

HOW TO IMPORT EMPLOYEE DATA FROM QUICKBOOKS

Question

PLEASE REFER TO THE STEPS BELOW:

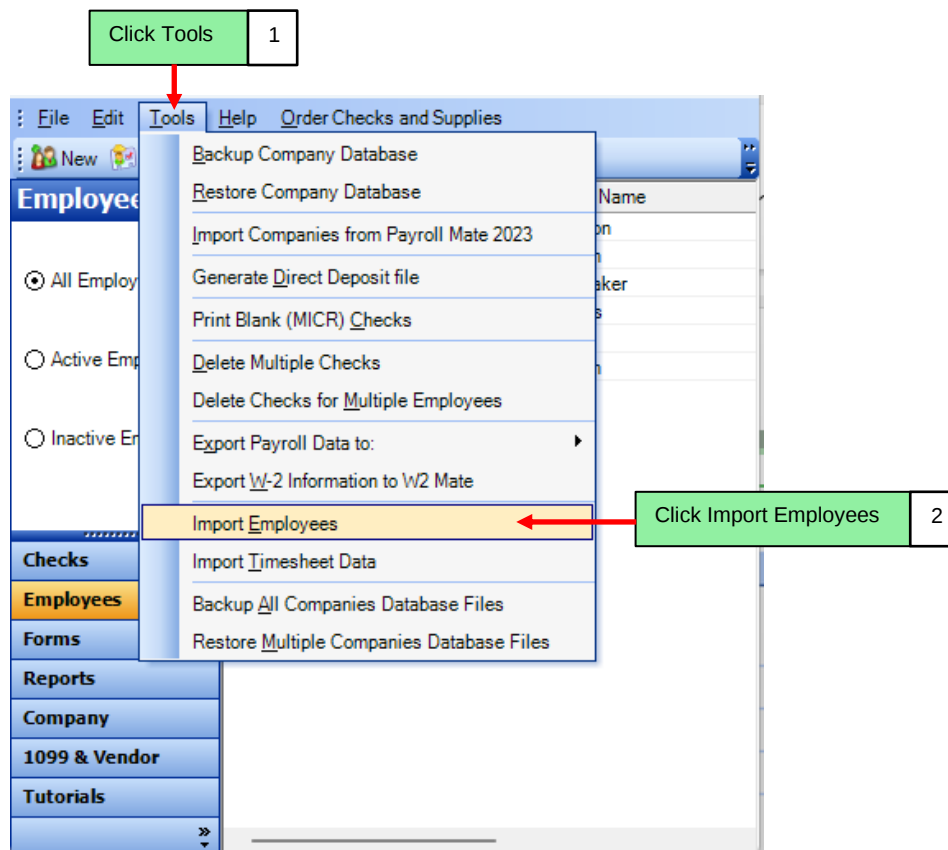
Answer

Make sure you have the correct company open.

