KARBON | Webinar Series

Using Karbon with Intuit TSheets and QuickBooks Online

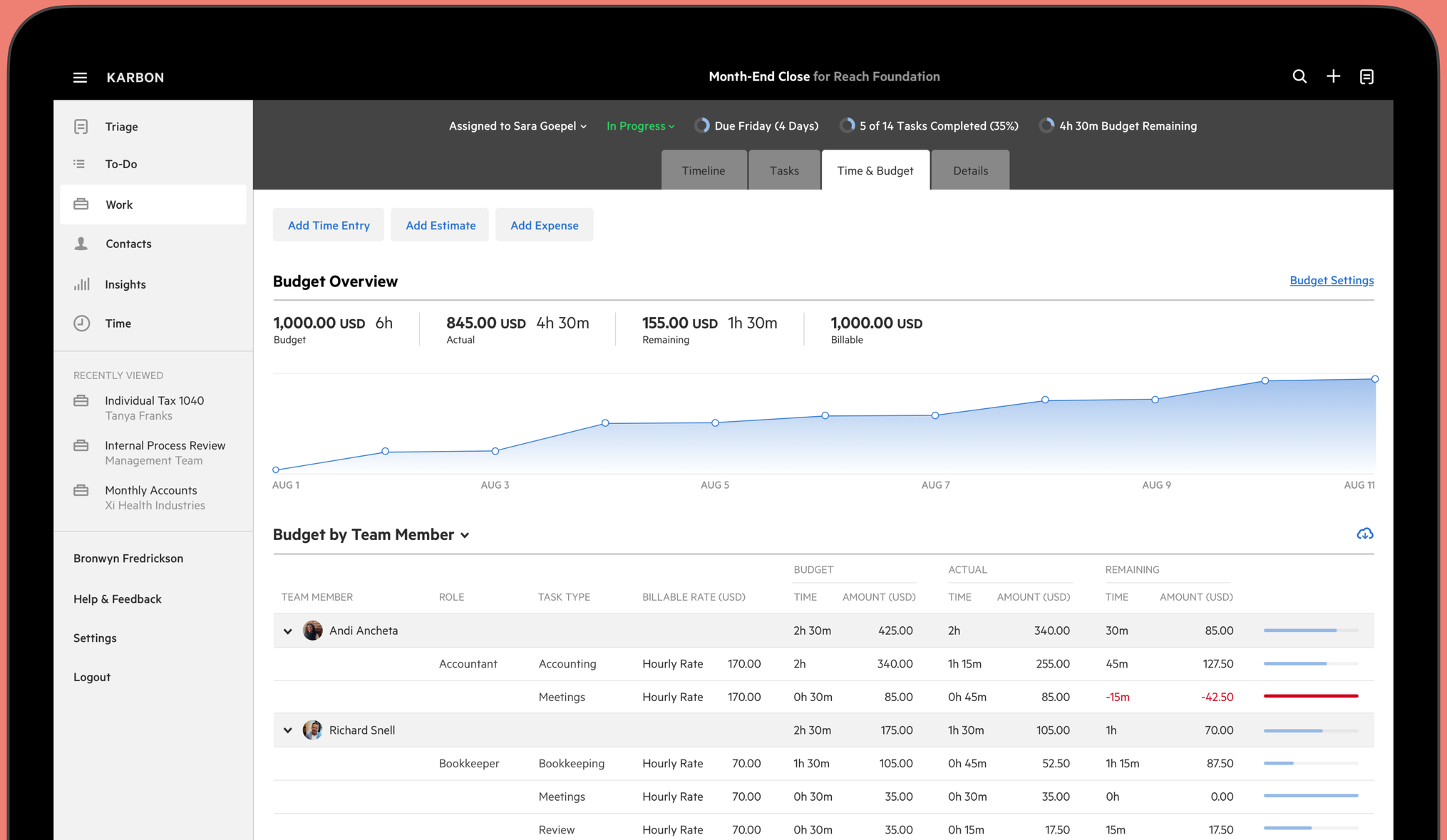
karbonhq.com

Meet your hosts

Andi Ancheta
Karbon
VP, Customer Success

Ian Vacin
Karbon
Chief Customer Officer

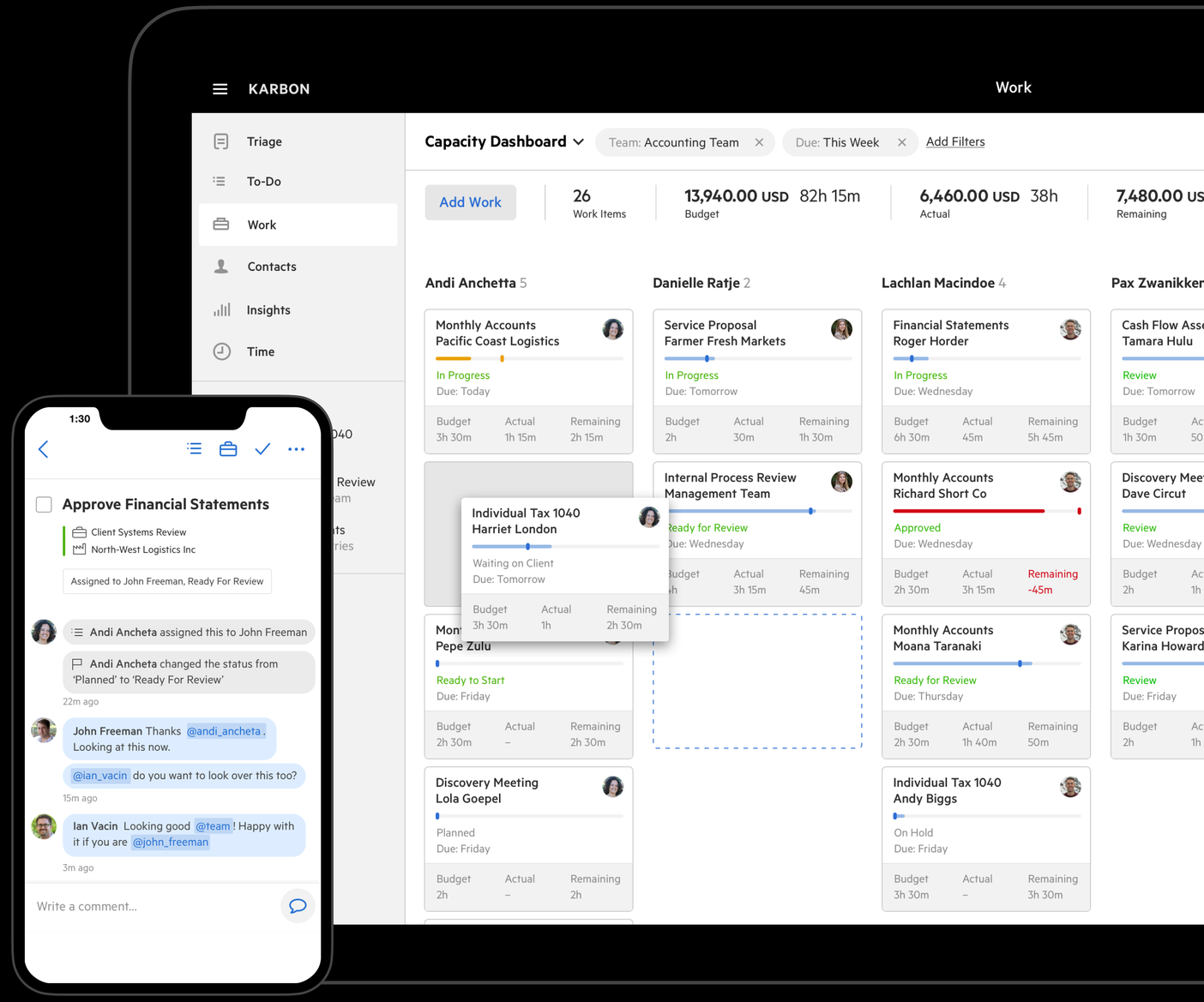
Manage budgets, actuals, timesheets and analysis where the work happens.



Work Management Software *for* Accounting Firms

karbonhq.com

GET STARTED



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KARBON

KARBON MAGAZINE

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TECHNOLOGY LEADERSHIP WORK LIFE GROWTH INDUSTRY KARBON

Articles Events Videos Ebooks Templates Opinions Guides Customer Stories

The blueprint for growing your accounting firm in 2020

Many accounting firms lack a plan for how they will grow, which is why the thought of hiring more staff is often associated with pain. Here's how to overcome that.

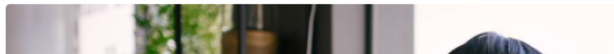
4 min read

Recruiting // 30 interview questions to help you identify the best candidate

We spoke with managers from high-performing accounting firms to find out the best interview questions to ask when hiring new candidates.

15 min read

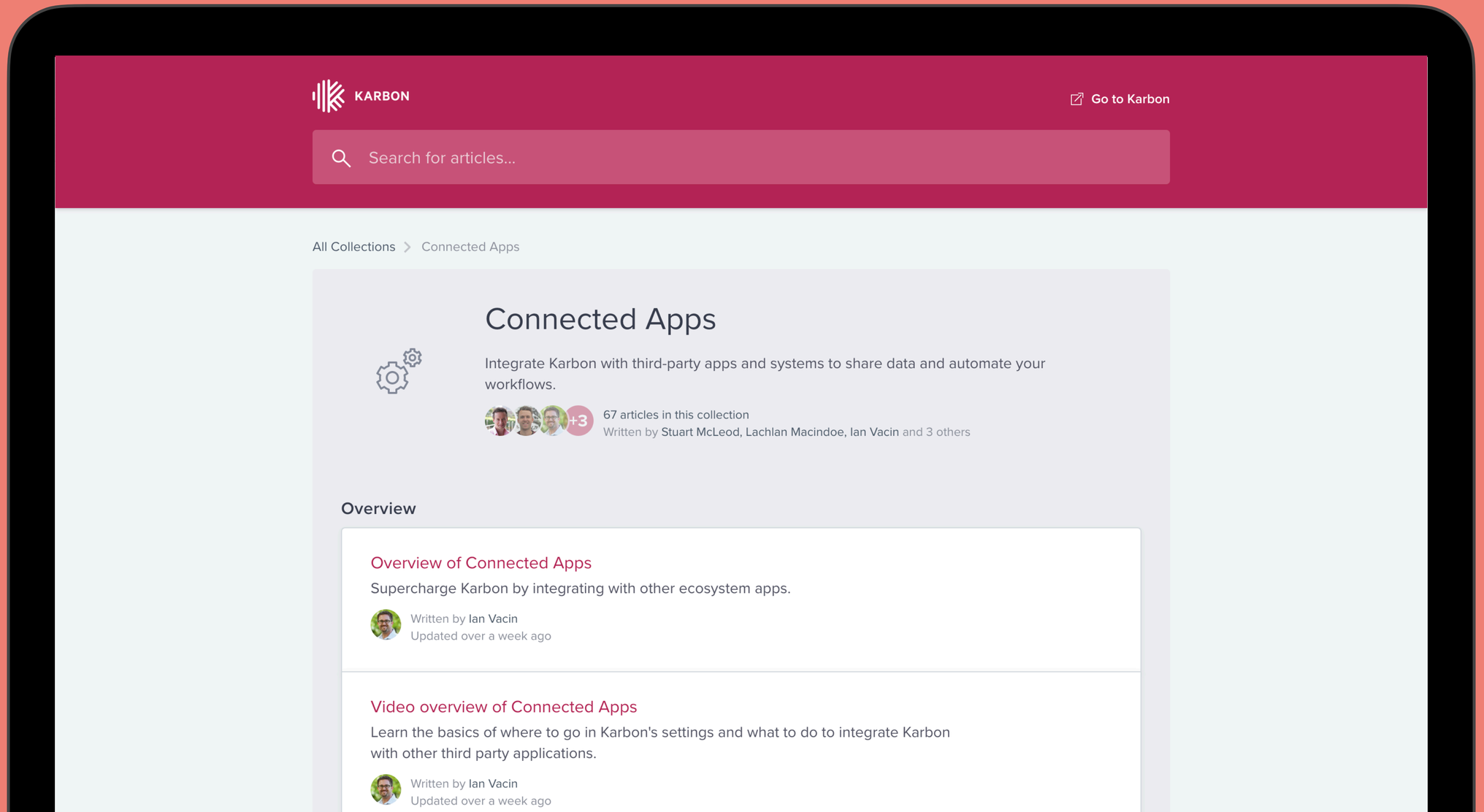
WORKING REMOTELY



How would you manage your firm if shelter-in-place lasted 2 years?

help.karbonhq.com

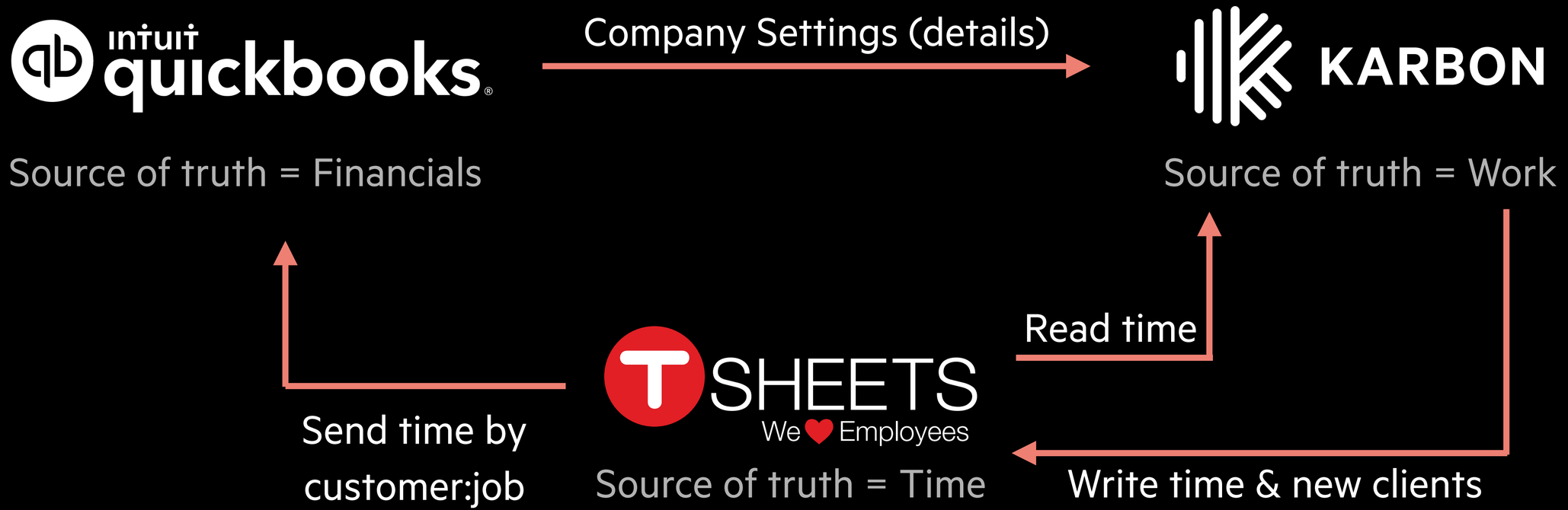
Gain confidence by reviewing video overviews, step-by-step guides and comprehensive FAQs.



1. Close any open apps
2. Ask and we'll answer

1. **The process**
2. The integrations
3. Common FAQs
4. Wrap-up & questions

How data flows between Karbon, TSheets & QBO



For time & billing to flow, contact names must match between all three systems.

7 steps to integrating Karbon + TSheets + QBO

1. Setup the various systems
2. Integrate TSheets + QBO
3. Ensure Custom Fields are enabled
4. Create a uniform client list
5. Integrate Karbon + TSheets
6. Set integration parameters
7. Sync, pause, and track time

Watch: Getting started with Time & Budgets in Karbon

https://wi.st/371CCvM

The process

- **Systems setup**: Create your QuickBooks Online, TSheets Pro and Karbon accounts. Be sure staff members exist in each (and emails).
- **Integrate TSheets + QBO**: Initiate from either QBO or TSheets, integrate TSheets to QBO. QBO should enable custom fields.
- **Ensure Custom Fields are enabled**: QBO should trigger these on, but if not, turn on in TSheets to enable the Karbon integration.
- **Uniform client list**: Depending on your setup, ensure your clients are exactly (letter for letter) the same across the three apps.

The process (continued)

- **Integrate Karbon + TSheets**: Initiate the integration from Settings > Connected Apps > TSheets.
- **Set integration parameters**: Specify integrating at Contacts Only or Contacts & Work, and which Contact Types to sync. Test first.
- **Sync, pause, and track time**: Click sync and Karbon will sync contacts & time for level / type specified. Track time in either system.

