Integrating MYOB with TimePro



With TimePro's MYOB Integration Module, you can **import TimePro time records into MYOB** for invoice processing or payroll integration. These records are then used to generate:

- o Sales Invoices,
- Purchases Invoices (these can be imported into your MYOB Accounting Package direct from TimePro and suppliers' paper invoices can simply be matched against your imported Purchase Invoices rather than entered manually); or
- o Activity Slips.

The MYOB Integration Module allows data for **Activities, Customers and Suppliers Cards** to be exported out of MYOB and then integrated with TimePro Customer, Supplier and Activity records. MYOB Activity records are only required to be set up if you are using a MYOB "Sales Invoice Type" of "Time Billing". The MYOB Activity ultimately determines which MYOB Income Account sales are recorded against. If you do not have a requirement to split your sales Income across multiple accounts in your MYOB Accounting Package, then more than likely you will only need to set up one MYOB Activity (e.g. Consulting). This scenario of using a single MYOB Activity is the recommended approach for most businesses.

Once the initial data has been imported, records are viewed and maintained using maintenance screens in TimePro. Any further changes made to MYOB data can be imported again or maintained on a record-by-record basis in TimePro. Instructions on setting up the module are contained in Page 2. **Note: Entered records must have matching entries in both TimePro and MYOB.**

How it works

The following pages provide step by step instructions on the main stages of the MYOB Integration Module.

- Step 1: Importing MYOB data into TimePro initial set up integration
- Step 2: Matching MYOB Activities, Customers and Suppliers with corresponding TimePro Customers, Suppliers, Staff Project records
- Step 3: Export TimePro data into a text file
- Step 4: Integrate TimePro data into MYOB

A very powerful feature of TimePro is the ability to extract information from TimePro to generate invoices and activity slips for export into a text file and then imported into MYOB. This will save many hours in manual Invoice creation.

MYOB Export Sales Invoices

TimePro supports the following MYOB related Sales Invoice Types: Time Billing, Professional, Service and Miscellaneous/Other.

MYOB Export Purchases Invoices

Purchases Invoices will correspond to the invoices received from Contract staff. The great feature of this facility is that it alleviates the need to enter invoices that received from Suppliers of Contract Staff into MYOB as they will already have been imported into MYOB by this process. All you need do is check that the amounts that you have been invoiced match the amounts in MYOB, which is a great way to pick up any mistakes in the Suppliers invoices to you.

MYOB Export Activity Slips

To meet the requirements of a broad client base, the Activity Slips Export will ignore the "Chargeable" and "Export to MYOB" Project flags in the Activity Slips Export process. This is because the Activity Slips Export is often used for payroll integration and not just invoicing.

Quick Reference Guide – MYOB Integration Module

You have to be logged into TimePro to enable the links to the online help

Step 1: Configure MYOB Settin

Set **configuration options** to match your requirements including which version of MYOB you're using and various invoicing options for your Sales and Purchases.

Step 2: Add MYOB Activities, Customers & Suppliers

The quickest way is to set up these records is to import them into TimePro (using the **MYOB Import**) rather than adding them individually.

Step 3: Match MYOB entries with TimePro Records

After adding these MYOB entries, you will need to link them with the appropriate TimePro **Customer**, **Supplier**, Project and **Staff Project** records located in the Admin tab

Step 4: Time to Export TimePro data to a .csv file

The **MYOB Export facility** gives you the ability to take the time records entered into TimePro and to export these records for generating Sales Invoices and Purchases Invoices in MYOB. The **Sales Invoices**, **Purchases Invoices** and/or **Activity Slips** are then exported in a text file which is then imported into MYOB.

Only Time records that have been marked as "Completed" are included as part of the export process. Therefore it is a good idea to use the **Check Timesheets screen** to check that staff have "Completed" their timesheets and then locking all timesheets before running an export.

