# Exporting time-sheets from TimeDock into Xero Payroll

*Last updated – May 07, 2024 at 9:30AM*

**Note:** Before exporting to Xero payroll first make sure that the *First Name* and *Last Name* for each employee in TimeDock matches with your employee records in Xero Payroll.

## Connect to Xero

1. Ensure that your Xero account includes the *Payroll* module and that you have completed the payroll setup process.
2. Login to your TimeDock account and navigate to *Export*.
3. Choose *Xero Payroll* from the list of export formats.
4. Click on the *Connect To Xero* dropdown and select your payroll country.
5. Select your Xero organisation to connect, and click *Allow access*.
6. A list of your active *Employees*, *Pay Calendars* and *Pay Codes* in Xero Payroll will be pulled into your TimeDock account.
7. Your TimeDock account will now be connected to your Xero Payroll account and is ready for direct timesheet exporting.

## Configure integration settings

1. Login to your TimeDock account and navigate to *Export*.
2. Choose *Xero Payroll* from the list of export formats.
3. Click on the *Manage* dropdown and select *Setup*.
4. Select a *Default Pay Code* to be applied to timesheet lines exported to Xero.
   - *N.B.* To override the *Default Pay Code* at the employee level, navigate to *Settings > Employees*, click *Edit* for the relevant employee and use the *Pay Code* dropdown to select a different pay code to use for that particular employee.
5. Select a *Tracking Code Source* to be applied to timesheet lines exported to Xero. See Set up tracking code mappings for more info.

6. Optionally enter in the name of a Xero tracking option to be used as a *Default Tracking Code*, to be applied to timesheet lines exported to Xero. See Set up tracking code mappings for more info.

## Set up tracking code mappings

Tracking code set up is an *optional* step you can take if you want to tag your exported timesheet lines with Xero tracking codes.

1. In your Xero organisation, ensure that you've set up a *Tracking Category* with a list of *Options*, and that you've assigned that tracking category to your Xero *Timesheet Payroll Tracking*. See Payroll tracking in Xero for more info.

2. In your TimeDock web dashboard, navigate to your Xero integration settings (*Export > Xero Payroll > Manage > Setup*) and select a *Tracking Code Source*. This is the TimeDock data source that will be used to populate the *Tracking Category* in your Xero timesheets that are exported from TimeDock.

3. Ensure that your selected *Tracking Code Source* contains a list of items that match to your Xero *Tracking Category Options* by name. For example, if your selected TimeDock *Tracking Code Source* is *Activity Name*, ensure that your TimeDock *Activity* names are the same as your Xero *Tracking Category Options*.

4. To include a tracking code for every timesheet line, ensure your TimeDock *Default Tracking Code* matches the name of one of your Xero *Tracking Category Options*. This default will be used for a timesheet line if the TimeDock *Tracking Code Source* value is blank, or if it doesn't match the name of any of your Xero *Tracking Category Options*.

**Note:** If you use *Xero Payroll Australia* and have assigned a tracking category to your Xero *Timesheet Payroll Tracking*, each timesheet line exported to Xero *must* reference a valid Xero *Tracking Category Option*, otherwise the timesheet will fail to export. We recommend entering a valid *Default Tracking Code* into your Xero integration settings in TimeDock to ensure that your timesheets can use that as a fallback and successfully export to Xero.

# Export timesheets to Xero

1. Login to your TimeDock account and navigate to *Export*.
2. Choose *Xero Payroll* from the list of export formats.
3. Select a *Pay Period* which relates to a *Pay Calendar* in your Xero Payroll account.
4. Based on the selected *Pay Period*, select a timesheet *Date Range*.
5. Choose a rounding option or filter the exported timesheets by a specific department.
6. Select a status to export your timesheets as.
7. Choose if you want to create automatic break deductions by changing the settings in the *Break Deductions* box.
8. Click *Export to Xero*.
9. An export log will be displayed showing you the status and progress of your export. Click *Refresh* periodically to view successful employee timesheet exports, or any errors.
10. When the export log has indicated that the export has completed successfully, login to your Xero account and navigate to *Payroll > Timesheets*.
11. Ensure that the pay calendar filter is set to the *Pay Period* you chose when performing the export from TimeDock.
12. Your employee timesheets will be visible under the date range that you selected when performing the export from TimeDock. N.B. the employee *First Name* and *Last Name* must match between TimeDock and Xero Payroll in order for timesheets to be successfully exported for the employee.

# Sync lists from Xero

If you've added or updated *Employees*, *Pay Calendars* or *Pay Codes* in Xero Payroll since you first connected (or your last sync), you can sync these items into your TimeDock account.

1. Login to your TimeDock account and navigate to *Export*.
2. Choose *Xero Payroll* from the list of export formats.
3. Click on the *Manage* dropdown and select *Setup*.

4. Click the *Sync* button.

# Troubleshoot connection problems

If a connection error occurs, the status of your integration will be flagged as having a *connection problem*. You can check the connection status of your integration and disconnect/reconnect at any time by viewing your Xero integration settings (*Export > Xero Payroll > Manage > Setup*).

