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

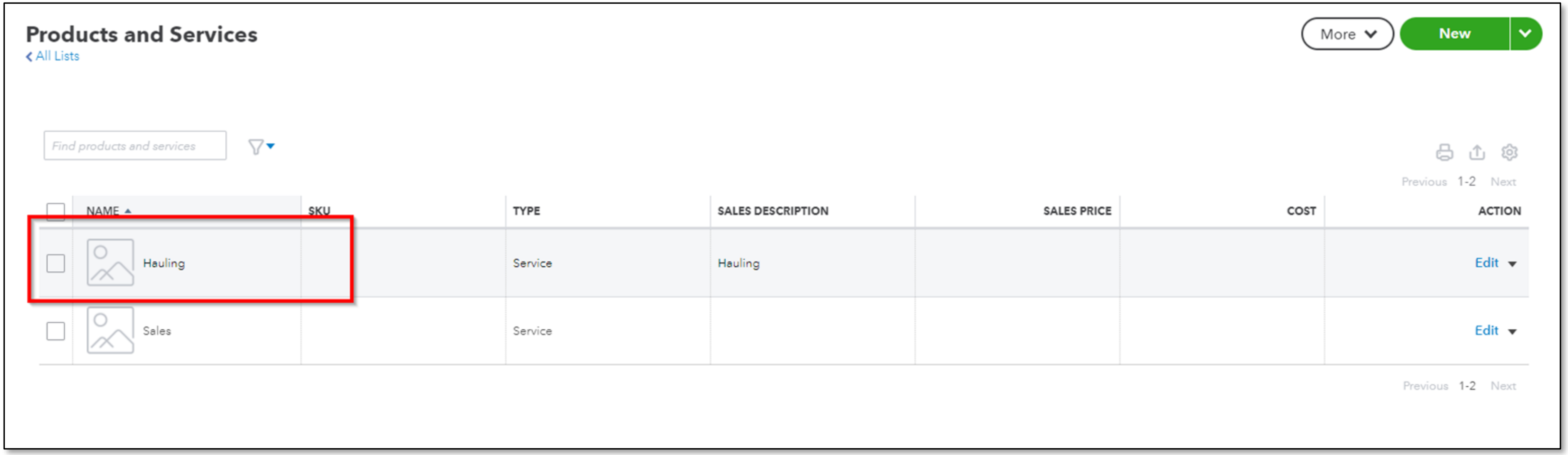
QuickBooks
Online Version

QuickBooks **ONLINE** Subscribers

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

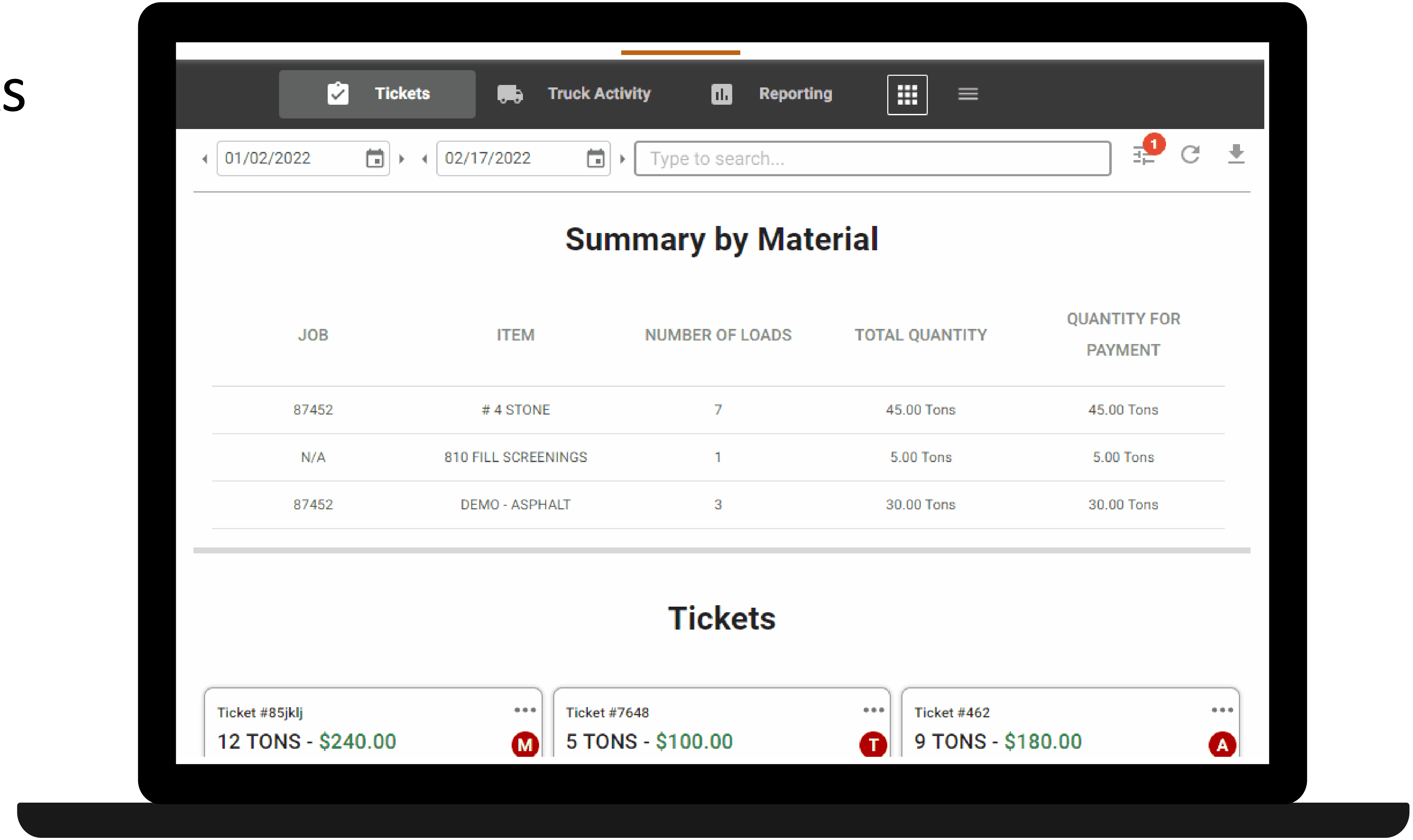
NOTE: ***This only needs to be created before you import your first file***

intuit quickbooks.



QuickBooks Online

.GIF Tutorial


Tickets Truck Activity Reporting

01/02/2022 02/17/2022 Type to search...

