# Importing EIOBoard Timecards into Quickbooks

Table of Contents

Track Time in Quickbooks

Before you import Timecards into QuickBooks from the EIOBoard Timecard export, QuickBooks must be configured to track time. To verify or change this, complete the following steps:

1. Open QuickBooks and login with the Administrator account.
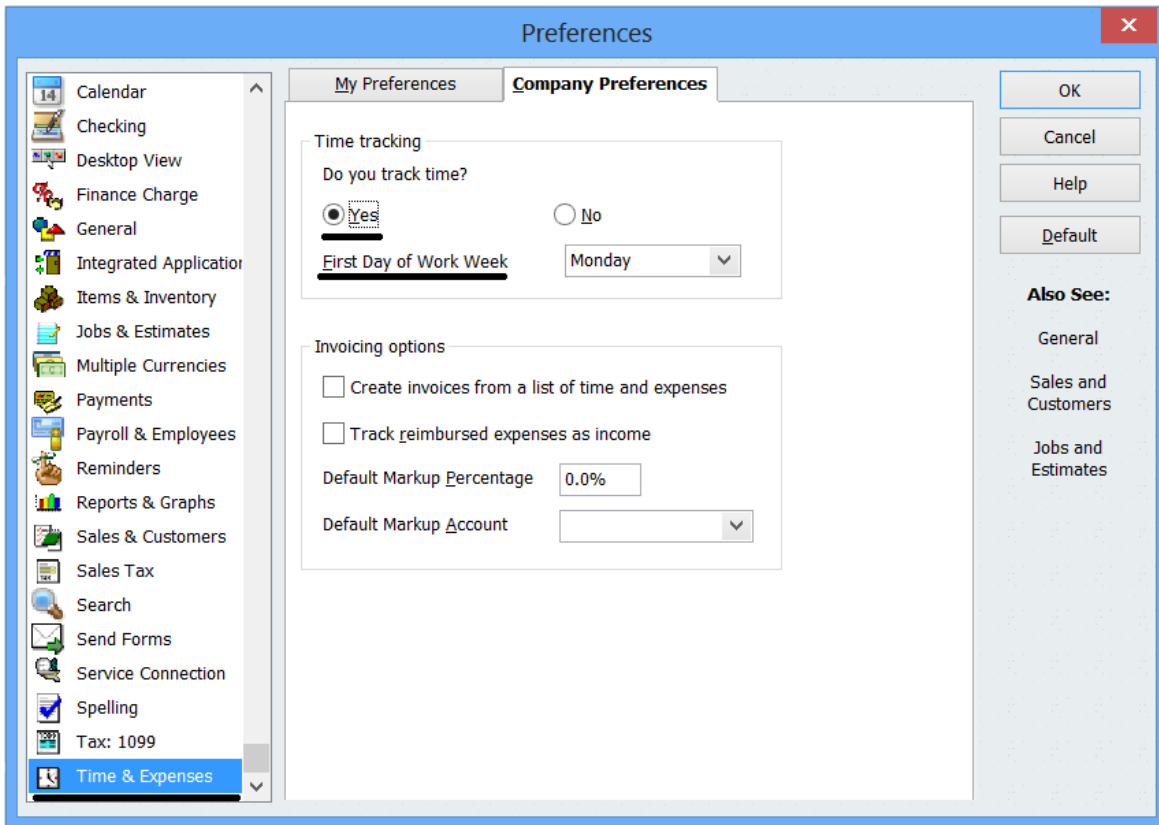2. Click the "File" menu and select "Switch to Single-user Mode" if it is currently in "Multi-user Mode".
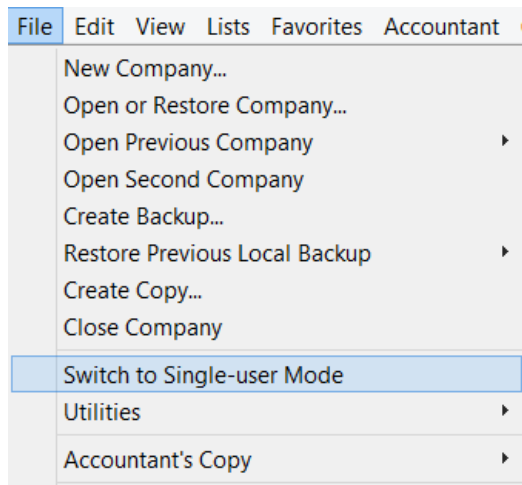
3. Once in Single-user Mode, click the "Edit" menu and select "Preferences…".
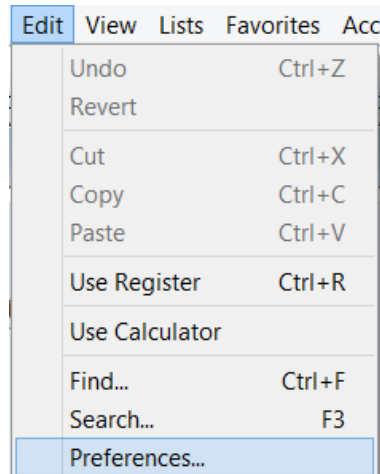
4. Select "Time & Expenses" at the bottom of the left frame in the Preferences window.
5. Click the "Company Preferences" tab. Select "Yes" in the "Do You Track Time?" frame, set the "First Day of Work Week", and click "OK".
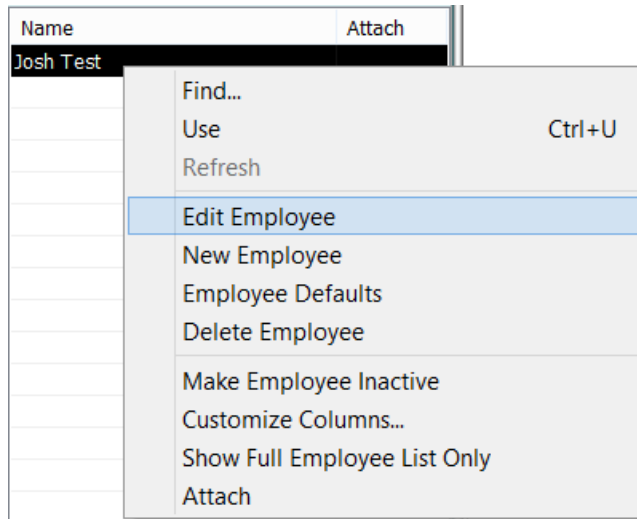
6. Back on the "Home" screen, click the "Employees" tab on the bottom left corner of the window.