1. The process
2. **The integrations**
3. Common FAQs
4. Wrap-up & questions

1. Setup the various systems.

2. Integrate TSheets + QBO.

TSHEETS by quickbooks

PM 2:17:08

Ian Vacin
Karbon

- TSheets PRO Portal
- Manage Clients
- Getting Started
- Time Clock
- Schedule
- Projects
- Who's Working
- Time Entries
- Time Off
- Approvals
- Reports

My Team
Jobs
Company Settings
Feature Add-ons

Time Clock

Ian is off the clock

TOTALS

CURRENT	DAY	WEEK
-	-	-

JOBS

Search jobs

Top

- Acme Bread
- ACME Bread & Pastrie's
- Andi Ancheta (personal)
- Fred
- FusionCPA
- Ian Vacin
- Jim & Jan TestTSheets
- Jim TestTSheets
- Katherine Harrington
- Test TSheets Org
- TSheets Test Organization

OPTIONS

Clock In

Manage Add-ons

Search

FEATURED

QuickBooks Online Integration
Import employees, customers, and service items from QBO. Export timesheets. Learn more
Install

QuickBooks Desktop Integration
Import employees, customers, and service items from QBD. Export timesheets. Learn more
Install

INSTALLED

Approvals
Set up timesheet submission, manager approvals, and notifications.
Learn more
Uninstall
Preferences

Breaks
Allow your employees to track paid and unpaid breaks throughout the day.
Learn more
Uninstall
Preferences

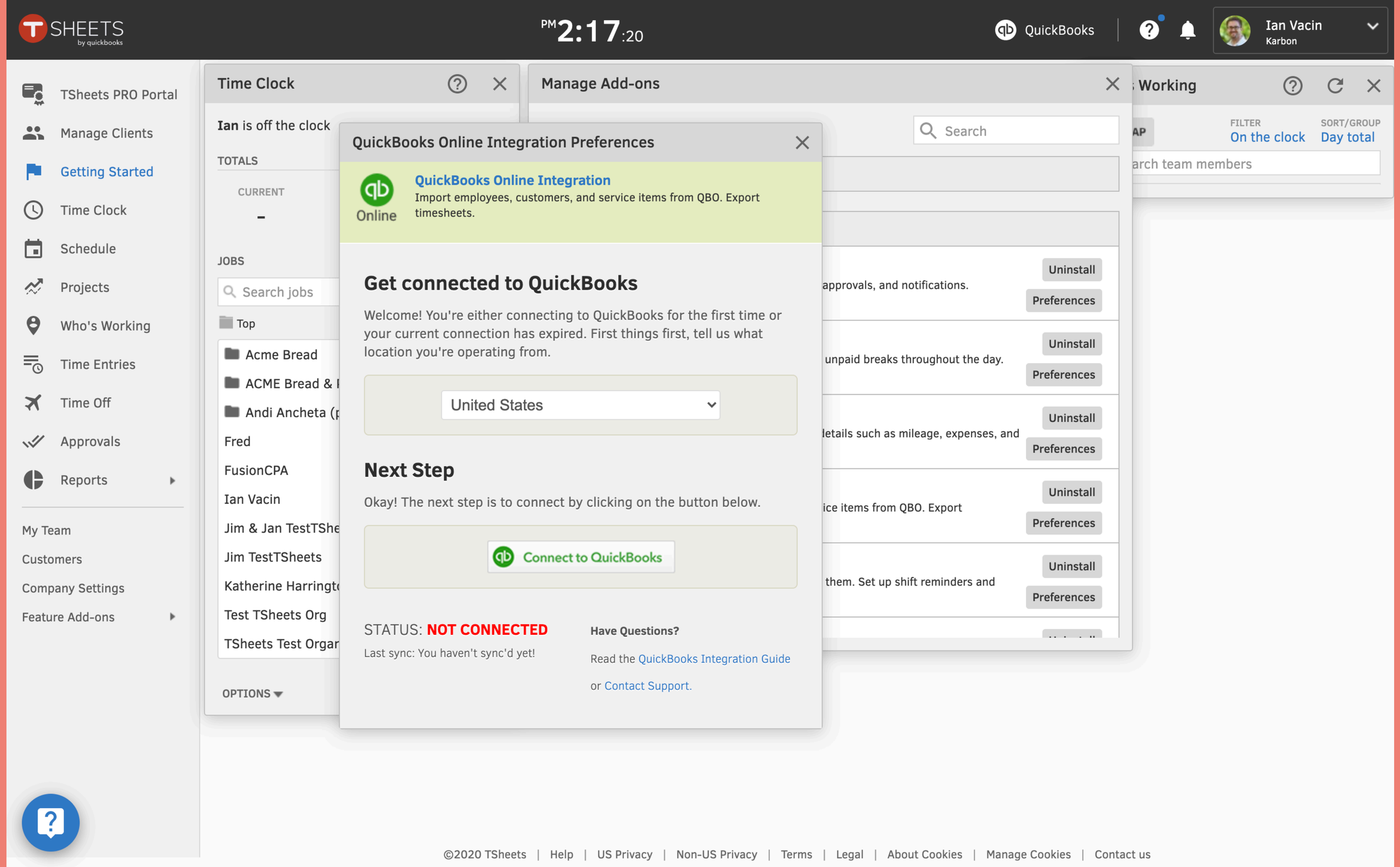
Custom Fields
Add fields to timesheets to track more details such as mileage, expenses, and equipment. Learn more
Uninstall
Preferences

Schedule

Working

FILTER On the clock
SORT/GROUP Day total

arch team members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Search
approvals, and notifications.
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Uninstall
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Uninstall
Preferences
them. Set up shift reminders and
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FILTER
On the clock
SORT/GROUP
Day total
arch team members
QuickBooks Online Integration Preferences
Online
QuickBooks Online Integration
Import employees, customers, and service items from QBO. Export timesheets.
Get connected to QuickBooks
Welcome! You're either connecting to QuickBooks for the first time or your current connection has expired. First things first, tell us what location you're operating from.
United States
Next Step
Okay! The next step is to connect by clicking on the button below.
Connect to QuickBooks
STATUS: NOT CONNECTED
Last sync: You haven't sync'd yet!
Have Questions?
Read the QuickBooks Integration Guide
or Contact Support.
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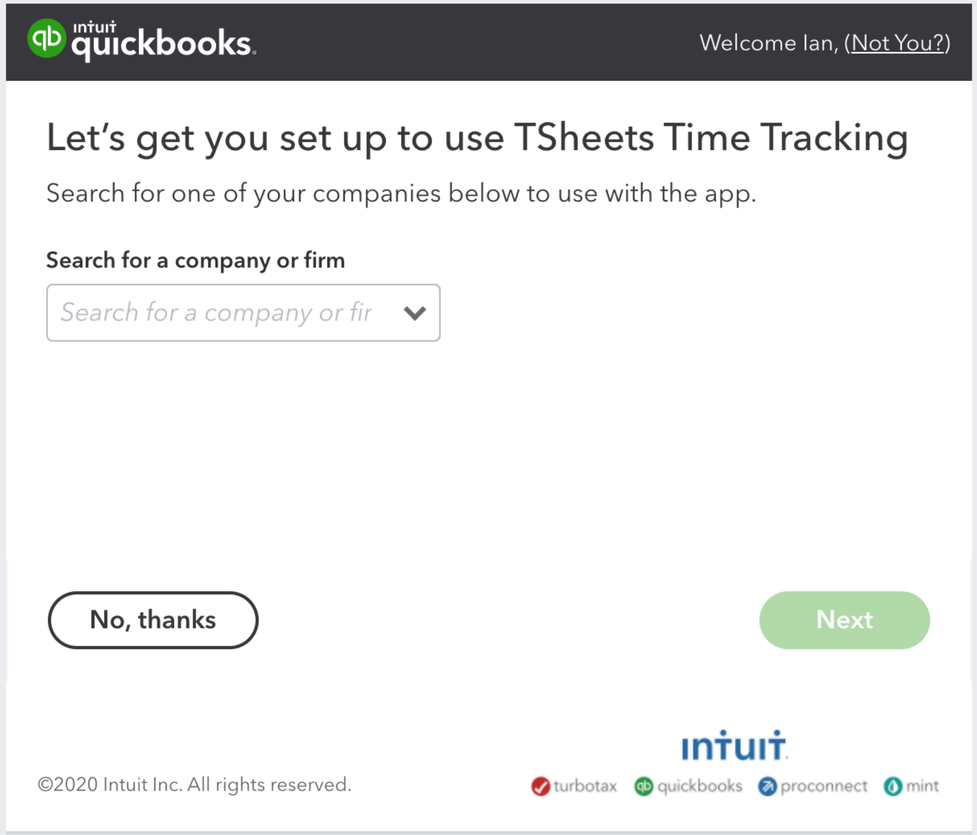
quickbooks
Welcome Ian, (Not You?)
Let's get you set up to use TSheets Time Tracking
Search for one of your companies below to use with the app.
Search for a company or firm
Search for a company or fir
No, thanks
Next
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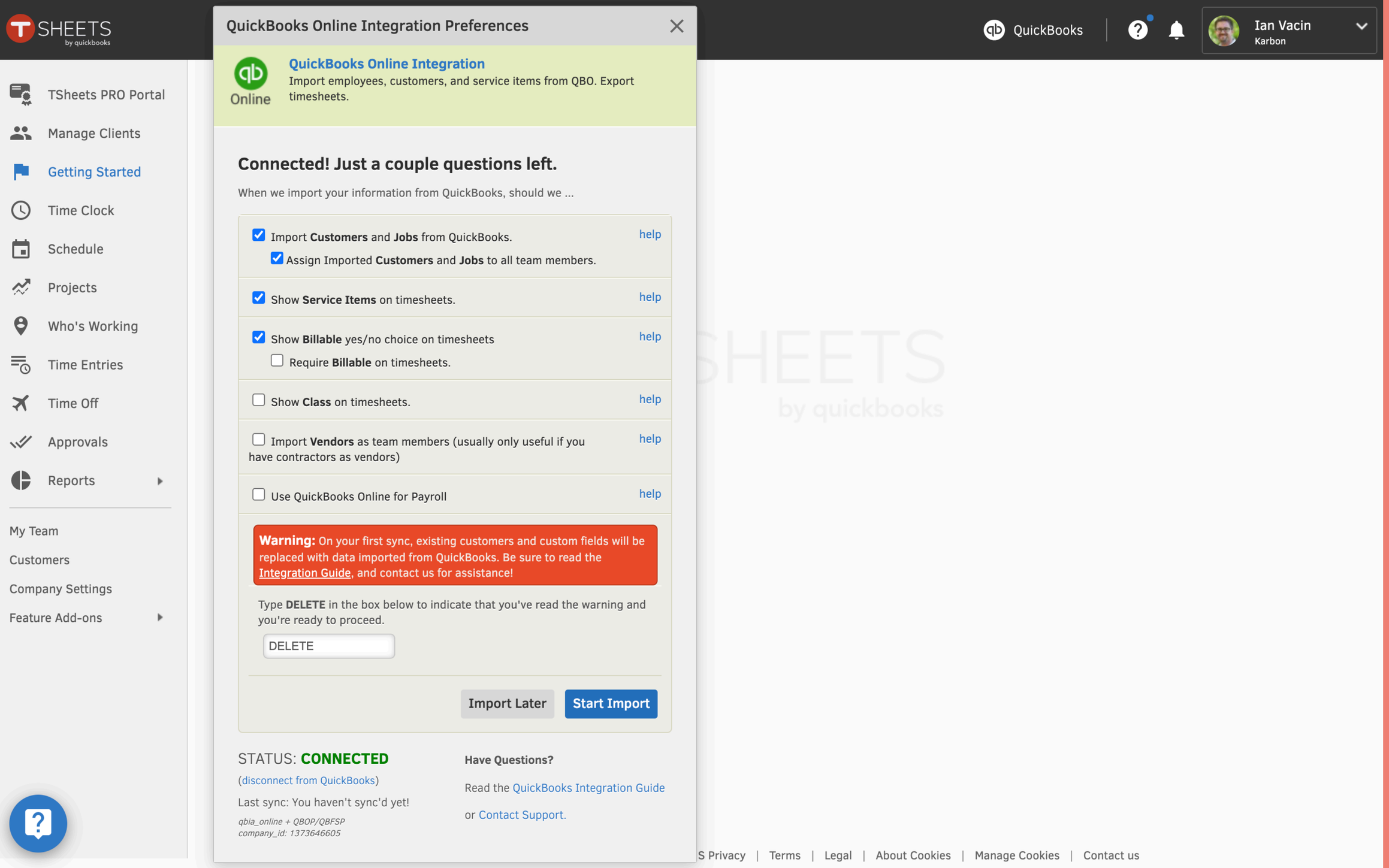
mint


TSHEETS by quickbooks
QuickBooks
Ian Vacin
Karbon
TSheets PRO Portal
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Feature Add-ons
QuickBooks Online Integration Preferences
QuickBooks Online Integration
Import employees, customers, and service items from QBO. Export timesheets.
Online
Connected! Just a couple questions left.
When we import your information from QuickBooks, should we ...
Import Customers and Jobs from QuickBooks.
help
Assign Imported Customers and Jobs to all team members.
Show Service Items on timesheets.
help
Show Billable yes/no choice on timesheets
help
Require Billable on timesheets.
Show Class on timesheets.
help
Import Vendors as team members (usually only useful if you have contractors as vendors)
help
Use QuickBooks Online for Payroll
help
Warning: On your first sync, existing customers and custom fields will be replaced with data imported from QuickBooks. Be sure to read the Integration Guide, and contact us for assistance!
Type DELETE in the box below to indicate that you've read the warning and you're ready to proceed.
DELETE
Import Later
Start Import
STATUS: CONNECTED
(disconnect from QuickBooks)
Last sync: You haven't sync'd yet!
qbia_online + QBOP/QBFSP
company_id: 1373646605
Have Questions?
Read the QuickBooks Integration Guide
or Contact Support.
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TSheets PRO Portal
Manage Clients
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Who's Working
Time Entries
Time Off
Approvals
Reports

My Team
Clients
Company Settings
Feature Add-ons

Time Clock

Ian is off the clock

TOTALS

CURRENT	DAY	WEEK
-	-	-

CLIENTS

Search clients

Top

- Acme Corporation
- Adam & Smith Consulting
- Adam & Smith Consulting-1
- Adam & Smith Consulting-2
- Amelia Contact
- August 9 2020 Smoke Test
- Big Boo
- Bob Jones
- BUSINESS SAMPLE
- BUSINESS SAMPLE
- BUSINESS SAMPLE-1
- Contact Aug 2020
- Contact type Joint

OPTIONS

Clock In

QuickBooks Online Integration Preferences

QuickBooks Online Integration
Import employees, customers, and service items from QBO. Export timesheets.

Congratulations! You've completed your first import!

Before you are able to Export, you must...

1) Use the Payroll Item Mapping Tool to map payroll items to your employees.

2) Track some time (instructions here).

3) Then you need to approve time (instructions here).

4) And finally, you can then export time (instructions here).

STATUS: **CONNECTED**
(disconnect from QuickBooks)
Last sync: 1 seconds ago
qbia_online + QBOP/QBFSP
company_id: 1373646605

Have Questions?
Read the QuickBooks Integration Guide
or Contact Support.