Summary by Material

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

Tickets

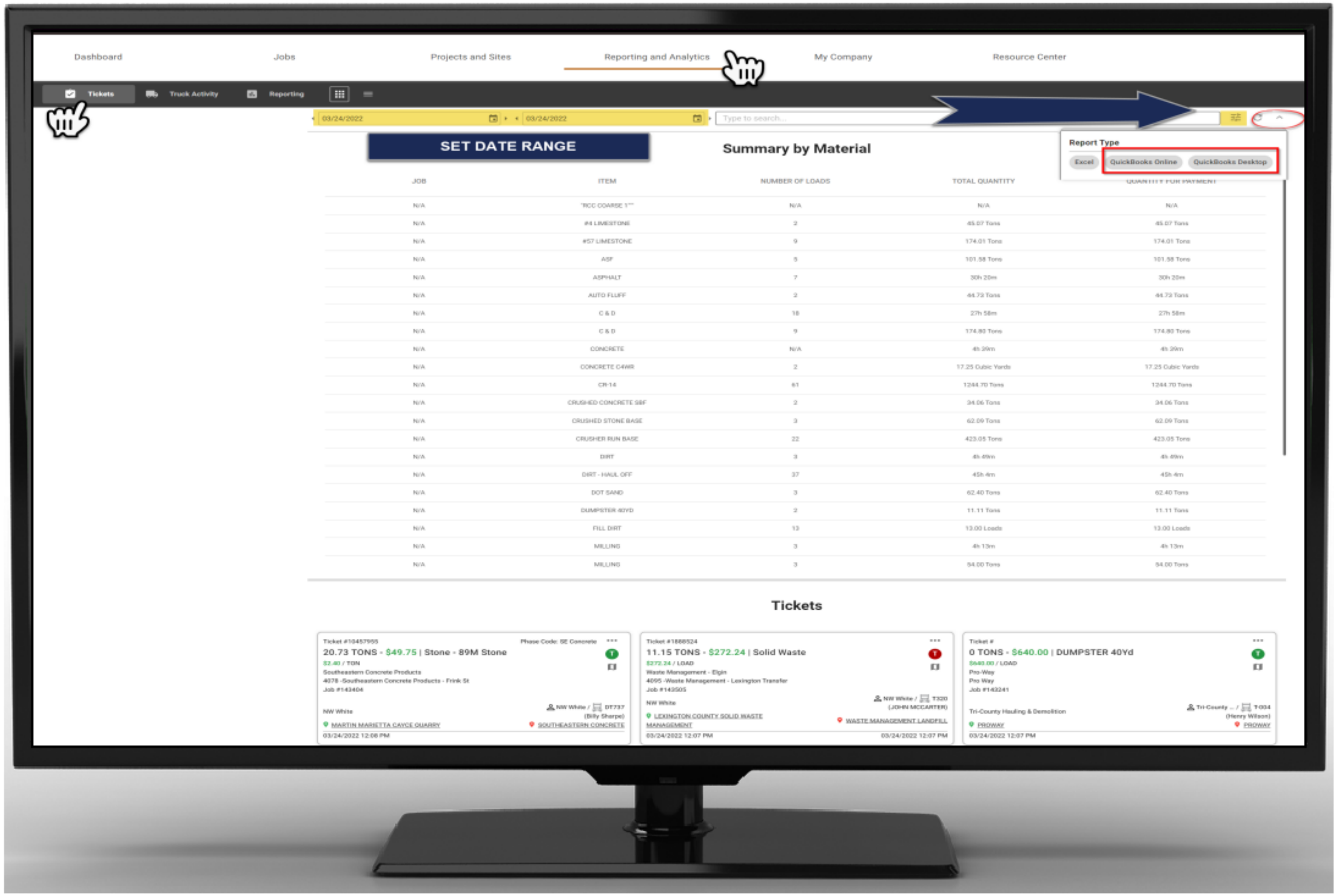
Ticket #85jklj
12 TONS - $240.00

Ticket #7648