7. Right click the first employee you wish to import Timecards for and select "Edit Employee".

8. In the "Change tabs" drop down, select "Payroll and Compensation Info".
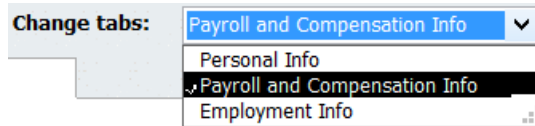
9. Check "Use time data to create paychecks" and click "OK".

10. Repeat steps 7 – 9 for each employee you are importing Timecards for.

EIOBoard Settings

At this point, QuickBooks is configured to import Timecards, but you will also need to make sure EIOBoard is setup to import the data properly. In order to import EIOBoard Timecards into QuickBooks, there are certain fields that must match up exactly to the fields in QuickBooks. First, the Employee Name in QuickBooks must match the Contact Name in EIOBoard. Follow the instructions below to verify these fields match:

1. Open QuickBooks and login with the Administrator account.
2. Click the "File" menu and select "Switch to Single-user Mode" if it is currently in "Multi-user Mode".
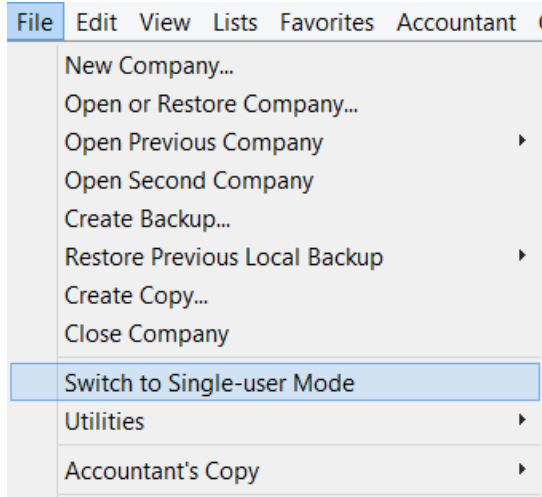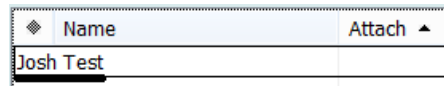
3. On the "Home" screen, click the "Employees" tab on the bottom left corner of the window.