Who's Working

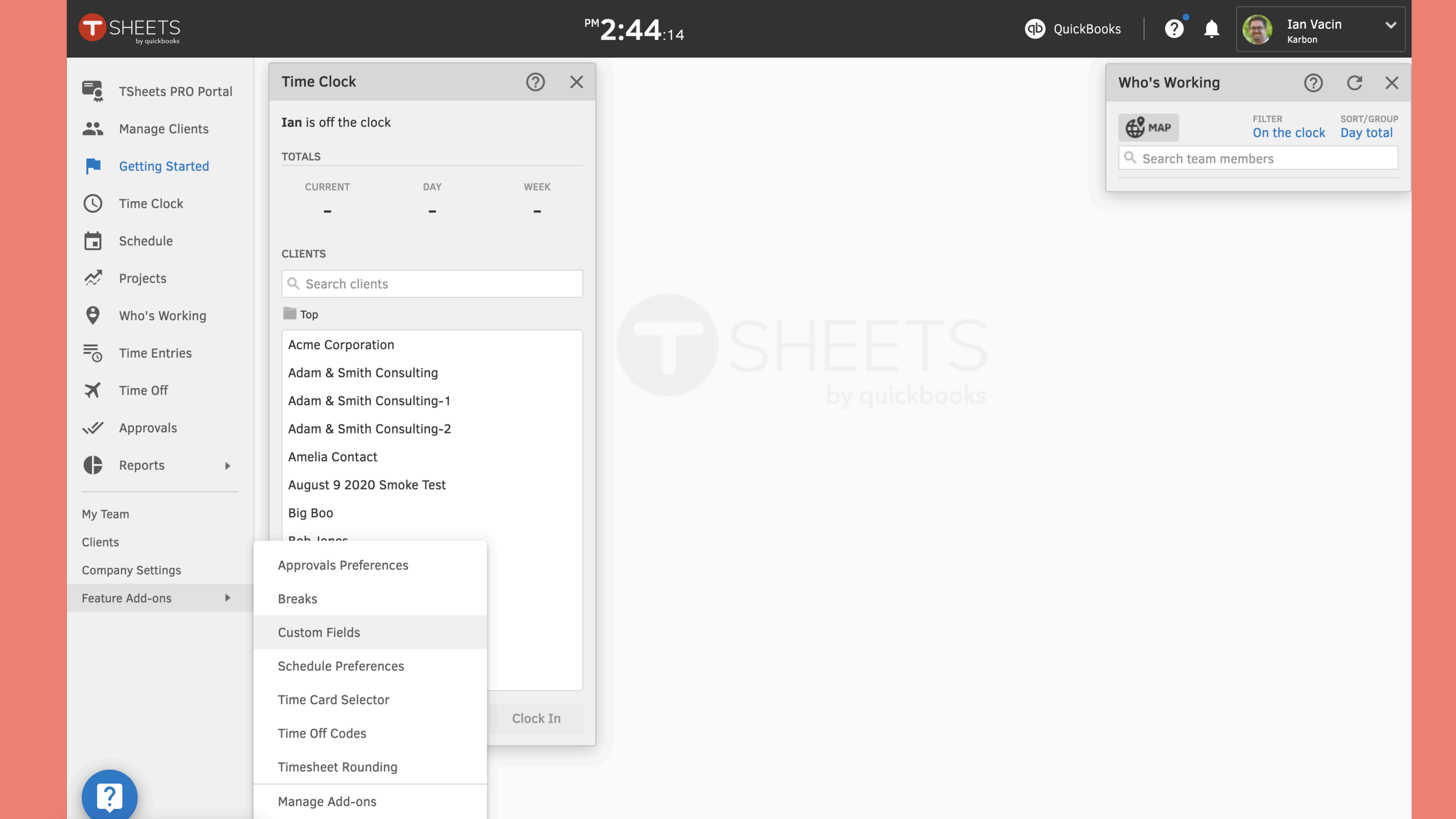
MAP

FILTER On the clock

SORT/GROUP Day total

Search team members

3. Ensure Custom Fields are enabled.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Breaks
Custom Fields
Schedule Preferences
Time Card Selector
Time Off Codes
Timesheet Rounding
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Ian is off the clock
TOTALS
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CLIENTS
Search clients
Top
Acme Corporation
Adam & Smith Consulting
Adam & Smith Consulting-1
Adam & Smith Consulting-2
Amelia Contact
August 9 2020 Smoke Test
Big Boo
Clock In
Who's Working
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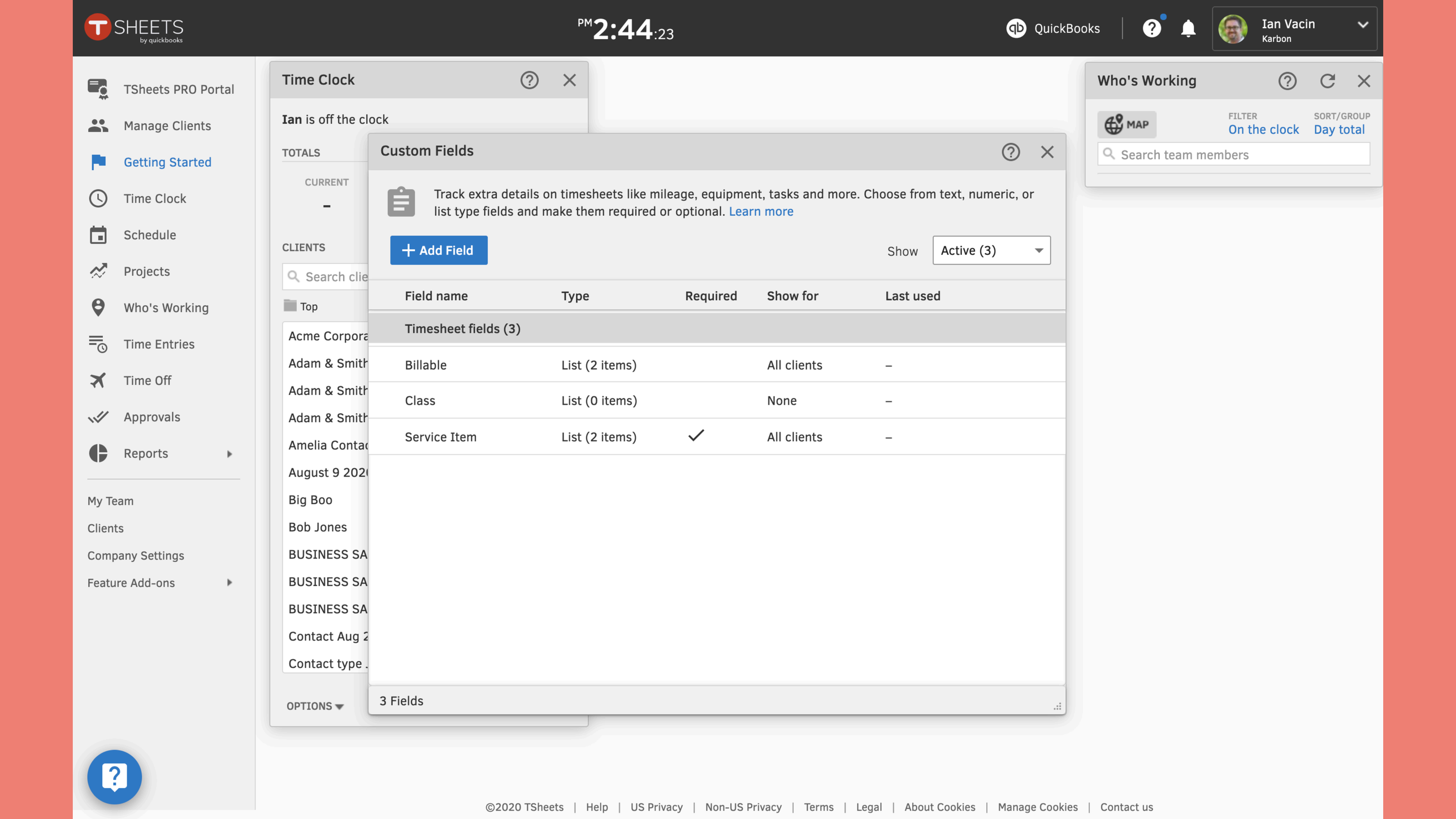
Day total
Search team members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Big Boo
Bob Jones
BUSINESS SA
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Contact Aug 2
Contact type
OPTIONS
Custom Fields
Track extra details on timesheets like mileage, equipment, tasks and more. Choose from text, numeric, or list type fields and make them required or optional. Learn more
+ Add Field
Show
Active (3)
Field name
Type
Required
Show for
Last used
Timesheet fields (3)
Billable
List (2 items)
All clients
–
Class
List (0 items)
None
–
Service Item
List (2 items)
All clients
–
3 Fields
Who's Working
MAP
FILTER
On the clock
SORT/GROUP
Day total
Search team members
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4. Create a uniform client list.

+ New

YOUR PRACTICE

Clients

Team

ProAdvisor

Work

Apps

YOUR BOOKS

Overview

Dashboard

Banking

Expenses

Sales

Payroll

Time

Reports

Taxes

Mileage

Accounting

Overview | All Sales | Invoices | Payment Links NEW | Clients | Products and Services

Clients

Client types | New client

Unbilled Last 365 Days		Unpaid Last 365 Days		Paid
$0	$0	$0	$200	$0
0 ESTIMATE	0 UNBILLED ACTIVITY	0 OVERDUE	1 OPEN INVOICE	0 PAID LAST 30 DAYS

Batch actions | Search

CLIENT / COMPANY	PHONE	OPEN BALANCE	ACTION
Acme Corporation Acme Corporation	123-456-7890	$0.00	Create invoice
Adam & Smith Consulting Adam & Smith Consulting	(478) 896-3138	$0.00	Create invoice
Adam & Smith Consulting-1 Adam & Smith Consulting		$0.00	Create invoice
Adam & Smith Consulting-2 Adam & Smith Consulting		$0.00	Create invoice
Amelia Contact		$0.00	Create invoice
August 9 2020 Smoke Test		$0.00	Create invoice
Big Boo		$0.00	Create invoice

+ New

YOUR PRACTICE

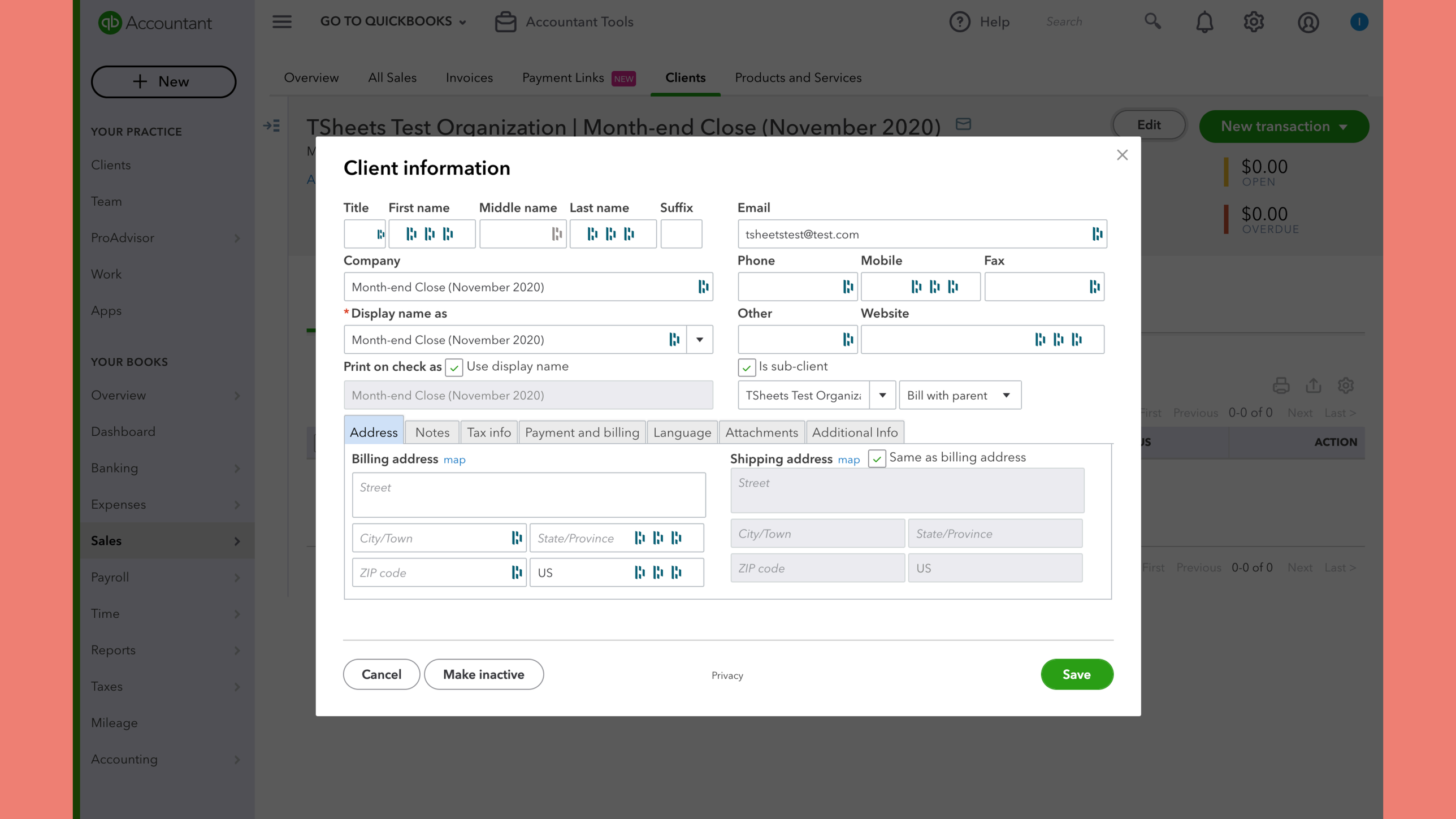
Clients
Team
ProAdvisor
Work
Apps

YOUR BOOKS

Overview
Dashboard
Banking
Expenses
Sales
Payroll
Time
Reports
Taxes
Mileage
Accounting

CLIENT / COMPANY	PHONE	OPEN BALANCE	ACTION
Smoke Test October 15		$0.00	Create invoice
Smoke Test Nov test 1		$0.00	Create invoice
Smoke Test nov 23 Test		$0.00	Create invoice
test test		$0.00	Create invoice
test 122325 tewtwet		$0.00	Create invoice
Test 2 Test		$0.00	Create invoice
Test 2 Dec 2020		$0.00	Create invoice
Test test test test test Test test test test test		$0.00	Create invoice
TSheets Test Organization TSheets Test Organization		$200.00	Receive payment
Month-end Close (November 2020) Month-end Close (November 2020)		$0.00	Create invoice

Privacy


Accountant
GO TO QUICKBOOKS
Accountant Tools
Help
Search
New
YOUR PRACTICE
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ProAdvisor
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Overview
Dashboard
Banking
Expenses
Sales
Payroll
Time
Reports
Taxes
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Accounting
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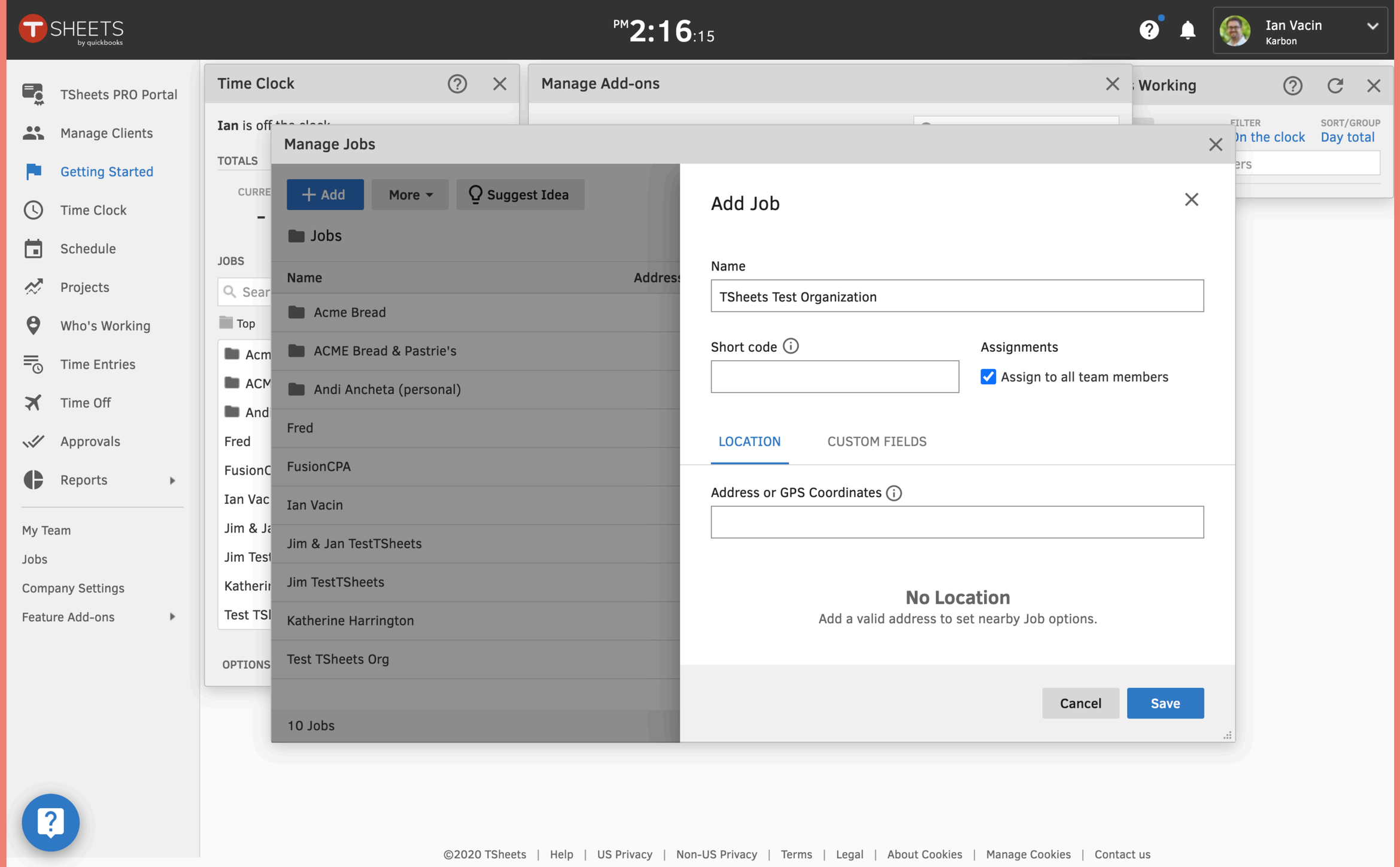
All Sales
Invoices
Payment Links NEW
Clients
Products and Services
TSheets Test Organization | Month-end Close (November 2020)
Edit
New transaction
$0.00
OPEN
$0.00
OVERDUE
First Previous 0-0 of 0 Next Last >
ACTION
Client information
Title
First name
Middle name
Last name
Suffix
Email
tsheetstest@test.com
Company
Month-end Close (November 2020)
Phone
Mobile
Fax
*Display name as
Month-end Close (November 2020)
Other
Website
Print on check as
Use display name
Month-end Close (November 2020)
Is sub-client
TSheets Test Organiza
Bill with parent
Address
Notes
Tax info
Payment and billing
Language
Attachments
Additional Info
Billing address
map
Street
City/Town
State/Province
ZIP code
US
Shipping address
map
Same as billing address
Street
City/Town
State/Province
ZIP code
US
Cancel
Make inactive
Privacy
Save


