

# How to Import Timesheet Data into Payroll Mate

Note: In order to use this feature you must purchase and enable Payroll Mate Option #3 (Additional Companies & Employees + Timesheet Import)

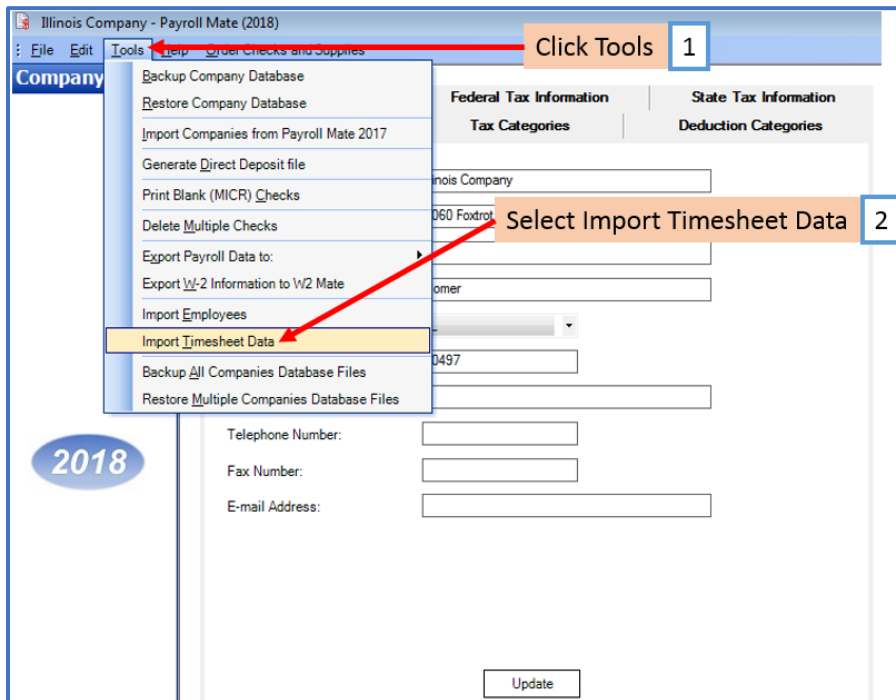
Prepare your CSV file to include the following data: Social Security Number, First Name, Last Name and Per Hour Income Categories. If you have custom income categories, you will create a column for each income category used for payroll processing. Any employee imported from the CSV file will be included in the paycheck processing (including non-hourly).