5 TONS - $100.00

Ticket #462
9 TONS - $180.00

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:

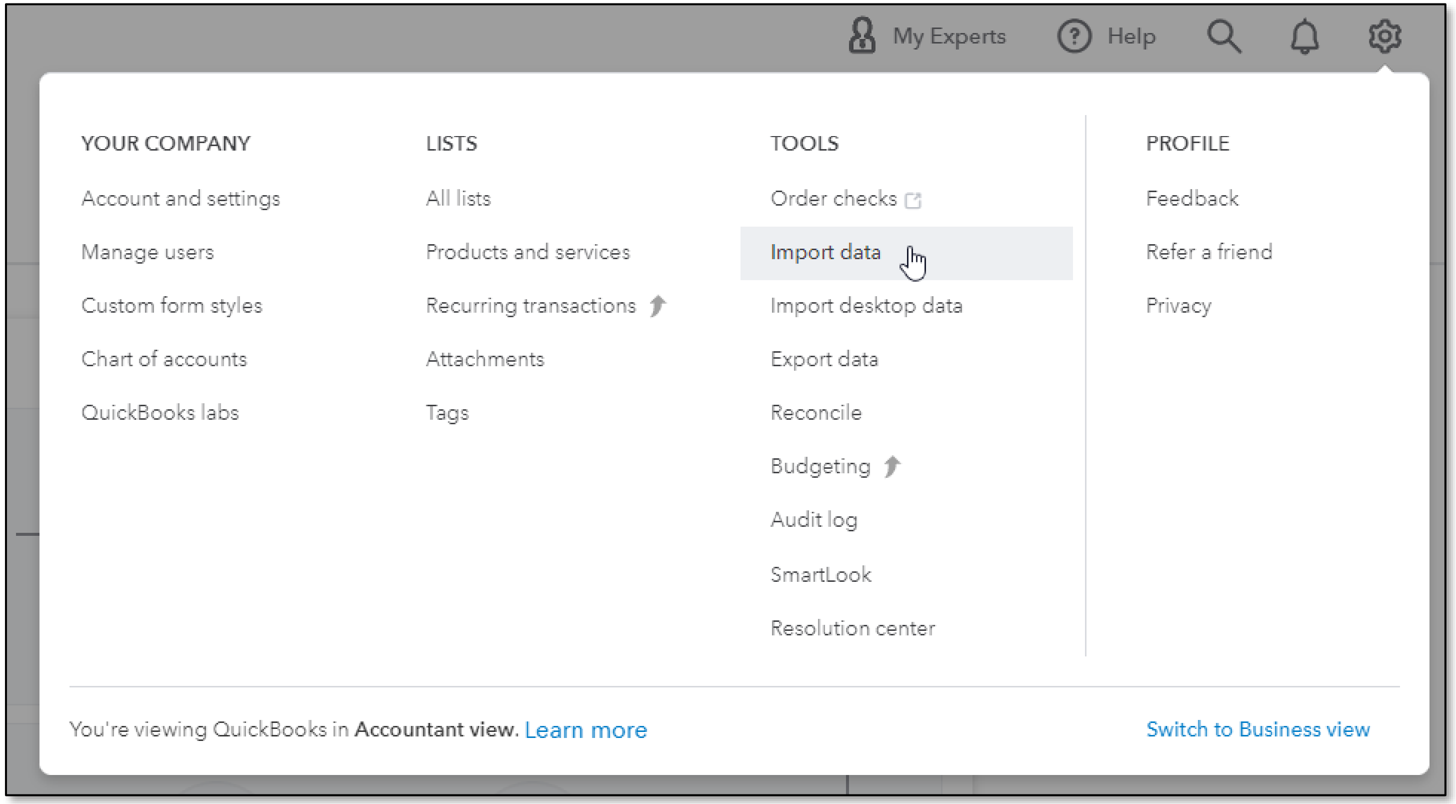
A. QuickBooks Online
B. QuickBooks Desktop

