



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

## **QuickBooks** Desktop Version

## QuickBooks **DESKTOP** Subscribers

## Set your QuickBooks account names in the TruckIT Portal

### STEP 1:

QuickBooks: Chart of Accounts > Identify and confirm NAME of Accounts Receivable and Income account TYPE

### **STEP 2:**

TruckIT Portal: My Company > Settings > General > QuickBooks > Add Receivables Account NAME & Revenue Account NAME > CLICK Save





	Chart of Accounts	_ 🗆 ×
Look for account name or number Search	Re <u>s</u> et	
<ul> <li>AR</li> <li>◆ araccount</li> </ul>	Accounts Receivable Accounts Receivable	5,343.60
♦ Driver Advances	Other Current Asset	0.00
Prepaid Insurance     Accumulated Depreciation	Other Current Asset Fixed Asset	0.00
<ul> <li>Furniture and Equipment</li> </ul>	Fixed Asset	0.00
Payroll Liabilities	Fixed Asset Other Current Liability	0.00
Opening Balance Equity	Equity	0.00
<ul> <li>Owners Draw</li> <li>Owners Equity</li> </ul>	Equity	0.00
Fuel Surcharge     Cross Trusking Income	Income	
Income	Income	
♦ incomeaccount	Income	
Fuel for Hired Vehicles     Travel Expenses for Drivers	Cost of Goods Sold Cost of Goods Sold	