CSV file example

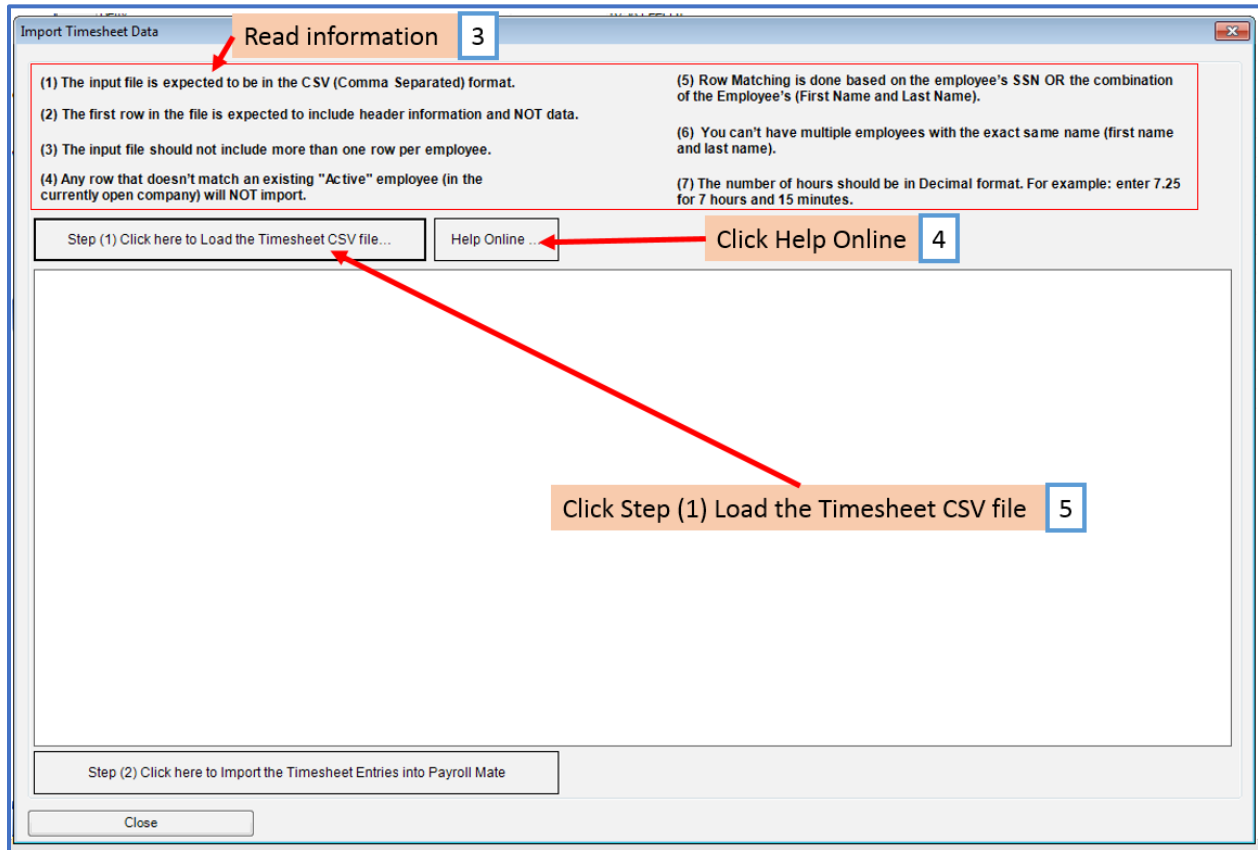
	A	B	C	D	E	F	G
1	SSN	First Name	Last Name	Regular Hours	Overtime Hours	Training Hours	
2	123-45-6788	George	Orange	32	5.25	8	
3							
4							
5							
6							