Step 5: Import TimePro data into MYOB

The final step is to import the TimePro data (either sales or purchase invoice information) into MYOB using **MYOB's Data Import Facility. Important: perform a backup of your MYOB data file before starting the import.**

INTERTEC TimePro





Admin Imesheet Settings Reports NYOB NYOB MYOB MYOB MYOB MYOB Imesheet Image: Configure Image: Configure



Import File	🖻 Import Data 🗙
Import Time Billing Sales	First click an Import Field, then click the matching MYOB Field Import Fields Co.2.ast Mane Co.2.ast Name Co.2.ast Mane
Import File Format Tab-delimited	Fairt Name Fairt Name Fairt Name Investor #f Investor #f Investor #f Data Data Data Data Industra Investor #f
First Record is: Header Record	Contrave PD Contrave PD Defining Status Defining Status Defining Status Defining Status
Duplicate Records: Reject Them	(* = Required Field: Must Have a Valid Matching Import Field) (* = Conditional Field: Once or Nore Fields Must Have a Valid Matching Import Field)
Identify Customers by: Co./Last Name	Cancel Urmatch Al Insport

Step 1: Setting up the MYOB Integration Module

IN MYOB

Step 1. Choose one of the following menu options in MYOB depending on the data you wish to import into TimePro.

- o File->Export Data->Activities
- o File->Export Data->Cards->Customer Cards
- o File->Export Data->Cards->Supplier Cards
- Step 2. On the MYOB Export File screen choose the following options:
 - o Export File Format: Tab-Delimited
 - o First Record is: Header Record

Leave any other options as they are and press Continue.

Step 3. Choose the fields to export by clicking on them. This should place the required field into the Export Fields

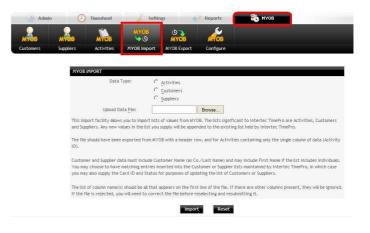


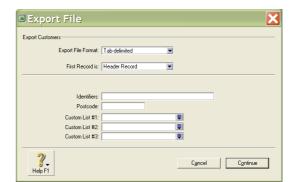
Name, Card ID and (optionally) Card Status Customer Export : Choose Co./Last Name, First Name, Card ID and (optionally) Card Status

Step 4. Press Export and then Save to complete the export process. Note: remember the location that you saved the file on your computer so that you can find it again later.

IN TIMEPRO

- Step 1. On the MYOB Tab in TimePro press on the Import option.
- Step 2. Click on Activities, Customers or Suppliers and then choose the file that you have exported in the previous steps from MYOB by pressing the Browse button.
- Step 3. TimePro: Click on Import to start the Import process. A confirmation screen will be shown once the data import is complete.

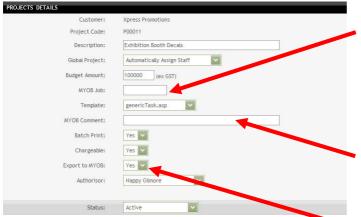




Step 2: Matching TimePro records with MYOB entries

MYOB Customer, Supplier and Activities have to be linked with existing Customer, Supplier, Project and Staff Project records in TimePro (located in the "Admin" tab).

Customer Code:		
Name:		
MYOB Name:	Please Select	_
Status:	Active	
PPLIER DETAILS		
PPLIER DETAILS Supplier Code:		
Supplier Code:	Rease Select	
Name:	Prease Select	



STAFF PROJECT DETAILS Exhibition Booth Decals ~ Staff: Happy Gavin PM Role: MYOB Line Item Description: Professional services provided by [StaffName] 150 (ex GST) Hourly Charge Rate: Hourly Cost Rate: 45 (ex GST) Cost Code: (none) MYOB Activity: Consulting MYOB Line Item Order: Status: Active ₩ Notify the staff memb Reset Cancel

CUSTOMER & SUPPLIER ADD/UPDATE

MYOB Name: Link your TimePro Customer with the corresponding Customer record in your MYOB system.

MYOB Supplier Name: Link your TimePro Supplier with the corresponding Supplier record in your MYOB system.

You should use the same Names in TimePro as you do in MYOB. You may choose to abbreviate these names in cases where the MYOB names are very long or very formal.

