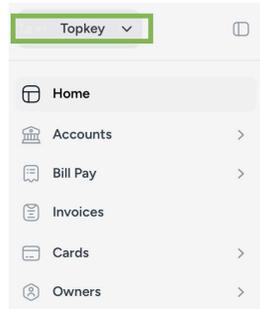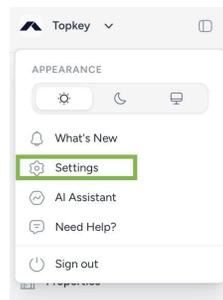# Setting Up Topkey + Track Integration
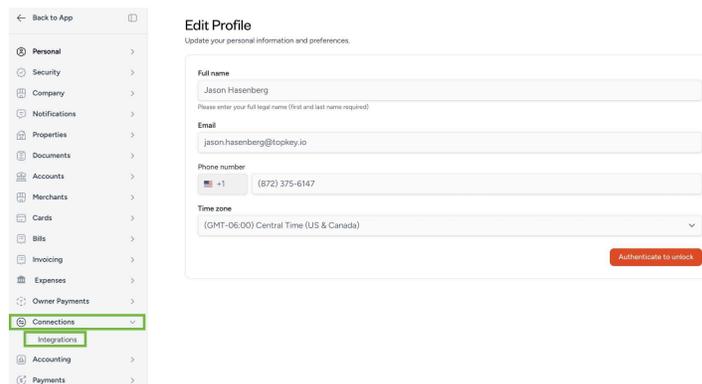
Step 1: Navigate to Integrations

1. Log in to your Topkey account
2. Click "Topkey" in the top left navigation, a dropdown will appear

3. Select "Settings" from the dropdown
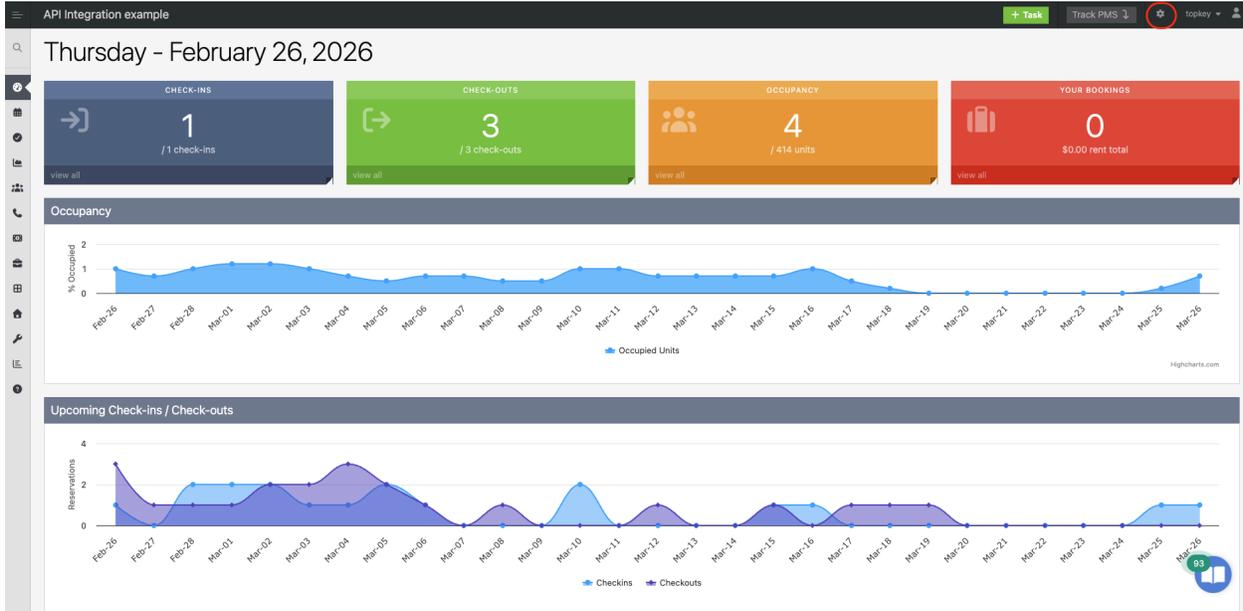

4. Navigate to Connections and click "Integrations"

Step 2: Connect Track

Topkey <> Track Setup Instructions:

1. Login to Track and click on the gear icon in the top righthand corner of the main dashboard to access your Configurations page.

2. Go to "Company Setup" tab then "API Keys" menu.

3. Click "+Server Key" in the top righthand corner.
4. Click "Generate Key".

5. This will take you to a new screen with your API Server Key and API Server Secret. Save after generating and name them Topkey.
6. Copy and paste in Topkey.

Step 3: Configure Your Export Settings

Once connected, navigate to **Settings** → **Integrations** → **Track Settings** to choose how expenses are exported to Track. There are three options:

Integration settings

☑ Automatically sync properties twice per day

☐ Sync short property names

☐ Require account when creating bill for work order

Default vendor

[▾]

Source of truth for vendors and owners ⓘ

[Automatic (pull from PMS only if data is missing) ▾]

Vendor Passthrough account ID for bill generation (when using Trust Accounting)

[ ]

☐ Mark created work orders as processed

Automatically populate status of work order to ⓘ

[Complete work order ▾]

Default expense export mode

[Export as Bill ▾]

Selectable export modes

☐ Export as Work Order with Bill
☐ Export as Work Order with Charge
☐ Export as Work Order only
☑ Export as Bill
☑ Export as Reservation Charge

☑ Export bill line items & markup separately (do not merge!)

☐ Attach a receipt link to each bill line item to provide the owner with access to the receipt

☑ Expose only maintenance accouting items

Transaction title template

[ ]

Default: `split.description||transaction.merchant_name,transaction.summary,transaction.memos`

Bill title template

[ ]

Default: `bill.vendor_name,bill.payment_for,line_item.description`

[**Save Settings**]

Export as Work Order with Bill (Default — recommended for most users) Creates both a work order and a bill in Track. You'll need to select an accounting account to complete the process.

Export as Work Order with Owner Charge Creates a work order with an owner charge but generates no bill. You'll need to select an accounting item to complete the process.

Export as Bill Only Creates a bill in Track with no associated work order. You'll need to select an accounting account to complete the process.

Integration settings

☑ Automatically sync properties twice per day

☐ Sync short property names

☐ Require account when creating bill for work order

Default vendor

[⌄]

Source of truth for vendors and owners ⓘ

[Automatic (pull from PMS only if data is missing)   ⌄]

Vendor Passthrough account ID for bill generation (when using Trust Accounting)

[   ]

☐ Mark created work orders as processed

Automatically populate status of work order to ⓘ

[Complete work order   ⌄]

Default expense export mode

[Export as Bill   ⌄]

Selectable export modes

☐ Export as Work Order with Bill

☐ Export as Work Order with Charge

☐ Export as Work Order only

☑ Export as Bill

☑ Export as Reservation Charge

☑ Export bill line items & markup separately (do not merge!)

☐ Attach a receipt link to each bill line item to provide the owner with access to the receipt

☑ Expose only maintenance accouting items

Transaction title template

[   ]

Default: `split.description||transaction.merchant_name,transaction.summary,transaction.memos`

Bill title template

[   ]

Default: `bill.vendor_name,bill.payment_for,line_item.description`

[Save Settings]

Step 4: Start Syncing Expenses

Once your settings are configured, expenses created in Topkey will automatically push to Track based on your selected export method. Each synced expense will include a direct hyperlink back to the corresponding Track record for easy verification.

Need help? Reach out to your Topkey rep or contact us at support@topkey.io