Make sure you have the correct Company open inside Payroll Mate

1. Click Tools
2. Select Import Timesheet Data

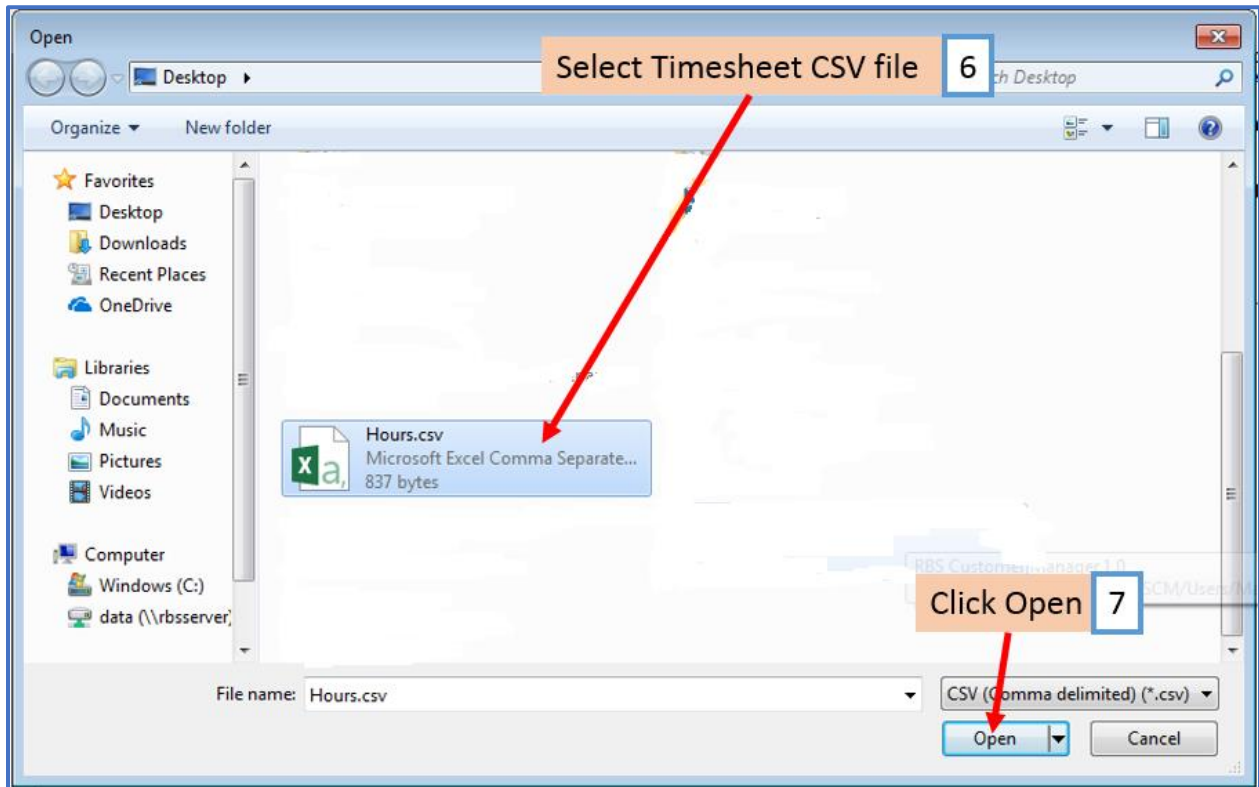


3. Read the Information provided regarding importing
4. Click Help Online for additional help/tutorials
5. Click Step (1) Click here to Load the Timesheet CSV file



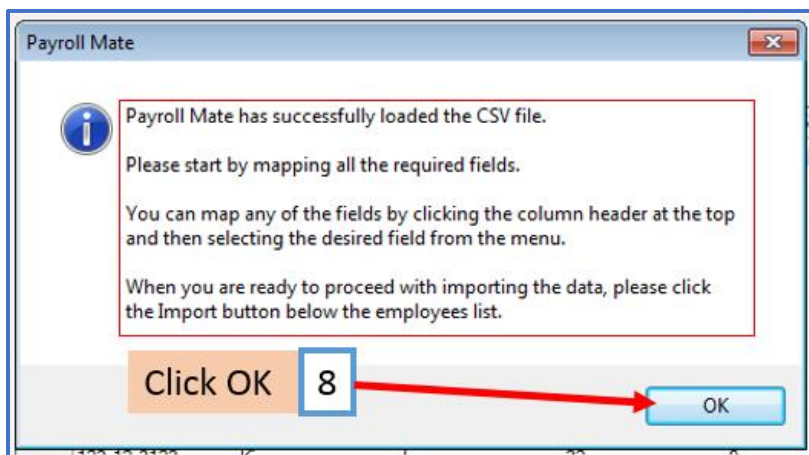
6. Select the Timesheet CSV file

7. Click Open



Note: The first row of the CSV is expected to include header information and NOT data. The header should contain names corresponding to the fields (columns) in the file and should contain the same number of fields (columns) as the records in the rest of the CSV file.

8. Click OK



## 9. Map each column

When mapping your columns, click the word "Unused" for each column and select the correct column data description

Import Timesheet Data

(1) The input file is expected to be in the CSV (Comma Separated) format.  
(2) The first row in the file is expected to include header information and NOT data.  
(3) The input file should not include more than one row per employee.  
(4) Any row that doesn't match an existing "Active" employee (in the currently open company) will NOT import.  
(5) Row Matching is done based on the employee's SSN OR the combination of the Employee's (First Name and Last Name).  
(6) You can't have multiple employees with the exact same name (first name and last name).  
(7) The number of hours should be in Decimal format. For example: enter 7.25 for 7 hours and 15 minutes.

Step (1) Click here to Load the Timesheet CSV file... Help Online ...

Unused 1	Unused 2	Unused 3	Unused 4	Unused 5	Unused 6
SSN(###-##-#### or #####)	First Name(Max 50 characters)	Last Name(Max 50 characters)	Regular Hours	Overtime Hours	Training Hours
899-99-9999	Beth	Berry	0	3	20
999-99-9999	Betty	Banana	37	0	0
111-22-3333	Gilbert	Grape	40	1	0
123-22-3333	Jenny	Jumper	40	0	0
998-99-9999	Kim	Lemon	32	0	0
456-78-9121			45	0	0
321-56-9874			44	0	0
474-47-4774	Stanley	Smile	35	0	0
525-55-5552	Dark	Vader	40	0	0
898-99-8899	Wendy	Mountain	38	0	0
123-12-3123	Mark	Marker	40	7	0
45	Brian	Brown	40	2	0
44	Leslie	North	27	0	0
383-33-8888	Tammy	Tripper	40	6	0
654-22-1111	Brad	Pitt	40	5	0
420-20-2018	Chris	Pine	32	0	0
512-47-9999			40	0	0
121-22-1212			40	0	0
444-44-4444			40	0	0
888-77-5555			40	0	0
777-88-4444			40	0	0
654-66-5544			40	0	0
999-99-9999			40	0	0

Map each column 9

Step (2) Click here to Import the Timesheet Entries into Payroll Mate

Close

## 10. Click Step (2) to Import the Timesheet Entries

(1) The input file is expected to be in the CSV (Comma Separated) format.

