How to Import Timesheet Data into Payroll Mate Using T-Sheets

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

To Export your data from T-Sheets:

Be sure the CSV file includes the following data: First Name, Last Name and Per Hour Income Categories. Custom income categories will need a column created 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).

1. Click More from menu

2. Select Payroll

3. Select Payroll Hrs Summary by Employee



4. Select Report Dates

5. Click Download CSV

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	We've simplified our menu. EXPLORE A PREVIEW
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6. Click Open

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7. Review Employees to import

Note: The name needs to be separated into 2 columns (Last Name & First Name) You can separate the names into 2 columns manually or follow steps 8-18 to have Excel separate them.

If you do not want to split the name each time you do the export from T-sheets you can add the employee SSN as the Payroll ID and map the SSN column inside Payroll Mate when you import (instead of mapping the first name/last name-leave columns as Unused during mapping).

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8. Right-click on the Column after Employee Name

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9. Click Insert to insert a blank column

10. Click the Data Tab

11. Select the column with the full name

12. Click Text to Columns

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13. Select Delimited

14. Click Next

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15. Select Comma

16. Click Next

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17. Review Data (remove any spaces in name)

18. Click Finish

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19. Other than the top Header row, delete any rows that do not include employee information

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Make sure you have the correct Company open inside Payroll Mate

21. Click Employees from Shortcuts



22. Click Import Timesheet Data

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



24. Double-click to Select the Timesheet CSV file

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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.

25. Click OK

(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. Step (1) Click here to Load the Timesheet CSV file					 (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. 						
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26. Map each column

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

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27. Click Step (2) to Import the Timesheet Entries

28. 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

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.)

 The first row in the fill The input file should in 	Check Details Pay Frequency: Weekly (52 Pay Periods)	ame (first name
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Note: Click Create Check and Go to Next Employee to create this paycheck Note: Click Skip Employee to skip this employee and not create a paycheck Note: Click Quit Creating Checks to cancel creating checks

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