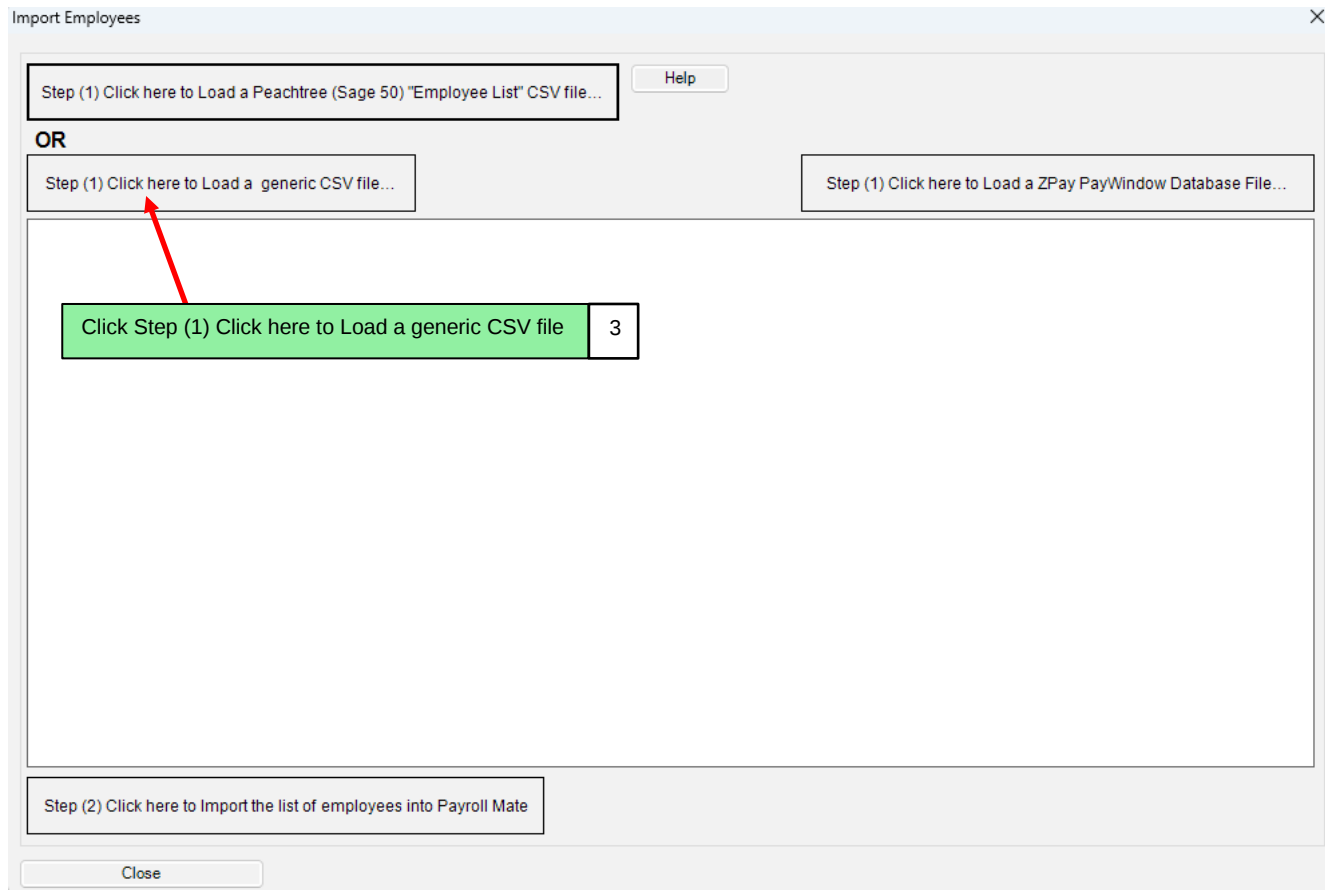
Note: If you do not currently have this company created inside of Payroll Mate you will need to create the company prior to importing the data. See [How to Create a New Company | Payroll Mate® Software Tutorials](#)

Import Employee Data from QuickBooks:

1. Click **Tools**
2. Click **Import Employees**



3. Click **Step (1) Click here to Load a generic CSV file**



Import Employees

Step (1) Click here to Load a Peachtree (Sage 50) "Employee List" CSV file...

Help

OR

Step (1) Click here to Load a generic CSV file...

Step (1) Click here to Load a ZPay PayWindow Database File...

