



EXPORTING QUICKBOOKS DATA FOR ETSS SETUP

In order to import the data from QuickBooks to eTSS, please export the data sets as they pertain to your company. The class and service item/labor category fields are optional.

EXPORTING EMPLOYEE DATA

1. Open QuickBooks
2. Navigate to the Employee Contact Report under the Reports/List menu
3. Click on the Modify Report icon and **ONLY** select the following fields (First Name, M.I., Last Name, Phone, SS No., City, Address, Zip, Email and Date of Hire)

Note: If your company uses an employee ID other than Social Security numbers, then you will need to select that data element as well.

4. Click the Excel icon to export the file to your PC in Microsoft Excel format
5. Select Send report to a new Excel spreadsheet
6. Click OK and an a new window will open with the employee list as an Excel page
7. Save the Excel Employee List to your computer to be emailed at the end of this process along with the other data elements

EXPORTING CUSTOMER: PAYROLL ITEMS

1. Navigate to the Payroll Item Listing Report under the Reports/List menu.
2. Click on the Modify Report icon and **ONLY** select the following field (Items, Type)
3. Click the Excel icon to export the file to your PC in Microsoft Excel format
4. Select Send report to a new Excel spreadsheet
5. Click OK and an a new window will open with the employee list as an Excel page
6. Save the Excel Payroll Item Listing to your computer to be emailed at the end of this process along with the other data elements

EXPORTING CUSTOMER: JOBS

1. Navigate to the Customer Job List under the Reports/List menu.
2. Click on the Modify Report icon and **ONLY** select the following field (Customer)
3. Click the Excel icon to export the file to your PC in Microsoft Excel format



4. Select Send report to a new Excel spreadsheet
5. Click OK and an a new window will open with the employee list as an Excel page
6. Save the Excel Customer List to your computer to be emailed at the end of this process along with the other data elements

EXPORTING ITEMS OR LABOR CATEGORIES (OPTIONAL)

1. Navigate to the Item Listing Report under the Reports/List menu.
2. Click on the Modify Report icon and ONLY select the following field (Item, Description)
3. Click the Excel icon to export the file to your PC in Microsoft Excel format
4. Select Send report to a new Excel spreadsheet
5. Click OK and an a new window will open with the employee list as an Excel page
6. Save the Excel Item Listing to your computer to be emailed at the end of this process along with the other data elements

EXPORTING CLASSES (OPTIONAL IF NOT USED IN QUICKBOOKS TIMESHEET)

1. Navigate to the Class Listing Report under the Reports/List menu.
2. Click on the Modify Report icon and ONLY select the following field (Item, Description)
3. Click the Excel icon to export the file to your PC in Microsoft Excel format
4. Select Send report to a new Excel spreadsheet
5. Click OK and an a new window will open with the employee list as an Excel page
6. Save the Excel Class Listing to your computer to be emailed at the end of this process along with the other data elements

ADDITIONAL INFORMATION NEEDED FOR SETUP

In order to have a successful export, all middle initials for employees must have consistent formatting. You will need to let us know if the middle initial for each employee has a period or does not. If your employee list has both, then you will need to select one format or the other and change that data in QuickBooks before exporting from eTSS to QuickBooks.