PROJECT ADD/UPDATE/COPY

MYOB Job: This is an optional field. If you wish to track this Project as a Job in MYOB then set this field to the corresponding MYOB Job that you have created for this project in your MYOB Accounting Package (choose the Lists menu, then Jobs in MYOB). Remember to make sure that this Job exists in MYOB before you import any data into MYOB.

MYOB Comment: Set this field to contain any specific information that you wish to include on the Sales Invoice that is generated by MYOB eg. Customer's Purchase Order Number.

Export to MYOB: Set this field to Yes if you wish Time recorded by your staff against this project to be used to generate Sales Invoice details for export to MYOB. If No is selected then this Project will be skipped when an MYOB export is performed.

STAFF PROJECT ADD/UPDATE/COPY

Description: The Description is a very important field as it is used as the description for line items on MYOB Sales Invoice Exports. Include the tag [StaffName] in the Description field to have the Staff members First Name and Surname substituted automatically into this field when data pertaining to this record is exported to MYOB.

MYOB Activity: Set it to the MYOB Activity that you want this Staff Project record to be linked with.

MYOB Line Item Order: Set this field to a number such as 10, 20, 30, as it is used for ordering line items on your MYOB Sales Invoices.

4. TimePro

Step 3: MYOB Export Selection Criteria (Sales Invoice)

• Uninvoiced Time Records up to a specified date

The normal mode of operation is to select all time records which have been marked as complete but which are as yet uninvoiced. You are then able to review the invoices which would result from these time records, and you can omit entire invoices, invoice line-items, or individual time records, postponing these until a later invoice batch. An invoice batch number is automatically assigned, and you can then print all timesheets which match this batch. The default value is the last day of the period before the current one.

• Time Records for the Period

You may also select all items for a specific time period, which is by default the period preceding the current period. It is important to note that this will select all completed time records for the period you specify, whether or not they have already been invoiced. This allows you to produce a new invoice to replace one previously produced. You would normally proceed by deselecting all records, and then selecting specifically the information for which you want to produce the invoice or invoices. You should bear in mind that this will produce a new invoice batch, and time records previously assigned to nearlier batch will be removed from that batch

·	
MYOB Export (Sales Invoices: Time Billin	ng)
Step 1. Select Time Records to be Invoid	ced
Uninvoiced Time Records for all dates up until	27 February 2011
O Time Records for the period (even if already invoiced)	14 February 2011 to 27 February 2011
Step 2. Specify Invoice Details	
Invoice Date:	28 February 2011
Invoice Content:	One invoice per Customer and Project
Step 3. Value to be supplied as Activity	ID
For the Activity ID, use the value selected from	Staff Projects: MYOB Activity ID 💌
Step 4. Limit the Data to be Exported	
Customer:	All Customers
	Prepare Invoices

o Invoice Date

As well as specifying the way time records are to be selected, you also need to specify the date which is to appear on invoices. TimePro will suggest the first day of the current period.

o Invoice Content

The last item you need to specify is the content of each invoice, meaning the conditions under which a new invoice will be produced

• Activity ID

The Activity ID can be taken from a number of fields: Projects: MYOB Job, Staff Projects: Cost Code, Staff Projects: Description, Staff Projects: MYOB Activity ID, Staff Projects: Activity ID, Staff Projects: Role, Staff: Reference, Task: Description, Task: External ID, or a value can be specified by choosing Use Value Below.

• Customer

You can optionally limit the export to a single Customer if required.

• Prepare Invoices

When you click on this button, the time records which satisfy your selections above are gathered and grouped into invoices, and displayed in the **MYOB Export Item Selection** page.

Batch 8 (28-Oct-2008 12:53)
View Batch Undo Batch
If you have prepared a Sales Invoice
Batch for MYOB using this screen
and subsequently realise that you
have made a mistake in the data that
was selected for Export, you can
reverse out the batch using this
option. There is also an option to
"View Batch" so that you can verify
the records that will be reversed
before actually performing the
"Undo" operation.