## **BEGIN** Exporting Ticket Data to QuickBooks:

TruckIT Portal > Reporting & Analytics Tab > Tickets Page

Name       Department       Department       Department       Department         1<	2 Tiekets 🗰 Truck Activity 🖾 Repe	orting III =			<u> </u>				
1     10     100 (1000)     1000 (1000)     1000 (1000)       10     1000 (1000)     1000 (1000)     1000 (1000)     1000 (1000)       10     1000 (1000)     1000 (1000)     1000 (1000)     1000 (1000)       10     1000 (1000)     1000 (1000)     1000 (1000)     1000 (1000)       10     1000 (1000)     1000 (1000)     1000 (1000)     1000 (1000)       10     1000 (1000)     1000 (1000)     1000 (1000)     1000 (1000)       10     1000 (1000)     1000 (1000)     1000 (1000)     1000 (1000)       10     1000 (1000)     1000 (1000)     1000 (1000)     1000 (1000)       10     1000 (1000)     1000 (1000)     1000 (1000)     1000 (1000)       10     1000 (1000)     1000 (1000)     1000 (1000)     1000 (1000)       10     1000 (1000)     1000 (1000)     1000 (1000)     1000 (1000)       10     1000 (1000)     1000 (1000)     1000 (1000)     1000 (1000)       10     1000 (1000)     1000 (1000)     1000 (1000)     1000 (1000)       10     1000 (1000)     1000 (1000)     1000 (1000)     1000 (1000)       10     1000 (1000)     1000 (1000)     1000 (1000)     1000 (1000)       10     1000 (1000)     1000 (1000)     1000 (100	9		SET DATE RANGE	Summary by M	aterial	Report Type  Even  OuickBooks Online  OuickBooks Design			
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		N/A	JECE COVERE 1	N/A	N/A	N/A			
		N/A	P4 LIVESTONE	2	45.07 Tons	45.07 Tons			
64       67       6       1010°       1010°         64       4010°       7       5010°       5010°         64       4010°       6       4010°       500°       5010°         64       600°       600°       600°       600°       600°       600°         64       600°       600°       600°       600°       600°       600°       600°         64       600°		N/A	#57 LIMESTONE	9	174.01 Tons	174.01 Tons			
NA       APPA (1)       7       SD 20       SD 20         NA       AD 10 AD       3       AD 20       AD 20       AD 20         NA       CD 20       SD 20       SD 20       SD 20       SD 20         NA       CD 20       SD 20       SD 20       SD 20       SD 20       SD 20         NA       CD 20       SD		N/A	ASF	5	101.58 Tons	101.58 Tores			
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NA       648       9       0.06       0		N/A	AUTO FLUFF	2	44.72 Tons	44.72 Tans			
NACBPCRANECRANENACOMETT COMNAA ShaA CRANENACAMETT COM2CRANECRANENACAMETT COM2 </td <td></td> <td>N/A.</td> <td>CAD</td> <td>10</td> <td>27h 58m</td> <td>27h 58m</td>		N/A.	CAD	10	27h 58m	27h 58m			
NA     CORRET     NA     CARDAT     <		N/A	CSD	9	174.80 Tons	174.80 Tons			
NA     Oxfered     2     Oxfered     12     Oxfered     12       NA     Oxfered     3     Oxfered     12     Oxfered     12       NA     Oxfered     12     Oxfered     12     Oxfered     12       NA     Oxfered     12     Oxfered     12     Oxfered     12       NA     Oxfered     12     Oxfered     0     Oxfered       NA     Oxfered     13     Oxfered     0     0       NA     Oxfered     13     Oxfered     0     0       NA     Oxfered     State     State     State     State       No     Oxfered     State     State     State     Sta		N/A	CONCRETE	N/A.	4h.29m	4h 29m			
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NA       OLGADO CONSTITUTION       2       Alterian       Alterian         NA       OLGADO CONSTITUTION       3       Alterian       Alterian         NA       OLGADO CONSTITUTION       Alterian       Alterian       Alterian         NA       OLGADO CONSTITUTION       Alterian       Alterian       Alterian         NA       MLIAND       3       Alterian       Alterian         NA       MLIAND       3       Alterian       Alterian         NA       MLIAND       3       Alterian       Alterian         NA       MLIAND       Alterian       Alterian       Alterian         NA       MLIAND       Alterian       Alterian       Alterian         <		N/A	CR-14	61	1244.70 Tons	1244.70 Tons			
NA       OLDARED TOTAL MARE       3       64.00 Tank       64.00 Tank         NA       OLDARED TOTAL MARK       2       64.00 Tank       64.00 Tank         NA       DET TANK       3       64.00 Tank       64.00 Tank         NA       DET TANK       3       64.00 Tank       64.00 Tank         NA       DET TANK       64.00 Tank       64.00 Tank       64.00 Tank         NA       DET TANK       64.00 Tank       64.00 Tank       64.00 Tank         NA       NA.000       3       64.00 Tank       64.00 Tank         NA       NA.000       5       64.00 Tank       64.00 Tank         NA       NA.000       5       64.00 Tank       64.00 Tank         NA.000       5       50.000		N/A.	CRUSHED CONCRETE :	18F 2	34.06 Tons	34.06 Tana			
NA     CRUMENTING     2     420 Trem     420 Trem     420 Trem       NA     CRUMENTING     3     4000     4000       NA     CRUMENTING     3     4000     1001 Leads       NA     CRUMENTING     3     4000     1001 Leads       NA     CRUMENTING     3     4000     4000       NA     CRUMENTING     3     4000     4000       NA     CRUMENTING     4000     3     4000     4000       NA     CRUMENTING     5     4000     4000     4000       NA     CRUMENTING     5     5000 Leads     4000     4000       NA     CRUMENTING     5     5000 Leads     4000     4000       NA     CRUMENTING     5     5000 Leads     4000     5     5000 Leads       NA     CRUMENTING     5     5000 Leads     5000 Leads     5     5000 Leads     5       NA     CRUMENTING     5     5000 Leads     5     5     5     5     5       SOUTONS - 5400.75 1 Stone - 59MS		N/A	ORUSHED STONE BAS	6 a	62.00 Tons	62.09 Tona			