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

NOTE: Only reconciled tickets will be included the download

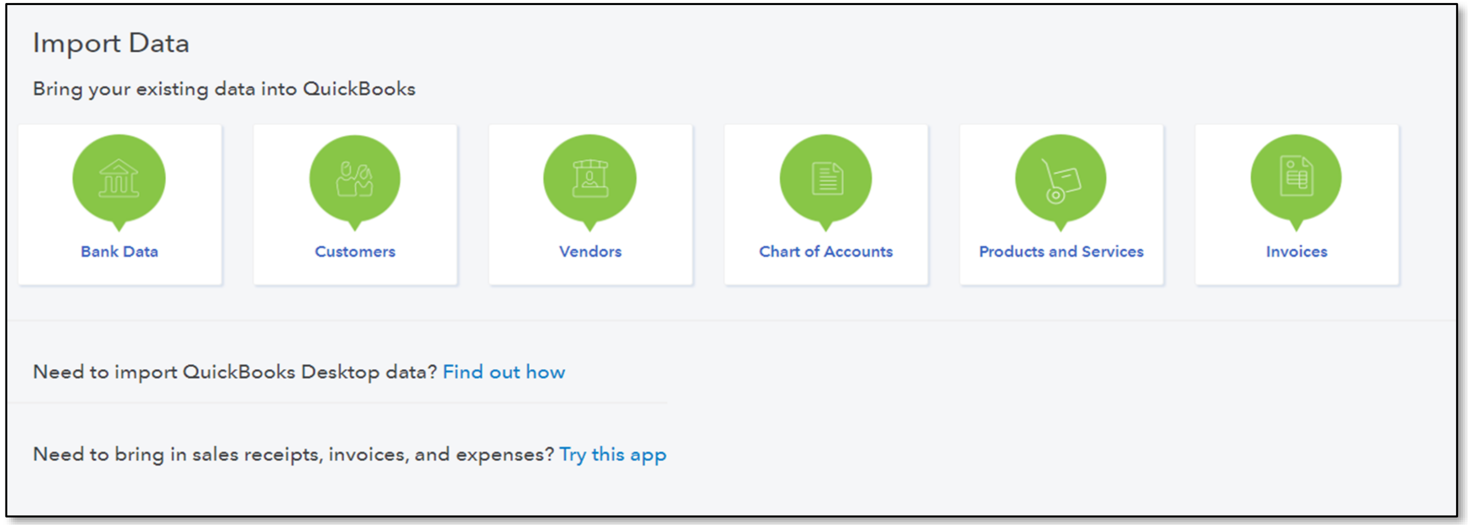
STEP 1:

GO TO Settings > **SELECT** Import data



STEP 2:

SELECT Invoices



STEP 3:

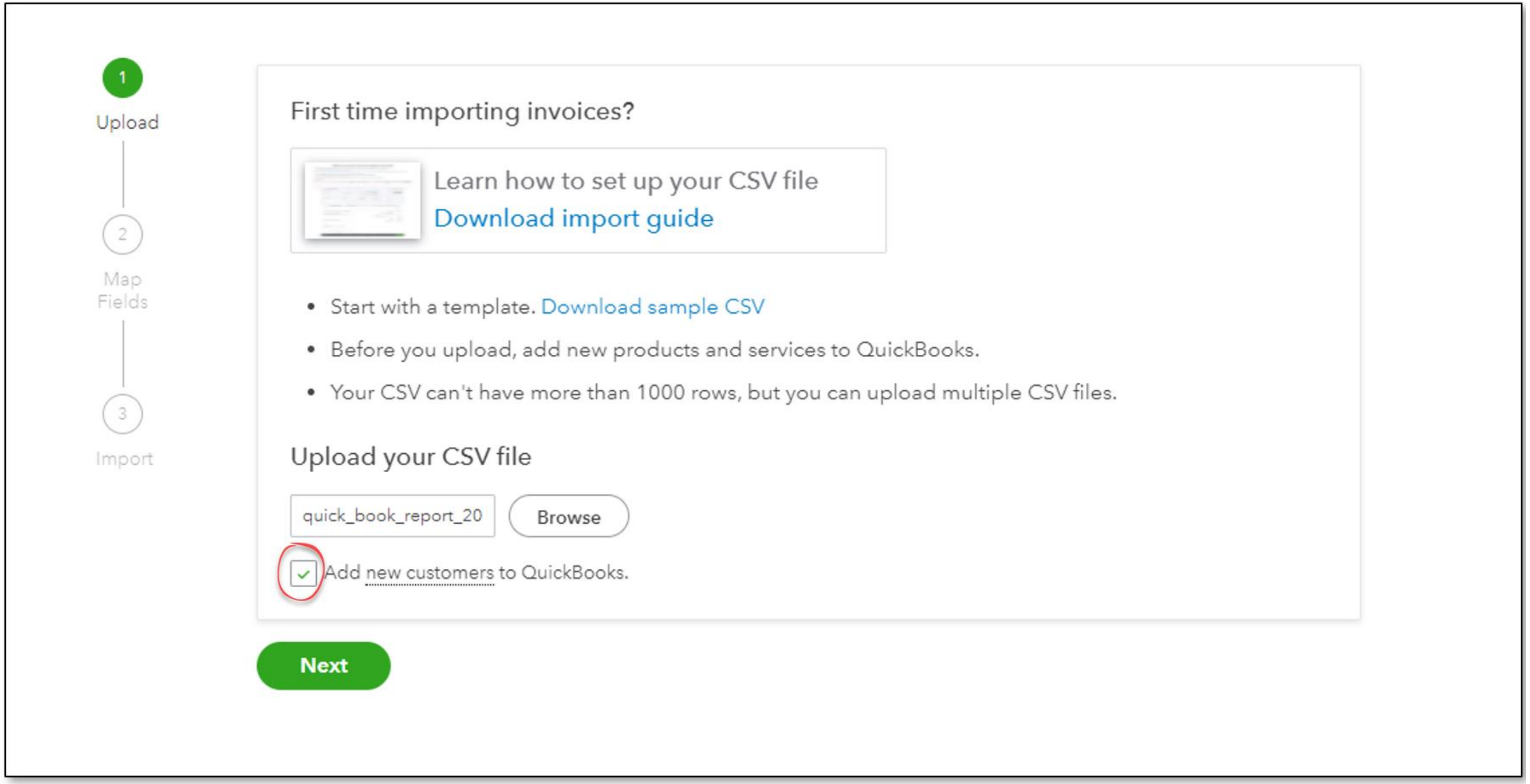
SELECT file & check

"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.