Undo an Existing Batch

Note: Once a batch has been "undone" it is still shown in the batch list but is prefixed with an "X" to indicate that it has been backed out. On the **MYOB Export Item Selection** screen, you are presented with a list of the invoices which can be produced from the time records you have selected. What you see will depend on your browser.

Each row of information also has a selector button and is selected by default.

- If you selected time records for a date range you would typically start by pressing the Select None button (this can take a few seconds to complete). You would then select the items you wish to include in the invoice run.
- If you selected uninvoiced time records you would review the invoices and may choose to select items to exclude from the invoice run.

You may select information at any level of detail to include that item and everything at a lower level. You may deselect an item to exclude it and all lower-level detail. If some items at a level are selected and others not selected, the next-higher parent level will be part-selected. The line-item and invoice values are adjusted in response to your selections.

Once you are satisfied that the invoices are as you wish to see them, click on the Create Batch button. This will take you to the **MYOB Export Save Batch** screen.

This screen shows you the batch number allocated to this information. You should note this number so that you can specify it in the batch print to select time sheets to match these invoices. At this point you get a last chance to change the batch. If you choose the Re-do Selections button, you will be returned to the MYOB Export Item Selection screen to repeat the process, and you will replace this batch when you complete the selection.

Normally you would continue with the Export Invoice Data button. This will open up a new browser window (Data Export Complete) which includes a link which you can be to open the exported data file or to save the exported data in the location from you will import it to MYOB.

MYOB Export (Sales Invoic es: Time Billing)						
Date Range From:	15 September 2008	To:	28 September 2008			
01 October 2008						
One invoice per Customer and P	roject					
	Date Range From: 01 October 2008	Date Range From: 15 September 2008	Date Range From: 15 September 2008 To: 01 October 2008	Date Range From: 15 September 2008 To: 28 September 2008 01 October 2008		



-	INVOICE 1 - Customer Name: Envisage Media; Project Name: Website design									
		Inv. Detail Date	Inv. Job	Inv. Activity	Staff Name	Inv. Rate (Ex GST)	Inv. Hours	Inv. Amount (Ex GST)	Inv. Note	Inv. Comment
+	~	15-Sep-2008		Consulting	Happy Gavin	140	8.75	A\$1,225.00	Professional services provided by Happy Gavin	
+		15-Sep-2008		Consulting	Happy Gilmore	140	23.25	A\$3,255.00	Professional services provided by Happy Gilmore	
+	~	22-Sep-2008		Consulting	Happy Gavin	140	30.50	A\$4,270.00	Professional services provided by Happy Gavin	
+	~	22-Sep-2008		Consulting	Happy Gilmore	140	11.25	A\$1,575.00	Professional services provided by Happy Gilmore	
+	~	22-Sep-2008		Consulting	Trixi Fifi	105	9.75	A\$1,023.75	Professional services provided by Trixi Fifi	
+		22-Sep-2008		Consulting	John Khoo	165	4.50	A\$742.50	Professional services provided by John Khoo	
		Invoice Total					88.00	A\$12,091.25		

-	🔯 INVOICE 2 - Customer Name: Red Square; Project Name: Online training									
		Inv. Detail Date	Inv. Job	Inv. Activity	Staff Name	Inv. Rate (Ex GST)	Inv. Hours	Inv. Amount (Ex GST)	Inv. Note	Inv. Comment
+	✓	15-Sep-2008		Consulting	Happy Gavin	95	8.50	A\$807.50	Professional services provided by Happy Gavin	
+	✓	15-Sep-2008		Consulting	Happy Gilmore	105	5.00	A\$525.00	Professional services provided by Happy Gilmore	
+	1	22-Sep-2008		Consulting	Happy Gavin	95	11.00	A\$1,045.00	Professional services provided by Happy Gavin	
+	✓	22-Sep-2008		Consulting	Trixi Fifi	105	3.25	A\$341.25	Professional services provided by Trixi Fifi	
+	~	22-Sep-2008		Consulting	John Khoo	165	16.75	A\$2,763.75	Professional services provided by John Khoo	
		Invoice Total					44.50	A\$5,482.50		

Data Export Complete 19 records.