(2) The first row in the file is expected to include header information and NOT data.

(3) The input file should not include more than one row per employee.

(4) Any row that doesn't match an existing "Active" employee (in the currently open company) will NOT import.

(5) Row Matching is done based on the employee's SSN OR the combination of the Employee's (First Name and Last Name).

(6) You can't have multiple employees with the exact same name (first name and last name).

(7) The number of hours should be in Decimal format. For example: enter 7.25 for 7 hours and 15 minutes.

Step (1) Click here to Load the Timesheet CSV file... Help Online ...

SSN	First Name	Last Name	Regular Hourly Pa	Overtime Hourly P	Training Hourly Pa
899-99-9999	Sally	Tester	32.22	10.25	0.00
999-99-9999	Sally	Tester	30.00	4.00	0.00
111-22-3333	Samuel	Sample	40.00	0.00	0.00
123-22-3333	Stuart	Sample	42.00	8.00	0.00
998-99-9999	Tommy	Tester	38.00	0.00	0.00
456-78-9123	Bob	Boston	35.00	0.00	0.00
321-56-9874	Beth	Berry	0.00	3.00	20.00
474-47-4774	Betty	Banana	37.00	0.00	0.00
525-55-5552	Gilbert	Grape	40.00	1.00	0.00
898-99-8899	Jenny	Jumper	40.00	0.00	0.00
123-12-3123	Kim	Lemon	32.00	0.00	0.00
456-98-9874	Larry	Ruby	34.00	0.00	0.00
444-44-4444	Leslie	North	27.00	0.00	0.00
383-33-8888	Sidney	Smile	35.00	0.00	0.00
654-22-1111	Dark	Vader	40.00	0.00	0.00
420-20-2018	Wendy	Mountain	38.00	0.00	0.00
512-47-9999	Mark	Marker	40.00	7.00	0.00
121-22-1212	Brian	Brown	40.00	2.00	0.00
444-44-4444	Leslie	North	27.00	0.00	0.00
888-77-5555	Tammy	Tripper	40.00	6.00	0.00
777-88-4444	Brad	Pitt	40.00	5.00	0.00
654-66-5544	Chris	Pine	32.00	0.00	0.00

Step (2) Click here to Import the Timesheet Entries into Payroll Mate

Close

Click Step (2) Import the Timesheet Entries 10

If no errors are found during import, continue to step 11

If errors are found during import, continue to step 15

11. If there are no errors in your CSV file, you will be taken to the first check to create

**Note: Verify Begin Date, End Date, Pay Date and Check #**

11a. Total number of employee checks to be created will be shown here

Note: Edits to payroll check can be made here as needed (including edits to rates, hours, tax, deductions, etc.) **Pay special attention to employee(s) with non-hourly income (salary, bonus, per piece, etc.)**

12. Click Create Check and Go to Next Employee

If there are no errors you will be taken to the first check 11

11a

12

Click Create Check & Go to Next Employee

Click to Skip Employee

Click to Quit Creating Checks

Income:	Rate:	Type:	Quantity:	Amount:	YTD:
Regular Hourly Pay	11.0000	Per Hour	32.22	354.42	354.42
Overtime Hourly Pay	15.0000	Per Hour	10.25	153.75	153.75

Tax:	Amount:	YTD:
Federal Income Tax	48.78	48.78
Social Security (Employee)	31.51	31.51
Medicare (Employee)	7.37	7.37
State Income Tax	25.15	25.15
Local Income Tax	0.00	0.00
State Disability Insurance (Employee)	0.00	0.00

