

HOW TO IMPORT EMPLOYEES FROM A SPREADSHEET

Question

PLEASE REFER TO THE STEPS BELOW:

Answer

To import employees from a spreadsheet, your company already needs to be created in Payroll Mate. If your company isn't created, create it before proceeding.

1. **Prepare your CSV file** to include the following data

First Name [Required] (Max 50 characters)
Last Name [Required] (Max 50 characters)
Address1 [Required] (Max 50 characters)
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)

Prepare your CSV file

1

Example of CSV (Comma delimited) File:

	A	B	C	D	E	F	G	H	I	J	K
1	First Name	Last Name	Address 1	City	State	Zip	SSN	Middle Name	Address2	Email	Phone
2	Stella	Smith	101 N Wilson	Lockport	IL	60441	111111111	Ann		ssmith@gmail.com	815-685-7845
3	Fred	Harris	6812 S Jefferson	Lockport	IL	60441	111111111			fredh@gmail.com	708-990-7859
4	Justine	Heeney	90 W James St	Lockport	IL	60441	111111111			heeney12@gmail.com	815-874-6975

L	M	N	O	P	Q	R	S
Federal Filing Status	Federal Allowances	Additional Federal Withholding	Withholding State	Additional State Withholding	Pay Type	Pay Rate	Pay Frequency
Single	1		0 IL		0 Hourly	26.5	Semi-Monthly
Married	1		10 IL		0 Salary	60000	Semi-Monthly
Head of Household	1		0 IL		0 Salary	45000	Semi-Monthly

- Click **Tools**
- Click **Import Employees**

Click Tools

2

Tools

Backup Company Database

Restore Company Database

Import Companies from Payroll Mate 2024

Generate Direct Deposit file

Print Blank (MICR) Checks

Delete Multiple Checks

Delete Checks for Multiple Employees

Export Payroll Data to:

Export W-2 Information to W2 Mate

Import Employees

Import Timesheet Data

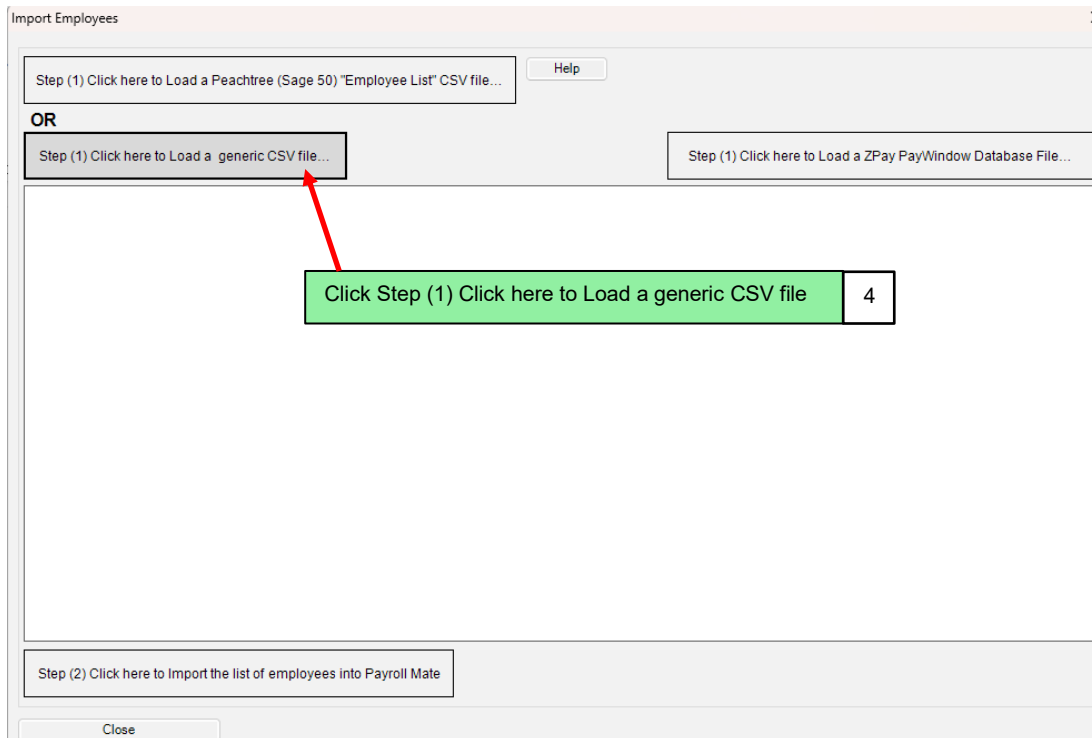
Backup All Companies Database Files

Restore Multiple Companies Database Files

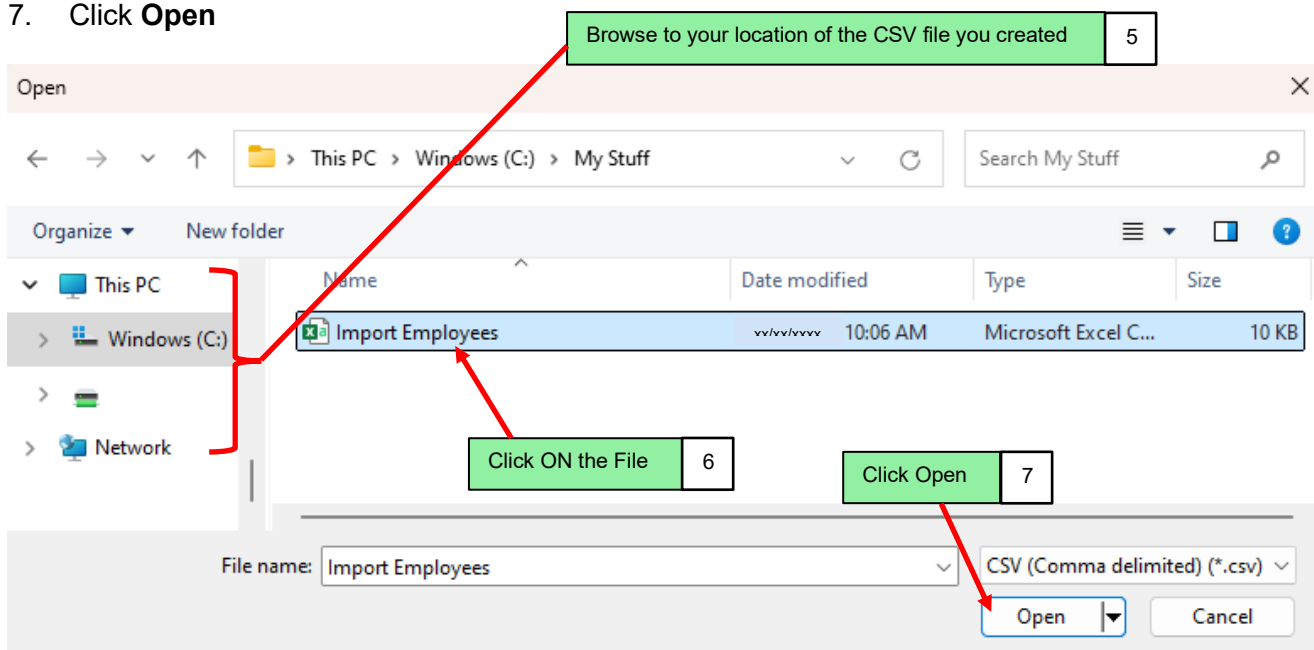
Click Import Employees

3

- The Import Employees wizard will open, click **Step (1) Click here to Load a generic CSV file**



- An Open dialog box will appear, **browse to your location of the CSV file you created**
- Click on the File** (to select it)
- Click **Open**



8. The data you imported will load and display in the window. A message dialog box will also appear. Click **OK**

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...

	Unused 1	Unused 2	Unused 3	Unused 4	Unused 5	Unused 6	Unused 7	Unused 8	Unused 9
▶	First Name	Last Name	Address 1	City	State	Zip	SSN	Middle Name	Address2
	Stella	Smith	101 N Wilson	Lockport					
	Fred	Harris	6812 S Jefferson	Lockport					
	Justine	Heeney	90 W James St	Lockport					

Payroll Mate

i Payroll Mate has successfully loaded the CSV file.

Please start by mapping all the required fields.

You can map any of the fields by clicking the column header at the top and then selecting the desired field from the menu.

Once you have mapped all the required fields please review the employees' information.

Once you have mapped all the required fields, you can also edit any of the employees listed by double clicking the pointer on the left of the employee row.