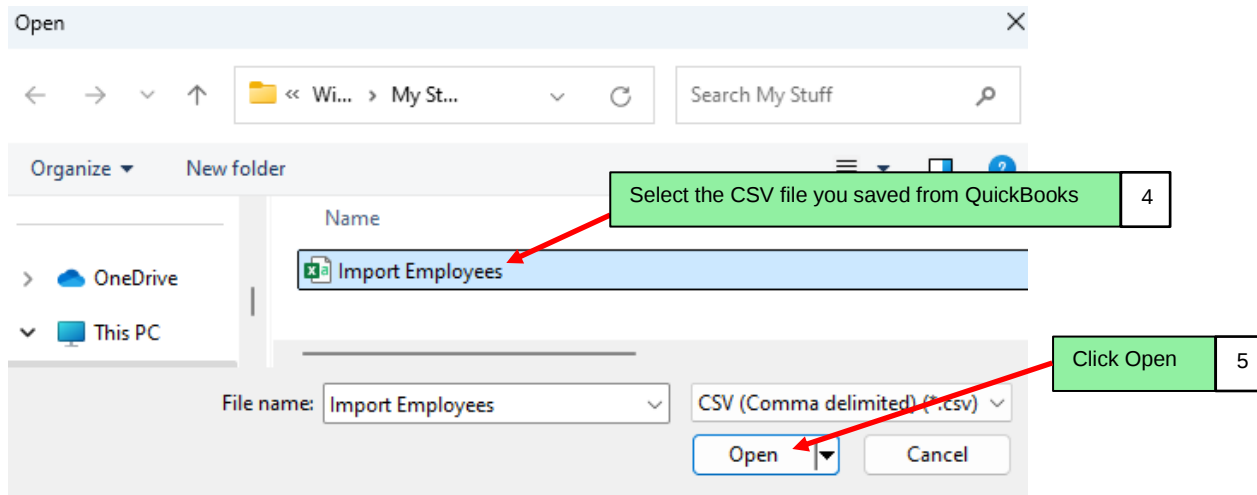
Click Step (1) Click here to Load a generic CSV file

3

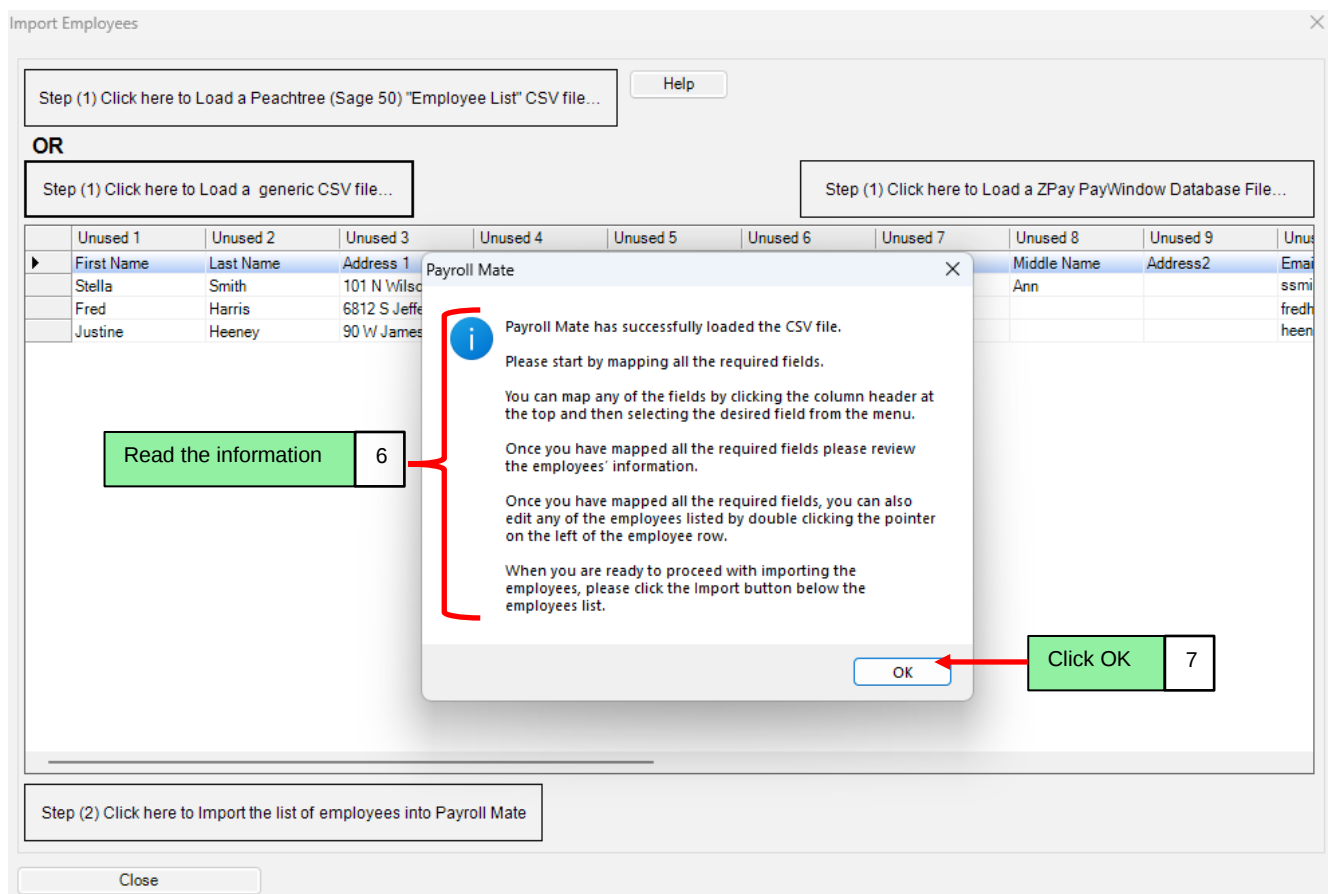
Step (2) Click here to Import the list of employees into Payroll Mate