TSHEETS by quickbooks
PM 2:16:15
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Working
Manage Jobs
Add
More
Suggest Idea
Jobs
Name
Acme Bread
ACME Bread & Pastrie's
Andi Ancheta (personal)
Fred
FusionCPA
Ian Vacin
Jim & Jan TestTSheets
Jim TestTSheets
Katherine Harrington
Test TSheets Org
10 Jobs
Add Job
Name
TSheets Test Organization
Short code
Assignments
Assign to all team members
LOCATION
CUSTOM FIELDS
Address or GPS Coordinates
No Location
Add a valid address to set nearby Job options.
Cancel
Save
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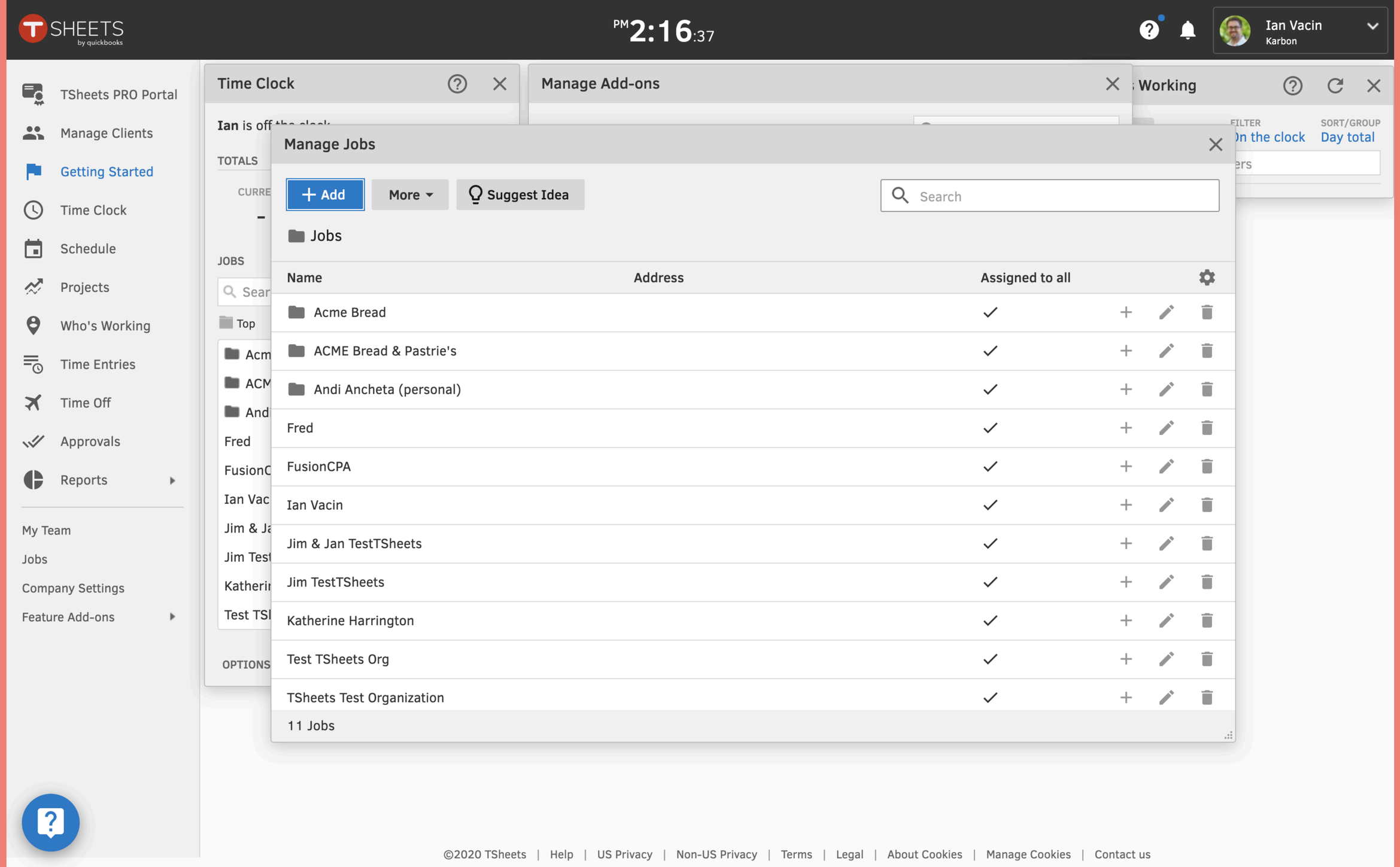
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Day total
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More
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Search
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Name
Address
Assigned to all
Acme Bread
ACME Bread & Pastrie's
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Jim TestTSheets
Katherine Harrington
Test TSheets Org
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11 Jobs
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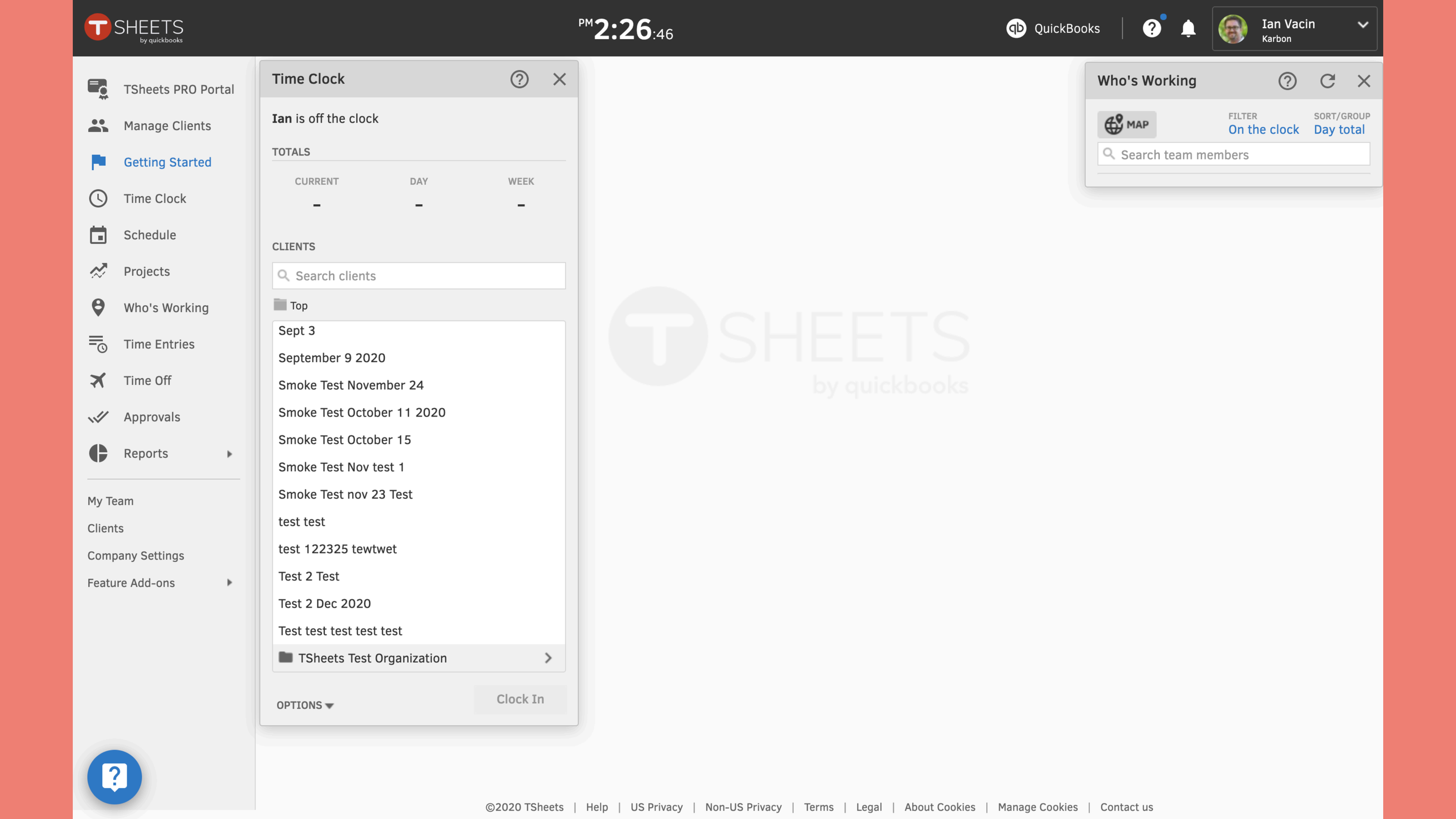
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Smoke Test November 24
Smoke Test October 11 2020
Smoke Test October 15
Smoke Test Nov test 1
Smoke Test nov 23 Test
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Test 2 Test
Test 2 Dec 2020
Test test test test test
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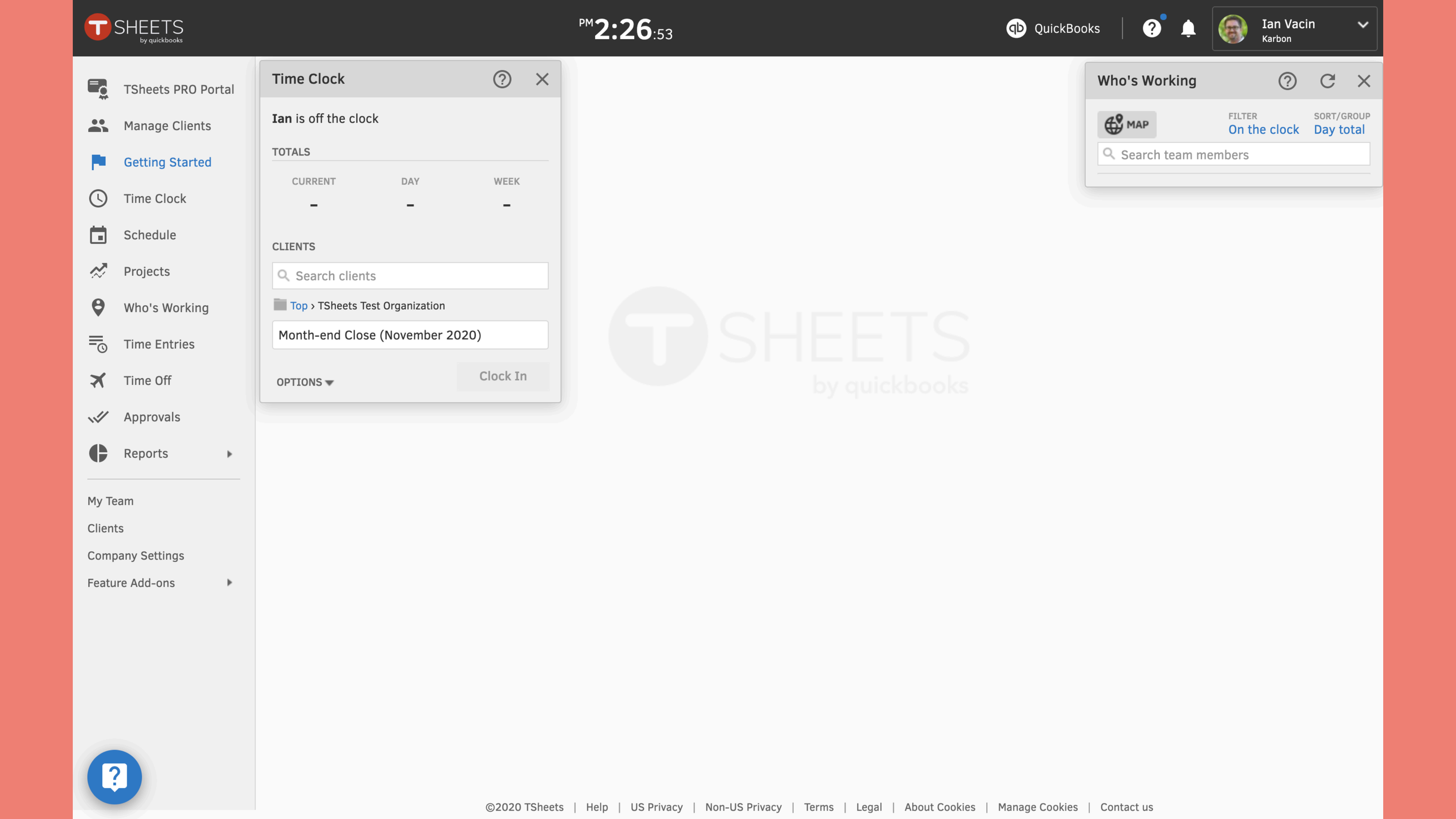
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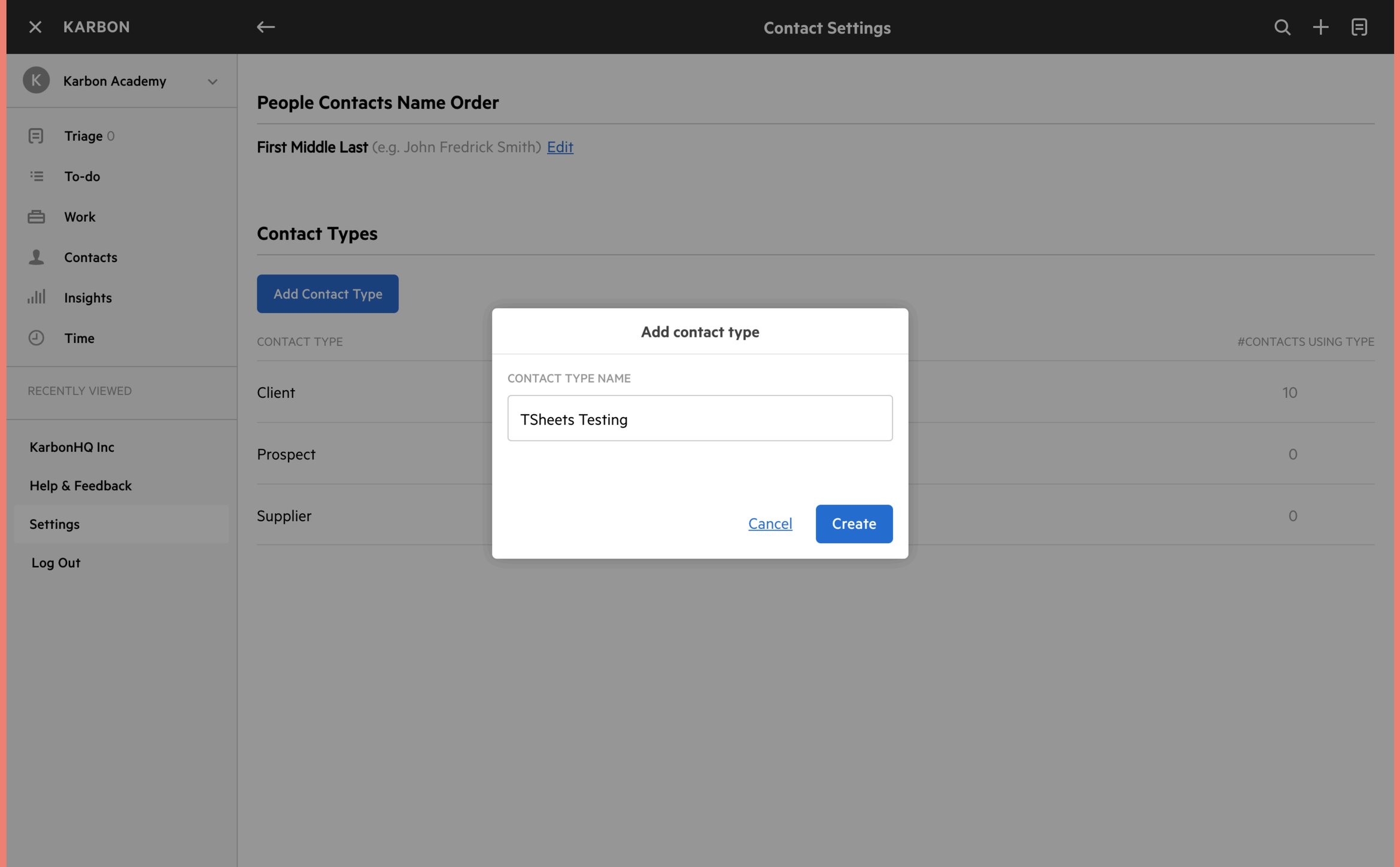
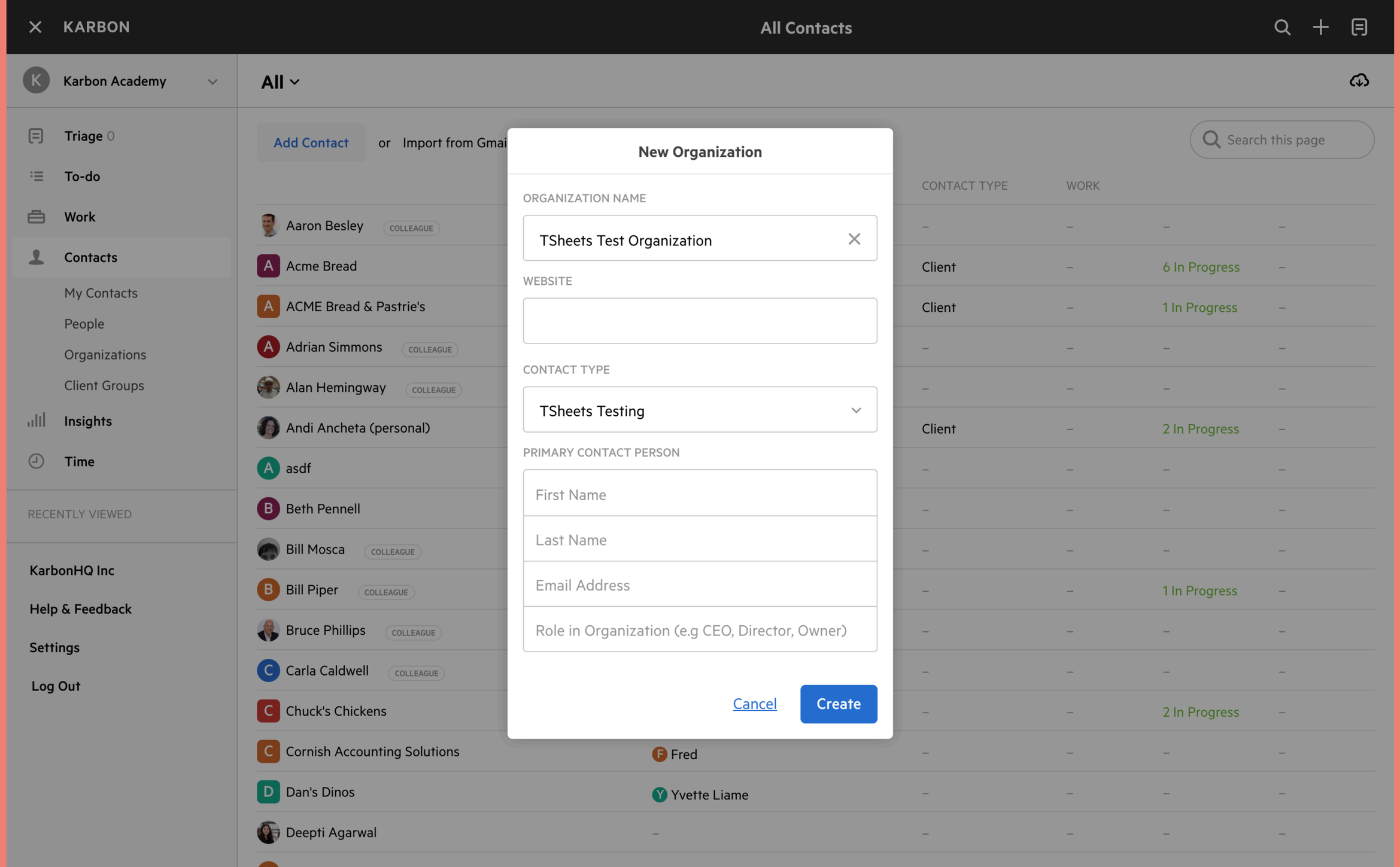
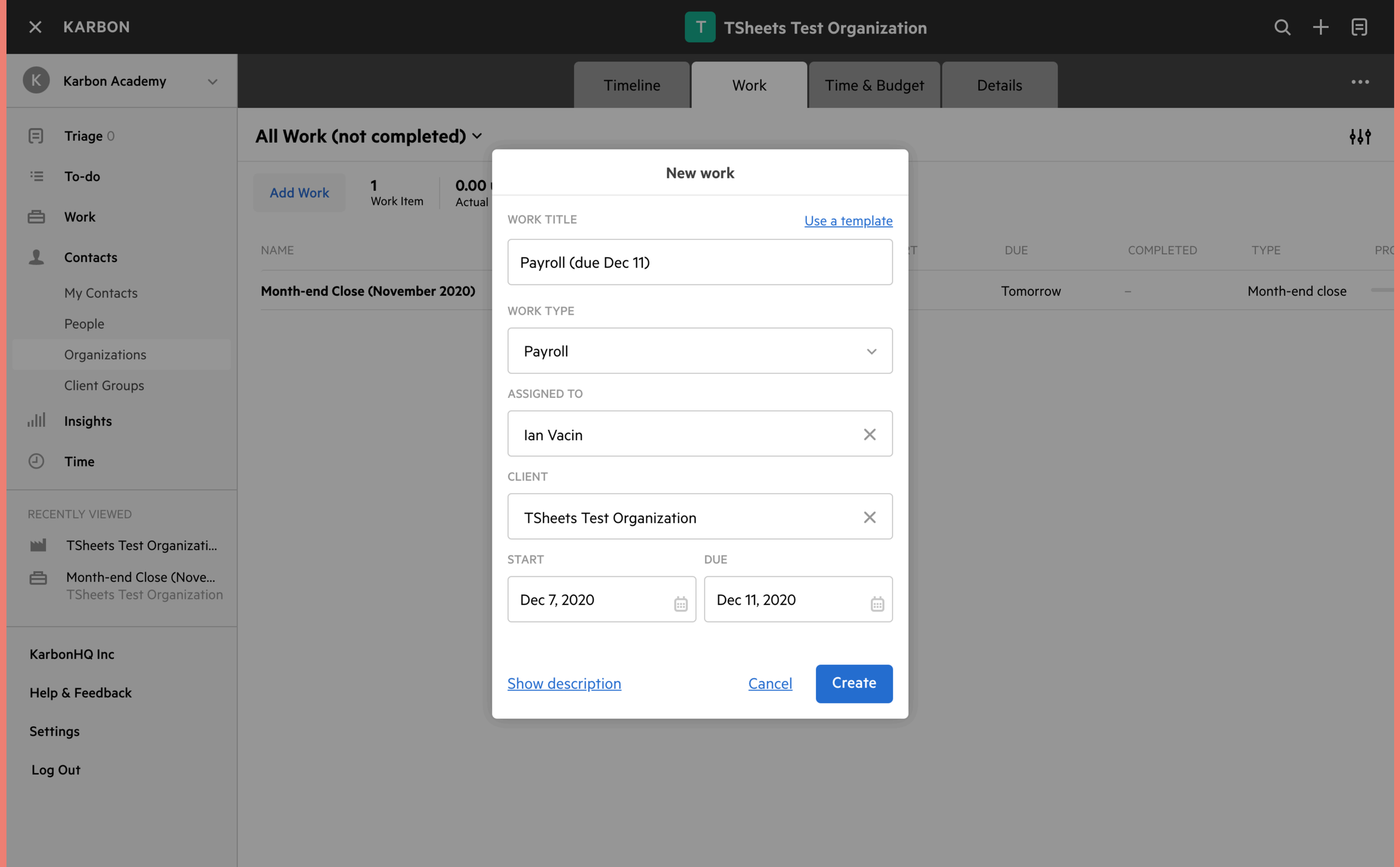
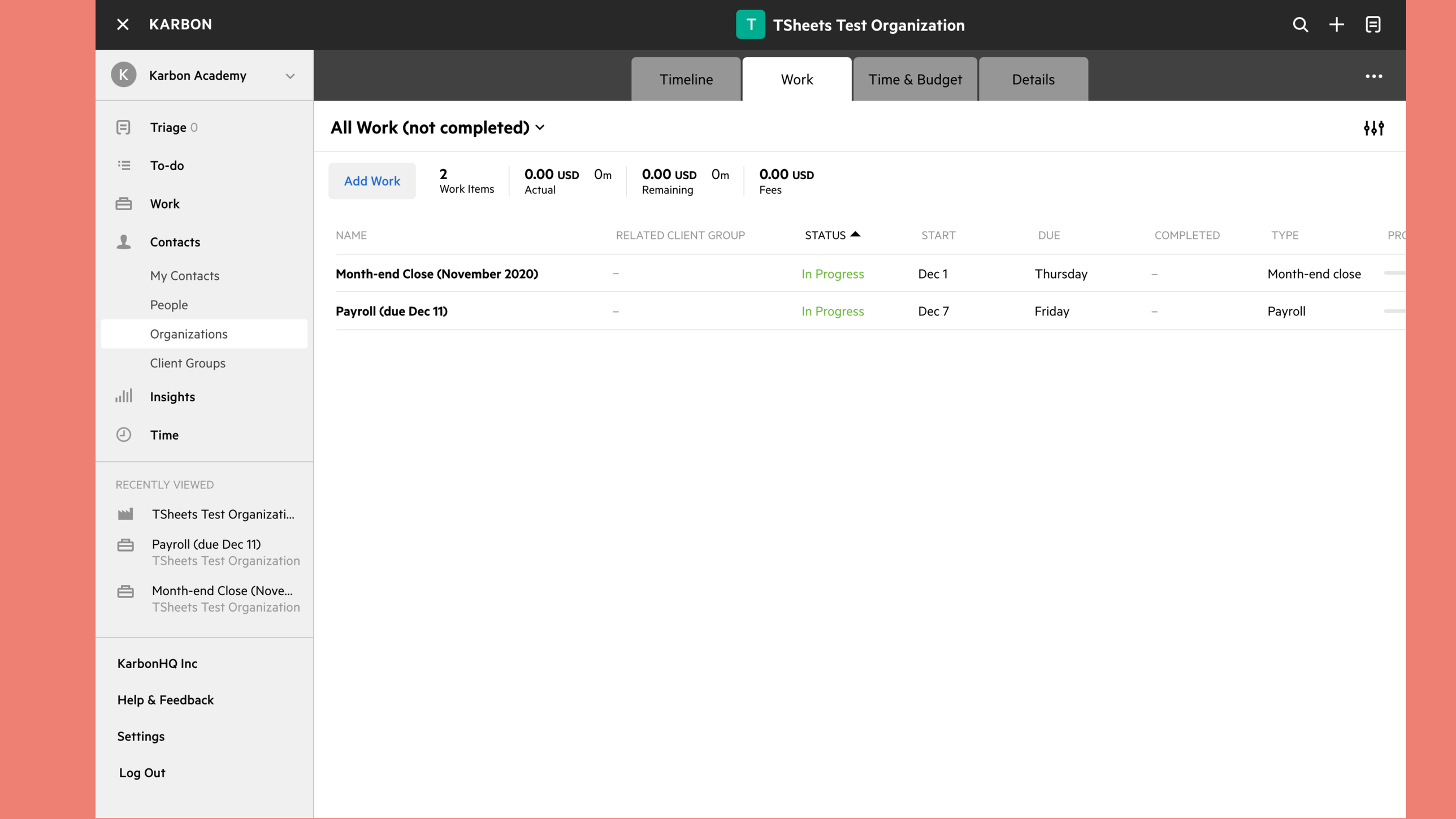

