



How to integrate reconciled ticket data from TruckIT to QuickBooks for easy and accurate invoicing

QuickBooks
Online Version



QuickBooks ONLINE Subscribers

Before importing ticket data files, "HAULING" needs to be created in QuickBooks as a "Product or Service"

NOTE: *This only needs to be created before you import your first file*





Products and Services More ▾ New ▾

[All Lists](#)

Find products and services Filter ▾

Print Upload Settings

Previous 1-2 Next

<input type="checkbox"/>	NAME ▲	SKU	TYPE	SALES DESCRIPTION	SALES PRICE	COST	ACTION
<input type="checkbox"/>	 Hauling		Service	Hauling			Edit ▾
<input type="checkbox"/>	 Sales		Service				Edit ▾

Previous 1-2 Next

QuickBooks Online

.GIF Tutorial

The screenshot displays the QuickBooks Online interface. At the top, there is a navigation bar with tabs for 'Tickets', 'Truck Activity', and 'Reporting'. Below the navigation bar, there is a date range selector showing '01/02/2022' to '02/17/2022' and a search bar with the placeholder text 'Type to search...'. The main content area is titled 'Summary by Material' and contains a table with the following data:

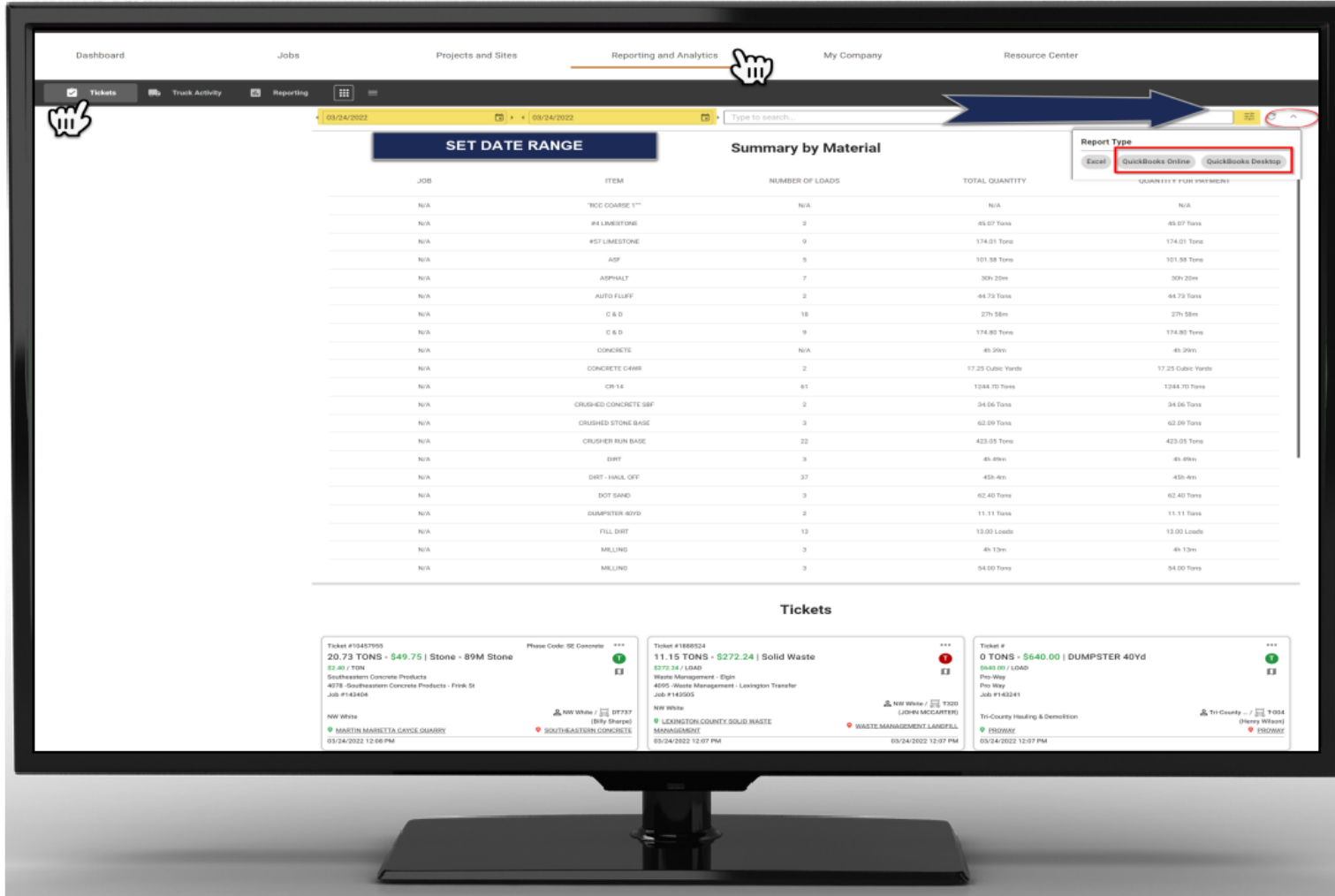
JOB	ITEM	NUMBER OF LOADS	TOTAL QUANTITY	QUANTITY FOR PAYMENT
87452	# 4 STONE	7	45.00 Tons	45.00 Tons
N/A	810 FILL SCREENINGS	1	5.00 Tons	5.00 Tons
87452	DEMO - ASPHALT	3	30.00 Tons	30.00 Tons