Close

4. **Select the CSV** you saved from QuickBooks
5. Click **Open**



6. **Read the information** provided regarding importing
7. Click **OK**



8. Map each column

When mapping your columns click the word **Unused #** for each column and select the correct column data description to use for mapping the column.

Example below depicts the first three columns as mapped, the fourth column (Unused 4) is being selected to map to City.

Import Employees

Step (1) Click here to Load a Peachtree (Sage 50) "Employee List" CSV file...

OR

Map each column 8

Step (1) Click here to Load a generic CSV file...

Step (1) Click here to Load a ZPay PayWindow Database File.

First Name	Last Name	Address1	Unused 4	Unused 5	Unused 6	Unused 7	Unused 8	Unused 9
First Name	Last Name	Address 1	City	First Name - Already used				Address2
Stella	Smith	101 N Wilson	Lockport	Last Name - Already used				
Fred	Harris	6812 S Jefferson	Lockport	Address1 - Already used				
Justine	Heeney	90 W James St	Lockport	City [Required] (Max 30 characters)				
				State [Required] (Valid 2 character state abbreviation)				
				Zip [Required] (#### or ####-####)				
				SSN [Required] (###-##-#### or #####)				
				Middle Name (Max 3 characters)				
				Address2 (Max 50 characters)				
				Email (Max 50 characters)				
				Phone (10 digit phone number Ex: ###-###-####)				
				Federal Filing Status (Single, Married, Head of Household)				
				Federal Allowances (Whole Number between 0 and 99)				
				Additional Federal Withholding (Number)				
				Withholding State (Valid 2 character state abbreviation)				
				Additional State Withholding (Number)				
				Pay Type (Hourly, Salary)				
				Pay Rate (Number greater than zero)				
				Pay Frequency (Daily, Weekly, Bi-Weekly, Semi-Monthly, Monthly)				
				Unused				

Step (2) Click here to Import the list of employees into Payroll Mate

Close

9. Click Step (2) to Import the employee data

Import Employees

Step (1) Click here to Load a Peachtree (Sage 50) "Employee List" CSV file...

Help

OR

Step (1) Click here to Load a generic CSV file...

Step (1) Click here to Load a ZPay PayWindow Database File...