4. On the "Employees" tab, find the name of the employee you will be importing Timecards for.

5. Open the EIOBoard Application Interface and login with a user that has "EB Admin" security rights.
6. Open the Administrator and make sure that the user you will be importing Timecards for has the same First and Last Name as the QuickBooks name determined in step 3 above.

　　　　a. Click the Administrator button.
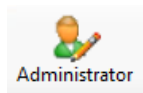
　　b. Check if the first and last name match.
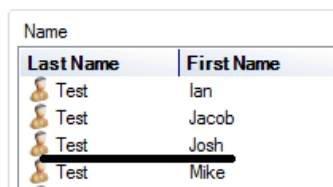
7. Repeat steps 4 – 6 above for each employee you will be importing Timecards for.

Payroll Settings

The next thing you need to verify is that the Payroll Item in QuickBooks matches up to the Payroll Type in EIOBoard. To verify this, follow the instructions below:

1. Open QuickBooks and login with the Administrator account.
2. Click the "File" menu and select "Switch to Single-user Mode" if it is currently in "Multi-user Mode".
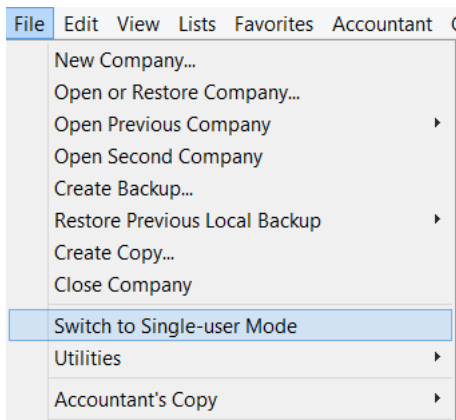
3. Click the "Employees" menu and select "Payroll Item List".
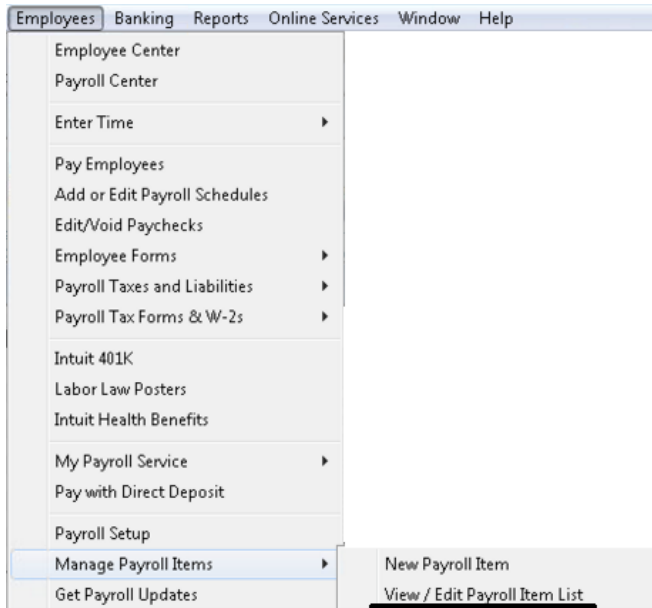
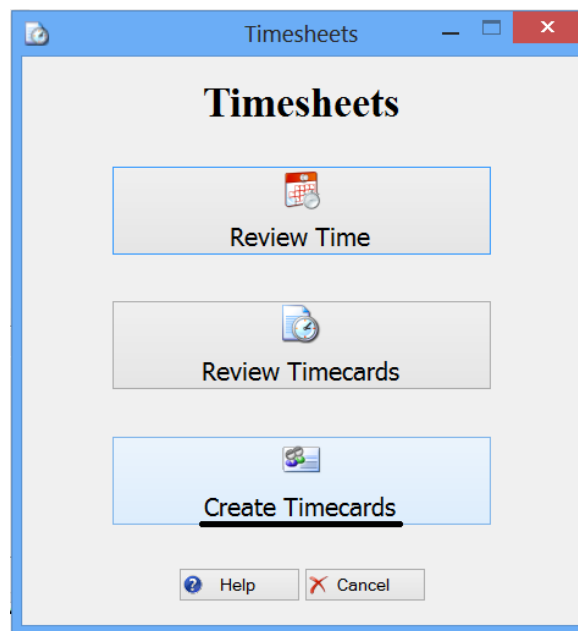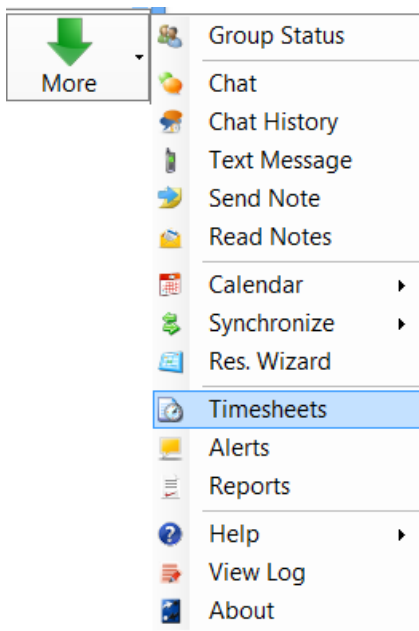4. Find the "Item Name" for the main/default "Hourly Wage" "Type" that is assigned to "Regular Pay".