Export File - 1_Export_Sales01102008_131821.txt

To save the export file to disk, you should right-click the file name and choose the 'Save Target As' option from the menu which pops up.

To view the file, you should click on the file name above to open it. While the file is open, you may choose File | Save As from the browser menu to save the file to disk.

Re-do Selections Export Invoice Data

Batch number 9 has been set up with a batch date of 28-Oct-2008 and time of 13:17.

MYOB Export (Sales Invoices: Time Billing)



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MYOB Export - Purchase Invoice



Data Export Complete 0 records.

Export File - 1_Export_Purchases22092008_111209.txt

To save the export file to disk, you should right-click the file name and choose the 'Save Target As' option from the menu which pops up.

To view the file, you should click on the file name above to open it. While the file is open, you may choose File | Save As from the browser menu to save the file to disk.



First select the Period Beginning from the dropdown list which has been pre-populated with dates based on the system configuration settings in the application. Once a date has been chosen from the dropdown list, the system automatically displays the period for which data will be extracted.

The Invoice Date is defaulted as the first day following the end of the period selected. The Detail Date is defaulted as the date that marks the start of the period selected. These values can be changed manually if you require different dates to appear on your purchase invoices.

The Invoice Content determines exactly how your Purchases Invoices are generated. A default is selected based on specific MYOB Configuration Settings. For example, if one of your Supplier's contractors is currently working on 3 Projects for one of your Customers, then you may wish to create only one invoice to cover all the Projects or you may want to generate a separate invoice for each Project (3 in this case). You can modify the option here so that the Invoices are generated in the manner you wish. The most common option is to generate One Invoice per Supplier and Project which is the default option.

Press the "Export" button to initiate The MYOB Export process.

A Data Export Complete screen then shows the number of records extracted and also provides a link to the exported file. You should right-click on the link and save the target file to your computer.

MYOB Export - Activity Slips

STEP 1.	Specify whether to e	export Time Records, Expense Rec	cords, or both.
		Time	Expenses
Export this	type of information	v	

STEP 2. Specify information to appear on MYOB Activity Slips.							
Content of the Notes field							
	Time	Expenses					
Prefix with Start/Finish Time							
Prefix with Staff Name							
Prefix with Project Code							
Prefix with Project Description							
Include Task External ID							
Include Task Description							
Include Time/Expense Record Description							
Include MYOB Line Item Order							
Value to be supplied as Rate Use the Staff Project Charge Rates stored in Intertec TimePro 💌							
Value to be supplied as Activity ID							
For the ActivityID, use the value selected from	Staff Projects: MYOB Activity ID 💌	Staff Projects: MYOB Activity ID					

Your Intertec TimePro system is set for Time Billing, i.e. this is the type of Sales Invoice you use. Any time records relating to Staff Project entries which do not have Activity IDs specified will not import successfully into MYOB. If you have such entries, you should specify an override activity ID above. This will be used for all Activity Slips generated.

Value to be supplied as MYOB Job		
For the MYOB Job, use the value selected from	Projects: MYOB Job	Projects: MYOB Job
Mark as already billed in export file		

Specify whether you wish to export Time Records, Expenses or Both

Content of the Notes field

Choose the detail you want to appear in the Notes included in the Activity Slips. By default, the Task details are included (if you use tasks), as are the manually-typed descriptions (if you use these). You may choose to prefix the Notes with the name of the Staff member doing the work and with the Project Description.

Value to be supplied for the Rate

Specify whether the rate is to be taken from the Staff Project record or MYOB.

Value to be supplied for the Activity ID

The Activity ID can be pulled from a number of fields within TimePro: Projects: MYOB Activity ID, Staff Projects: Cost Code, Staff Projects: Description, Staff Projects: MYOB Activity ID, Staff Projects: Role, Staff: Reference, Task: Description, Task: External ID, or you can specify a value.

Value to be supplied for the MYOB Job

The MYOB job can be pulled from a number of fields within TimePro, Projects: MYOB job, Staff Projects: Cost Code, Staff Projects: Description, Staff Projects: MYOB Activity ID, Staff Projects: Role, Staff: Reference, Task: Description, Task: External ID, or you can specify a value.