Optional Details	Amount:	YTD:
Hours Worked	0.00	.00
Weeks Worked	0.00	.00

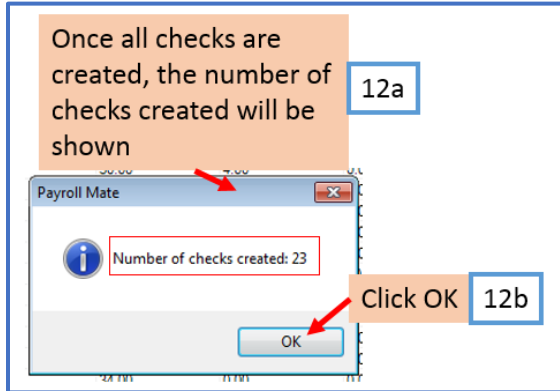
Check Summary	Total Incomes:	Total Taxes:	Total Deductions:	Net Pay:
This Check:	508.17	112.81	0.00	395.36
YTD:	508.17	112.81	0.00	395.36

Note: Click Skip Employee to skip this employee and not create a paycheck

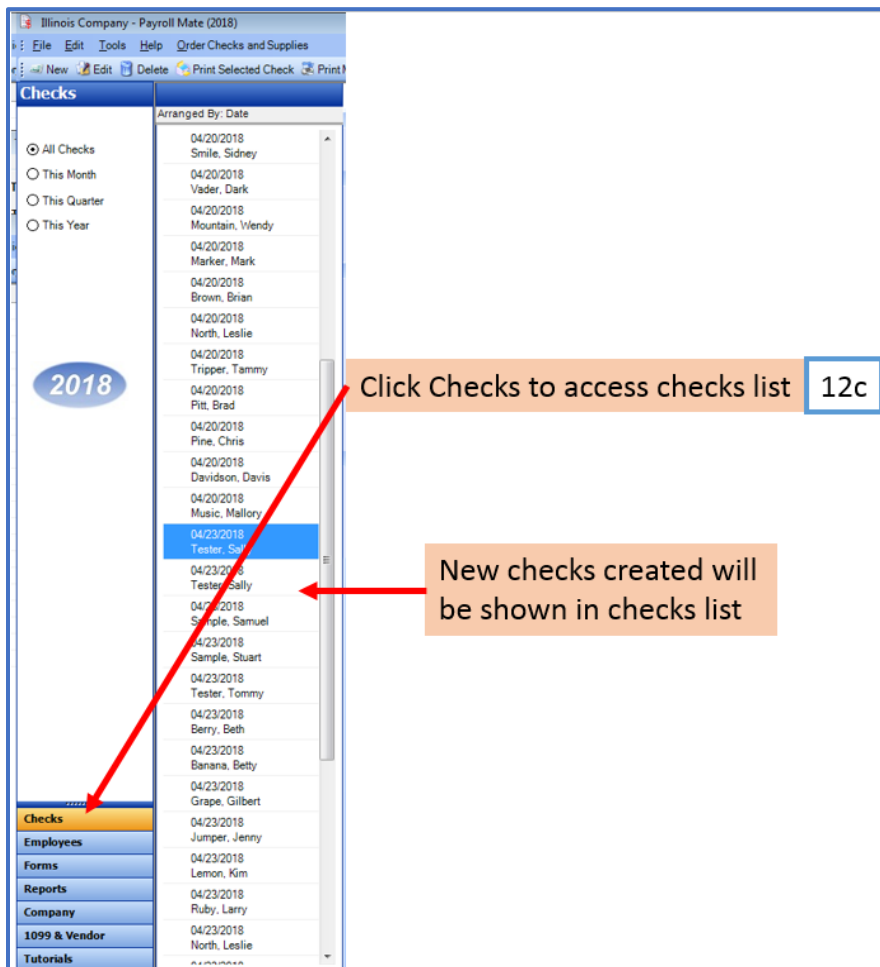
Note: Click Quit Creating Checks to cancel creating checks

12a. Once all the checks are created, the total number of checks created will be shown

12b. Click OK



12c. Click Checks from shortcuts to review checks created from the check list



15. If there are errors found when importing your CSV file, you will receive a message

16. Select Yes to continue the import

17. Select No to cancel the import

**If there are errors you will receive this message 15**

(1) The input file is expected to be in the CSV (Comma Separated) format.  
(2) The first row in the file is expected to include header information and NOT data.  
(3) The input file should not include more than one row per employee.  
(4) Any row that doesn't match an existing "Active" employee (in the currently open company) will NOT import.  
(5) Row Matching is done based on the employee's SSN OR the combination of the Employee's (First Name and Last Name).  
(6) You can't have multiple employees with the exact same name (first name and last name).  
(7) The number of hours should be in Decimal format. For example: enter 7.25 for 7 hours and 15 minutes.