KARBON
Contact Settings
Karbon Academy
Triage 0
To-do
Work
Contacts
Insights
Time
RECENTLY VIEWED
KarbonHQ Inc
Help & Feedback
Settings
Log Out
People Contacts Name Order
First Middle Last (e.g. John Fredrick Smith) Edit
Contact Types
Add Contact Type
CONTACT TYPE
#CONTACTS USING TYPE
Client
10
Prospect
0
Supplier
0
Add contact type
CONTACT TYPE NAME
TSheets Testing
Cancel
Create


KARBON
All Contacts
Karbon Academy
Triage 0
To-do
Work
Contacts
My Contacts
People
Organizations
Client Groups
Insights
Time
RECENTLY VIEWED
KarbonHQ Inc
Help & Feedback
Settings
Log Out
All
Add Contact
or Import from Gmai
Search this page
CONTACT TYPE
WORK
Aaron Besley COLLEAGUE
Acme Bread
ACME Bread & Pastrie's
Adrian Simmons COLLEAGUE
Alan Hemingway COLLEAGUE
Andi Ancheta (personal)
asdf
Beth Pennell
Bill Mosca COLLEAGUE
Bill Piper COLLEAGUE
Bruce Phillips COLLEAGUE
Carla Caldwell COLLEAGUE
Chuck's Chickens
Cornish Accounting Solutions
Dan's Dinos
Deepti Agarwal
Client
6 In Progress
1 In Progress
2 In Progress
Fred
Yvette Liame
New Organization
ORGANIZATION NAME
TSheets Test Organization
WEBSITE
CONTACT TYPE
TSheets Testing
PRIMARY CONTACT PERSON
First Name
Last Name
Email Address
Role in Organization (e.g CEO, Director, Owner)
Cancel
Create


KARBON
TSheets Test Organization
Karbon Academy
Timeline
Work
Time & Budget
Details
Triage 0
To-do
Work
Contacts
My Contacts
People
Organizations
Client Groups
Insights
Time
RECENTLY VIEWED
TSheets Test Organizati...
Month-end Close (Nove...
TSheets Test Organization
KarbonHQ Inc
Help & Feedback
Settings
Log Out
All Work (not completed)
Add Work
1
Work Item
0.00
Actual
NAME
DUE
COMPLETED
TYPE
Month-end Close (November 2020)
Tomorrow
–
Month-end close
New work
WORK TITLE
Use a template
Payroll (due Dec 11)
WORK TYPE
Payroll
ASSIGNED TO
Ian Vacin
CLIENT
TSheets Test Organization
START
DUE
Dec 7, 2020
Dec 11, 2020
Show description
Cancel
Create


KARBON
TSheets Test Organization
Karbon Academy
Timeline
Work
Time & Budget
Details
Triage 0
To-do
Work
Contacts
My Contacts
People
Organizations
Client Groups
Insights
Time
RECENTLY VIEWED
TSheets Test Organizati...
Payroll (due Dec 11)
TSheets Test Organization
Month-end Close (Nove...
TSheets Test Organization
KarbonHQ Inc
Help & Feedback
Settings
Log Out
All Work (not completed)
Add Work
2
Work Items
0.00 USD
Actual
0m
0.00 USD
Remaining
0m
0.00 USD
Fees
NAME
RELATED CLIENT GROUP
STATUS
START
DUE
COMPLETED
TYPE
Month-end Close (November 2020)
–
In Progress
Dec 1
Thursday
–
Month-end close
Payroll (due Dec 11)
–
In Progress
Dec 7
Friday
–
Payroll

5. Integrate Karbon + TSheets.

Karbon Academy

Triage 0

To-do

Work

Contacts

Insights

Time

RECENTLY VIEWED

TSheets Test Organizati...

Payroll (due Dec 11)
TSheets Test Organization

Month-end Close (Nove...
TSheets Test Organization

KarbonHQ Inc

Help & Feedback

Settings

Log Out

Client Tasks

Colleagues 35 Invite

Company Details

Connected Apps 2

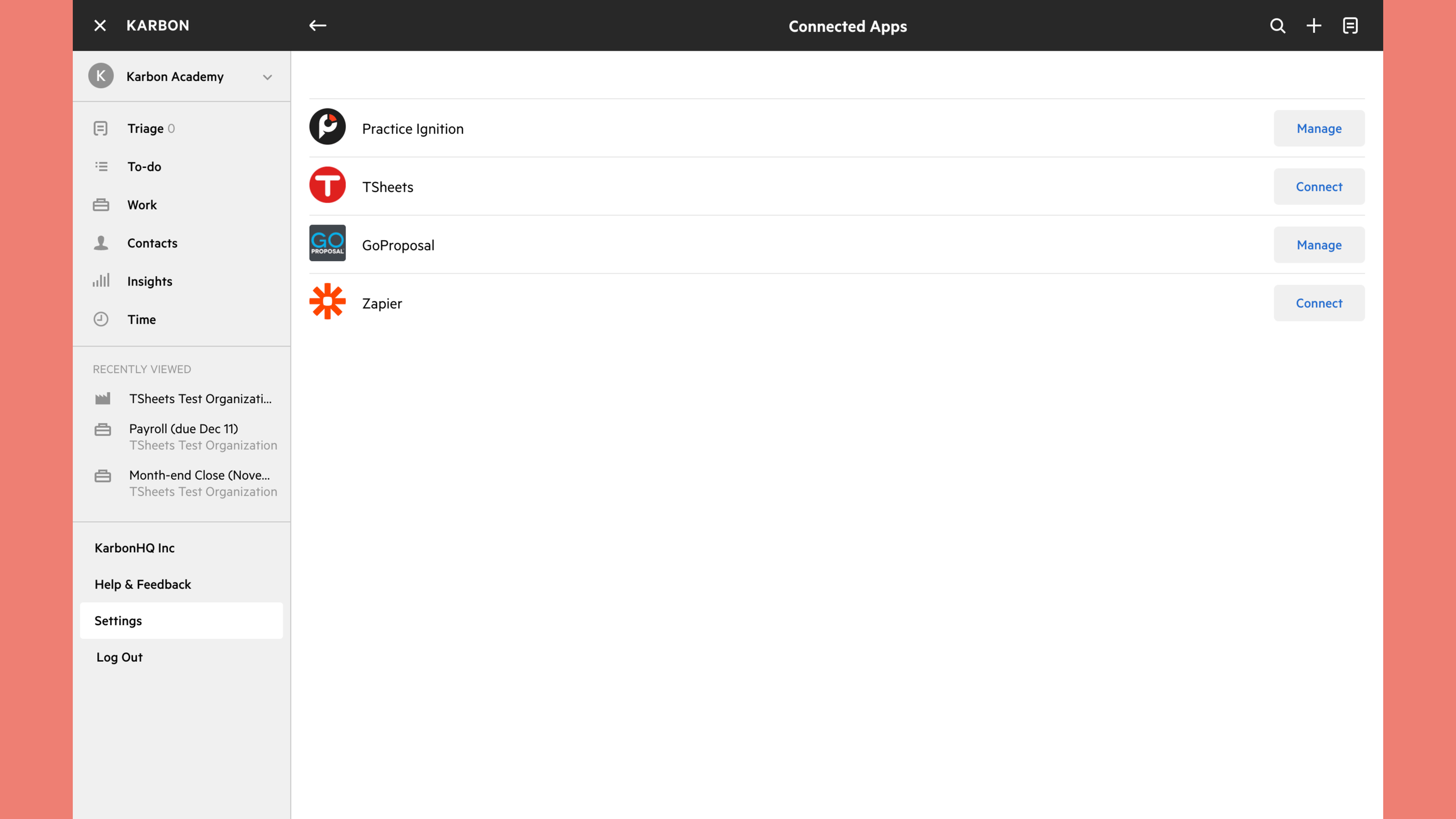
Contact Settings 4

Subscription

Time & Budgets

Workflow

Work Templates


KARBON
Connected Apps
Karbon Academy
Triage 0
To-do
Work
Contacts
Insights
Time
RECENTLY VIEWED
TSheets Test Organizati...
Payroll (due Dec 11)
TSheets Test Organization
Month-end Close (Nove...
TSheets Test Organization
KarbonHQ Inc
Help & Feedback
Settings
Log Out
Practice Ignition
Manage
TSheets
Connect
GoProposal
Manage
Zapier
Connect

Karbon Academy

Triage 0

To-do

Work

Contacts

Insights

Time

RECENTLY VIEWED

TSheets Test Organizati...