When you are ready to proceed with importing the employees, please click the Import button below the employees list.

OK

Click OK

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

Close

9. **Map your data** (top row of Unused fields) with the second row.

Map your data 9

	Unused 1	Unused 2	Unused 3	Unused 4	Unused 5	Unused 6	Unused 7	Unused 8	Unused 9
▶	First Name	Last Name	Address 1	City	State	Zip	SSN	Middle Name	Address2
	Stella	Smith	101 N Wilson	Lockport	IL	60441	111111111	Ann	
	Fred	Harris	6812 S Jefferson	Lockport	IL	60441	111111111		
	Justine	Heeney	90 W James St	Lockport	IL	60441	111111111		

10. Once you are done with Mapping the fields your mappings should look like screen shot below (across all fields),
click **Step (2) Click here to Import the list of employees into Payroll Mate**

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...

First Name	Last Name	Address1	City	State	Zip	SSN	Middle Name	Address2	Email
Stella	Smith	101 N Wilson	Lockport	IL	60441	111-11-1111	Ann		ssmi
Fred	Harris	6812 S Jefferson	Lockport	IL	60441	111-11-1111			fredh
Justine	Heeney	90 W James St	Lockport	IL	60441	111-11-1111			heen

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

10

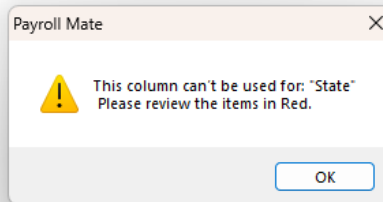
Step (2) Click here to Import the list of employees into Payroll Mate

Close

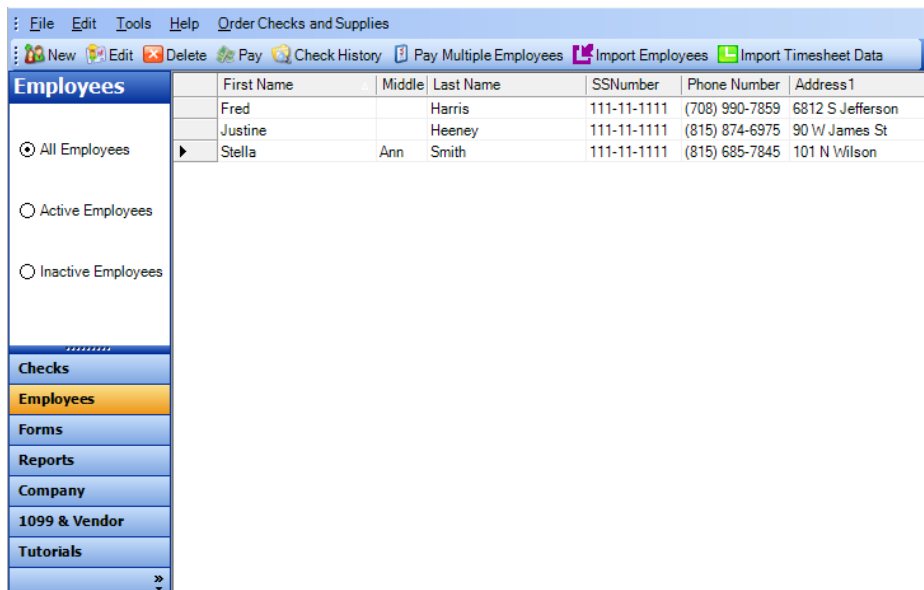
NOTE: If there are any errors or if any required data is missing, you will get a pop-up notice. EXAMPLE BELOW

We recommended that you close the Import Employees window, make corrections to your file and try again.

First Name	Last Name	Address1	City	Unused 5	Unused 6	Unused 7	Unused 8	Unused 9
First Name	Last Name	Address 1	City	State	Zip	SSN	Middle Name	Address2
Stella	Smith	101 N Wilson	Lockport	Illinois	60441	111111111 108765	Ann	
Fred	Harris	6812 S Jefferson	Lockport	Illinois	60441	111111111 129745		
Justine	Heeney	90 W James St	Lockport	Illinois	60441	111111111 100712365		



- If everything is correct, once you click Step (2) the Import Employee Wizard will disappear and you will see your list of imported employees.



Congratulations! You have imported employees from a spreadsheet.