Step (1) Click here to Load the Timesheet CSV file... Help Online ...

SSN	First Name	Last Name	Regular Hourly Pa	Overtime Hourly P	Training Hourly Pa
899-99-9999	Sally	Tester	32.22		
999-99-9999	Sally	Tester	30.00		
111-22-3333	Samuel	Sample	40.00		
123-22-3333	Stuart	Sample	42.00		
998-99-9999	Tommy	Tester	38.00		
456-78-9123	Bob	Boston	35.00		
321-56-9874	Beth	Berry	0.00		
474-47-4774	Betty	Banana	37.00		
525-55-5552	Gilbert	Grape	40.00		
898-99-8899	Jenny	Jumper	40.00		
123-12-3123	Kim	Lemon	32.00		
456-98-9874	Larry	Ruby	34.00	0.00	0.00
444-44-4444	Leslie	North	27.00	0.00	0.00
383-33-8888	Sidney	Smile	35.00	0.00	0.00
654-22-1111	Dark	Vader	40.00	0.00	0.00
420-20-2018	Wendy	Mountain	38.00	0.00	0.00
512-47-9999	Mark	Master	40.00	7.00	0.00
121-22-1212					
444-44-4444					
888-77-5555	Tammy	Tripper	40.00	6.00	0.00
777-88-4444	Brad	Pitt	40.00	5.00	0.00
654-66-5544	Chris	Pine	32.00	0.00	0.00
999-99-9999					

**Payroll Mate**  
The rows marked in red won't import properly as they don't match any of the Active employees in the currently opened company. Would you like to continue without importing these rows?  
Yes No

**Select Yes to Import without the rows with errors 16**

**Select No to cancel import 17**

Step (2) Click here to Import the Timesheet Entries into Payroll Mate

Close



17a. If No is selected, a message will show the employee(s) with errors. Click OK

Import Timesheet Data

(1) The input file is expected to be in the CSV (Comma Separated) format.  
(2) The first row in the file is expected to include header information and NOT data.  
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(4) Any row that doesn't match an existing "Active" employee (in the currently open company) will NOT import.

(5) Row Matching is done based on the employee's SSN OR the combination of the Employee's (First Name and Last Name).  
(6) You can select to match on first name and last name.  
(7) The number of hours for 7 hours.

Step (1) Click here to Load the Timesheet CSV file... Help Online ...

SSN	First Name
899-99-9999	Sally
999-99-9999	Sally
111-22-3333	Samuel
123-22-3333	Stuart
998-99-9999	Tommy
456-78-9123	Bob
321-56-9874	Beth
474-47-4774	Betty
525-55-5552	Gilbert
898-99-8899	Jenny
123-12-3123	Kim
456-98-9874	Larry
444-44-4444	Leslie
383-33-8888	Sidney
654-22-1111	Dark
420-20-2018	Wendy
512-47-9999	Mark
121-22-1212	Brian
444-44-4444	Leslie
888-77-5555	Tammy
777-88-4444	Brad
654-66-5544	Chris

Attention

The employees listed below don't match any of the active employees in this company:

[456-78-9123] Bob Boston

OK

Step (2) Click here to Import the Timesheet Entries into Payroll Mate

Close

17a

17b. Click Yes

(1) The input file is expected to be in the CSV (Comma Separated) format.

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(3) The input file should not include more than one row per employee.

(4) Any row that doesn't match an existing "Active" employee in the cu

(5) Row Matching is done based on the employee's SSN OR the combination of the Employee's (First Name and Last Name).

(6) You can't have multiple employees with the exact same name (first name and last name).

(7) The number of hours should be in Decimal format. For example: enter 7.25 for 7 hours and 15 minutes.

Payroll Mate

Are you sure you want to close this window before completing the import process?