	Phone	Federal Filing Stat	Federal Allowance	Additional Federal	Withholding State	Additional State W	Pay Type	Pay Rate	Pay Frequency
co		Single	1	0.00	IL	0.00	Hourly	26.50	Semi-Monthly
om		Married	1	10.00	IL	0.00	Salary	60000.00	Semi-Monthly
ail.		Head of Househol	1	0.00	IL	0.00	Salary	45000.00	Semi-Monthly

Click Step (2)

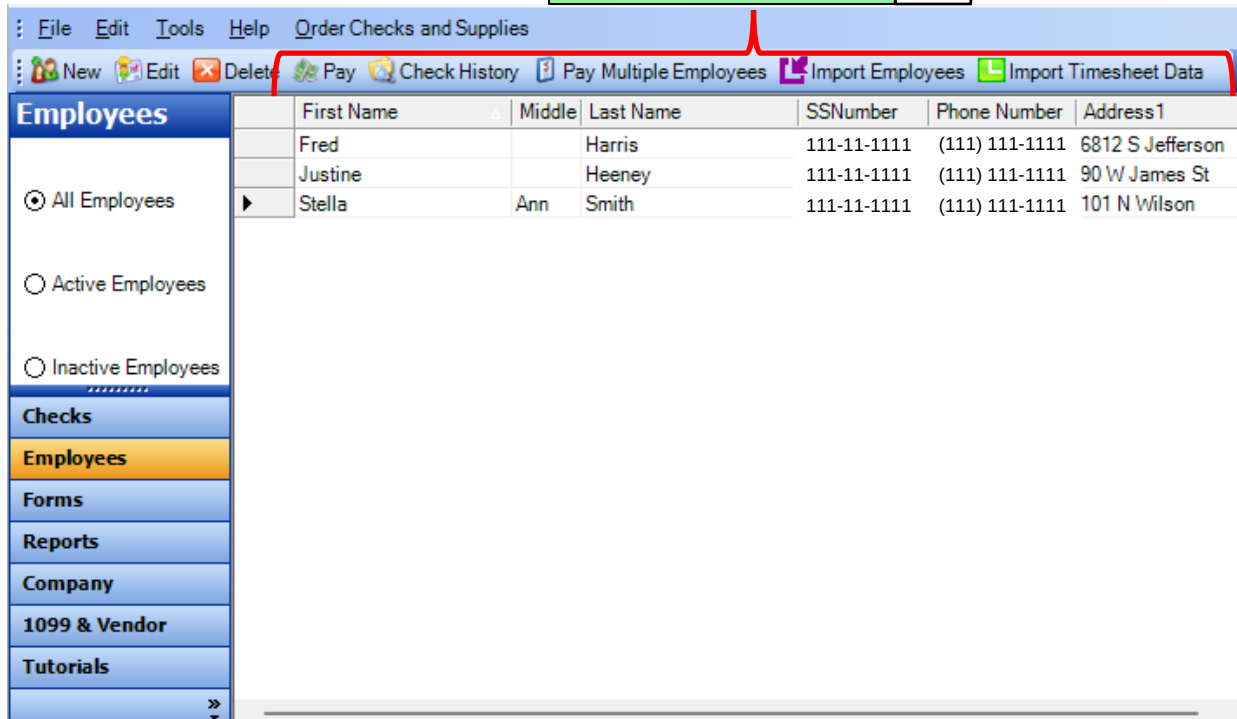
9

Step (2) Click here to Import the list of employees into Payroll Mate

Close

10. The **employees you were importing should now be visible** inside Payroll Mate

Imported employees are visible
10



	First Name	Middle	Last Name	SSNumber	Phone Number	Address1
☒ All Employees	Fred		Harris	111-11-1111	(111) 111-1111	6812 S Jefferson
☐ Active Employees	Justine		Heeney	111-11-1111	(111) 111-1111	90 W James St
☐ Inactive Employees	Stella	Ann	Smith	111-11-1111	(111) 111-1111	101 N Wilson

You have completed the import of employee data from QuickBooks into Payroll Mate.