Payroll (due Dec 11)
TSheets Test Organization

Month-end Close (Nove...
TSheets Test Organization

KarbonHQ Inc

Help & Feedback

Settings

Log Out

Connect TSheets

Connect TSheets account or Sign up for a new TSheets account

Karbon would like to access your TSheets account, but first you need to sign in.

EMAIL OR USERNAME

Cancel Continue

or Create a TSheets account

6. Set integration parameters.

Karbon Academy

Triage 0

To-do

Work

Contacts

Insights

Time

RECENTLY VIEWED

TSheets Test Organizati...

Payroll (due Dec 11)
TSheets Test Organization

Month-end Close (Nove...
TSheets Test Organization

KarbonHQ Inc

Help & Feedback

Settings

Log Out

TSheets Settings

Track time against:

Contacts Only

Choose which contact types to sync from Karbon to TSheets:

You probably don't want all of your contacts in Karbon to be added to TSheets as it is unlikely you record time against suppliers or individual people within an organization.

- [ ] Client
- [ ] Prospect
- [ ] Supplier
- [x] TSheets Testing
- [ ] None

Before you sync!

1. **Check for name matches to avoid duplicates** — Contacts are synced by matching contact names with TSheet codes. Any Karbon contacts that don't match an existing TSheets code will create a new code. To avoid creating duplicate contacts in TSheets, existing TSheets customers may want to export their codes from TSheets and compare them with Karbon contacts to ensure the names match and make any necessary adjustments.
2. **Turn on Custom Fields in TSheets** — Custom Fields are required for time entries to sync between Karbon and TSheets. Ensure Custom Fields are turned on in TSheets before syncing.

Disconnect

Cancel

Sync now

Karbon Academy

Triage 0

To-do

Work

Contacts

Insights

Time

RECENTLY VIEWED

TSheets Test Organizati...

Payroll (due Dec 11)
TSheets Test Organization

Month-end Close (Nove...
TSheets Test Organization

KarbonHQ Inc

Help & Feedback

Settings

Log Out

Status

Connected to TSheets account 'Karbon'.

Last synced Just now

Settings

Time Tracking

TRACK TIME ON

Contacts Only

Contact Syncing

Choose which contact types to sync to TSheets.

- [ ] Client
- [ ] Prospect
- [ ] Supplier
- [x] TSheets Testing
- [ ] None

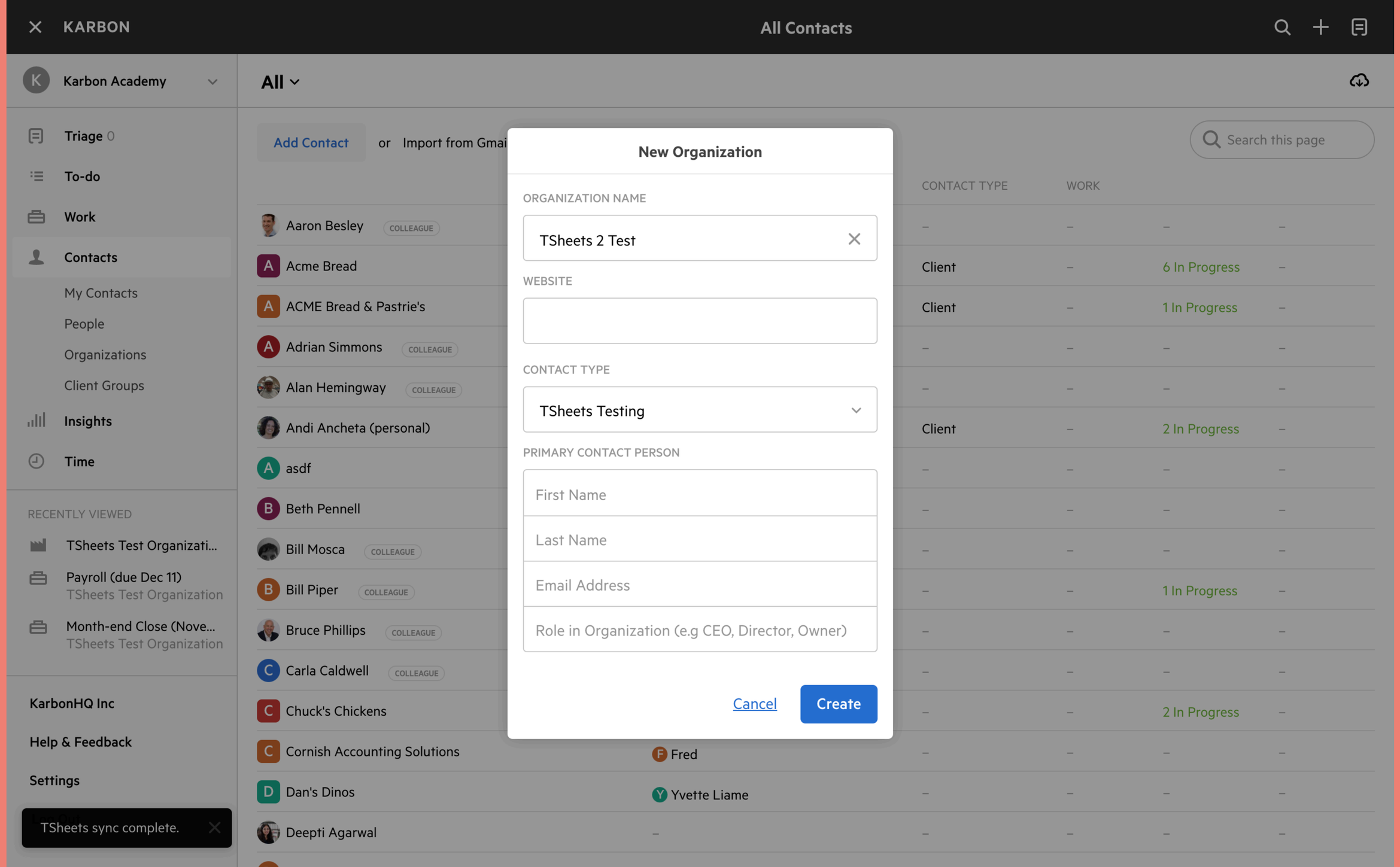
Disconnect

Cancel

Save & Sync

TSheets sync complete.

7. Sync, pause, and track time.


KARBON
All Contacts
Karbon Academy
All
Triage 0
To-do
Work
Contacts
My Contacts
People
Organizations
Client Groups
Insights
Time
RECENTLY VIEWED
TSheets Test Organizati...
Payroll (due Dec 11)
TSheets Test Organization
Month-end Close (Nove...
TSheets Test Organization
KarbonHQ Inc
Help & Feedback
Settings
TSheets sync complete.
Add Contact
or Import from Gmai
Search this page
CONTACT TYPE
WORK
Aaron Besley COLLEAGUE
Acme Bread
Client
6 In Progress
ACME Bread & Pastrie's
Client
1 In Progress
Adrian Simmons COLLEAGUE
Alan Hemingway COLLEAGUE
Andi Ancheta (personal)
Client
2 In Progress
asdf
Beth Pennell
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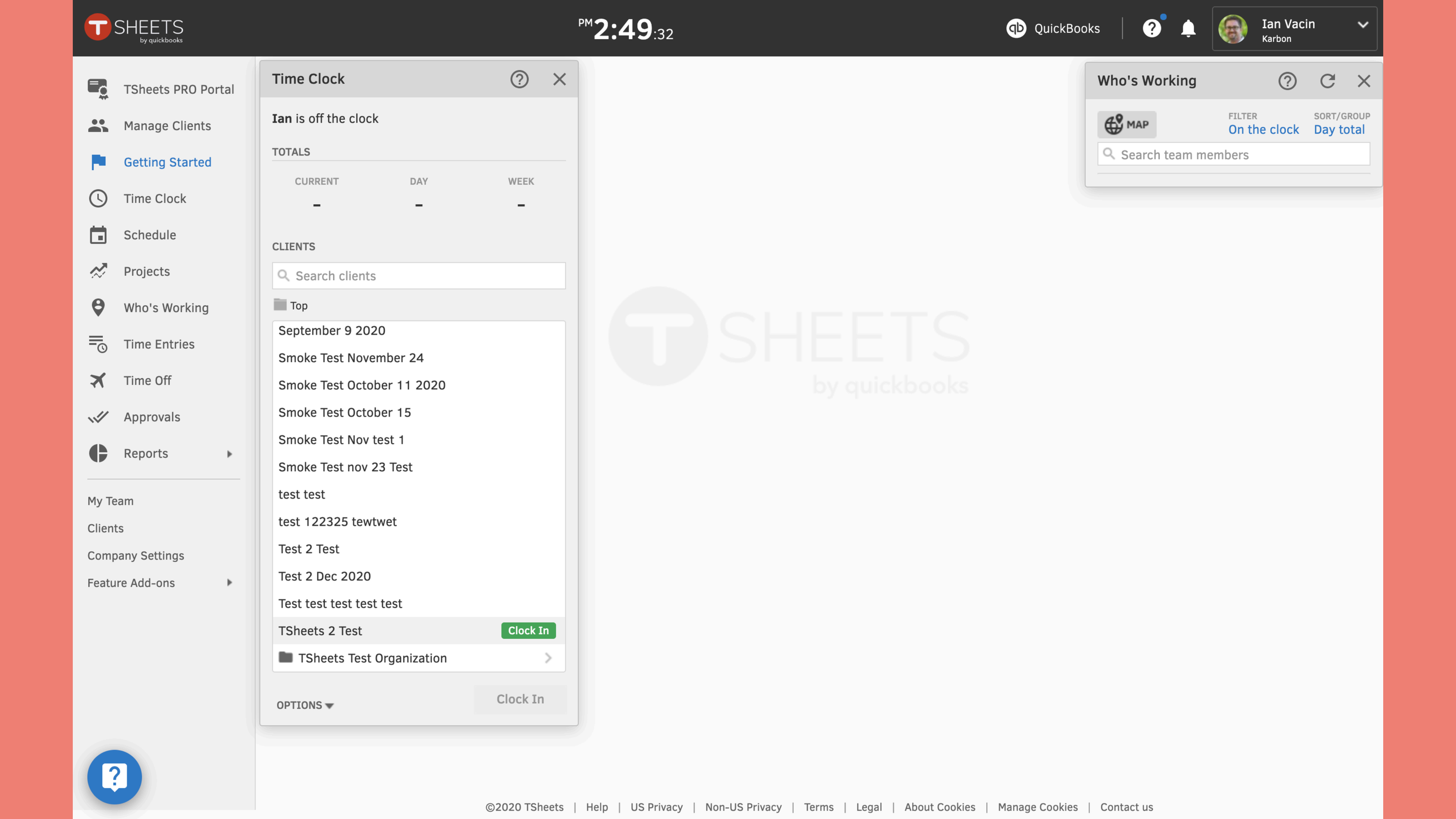
Bill Piper COLLEAGUE
1 In Progress
Bruce Phillips COLLEAGUE
Carla Caldwell COLLEAGUE
Chuck's Chickens
2 In Progress
Cornish Accounting Solutions
Fred
Dan's Dinos
Yvette Liame
Deepti Agarwal
New Organization
ORGANIZATION NAME
TSheets 2 Test
WEBSITE
CONTACT TYPE
TSheets Testing
PRIMARY CONTACT PERSON
First Name
Last Name
Email Address
Role in Organization (e.g CEO, Director, Owner)
Cancel
Create


TSHEETS by quickbooks
PM 2:49:32
QuickBooks
Ian Vacin
Karbon
TSheets PRO Portal
Manage Clients
Getting Started
Time Clock
Schedule
Projects
Who's Working
Time Entries
Time Off
Approvals
Reports
My Team
Clients
Company Settings
Feature Add-ons
Time Clock
Ian is off the clock
TOTALS
CURRENT
DAY
WEEK
- - -
CLIENTS
Search clients
Top
September 9 2020
Smoke Test November 24
Smoke Test October 11 2020
Smoke Test October 15
Smoke Test Nov test 1
Smoke Test nov 23 Test
test test
test 122325 tewtwet
Test 2 Test
Test 2 Dec 2020
Test test test test test
TSheets 2 Test
Clock In
TSheets Test Organization
OPTIONS
Clock In
Who's Working
MAP
FILTER
On the clock
SORT/GROUP
Day total
Search team members
TSHEETS by quickbooks
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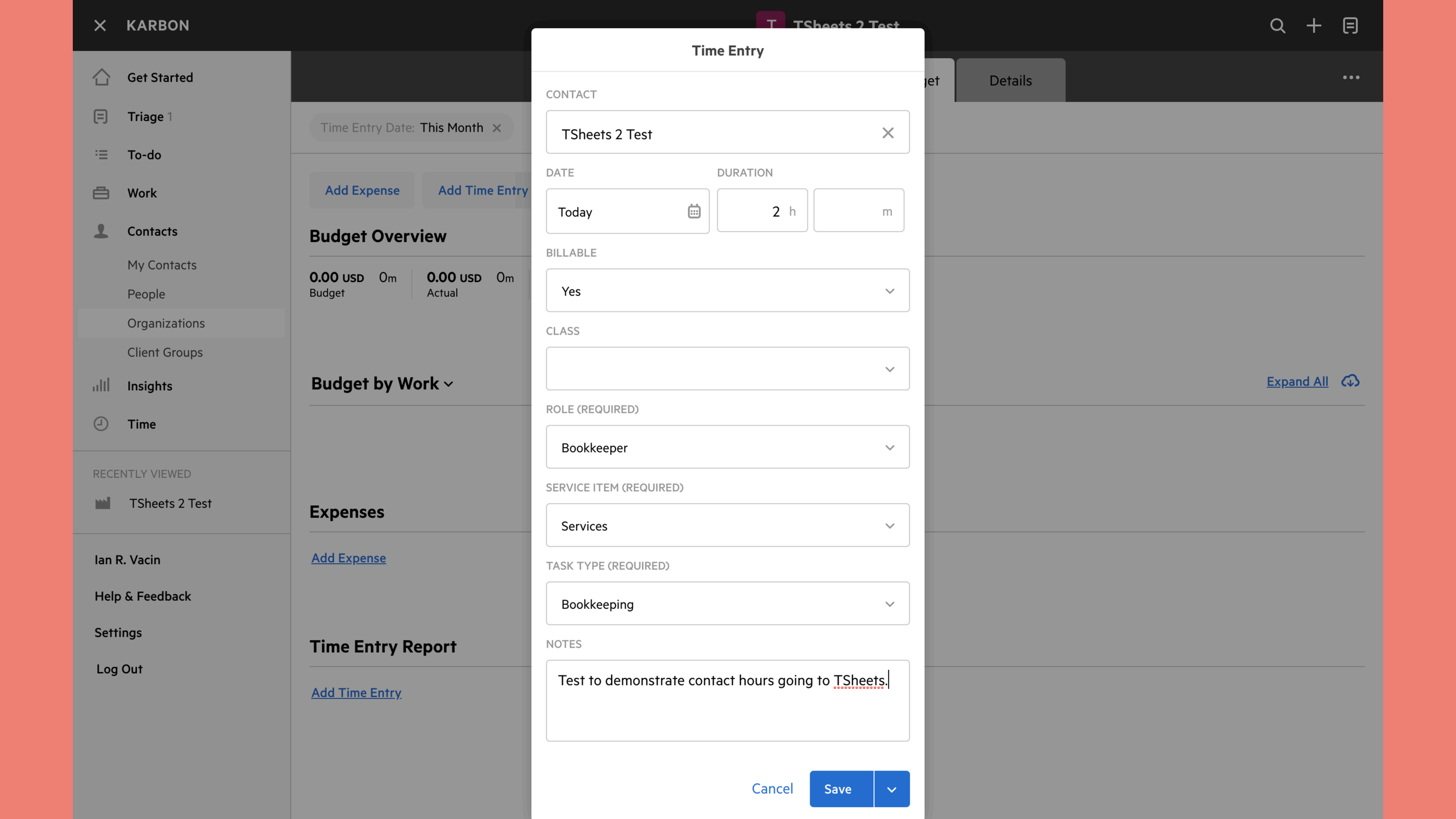
KARBON
TSheets 2 Test
Get Started
Triage 1
To-do
Work
Contacts
My Contacts
People
Organizations
Client Groups
Insights
Time
RECENTLY VIEWED
TSheets 2 Test
Ian R. Vacin
Help & Feedback
Settings
Log Out
Details
Time Entry Date: This Month
Add Expense
Add Time Entry
Budget Overview
0.00 USD 0m
Budget
0.00 USD 0m
Actual
Budget by Work
Expand All
Expenses
Add Expense
Time Entry Report
Add Time Entry
Time Entry
CONTACT
TSheets 2 Test
DATE
Today
DURATION
2 h
m
BILLABLE
Yes
CLASS
ROLE (REQUIRED)
Bookkeeper
SERVICE ITEM (REQUIRED)
Services
TASK TYPE (REQUIRED)
Bookkeeping
NOTES
Test to demonstrate contact hours going to TSheets.
Cancel
Save

KARBON

T TSheets 2 Test

- Get Started
- Triage 1
- To-do
- Work
- Contacts
  - My Contacts
  - People
  - Organizations
  - Client Groups
- Insights
- Time

RECENTLY VIEWED

- TSheets 2 Test

- Ian R. Vacin
- Help & Feedback
- Settings
- Log Out

Timeline | Work | Time & Budget | Details

Time Entry Date: This Month × Add Filter

Add Expense Add Time Entry

Budget Overview

0.00 USD 0m
Budget

200.00 USD 2h 0m
Actual

-200.00 USD -2h 0m
Remaining

Budget by Work

Expand All

WORK	STATUS	WORK TYPE	TEAM MEMBER	BUDGET TIME	BUDGET AMOUNT	ACTUAL(TIME PERIOD) TIME	ACTUAL(TIME PERIOD) AMOUNT	ACTUAL TIME	ACTUAL AMOUNT	REMAINING TIME	REMAINING AMOUNT
> TSheets 2 Test (Client)				-	-	2h	200.00	2h	200.00	-2h	-200.00
				0h	**0.00**	**2h**	**200.00**	**2h**	**200.00**	**-2h**	**-200.00**

Expenses

Add Expense

Time Entry Report

Time entry added to TSheets ×

TSheets PRO Portal
Manage Clients
Getting Started
Time Clock
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Projects
Who's Working
Time Entries
Time Off
Approvals
Reports

My Team
Clients
Company Settings
Feature Add-ons

Time Clock

Ian clocked in at **2:57 PM**

TOTALS

CURRENT	DAY	WEEK
0:01:00	2:01	2:01

CLIENTS

Search clients

Top

- TSheets 2 Test 0:01
- Acme Corporation
- Adam & Smith Consulting
- Adam & Smith Consulting-1
- Adam & Smith Consulting-2
- Amelia Contact
- August 9 2020 Smoke Test
- Big Boo
- Bob Jones
- BUSINESS SAMPLE
- BUSINESS SAMPLE

BILLABLE: Yes

ROLE: Admin

SERVICE ITEM: Services

TASK TYPE: Admin

NOTES Saved

Test to show time data from TSheets.

