consultant can assist you with making this decision which will depend on your requirements for integration.
- If you are using Tracking Categories, define the name of the Tracking Category under Xero | Xero Configure | Xero Common.
- If you are using Tracking Categories decide at which level the Option is to be derived from. Populate the Tracking Category Options. For example if you are deriving your Option from the Staff Reference, ensure that every Staff member has an entry in the Staff Reference field. Blank Tracking Category Options will result in the timesheet being rejected. Tracking Category Options that do not currently exist in Xero will be generated on import.

### Export to Xero

In TimePro go to Xero -> Xero Export -> Xero Timesheets

- In Step1. Use the Data Category drop down lists to filter the records to be selected.

INTERTEC  
**TimePro**<sup>®</sup>  
Intertec TimePro Xero Export Timesheets

ABC Services v5.5  
Intertec TimePro [v5.6.02.Beta] ; Logged on user [John Brown - Administrator]

[Help](#)

**STEP 1. Select the time records to be exported.**

Selections by Data Category:

Customer:   
All Customers

Project:   
All Projects

Staff:   
James Lebron

Staff Type:   
All Staff Types

Project [Export to Xero] setting: All data regardless of the setting

**Note: Only time records in "completed" timesheets are extracted by this export process.**

**STEP 2. Xero Data Tracking Options.**

For the Tracking Option Region, use the value selected from: Projects: Project Reference

**STEP 3. Payroll Integration.**

Pay Run Date From: 10-Aug-2015 To: 23-Aug-2015

For the Xero Earnings Rate, use the value selected from: Use Value Below

Ordinary Hours

- In Step 2, select where the Tracking Option(s) are to be derived from.
- In Step 3, select the date range. This date range must match an existing Payroll Run set up in Xero.
- Select where your Earnings Rate will be derived. If all staff are allocated to the same Earnings Rate then choose the option 'Use Value Below' from the drop-down and a text box will appear allowing you to type in the relevant Earnings Rate.
- Click 'Create the Export File' which brings up the following Data Export results screen.

INTERTEC  
**TimePro**<sup>®</sup>  
Data Export

ABC Services v5.5  
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Data Export Complete  
122 records.

Click on the link below to view the file being exported.  
[1\\_Export\\_Xero\\_Timesheet\\_143944.csv](#)

- Click 'Submit to Xero'.
- If you have not already logged into your Xero file you will be prompted to do so.
- Xero files you are permitted to access will be listed. Choose the appropriate file and click on the 'Authorise' button.

My Xero Emma Lawlor

Home Subscriptions & Billing Settings

## Authorise Application

**TimeUAT** (<http://www.timesheets.com.au/>) is requesting access to your Xero data.

Please select which organisation **TimeUAT** can access:

Intertec

**This application will have the same permissions as the user that has authorised access.**

This application will have access for **30 minutes** from the time you authorise it.

Once this application has been authorised, you can disconnect the application from accessing your Xero organisation from within the **General Settings > Add-ons** settings page in Xero.

- The following message will appear confirming the submission.

INTERTEC **TimePro**



**Time Records Submitted**

Results will be emailed to john@abcservices.comm;johnb@hotmail.comm when the upload is completed.

- An email similar to the screen capture below is sent to the TimePro administrators email address(es) with the results of the upload.

INTERTEC **TimePro**



**Upload Completed**

TimePro timesheet records read: 7  
 Xero timesheet records created: 1