5. Open the EIOBoard Application Interface and login with a user that has "EB Admin" or "EB Timecard Manager" security rights.

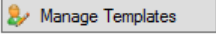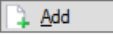6. Click the "Timesheets" button in the EIOBoard Application Interface and click "Create Timecards".

7. Select the Contacts or the List you would like to export Timecards for and click "Next >>".
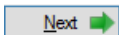
8. Click the "Manage Payroll Types" button and click "Add" . For the "Payroll Name", enter the "Item Name" from QuickBooks that you determined in step 3 above, check the appropriate Payroll Type, and click "Save".

9. Repeat steps 4 – 8 for each of the Payroll Types used by your Organization in QuickBooks.
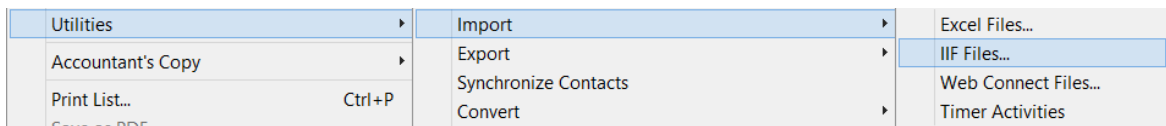
Imorting EIOBoard Timecard Data

For instructions on exporting the Timecards in EIOBoard, click the "Help" button in the Timecards window.

To import the EIOBoard Timecard data you exported in the above instructions, follow the steps below:
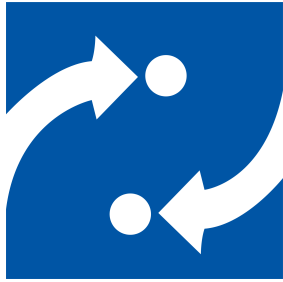
1. Open QuickBooks and login with the Administrator account.
2. Click the "File" menu and select "Switch to Single-user Mode" if it is currently in "Multi-user Mode".
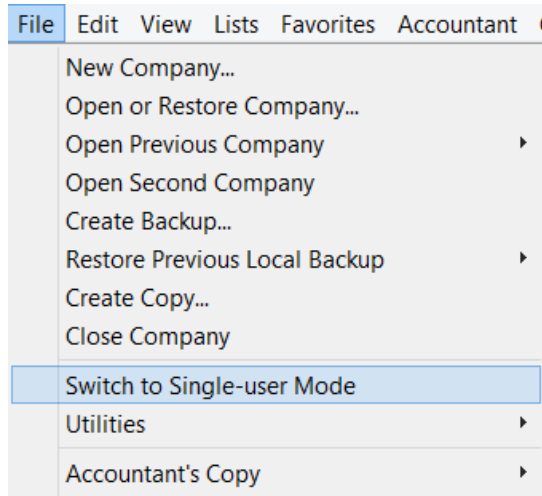
3. Click the "File" menu and navigate to "Utilities", "Import", and select "IIF Files…".

4. Select the ".iif" file you exported from the EIOBoard Timecards (see the PDF instructions above) which should have a filename like "qb_payroll_import_StartDate_EndDate.iif" and click "Open". You should see a message saying "Your data has been imported", which you just click "OK" to.

Thank you for choosing Savance!