Who's Working

MAP | FILTER On the clock | SORT/GROUP Day total

Search team members

Ian Vacin 2:00
TSheets 2 Test 0:00

TSheets PRO Portal
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Company Settings
Feature Add-ons

Time Entries

Timesheets | Manual Time Card | Time Slider

+ Add Time | Actions

Team member search | My | All

Month | Today | December 2020

Name	Time in - out	Duration	Client	Location	Attachme...	Notes
Tue, Dec 8						
Ian Vacin (you)	2:57pm – 2:58pm	01m	TSheets 2 Test	TSheets web		Test to show time data...
Ian Vacin (you)	Manual	2h 00m	TSheets 2 Test	Karbon		Test to demonstrate c...

by quickbooks

Get Started
Triage 1
To-do
Work
Contacts
My Contacts
People
Organizations
Client Groups
Insights
Time

RECENTLY VIEWED
TSheets 2 Test

Ian R. Vacin
Help & Feedback
Settings
Log Out

0.00 USD 0m
Budget

201.50 USD 2h 1m
Actual

-201.50 USD -2h 1m
Remaining

Budget by Work

Expand All

WORK	STATUS	WORK TYPE	TEAM MEMBER	BUDGET TIME	BUDGET AMOUNT	ACTUAL(TIME PERIOD) TIME	ACTUAL(TIME PERIOD) AMOUNT	ACTUAL TIME	ACTUAL AMOUNT	REMAINING TIME	REMAINING AMOUNT
TSheets 2 Test (Client)				-	-	2h 1m	201.50	2h 1m	201.50	-2h 1m	-201.50
			Ian R. Vacin	-	-	2h 1m	201.50	2h 1m	201.50	-2h 1m	-201.50
				0h	**0.00**	**2h 1m**	**201.50**	**2h 1m**	**201.50**	**-2h 1m**	**-201.50**

Expenses

Add Expense

Time Entry Report

DATE	TEAM MEMBER	WORK	ROLE	TASK TYPE	NOTE	TIME
Dec-08, 2020	Ian R. Vacin		Bookkeeper	Bookkeeping	Test to demonstrate contact hours going to TSheets.	2h 0m
Dec-08, 2020	Ian R. Vacin		Admin	Admin	Test to show time data from TSheets.	1m

Add Time Entry

Triage | Karbon

TSheets :: Online Timesheet -

karbon9706.tsheets.com/#

Apps | Stage | Karbon | Support | Karbon | App | Karbon | Okta | Reminder #1 - Ple... | Triage | Karbon | Triage | Karbon | Launch Meeting -... | New Tab | Karbon Support

TSHEETS by quickbooks

PM 3:04:09

QuickBooks

Ian Vacin
Karbon

- TSheets PRO Portal
- Manage Clients
- Getting Started
- Time Clock
- Schedule
- Projects
- Who's Working
- Time Entries
- Time Off
- Approvals
- Reports

My Team
Clients
Company Settings
Feature Add-ons

Approvals Report

Report Filters

All (1) | Approved (0) | Unapproved (1)

REPORT DATES:
12/08/2020 — 12/08/2020

Export Approved Time

Select all unapproved | Approve Selected

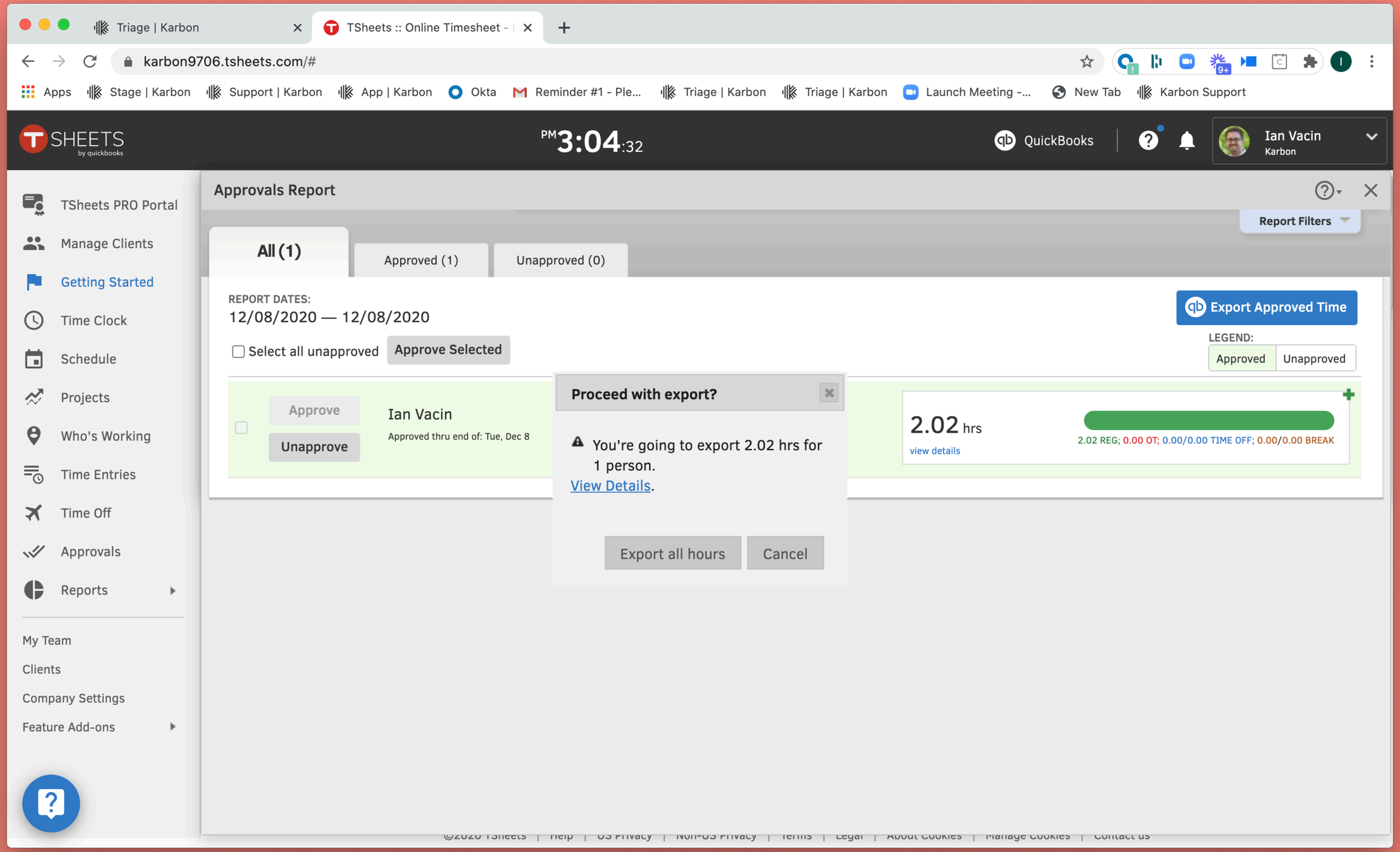
LEGEND: Approved | Unapproved

Approve
Unapprove

Ian Vacin
Approved thru end of: (never approved)

2.02 hrs
view details

2.02 REG; 0.00 OT; 0.00/0.00 TIME OFF; 0.00/0.00 BREAK


Triage | Karbon
TSheets :: Online Timesheet -
karbon9706.tsheets.com/#
Apps
Stage | Karbon
Support | Karbon
App | Karbon
Okta
Reminder #1 - Ple...
Triage | Karbon
Triage | Karbon
Launch Meeting -...
New Tab
Karbon Support
TSHEETS by quickbooks
PM 3:04:32
QuickBooks
Ian Vacin
Karbon
TSheets PRO Portal
Manage Clients
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Time Entries
Time Off
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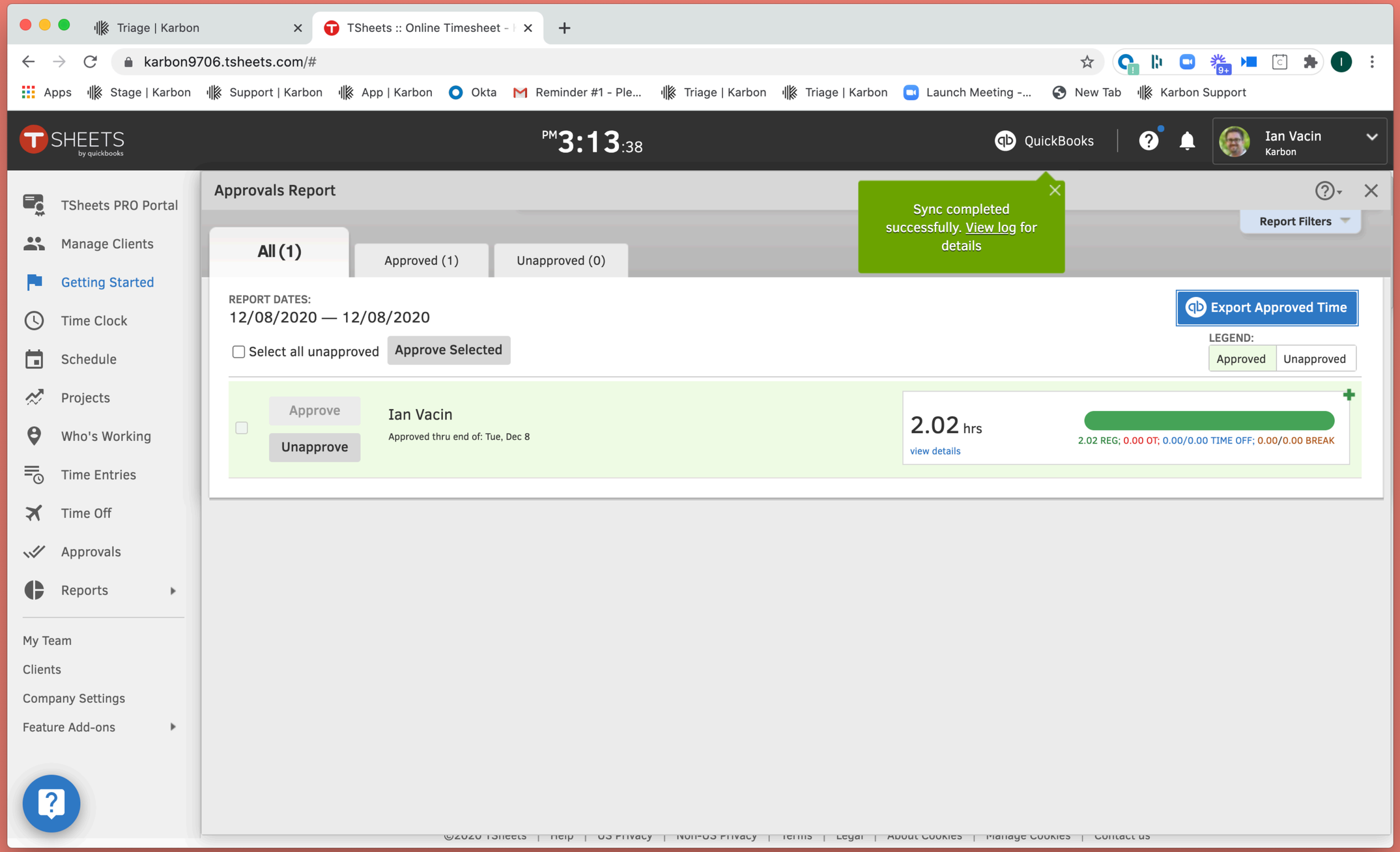
Company Settings
Feature Add-ons
Approvals Report
Report Filters
All (1)
Approved (1)
Unapproved (0)
REPORT DATES:
12/08/2020 — 12/08/2020
Export Approved Time
LEGEND:
Approved
Unapproved
Select all unapproved
Approve Selected
Approve
Unapprove
Ian Vacin
Approved thru end of: Tue, Dec 8
2.02 hrs
view details
2.02 REG; 0.00 OT; 0.00/0.00 TIME OFF; 0.00/0.00 BREAK
Proceed with export?
You're going to export 2.02 hrs for 1 person.
View Details.
Export all hours
Cancel


Triage | Karbon
TSheets :: Online Timesheet -
karbon9706.tsheets.com/#
Apps
Stage | Karbon
Support | Karbon
App | Karbon
Okta
Reminder #1 - Ple...
Triage | Karbon
Triage | Karbon
Launch Meeting -...
New Tab
Karbon Support
TSHEETS by quickbooks
PM 3:13:38
QuickBooks
Ian Vacin
Karbon
TSheets PRO Portal
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Time Off
Approvals
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Feature Add-ons
Approvals Report
Sync completed successfully. View log for details
Report Filters
All (1)
Approved (1)
Unapproved (0)
REPORT DATES:
12/08/2020 — 12/08/2020
Export Approved Time
Select all unapproved
Approve Selected
LEGEND:
Approved
Unapproved
Approve
Unapprove
Ian Vacin
Approved thru end of: Tue, Dec 8
2.02 hrs
view details
2.02 REG; 0.00 OT; 0.00/0.00 TIME OFF; 0.00/0.00 BREAK

+ New

YOUR PRACTICE
Clients
Team
ProAdvisor
Work
Apps

YOUR BOOKS
Overview
Dashboard
Banking
Expenses
Sales
Payroll
Time
Reports
Taxes
Mileage
Accounting

Overview | All Sales | Invoices | Payment Links NEW | Clients | Products and Services

TSheets 2 Test

TSheets 2 Test

Add notes

Edit

New transaction

$0.00 OPEN

$0.00 OVERDUE

Transaction List | Client Details | Late Fees

Batch actions | Filter

< First Previous 1-2 of 2 Next Last >

	DATE	TYPE	NO.	MEMO	DUE DATE	BALANCE	TOTAL	STATUS	ACTION
☐	12/08/2020	Time Charge		Test to demonstr…	12/08/2020	$0.00	$0.00	Open	Create invoice
☐	12/08/2020	Time Charge		Test to show tim…	12/08/2020	$0.00	$0.00	Open	Create invoice
		Total				$0.00	$0.00		

< First Previous 1-2 of 2 Next Last >

Additional things to note

+ New

YOUR PRACTICE
Clients
Team
ProAdvisor
Work
Apps

YOUR BOOKS
Overview
Dashboard
Banking
Expenses
Sales
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Taxes
Mileage
Accounting

Overview | Employees | Contractors | Workers' Comp | Benefits | HR Adviser | Compliance NEW

Add your team

Add and manage your employees.

