



One-Touch Automation, Inc.

Westfield, IN

Office: 317.896.1393

Fax: 317.614.7197

E-mail: info@one-touchautomation.com

Quick Books Time Integration with D-Tools

Step 1: Scheduling

QB Time: Actions - Add Shift

Title:

If Project Task

Clients Last Name + WO: #####

If Service Order

Clients Last Name + SO: #####

Date: Scheduled Date

Time: Scheduled Time

Team Member: Whoever is being scheduled

Customer: Select Client + Job

Location: Verify and if wrong, correct.

Notes: Any information for the Technician

Fields: (If no Fields are shown, press Blue + Add Fields)

Class: Fill in

SI Entity:

Company (if job prep or anything non-billable)

Project (not used as of now)

Service Order (if this is a Service Order, select this)

Task (if this is a Project Task Work Order, select this)

SI Entity Number:

If you chose Company as the Entity: 1111

If you chose Service Order as the Entity: (Enter Service Order Number)

If you chose Task as the Entity: (Enter Task Number from Project)

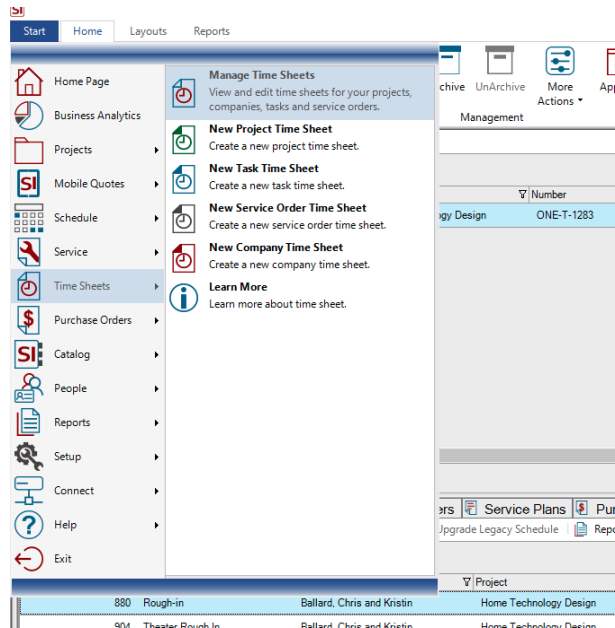
*****Service Order and Task Order Numbers must match Numbers in D-Tools*****

SI Phase:

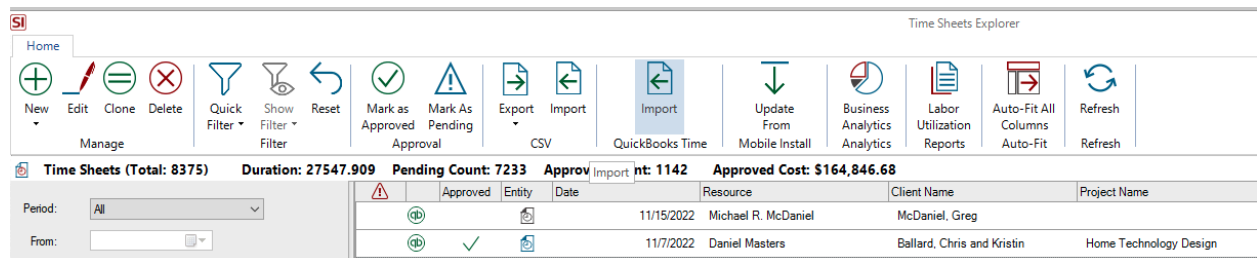
The Final selection is SI Phase. This is what phase of the project you are working on. Select the phase that makes sense for the task.

Step 2: Importing Time Sheets into D-Tools

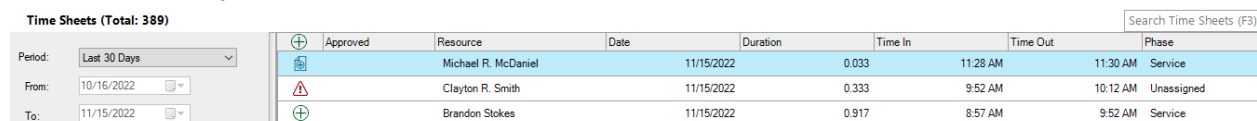
In D-Tools - Click Start - Time Sheets - Manage Time Sheets



Click Import under QuickBooks Time



On the left side, you will have 1 of 3 icons to determine what needs to be done



The top icon represents an existing timesheet already imported into D-Tools

The middle icon (triangle with explanation mark) represents something was inputted correctly in time - go to QB Time and make sure all fields are filled out.

The lower icon (green circle with +) means it is ready to import.

Highlight those that are Ready To Import and Click Import

Import Time Sheets from QuickBooks Time

Home

Import Select Deselect All New Existing Inadequate Resource Project Task Service Order Company Mass Update Update

Time Sheets (Total: 389)

Period: Last 30 Days

From: 10/16/2022

To: 11/15/2022

Approved	Resource	Date	Duration
	Michael R. McDaniel	11/15/2022	
	Clayton R. Smith	11/15/2022	
	Brandon Stokes	11/15/2022	
	Clayton R. Smith	11/15/2022	

Now they are imported and need approval.

Step 3: Approve Time Sheets

Open Service Order or Task

Click on Time Sheets

Edit Service Order - 1911

Home Tools

Save and Close Save Cancel General Contact Notes Repair Items Time Sheets Checklist Reports Scope Of Work Create Estimate QuickBooks Settings Publish Mobile Ir

General

Client: Loftus, Joe and Susan

Created On: 11/10/2022 2:06 PM Updated On: 11/10/2022 2:06 PM by Brandon Stokes

Verify time should be associated with Service Order or Task and if so, click on Mark as Approved

Edit Service Order - 1911

Home Tools

Save and Close Save Cancel General Contact Notes Repair Items Time Sheets Checklist Reports Scope Of Work Create Estimate QuickBooks Settings Publish Mobile Ir

Time Sheets

New Edit Clone Delete Filter Mark as Approved Mark as Pending Auto-Fit All Columns CSV

Approved	Date	Resource	Duration	Duration (Overtime)	Approved By	Approved On
	11/15/2022	Brandon Stokes	0.917			

Then Click Save and Close.

You can click No on Publish to Mobile Installer