Yes No

Click Yes 17b

SSN	First Name	Last Name	Hours	Rate	Training	Hourly Pa
456-78-9123	Bob	Boston	35.00	0.00	0.00	0.00
321-56-9874	Beth	Berry	0.00	3.00	20.00	0.00
474-47-4774	Betty	Banana	37.00	0.00	0.00	0.00
525-55-5552	Gilbert	Grape	40.00	1.00	0.00	0.00
898-99-8899	Jenny	Jumper	40.00	0.00	0.00	0.00
123-12-3123	Kim	Lemon	32.00	0.00	0.00	0.00
456-98-9874	Larry	Ruby	34.00	0.00	0.00	0.00
444-44-4444	Leslie	North	27.00	0.00	0.00	0.00
383-33-8888	Sidney	Smile	35.00	0.00	0.00	0.00
654-22-1111	Dark	Vader	40.00	0.00	0.00	0.00
420-20-2018	Wendy	Mountain	38.00	0.00	0.00	0.00
512-47-9999	Mark	Marker	40.00	7.00	0.00	0.00
121-22-1212	Brian	Brown	40.00	2.00	0.00	0.00
444-44-4444	Leslie	North	27.00	0.00	0.00	0.00
888-77-5555	Tammy	Tripper	40.00	6.00	0.00	0.00
777-88-4444	Brad	Pitt	40.00	5.00	0.00	0.00
654-66-5544	Chris	Pine	32.00	0.00	0.00	0.00
333-66-5555	Davis	Davidson	40.00	6.00	0.00	0.00
222-55-8888	Mallory	Music	40.00	0.00	0.00	0.00

Step (2) Click here to Import the Timesheet Entries into Payroll Mate

Close

### 17c. Click Close to close the import window

(1) The input file is expected to be in the CSV (Comma Separated) format.

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(4) Any row that doesn't match an existing "Active" employee (in the currently open company) will NOT import.

(5) Row Matching is done based on the employee's SSN OR the combination of the Employee's (First Name and Last Name).

(6) You can't have multiple employees with the exact same name (first name and last name).

(7) The number of hours should be in Decimal format. For example: enter 7.25 for 7 hours and 15 minutes.

Step (1) Click here to Load the Timesheet CSV file...    Help Online ...

SSN	First Name	Last Name	Regular Hourly Pa	Overtime Hourly P	Training Hourly Pa
899-99-9999	Sally	Tester	32.22	10.25	0.00
999-99-9999	Sally	Tester	30.00	4.00	0.00
111-22-3333	Samuel	Sample	40.00	0.00	0.00
123-22-3333	Stuart	Sample	42.00	8.00	0.00
998-99-9999	Tommy	Tester	38.00	0.00	0.00
456-78-9123	Bob	Boston	35.00	0.00	0.00
321-56-9874	Beth	Berry	0.00	3.00	20.00
474-47-4774	Betty	Banana	37.00	0.00	0.00
525-55-5552	Gilbert	Grape	40.00	1.00	0.00
898-99-8899	Jenny	Jumper	40.00	0.00	0.00
123-12-3123	Kim	Lemon	32.00	0.00	0.00
456-98-9874	Larry	Ruby	34.00	0.00	0.00
444-44-4444	Leslie	North	27.00	0.00	0.00
383-33-8888	Sidney	Smile	35.00	0.00	0.00
654-22-1111	Dark	Vader	40.00	0.00	0.00
420-20-2018	Wendy	Mountain	38.00	0.00	0.00
512-47-9999	Mark	Marker	40.00	7.00	0.00
121-22-1212	Brian	Brown	40.00	2.00	0.00
444-44-4444	Leslie	North	27.00	0.00	0.00
888-77-5555	Tammy	Tripper	40.00	6.00	0.00
777-88-4444	Brad	Pitt	40.00	5.00	0.00
654-66-5544	Chris	Pine	32.00	0.00	0.00

Step (2) Click here to Import the Timesheet Entries into Payroll Mate

Close

Click Close 17c

Note: Make corrections to your CSV file and attempt the import of the timesheet data again

### Things to consider

1. Any employee imported with a Valid SSN/Incorrect Name – Payroll Mate will create the check based on SSN of employee already inside Payroll Mate
2. Any employee imported with an Invalid SSN/Correct Name – Payroll Mate will create the check based on employee name already inside Payroll Mate
3. Duplicate employee listed in CSV – 2 paychecks will be created by Payroll Mate