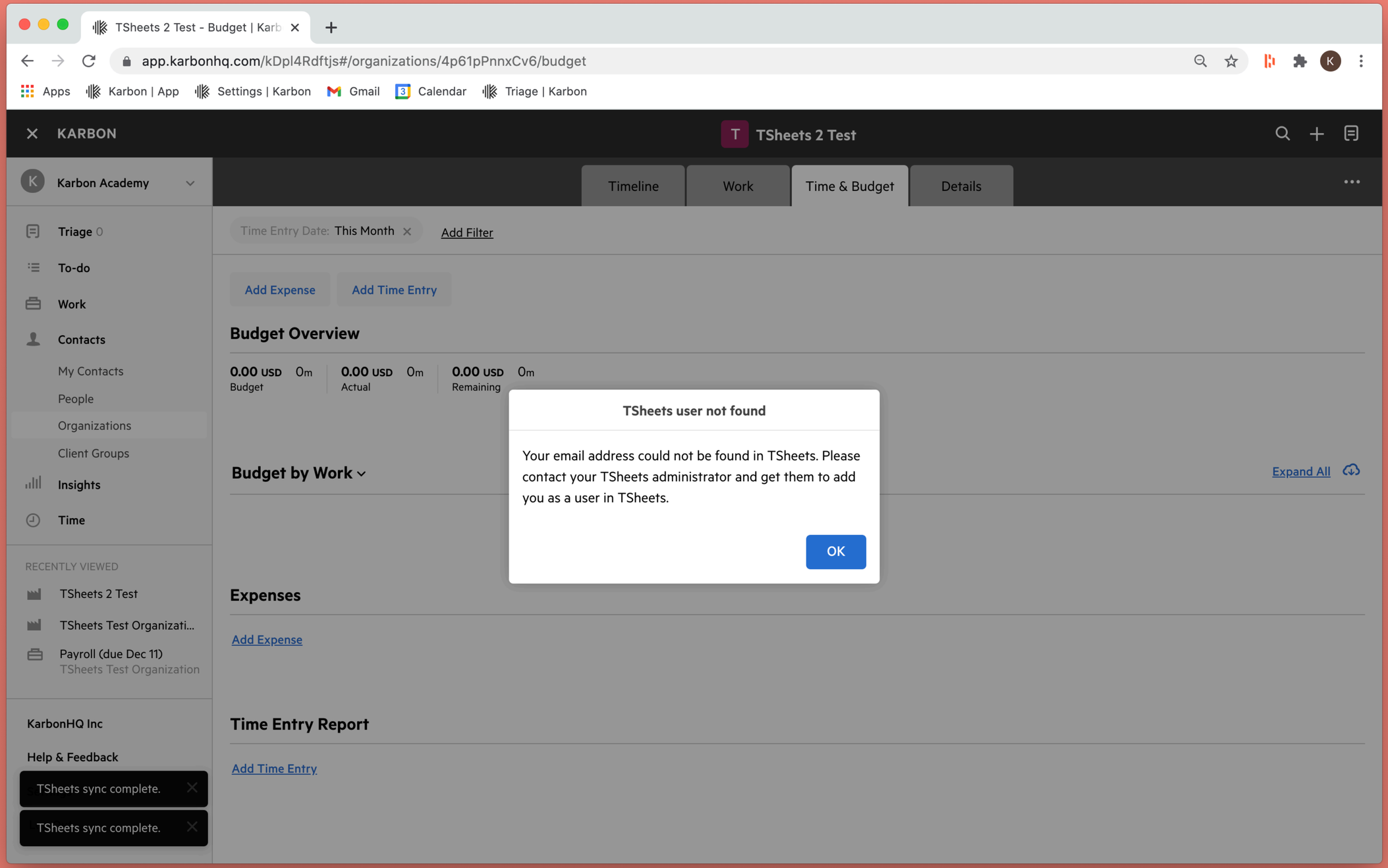
Save time and paper
Give your team access to their pay stubs and tax info—anytime, anywhere.

PRIVACY

Find an employee | Active Employees | Invite to Workforce | Add an employee

NAME ▲	PAY RATE	PAY METHOD	STATUS
Vacin, Ian	Missing	Check	Active

Feedback


TSheets 2 Test - Budget | Karb
app.karbonhq.com/kDpl4Rdftjs#/organizations/4p61pPnnxCv6/budget
Apps
Karbon | App
Settings | Karbon
Gmail
Calendar
Triage | Karbon
KARBON
TSheets 2 Test
Karbon Academy
Timeline
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Time & Budget
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Triage 0
To-do
Work
Contacts
My Contacts
People
Organizations
Client Groups
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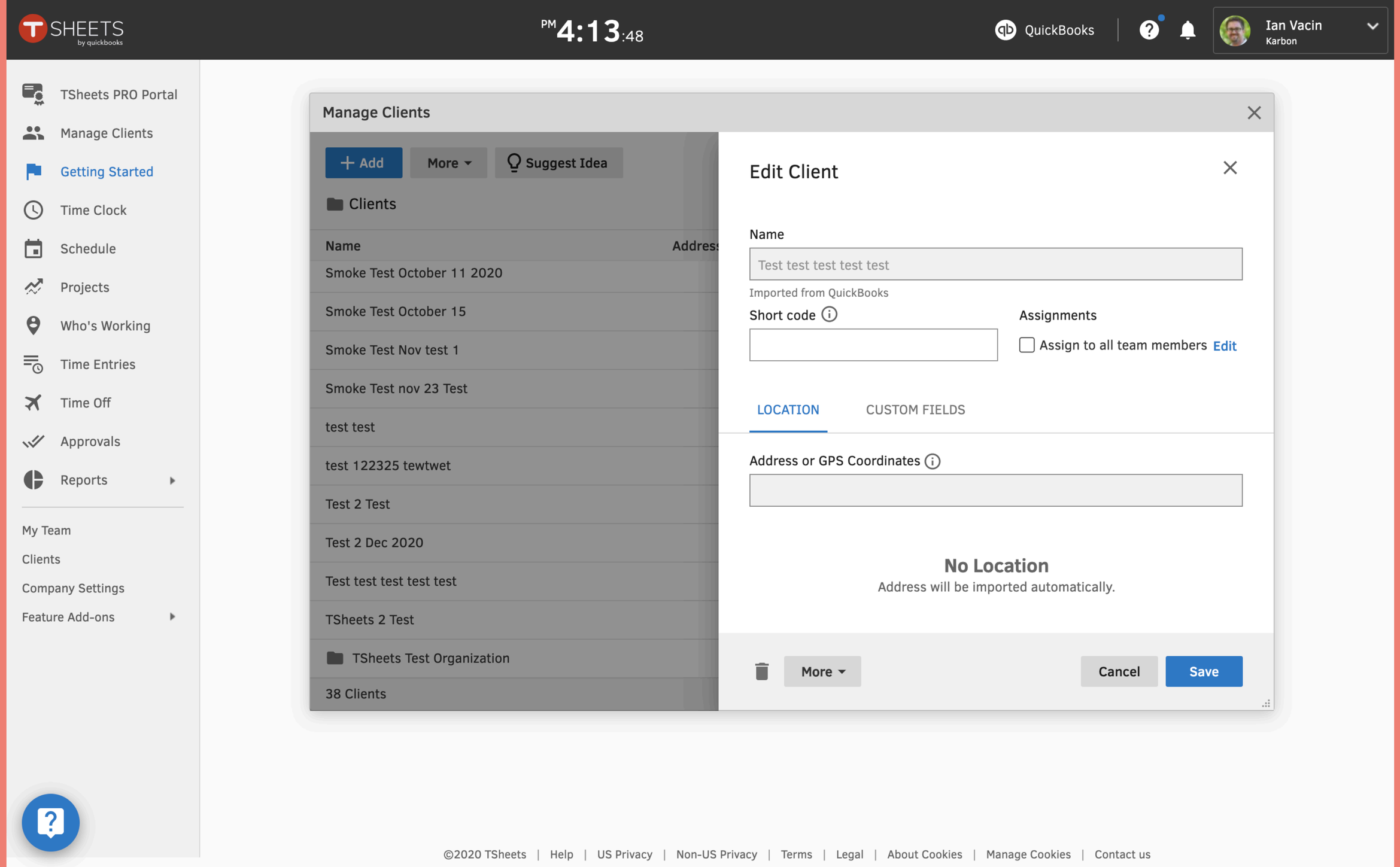
Time
RECENTLY VIEWED
TSheets 2 Test
TSheets Test Organizati...
Payroll (due Dec 11)
TSheets Test Organization
KarbonHQ Inc
Help & Feedback
TSheets sync complete.
TSheets sync complete.
Time Entry Date: This Month
Add Filter
Add Expense
Add Time Entry
Budget Overview
0.00 USD 0m
Budget
0.00 USD 0m
Actual
0.00 USD 0m
Remaining
Budget by Work
Expand All
Expenses
Add Expense
Time Entry Report
Add Time Entry
TSheets user not found
Your email address could not be found in TSheets. Please contact your TSheets administrator and get them to add you as a user in TSheets.
OK


TSHEETS by quickbooks
PM 4:13:48
QuickBooks
Ian Vacin
Karbon
TSheets PRO Portal
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Projects
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Feature Add-ons
Manage Clients
Add
More
Suggest Idea
Clients
Name
Address
Smoke Test October 11 2020
Smoke Test October 15
Smoke Test Nov test 1
Smoke Test nov 23 Test
test test
test 122325 tewtwet
Test 2 Test
Test 2 Dec 2020
Test test test test test
TSheets 2 Test
TSheets Test Organization
38 Clients
Edit Client
Name
Test test test test test
Imported from QuickBooks
Short code
Assignments
Assign to all team members Edit
LOCATION
CUSTOM FIELDS
Address or GPS Coordinates
No Location
Address will be imported automatically.
More
Cancel
Save
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TSheets PRO Portal
Manage Clients
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Time Clock
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Time Entries
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Approvals
Reports

My Team
Clients
Company Settings
Feature Add-ons

Time Clock

Ian clocked out at **2:58 PM**

TOTALS

CURRENT	DAY	WEEK
-	2:01	2:01

CLIENTS

Search clients

Top

- Sept 2020
- Sept 3
- September 9 2020
- Smoke Test November 24
- Smoke Test October 11 2020
- Smoke Test October 15
- Smoke Test Nov test 1
- Smoke Test nov 23 Test
- test test
- test 122325 tewtwet
- Test 2 Test
- Test 2 Dec 2020
- TSheets Test Organization

OPTIONS

Clock In

Manage Clients

Add | More | Suggest Idea

Search

Clients

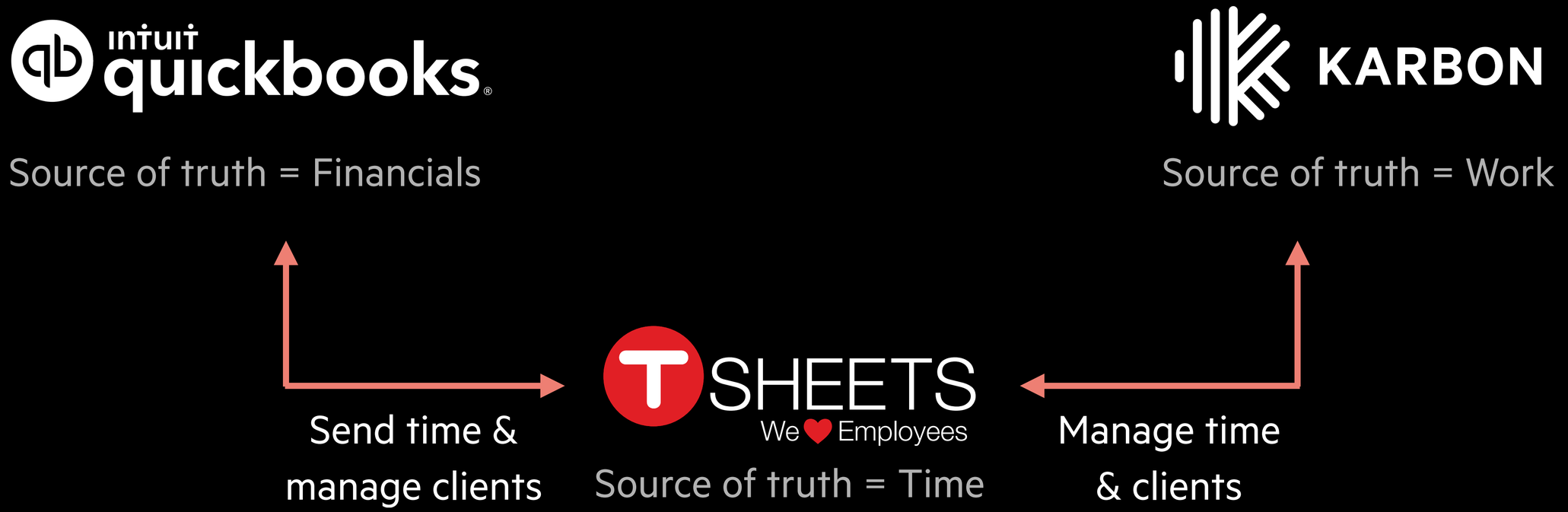
Name	Address	Assigned to all
Smoke Test October 11 2020		✓
Smoke Test October 15		✓
Smoke Test Nov test 1		✓
Smoke Test nov 23 Test		✓
test test		✓
test 122325 tewtwet		✓
Test 2 Test		✓
Test 2 Dec 2020		✓
Test test test test test		
TSheets 2 Test		✓
TSheets Test Organization		✓

38 Clients

1. The process
2. The integrations
3. **Common FAQs**
4. Wrap-up & questions

Is there a two-way sync coming?

How data flows between Karbon, TSheets & QBO



For time & billing to flow, contact names must match (or will be created).

Top 25 FAQs

- Is there two-way sync with QBO?
- Do I need to pay for a TSheets account?
- Should I track Contacts vs. Contacts & Work in TSheets setup?
- How come there is no Time & Budgets tab in Karbon?
- In Karbon, how do I setup so staff members can’t see billing rates?
- Do my billing rates / amounts flow to TSheets?
- Karbon says Contact/Work isn’t linked to TSheets.
- I complete a time entry in Karbon, but it won’t let me Save.

Top 25 FAQs

- Why are there multiple entry fields when tracking time?
- How do I archive / hide jobs in TSheets?
- Why can’t I successfully export to QBO from TSheets?
- What is different in Karbon when tracking time with TSheets?
- Time isn’t flowing between the apps. What do I do next?
- How do I add Karbon work items into TSheets and QBO?
- Like in TSheets, can you track seconds in Karbon?
- Is there a timer in Karbon to track time?

Top 25 FAQs

- Why am I getting duplicates in TSheets?
- Which system should I track time in? Karbon or TSheets?
- How can time flow between Karbon & TSheets, but not to QBO.
- I have tracked time in TSheets, but I can’t export it to QBO.
- If I change a name in Karbon or TSheets, will it change the name in the other system? How does that work in conjunction with QBO?
- What is the order of integration between the three systems?
- Where do I do WIP write-up or down?
- How do I know what I have billed or not billed?

1. The process
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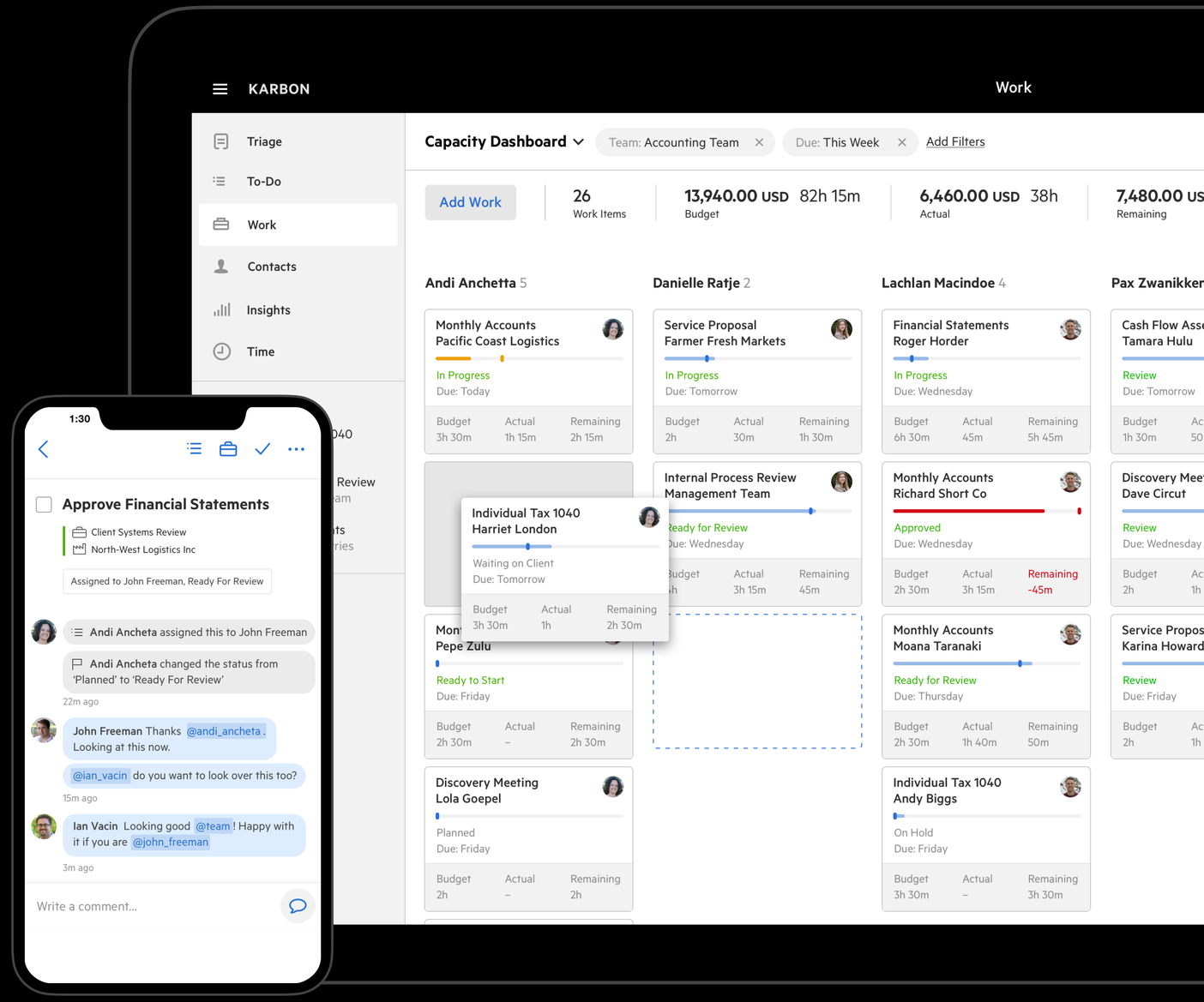
Work Management Software *for* Accounting Firms

karbonhq.com

GET STARTED



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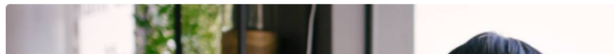
15 min read

WORKING REMOTELY



How would you manage your firm if shelter-in-place lasted 2 years?

Questions?

Thank you

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