NA     urr     i     i.e.m     i.e.m     i.e.m     i.e.m     i.e.m     i.e.m     i.e.m       NA     OFF-INGLOW     i.e.m     i.e.m     i.e.m     i.e.m     i.e.m       NA     OLDER     i.e.m     i.e.m     i.e.m     i.e.m       NA     I.e.m     i.e.m		N/A	CRUSHER RUN BASE	22	423.05 Tone	423.05 Tore			
NA     087 - NAL OFF     27     40.4m     40.4m       NA     0015400     3     40.4m     60       NA     000497184700     3     10.0100     10.0100       NA     000497184700     3     0.01000     10.0100       NA     MLINT     3     0.01000     0.0001000       NA     MLINT     3     0.01000     0.0001000       NA     MLINT     3     0.01000     0.0001000       NA     MLINT     3     0.0001000     0.0001000       NA     MLINT     3     0.00010000     0.00010000       NA     MLINT     3     0.000100000000000000000000000000000000		N/A	DIRT	3	4h-49m	45.4900			
NA       101 500       3       62.00 1000       62.00 1000         NA       RL DAT       3       11.11 Das cant       10.00 1000         NA       RL DAT       3       4.10 100       10.00 1000         NA       RL DAT       3       4.10 100       41.10 100         NA       ML DAT       3       4.10 100       41.10 100         NA       ML DAT       3       0.00 1000       90.00 1000         Statistical restricture       10.00 1000       90.00 1000       90.00 1000       90.00 1000         Statistical restrical restrical restricture       10.00 10000000		N/A.	DIRT - HAUL OFF	37	45h-Am	45h-4m			
NA         Dubrities darbs         2         11.11 faust         11.11 faust           NA         NLL DMT         13         13.01 Leddt		N/A.	DOT SAND	3	62.40 Tons	62.40 Tons			
NA     NL DAT     10     1.0.0 Lamb     1.0.0 Lamb     1.0.0 Lamb       NA     MLUM0     3     4.0.m     4.0.m       Tables #364.07005     Funce Color Of Concernet     This     This     This       State #364.07005     Funce Color Of Concernet     This     This     This       State #364.07005     Funce Color Of Concernet     This     This     This       No     Max     This     This     This     This       No     Max     This     This     This     This       No     Max     Max     This     This     This       No     Max     Max     This     This     This       No     Max     Max     This     This     This       Max     Max     Max     Max     Max     Max       Max     Max     Max     Max     Max     Max       Max     Max		N/A	DUMPSTER 40YD	2	11.11 Tons	11.11 Tons			
NA     MLIMB     3     Alton     Alton       NA     MLIMB     3     Alton     Alton       NA     MLIMB     3     Stores     Stores		N/A	FILL DIRT	13	13.00 Loads	13.00 Londs			
NA     NLIME     3     Statema     Statema       Ticket #19457405		N/A	MELING	3	4h13m	4h 13m			
Ticket #194571000       Ticket #194571000       Ticket #19457200         Total # #194571000       Four # 1000000       Four # 10000000       Four # 100000000       Four # 10000000       Four # 10000000       Four # 100000000       Four # 10000000       Four # 100000000       Four # 10000000       Four # 100000000       Four # 1000000000       Four # 100000000000000000000000000000000000		N/A.	MILUNG	3	54.00 Torra	64.00 Tons			
Tasket #134/37000     Phones Cole: 05 Conscrete     Transie #124/37000     Transie #1       20.73 TONS - \$62.75   Stone - 89M Stone Start Tom     Image: Start Tom     Image: Start Tom     Image: Start Tom       Start Tom     Schenberstein Constret Products - Price 5 - 30 #1424/dk     Image: Start Tom     Image: Start Tom       NW Write:     Start Tom     Image: Start Tom     Image: Start Tom     Image: Start Tom       NW Write:     Start Tom     Image: Start Tom     Image: Start Tom     Image: Start Tom       NW Write:     Start Tom     Image: Start Tom     Image: Start Tom     Image: Start Tom       NW Write:     Start Tom     Image: Start Tom     Image: Start Tom     Image: Start Tom       NW Write:     Start Tom     Image: Start Tom     Image: Start Tom     Image: Start Tom       NW Write:     Start Tom     Image: Start Tom     Image: Start Tom     Image: Start Tom       NW Write:     Start Tom     Start Tom     Image: Start Tom     Image: Start Tom       Start Tom     Start Tom     Start Tom     Start Tom     Image: Start Tom     Image: Start Tom       Start Tom     Start Tom     Start Tom     Start Tom     Start Tom     Image: Start Tom       Start Tom     Start Tom     Start Tom     Start Tom     Image: Start Tom     Image: Start Tom       Start Tom		Tickets							
Image: Second		Ticket #10457505 20.73 TONS - \$49.75   Stor 53.40 / TON Southeastern Concrete Products 4978-Southeastern Concrete Products Jub #145	Phase Code: DE Contempo e - 89M Stone	Ticket #1888524 11.15 TONS - \$272.24   Solid Waste E273.24 (JAO Waste Management - Epin 450- Maste Management - Lexington Transfer Job #14505 NW White		0   DUMPSTER 40Vd			
		MARTIN MARIETTA CAYCE QUARRY     03/24/2022 12:00 PM	(Billy Sharpe) SOUTHEASTERN CONCRETE	LEXINGTON COUNTY SOLID INASTE     MANAGEMENT     03/24/2022 12:07 PM	• WASTE MANAGEMENT LANDFILL         • Endowing         • Endowing	(herry Wilson) ♥ PROWAY			

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

Select the preferred QuickBooks download format from report types:

A. QuickBooks Online

3

B. QuickBooks Desktop

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

**NOTE:** Only reconciled tickets will be included the download

## QuickBooks Desktop START: File>Utilities>Import>IIF Files

**SELECT** the downloaded ticket data file from TruckIT and **IMPORT** the report **CONFIRM** file import to generate invoice



# TruckIT

# Systems Integrations

## **Business Systems Integration**





ORACLE

**NET**SUITE





## 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.