### Unable to connect to your Xero account:

If you receive this message in your export log when trying to export timesheets, you will need to re-connect to Xero. Click the red icon on the right-hand side of the error log and follow the prompts to reconnect to your Xero account. You can also perform a re-connect by navigating to your Xero integration settings (*Export > Xero Payroll > Manage > Setup*).
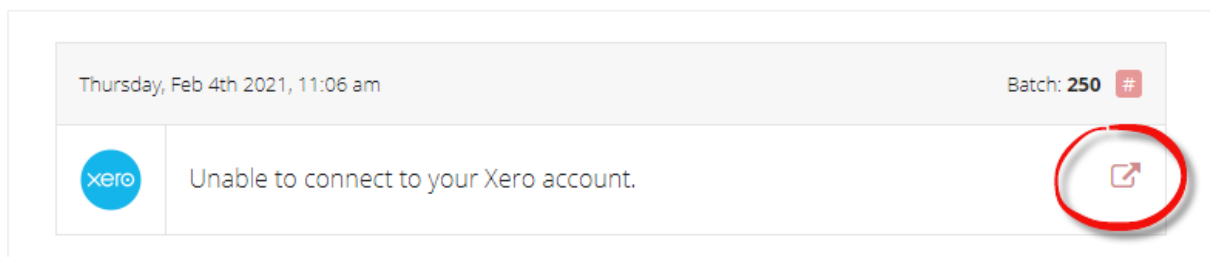


### No Xero organisation selected:

When connecting your Xero organisation to your TimeDock account, you may be redirected back to TimeDock and receive an error message stating "No Xero organisation selected".

This error occurs when you have previously successfully connected your Xero organisation and your connection has since become broken on the TimeDock end, however on the Xero end the connection is still recorded as active. When this happens and you try to re-connect, Xero will ignore the request to re-connect to the organisation.

To resolve this issue, login to your Xero organisation and navigate to *Settings > Connected Apps*. Locate TimeDock in the list of apps and click the *Disconnect* button.

In your TimeDock web dashboard, navigate to *Export > Xero Payroll > Manage > Setup*. Click the *Connect to Xero* button and follow the prompts to reconnect to your Xero organisation.
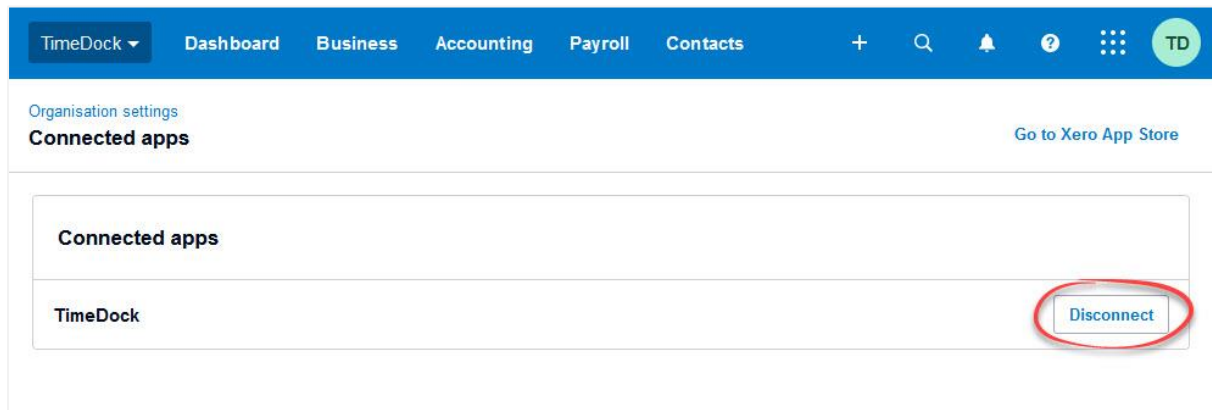


# Troubleshoot export problems

If any errors occur while exporting timesheets to Xero, these will be displayed in your export log. Which you can view at any time by navigating to *Export > Xero Payroll > Manage > Export Log*.

**Employee missing from export:**

If an employee timesheet is not being included in your export to Xero, check the following requirements:

- The employee *First Name* and *Last Name* (including casing) must match exactly between TimeDock and Xero.
- The employee must be on the same Xero *Pay Calendar* as the *Pay Period* that you've selected for your export from TimeDock.
- The employee must have hours logged for the date range that you've selected for your export from TimeDock.

### The timesheet is not a Draft timesheet:

If an employee timesheet already exists in Xero and has a status *other than Draft* then you cannot export a new version of the timesheet to Xero. Xero treats the timesheet as *locked* and in order to re-export the employee timesheet you will need to either *delete* the Xero timesheet or *revert it back to Draft status*.

### A valid tracking code is required for each timesheet line:

*Tracking Categories* has been turned on for your timesheets in Xero and therefore every timesheet line exported to Xero must reference a valid Xero *Tracking Category Option*. We recommend setting a *Default Tracking Code* within your Xero integration settings to ensure each of your exported timesheet lines is populated with one. See Set up tracking code mappings for more information.

### The employee doesn't have an ordinary earnings rate:

The employee record in Xero has not yet been assigned an *ordinary earnings rate*. Please update the record *within Xero* to complete the employee set up.

### No earnings rate selected:

The employee has not been assigned a Xero *Pay Code* in TimeDock to be used for their exported timesheets. Either set a *Pay Code* for the individual employee, or set a default to be used for all employees (where no pay code is specifically set). See Xero integration settings for more information.

# See also

- **Xero:** Add or edit an employee's timesheet (NZ)
- **Xero:** View employee timesheets
- **Xero:** Approve or decline a timesheet
- **Xero:** Payroll tracking
- **YouTube:** Export timesheets to Xero - Quick demo
- **YouTube:** Export timesheets to Xero - Full video
- **YouTube:** Synchronising multiple Xero organisations into TimeDock, for payroll
- **YouTube:** Exporting TimeDock timeSheets to multiple Xero organisations