STEP 4. Payroll Integration.		
	Time	Expenses
Mark MYOB Activity Slips for Payroll Integration		
For the MYOB Payroll Category, use the value selected from	Use Value Below	Expense: Code
	Create the Export File	
	Data Export Complete	
	49 records.	
	Export File - 1_Export_MYOBActivitySlips_104 To save the export file to disk, you should right-click and choose the 'Save Target As' option from the menu	the file name
	To view the file, you should click on the file name abo While the file is open, you may choose File I S from the browser menu to save the file to d	ave As
	Close	

Choose whether the Activity Slips are to be marked for integration with the Payroll, and if so, the Payroll Category which is to be used.The MYOB Payroll Category can be pulled out from a number of fields from within TimePro: MYOB job, Staff Projects: Cost Code, Staff Projects: Description, Staff Projects: MYOB Activity ID, Staff Projects: Role, Staff: Reference, Task: Description, Task: External ID, or you can specify a value.

Click on "Create the Export File" to generate a text file, which will be listed on a new screen.

A Data Export Complete screen then shows the number of records extracted and also provides a link to the exported file. You should rightclick on the link and save the target file to your computer.

Step 4: MYOB Import Instructions -Sales Invoices, Purchase Invoices and Activity Slips

The final step is to import the TimePro data (either sales or purchase invoice information) **into MYOB** using MYOB's Data Import Facility. Only Time records that have been marked as "Completed" are included as part of the export process.

Step 1. Perform a backup of your MYOB data file (IMPORTANT)

It is recommended as good practice to do a backup of your MYOB data file prior to using the MYOB Import facility especially until you are familiar with the process.

Step 2. Choose one of the following menu options in MYOB depending on the type of data you exported earlier:

Sales

- File->Import Data->Sales->Time Billing (default)
- File->Import Data->Sales->Professional
- File->Import Data->Sales->Service
- File->Import Data->Sales->Miscellaneous

Purchases

- File->Import Data->Purchases->Professional
- File->Import Data->Purchases->Service
- File->Import Data->Purchases->Miscellaneous

Step 3: On the MYOB Import File screen choose the following options:

- Export File Format: Tab-Delimited
- o First Record is: Header Record
- o Identify Customers By: Co./Last Name

Leave any other options as they are and press Continue.

Step 4. Select the file you saved during the TimePro MYOB Export process earlier and press Open.

Note: make sure that you do not have the file already open in another program (eg looking at the file in Excel) otherwise you will get an error.

Step 5. Press Match All and check that the fields in the MYOB Fields and Matching Import Fields columns are the same by quickly scrolling through the list.

> Note: if the fields don't match up then you have probably chosen the wrong file for the selected MYOB Import option. Cancel out and try again.

🖾 Import File		
Import Time Billing Sales		
Import File Format:	Tab-delimited	
First Record is:	Header Record	•
Duplicate Records:	Reject Them	•
Identify Customers by:	Co./Last Name	•
Help F1		Cancel

	st click an	Import Field, then click the ma	ICRING MITUE FIELD.		
Co./Last Name	•	^ Co./Last Name:	Co./Last Name		
First Name	_	First Name:	First Name		
Invoice #		Invoice #:	Invaiae #		
Date		Date:	Date		
Inclusive		Inclusive:	Inclusive		
Customer PO		Customer PD:	Customer PO		
Deliverv Status		Delivery Status:	Dolivery Status		
Destad Date	_	Detail Date:	Detail Date		
Activity ID	-	* Activity ID:	Activity ID		
			tching Import Field) a Valid Matching Import Field)		

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Step 6. Press Import to start the Import process.

Step 7. Carefully check the Import Completion Screen to see if there have been any MYOB Errors. Refer to "MYOBLOG.TXT" for error messages.

MYOB Accounting

X

3 records imported without errors. 0 records skipped. 1 records imported with warnings.

For more information, see the file D:\Program Files\myob18\MYOBLOG.TXT in the folder with your company file.

