



# Exporting time-sheets from TimeDock into Xero Payroll

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

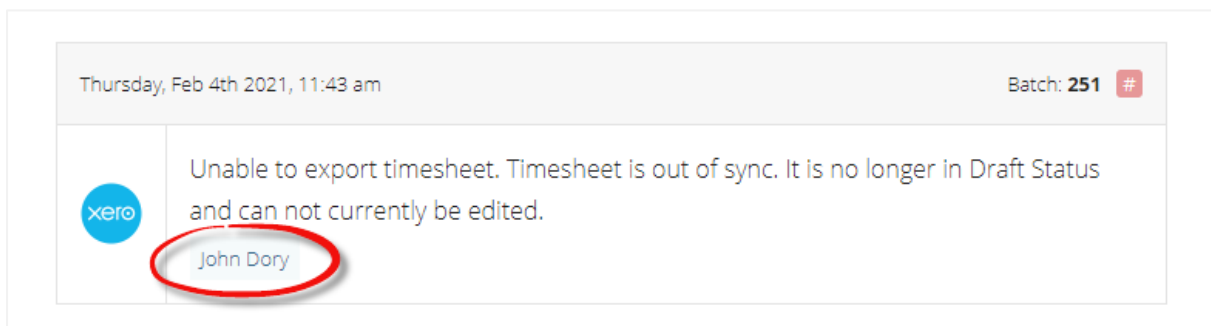
## Troubleshooting

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**.

### Timesheet export error

If an error occurs on an individual employee timesheet, such as a validation error, this will be displayed as a log item with the details of the error as well as the employee timesheet the error occurred on.

The below image is an example of an employee timesheet attempting to be re-exported to Xero. However the timesheet within Xero has already been marked as **Approved**, so the transaction is denied.



### Missing employee timesheet

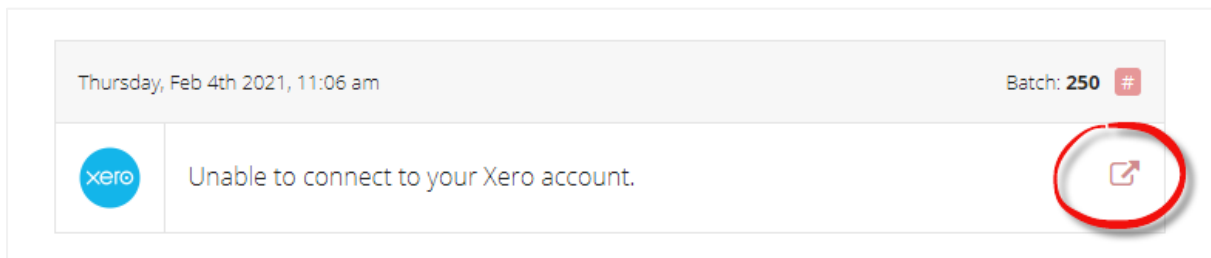
If an employee timesheet is not being included in your export to Xero, check the following requirements:

- The employee **First Name** and **Last Name** (including casing) must match exactly between TimeDock and Xero. Check there are no additional spaces in the first or last name.
- 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.

### Integration connection error

If the error is a connection error, there will be a single log item reflecting this. Click the red icon on the right-hand side of the error log and follow the prompts to reconnect to your Xero account.

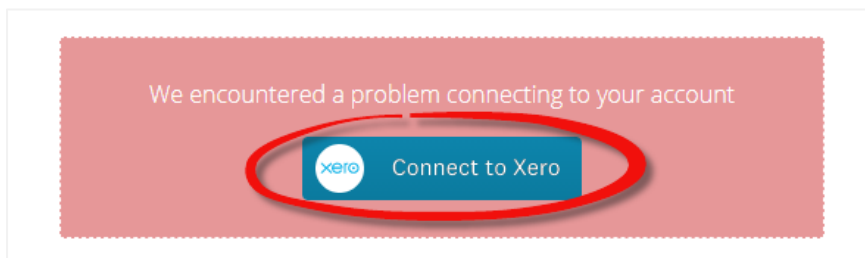


### Check your integration status

When 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*).

### Reconnect to Xero

If your integration has a connection problem, a red alert box will be displayed above your Xero integration settings (*Export > Xero Payroll > Manage > Setup*). Click on the **Connect to Xero** button and follow the prompts to reconnect to your Xero account.



## 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