How to setup for importing into QuickBooks

STEP ONE: First, check to see if QBTimer is installed in QuickBooks.

How to install the QBTimer

1. Load the QuickBooks CD in the computer
2. Browse to the CD and open the **QBTimer** folder
3. Run the Install.exe file
4. Follow the screen instructions

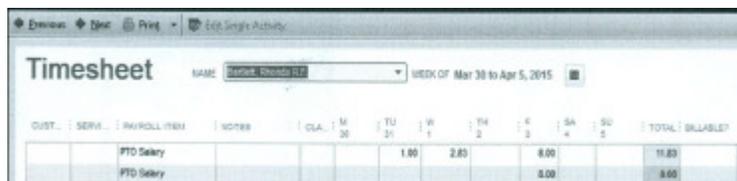## STEP TWO: Setup your export file format in Easy Time Clock

1. Log in as **Admin** and mouse over the **Setup** tab and select **Export File Setup** and select **QuickBooks** for the Payroll Company and **Save Changes**.
2. Check the following to make sure the employee names and PTO category export codes are entered in Easy Time Clock correctly. Follow the instructions on the export file setup page.
   a. Go to the **Setup** tab and select **Employee Setup** page to check the names to make sure they are entered in the same as your QuickBooks account.
   b. If you have paid time off categories, go to the **Features** tab and select **PTO Category Setup** and create the same PTO categories as in your QuickBooks and type in the QuickBooks's **Export Code** for each category. Select **Not Grouped** and **Save Changes**.
   c. Go **Features** tab and select **Assign PTO Categories** page and check the box to assign the PTO categories to the employees and **save changes**. Us the **Copy for All** and **Save All** buttons if needed.

How to create the export from Easy Time Clock and import into QB

1. To go the **Favorites** tab and select the **Summary Report** page and from the Export Box at the top of the page, click on the "**Export To QuickBooks**" link and **save the file to your desktop**.

In your QuickBooks account we strongly recommend to back up your QB data before importing your file.

2. **Open QB** then select **File | Utilities | Import | Timer Activities** or select **IIF file** and browse on your desktop the IIF file then select it to import. A popup will display showing that the import was successful. View the timesheet.