<u>O</u>K

Step 8. Review the invoices that have been imported into MYOB by opening the MYOB Transaction Journal and choosing the Sales or Purchases tab.

1 TimePro[®]

In the Date From and To search fields enter the Invoice Date that you specified in the TimePro MYOB Export screen. You will now see a list of the Invoices that you have imported. Note the word Imported is displayed against all of the invoices that have been created via the MYOB Data Import facility, making them easy to identify. If you need to modify or delete any invoices that you have imported, then you can do so safely on this screen, as you would for any other invoices that you create in MYOB.

3t Job 191.25 209.13	
209.13	
209.13	
209.13	
209.13	
182.50	
548.26	
940.20	
:10.00	
993.74 599.38	
	00.00 10.00

Integrating MYOB Activity Slips Import with Payroll

Time records exported as MYOB Activity Slips may be marked for Payroll Integration against a Payroll Category (defaults as "BaseHourly"). To import Activity Slips for payroll integration, you will need to set your MYOB system up as follows

In MYOB:

• Set up your MYOB Preferences to ensure that the option for "I Use Timesheets for Time Billing and Payroll..." is checked:

MYOB Accounting						
<u>E</u> lle <u>E</u> dit Lists <u>C</u> ommand Centres <u>S</u> etup <u>R</u> eports <u>W</u> indow <u>H</u> elp						
Preferences						
System Windows Reports Banking S⊴les Purchases Inventory Security						
I Use MYOB BetailManager I Use Timeslips Accounting Link I Prefer to Use Help From the Internet, Rather I han My Computer Warn if Jobs Are Not Assigned to All Transactions [System-wide] Turn on Category Tracking: Categories are Not Required on All Transactions [System-wide] For Time Billing: Categories are Not Required on All Transactions [System-wide] For Time Billing: Categories are interval on All Transactions [System-wide] Round Timer-Catculated time in Special 1 Minute Billing Units Round Timer-Catculated time interval on the North States on Monday System-wide] I Use Time Billing Invoices I Use Time Billing Invoices I Use Time Billing and Payroll on All Yweek States on Monday I System-wide]						
ок Нер F1						
Press F1 to get help. ABC Services.MYO						

- Access the Employee Card and, for each employee, define their settings as follows:
 - 1. Set Standard Pay for Base Hourly Category to "0":

MYOB Accounting				
Eile Edit Lists Command Centres	<u>Setup Reports Window Help</u>			
Cards List				
Card Information				
Profile Card Details	Payroll Details Payme	nt Details 👖 Contact L	.og Jobs I	History
Johnson, Adam				
Personal <u>D</u> etails >		juency: Weekly		
Wages 🕨	Hours per Pay Free	juency: 40		
Super <u>annuation</u> >				
Entitļements 🕨				
Deductions 🕨	Payroll Category ⇒ Base Hourly	Hours	Amount	Job
Employer Expenses)	D Base Houriy ⇒ PAYG Withholding		Calculated>	
Taxes ▶				
Standard Pay	-			
Pay History 🕨				
Time <u>B</u> illing ▶				
🚔 <u>P</u> rint 🔄 Crea	ate New Payroll Category	Reset to Original Amounts		
<				>
Press F1 to get help.			ABC S	iervices.MYO

2. Check that Wages details are associated with the Base Hourly Payroll Category:

MYOB Accounting		
Eile Edit Lists Command Centres	etup <u>R</u> eports <u>W</u> indow <u>H</u> elp	
Cards List		
Card Information		
Profile Card Details	Payroll Details Payment Details Contact Log Jobs	History
Johnson, Adam		
Personal <u>D</u> etails >	Pay Basis: Hourly	
Wages +	Annual Salary: \$72,800.00	
Super <u>annuation</u> >	Hourly Rate: \$35.00	
Entitlements 🕨	Pay Frequency: Weekly 💌 Hours in Weekly Pay Period: 40	
Ded <u>u</u> ctions ≽	Wages Expense Account ⇔: 6-5130 🔳 Wages & Salaries	
Employer Expenses >	Select all the relevant wage categories for this employee.	
Ta <u>x</u> es ≽		Salary
Standard Pay >	Sack Pay	Hourly
	✓ ⇔ Base Hourly	Hourly -
Pay History 🕨	⇔ Base Salary ⇔ Bonus	Salary Salary
Time <u>B</u> illing ≯	⇔ CDEP Payments	Hourly -
Erint Crea	e New Payroll Category	
Press F1 to get help.		ABC Services.MY0