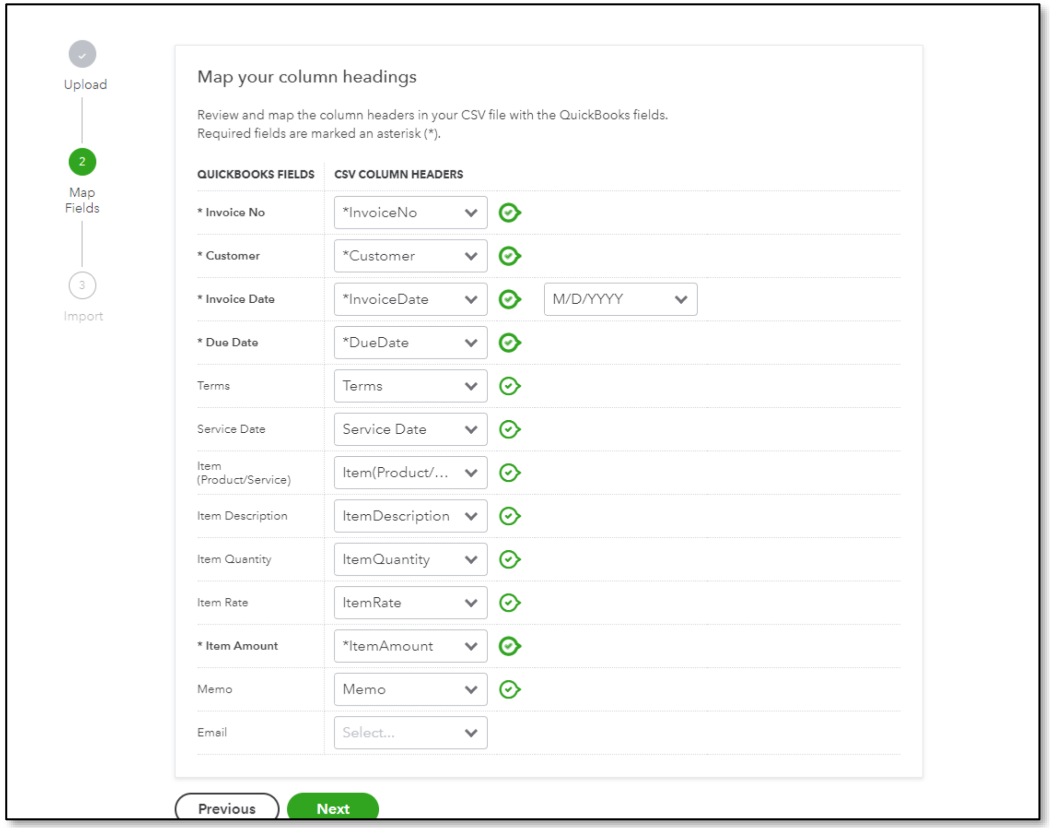


STEP 4:

ACCEPT default mappings.

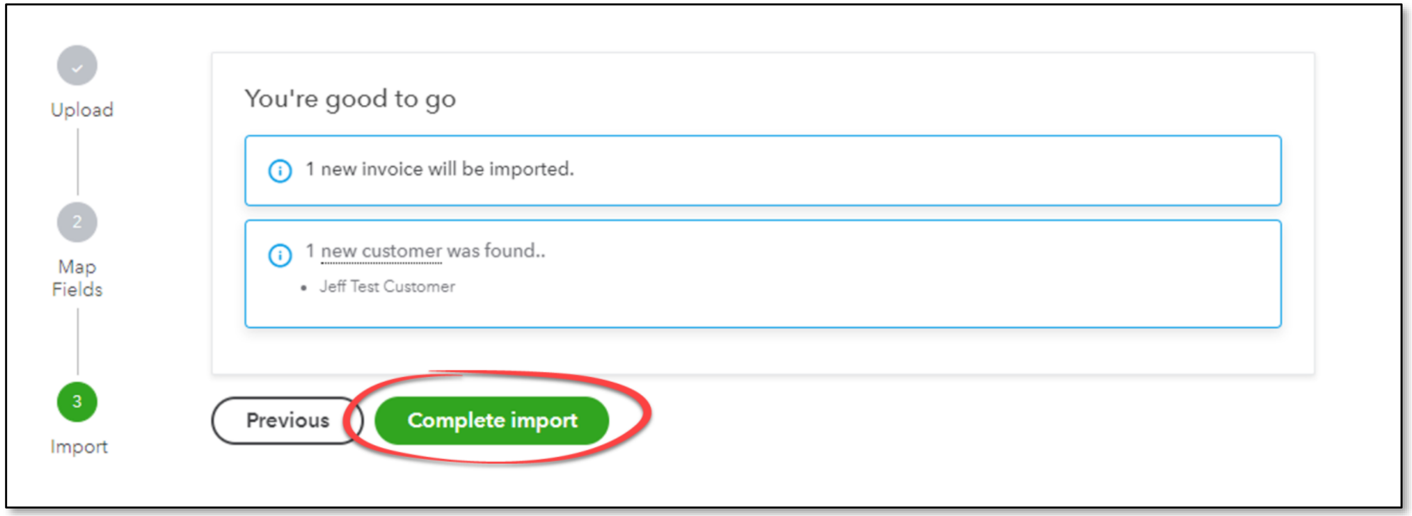
This will map the column files to fields in QuickBooks.

CLICK Next



STEP 5:

CLICK Complete Import



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.