Below the table, there is a section titled 'Tickets' which displays three ticket cards:

- Ticket #85klj: 12 TONS - \$240.00 (Status: M)
- Ticket #7648: 5 TONS - \$100.00 (Status: T)
- Ticket #462: 9 TONS - \$180.00 (Status: A)

BEGIN Exporting to QuickBooks:

TruckIT Portal > Reporting & Analytics Tab > Tickets Page



1

Set parameters for the ticket data to export using filters and calendar date range

2

Select the preferred QuickBooks download format from report types:

- A. QuickBooks Online
- B. QuickBooks Desktop

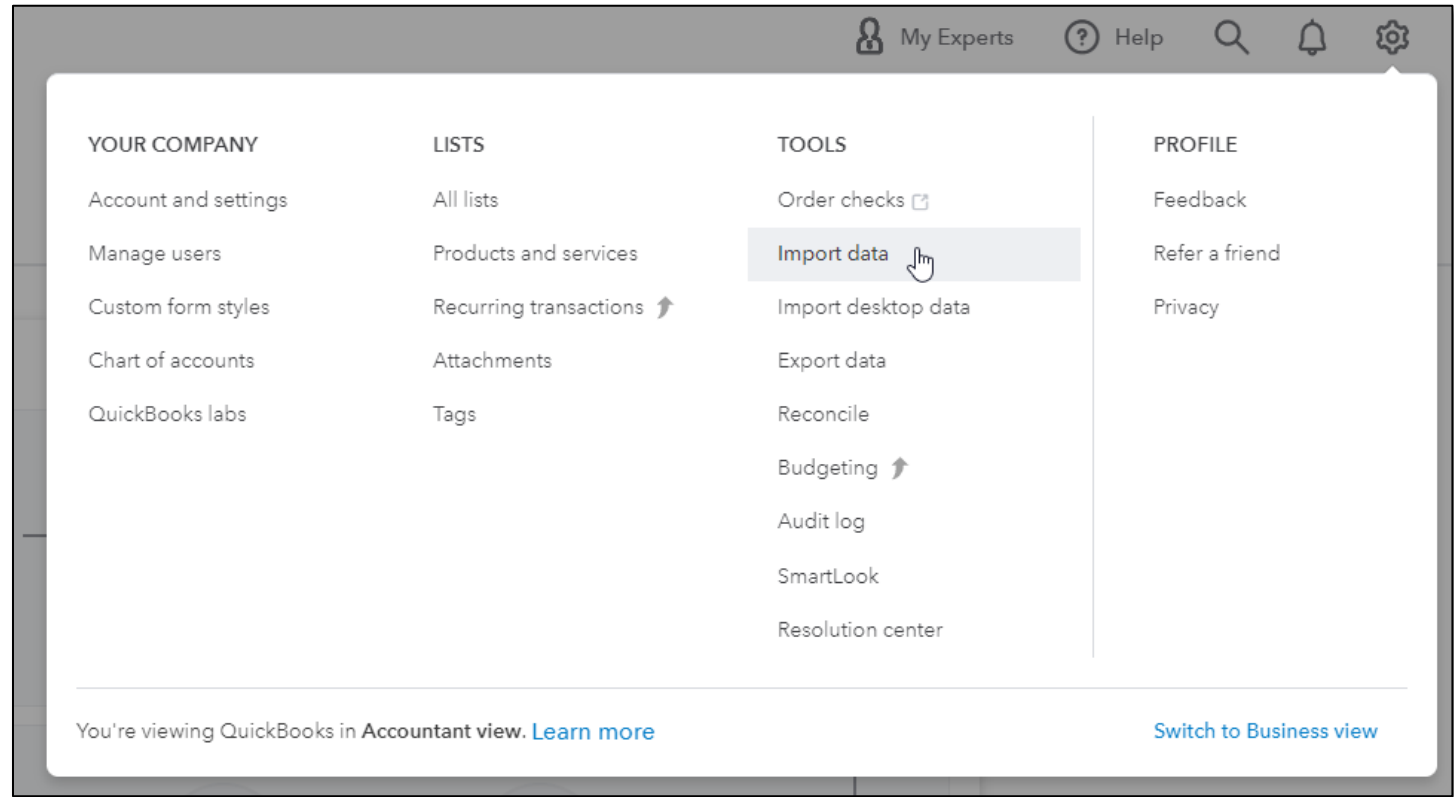
3

Downloading the file will prompt you to name and save the report

NOTE: Only reconciled tickets will be included the download

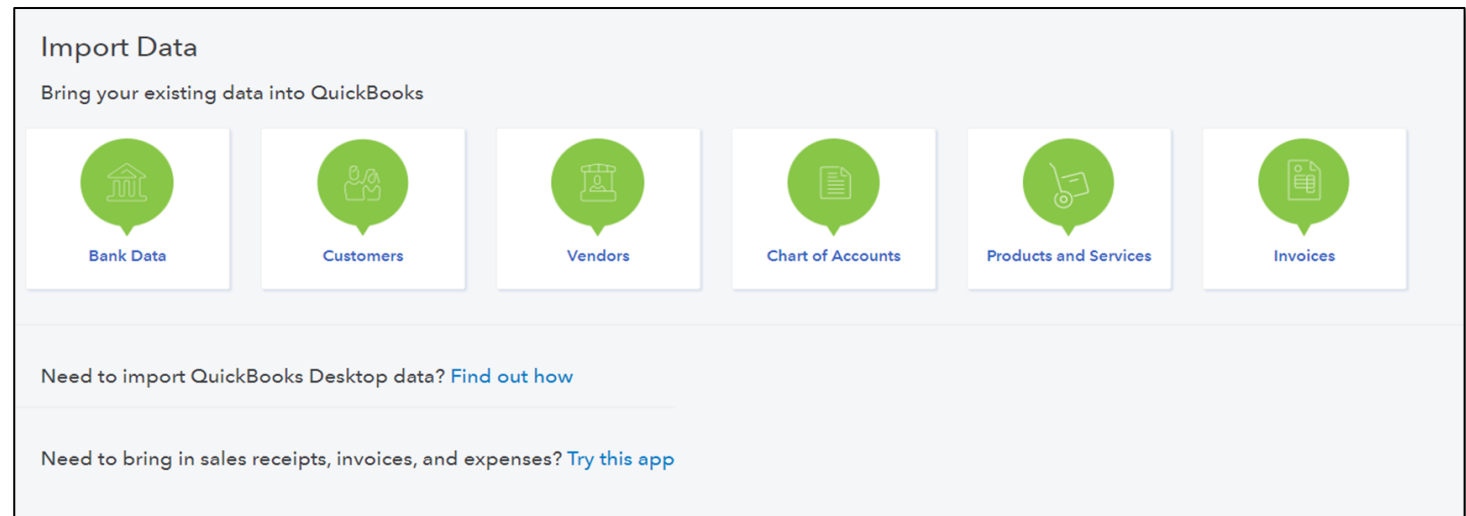
STEP 1:

GO TO Settings > **SELECT** Import data



STEP 2:

SELECT Invoices



STEP 3:

SELECT file & check

"Add new customers to QuickBooks"

NOTE:

CHECK add new customers for NEW customer's that do not already exist, so they are automatically created.


CREATING invoices for customers that have not been added to QuickBooks will receive an error notification.

1 Upload

2 Map Fields

3 Import

First time importing invoices?

 Learn how to set up your CSV file
[Download import guide](#)

- Start with a template. [Download sample CSV](#)
- Before you upload, add new products and services to QuickBooks.
- Your CSV can't have more than 1000 rows, but you can upload multiple CSV files.

Upload your CSV file

quick_book_report_20

Add new customers to QuickBooks.

STEP 4:

ACCEPT default mappings.

This will map the column files to fields in QuickBooks.

CLICK Next

The screenshot shows the 'Map your column headings' step. On the left, a progress indicator shows three steps: 'Upload' (1), 'Map Fields' (2, highlighted in green), and 'Import' (3). The main content area is titled 'Map your column headings' and includes the instruction: 'Review and map the column headers in your CSV file with the QuickBooks fields. Required fields are marked an asterisk (*).' Below this is a table with two columns: 'QUICKBOOKS FIELDS' and 'CSV COLUMN HEADERS'. Each row contains a QuickBooks field name, a dropdown menu for the CSV header, and a green checkmark icon. The 'Invoice Date' row also includes a date format dropdown set to 'M/D/YYYY'. At the bottom, there are 'Previous' and 'Next' buttons, with 'Next' being highlighted in green.

QUICKBOOKS FIELDS	CSV COLUMN HEADERS
* Invoice No	*InvoiceNo ✓
* Customer	*Customer ✓
* Invoice Date	*InvoiceDate ✓ M/D/YYYY
* Due Date	*DueDate ✓
Terms	Terms ✓
Service Date	Service Date ✓
Item (Product/Service)	Item(Product/... ✓
Item Description	ItemDescription ✓
Item Quantity	ItemQuantity ✓
Item Rate	ItemRate ✓
* Item Amount	*ItemAmount ✓
Memo	Memo ✓
Email	Select... ✓

STEP 5:

CLICK Complete Import

The screenshot shows the 'You're good to go' step. On the left, a progress indicator shows three steps: 'Upload' (1), 'Map Fields' (2), and 'Import' (3, highlighted in green). The main content area is titled 'You're good to go' and contains two informational messages in blue boxes: '1 new invoice will be imported.' and '1 new customer was found..' with a sub-bullet 'Jeff Test Customer'. At the bottom, there are 'Previous' and 'Complete import' buttons, with 'Complete import' being highlighted in green and circled in red.

TruckIT

Systems
Integrations



Business Systems Integration



More Ways to Integrate



Download CSV/Excel Files

Download Job and Ticket Data to upload to your back-office systems



Use our API's

Use API endpoints for a feature as soon as it launches. Features on TruckIT are available as an API because they're used internally first.



Custom Integrations

TruckIT in-house teams have built integrations with ERP systems, including Command Alkon's Apex. We also can integrate with multiple financial backend systems. (Quickbooks Online).



Import Jobs

TruckIT can work with your teams to automatically create, manage, and dispatch long running jobs using popular takeoff and estimate construction software.