In TimePro:

• When undertaking an Activity Slips export, make sure that the Activity Slips are marked for Payroll Integration and that you enter the correct MYOB Payroll Category name for integration with the Activity Slips.

Ob- G ×	http://www	.timesheets.com.au/tp50/admin/	myobExport_/	ActivitySlips.asp		Gr • Google	
Most Visited 🔇 Admin C	Console 📄 Customize Links	🔇 Demo Rooms 🛃 Google [Windows (TimePro Website	Admi () Intertec TimePro	- Logon	
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intertec intranet	01	ntertec TimePro - View Timeshee	t 🗐	() Intertec TimePro	o Admin - Export to MYOB	S Intertec TimePro - Expo	rt Activit 🔯
	STEP 1. Specify int	formation to appear on MYOB	Activity Slip	5.			
	Content of the Notes I						
	Prefix with Staff N	lame					
	Prefix with Projec	t Code					
	Include Time Reco	rd Task					
	Include Time Reco	i an					
	Value to be supplied as Activity ID						
		tivity ID from the Staff Project	s record				
		he Activity ID with the value: system is set for Time Billing, i.					
	specify an override act	tivity ID above. This will be used			o MYOB. If you have such ent	tries, you should	
		tivity ID above. This will be used	for all Activi	ty Sips generated.	om oo, n you nare saan en	rnes, you should	
			os MYOB Act	ty Sips generated.		rries, you should	
	STEP 2. Select the	time records to be exported	os MYOB Act	ty Slips generated. tivity Slips.		rnes, you should	
	STEP 2. Select the Date Range From:	time records to be exported	os MYOB Act	ty Slips generated. tivity Slips.		rnes, you should	
	STEP 2. Select the Date Range From: Customer:	time records to be exported 07-Mar-2009 A Customers	os MYOB Act	ty Sips generated. tivity Slips. 13-Mar-2009		rnes, you should	
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	STEP 2. Select the Date Range From: Customer: Project: Staff Member: Staff Type:	time records to be exported 07-Mar-2009 Al Customers Al Projects Adam Johnson	as MYOB Act	ty Slips generated. tivity/ Slips. 13-Mar-2009		rnes, you should	
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• Conduct the export from TimePro and import to MYOB as usual for payroll processing. You will note that the Activity Slips now register as hours recorded as Timesheet Hours:

N	YOB Acc	ounting						
Eile	<u>E</u> dit Lists	<u>Command Centres</u>	Setup Reports	Window H	lelp			
	۵	NYOB	Sel	C Process	Period all employees paid: individual employee:	Johnson, Adam		
		Select Pay Peri	od	Payment	date: 13/03/2009]		
	Se	elect & Edit Employee's F	10.5 M	🥅 Pay Jeav	re in advance:			
		Process Payme Print Payroll Adv		Pay period	start: 7/03/2009	Pay period end:	13/03/2009	
		Print Payroll Adv	Desel	ect timeshe	ets to remove from p	ayroll calculation		
				Date 9/03/2009	Employee Johnson, Adam	Pay Basis Hourly	s Weekly Hrs Timesheet Hrs 40.000 55,50 🔺	
				3/03/2003	Sonnson, Adam	Houly	40.000 35.50	Ξ
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Pre	ess F1 to ge	t help.					ABC Services.MYO	

This guide has been developed to provide an overview of how to integrate MYOB with TimePro. Comprehensive information can be sourced from the TimePro Online Help manual available via the Help section of your Intertec TimePro system.

> Contact Details: Further assistance is available from the Intertec TimePro team ☎ (08) 9286 3911 ⊠ support@timesheets.com.au

