



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



NAME	TYPE	BALANCE TOTAL	ATTACH
AR	Accounts Receivable	5,343.60	
araccount	Accounts Receivable	21.00	
Driver Advances	Other Current Asset	0.00	
Prepaid Insurance	Other Current Asset	0.00	
Accumulated Depreciation	Fixed Asset	0.00	
Furniture and Equipment	Fixed Asset	0.00	
Tractors and Trailers	Fixed Asset	0.00	
Payroll Liabilities	Other Current Liability	0.00	
Opening Balance Equity	Equity	0.00	
Owners Draw	Equity	0.00	
Owners Equity	Equity		
Fuel Surcharge	Income		
Gross Trucking Income	Income		
Income	Income		
incomeaccount	Income		
Fuel for Hired Vehicles	Cost of Goods Sold		
Travel Expenses for Drivers	Cost of Goods Sold		

My Fleet My Team IoT Devices Settings

General [checked]

Jobs Settings

Notifications

Customers

Haulers

Payloads

Truck Types

General Data

Company Name: Jeff Hauler

Address: 33 Bond Street, Brooklyn, NY, USA

Payload Measurement: Imperial (Tons)

Working Day Duration: 12

Quickbooks

Receivable Account: ar

Revenue Account: income

BEGIN Exporting Ticket Data to QuickBooks:

TruckIT Portal > Reporting & Analytics Tab > Tickets Page

Dashboard Jobs Projects and Sites Reporting and Analytics My Company Resource Center

Tickets Truck Activity Reporting

03/24/2022 03/24/2022 Type to search.

SET DATE RANGE

Summary by Material

Report Type
Excel QuickBooks Online QuickBooks Desktop

JOB	ITEM	NUMBER OF LOADS	TOTAL QUANTITY
N/A	"ICE COURSE 1"	N/A	N/A
N/A	#1 LIMESTONE	2	45.07 Tons
N/A	#57 LIMESTONE	9	174.01 Tons
N/A	ASF	5	101.58 Tons
N/A	ASPHALT	7	30h 20m
N/A	AUTO FLEEV	2	44.79 Tons
N/A	C & D	18	27h 58m
N/A	C & D	9	174.80 Tons
N/A	CONCRETE	N/A	4h 39m
N/A	CONCRETE C&WR	2	17.25 Cubic Yards
N/A	CR 14	61	1244.70 Tons
N/A	CRUSHED CONCRETE S&F	2	34.06 Tons
N/A	CRUSHED STONE BASE	3	62.09 Tons
N/A	CRUSHER RUN BASE	22	423.05 Tons
N/A	DRT	3	4h 49m
N/A	DRT - HAUL OFF	37	45h 4m
N/A	DOT SAND	3	62.40 Tons
N/A	DUMPSTER 40YD	2	11.11 Tons
N/A	FILL DIRT	13	13.00 Loads
N/A	MILLING	3	4h 13m
N/A	MILLING	3	54.00 Tons

Tickets

Ticket #13457095
20.73 TONS - \$49.75 | Stone - 89M Stone
\$2.40 / TON
Southeastern Concrete Products
4076 Southeastern Concrete Products - Frisk St
Job #143404
NW White / 07737 (Bry Sharp)
03/24/2022 12:08 PM

Phase Code: SE Concrete

Ticket #11880324
11.15 TONS - \$272.24 | Solid Waste
\$272.24 / LOAD
Waste Management - Elgin
4500 Waste Management - Lexington Transfer
Job #143505
NW White / 7100 (LORNA CARTERS)
03/24/2022 12:07 PM

Ticket # 0 TONS - \$640.00 | DUMPSTER 40YD
\$640.00 / LOAD
Pro-Way
Pro-Way
Job #143241
Tri-County Hauling & Demolition
03/24/2022 12:07 PM

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

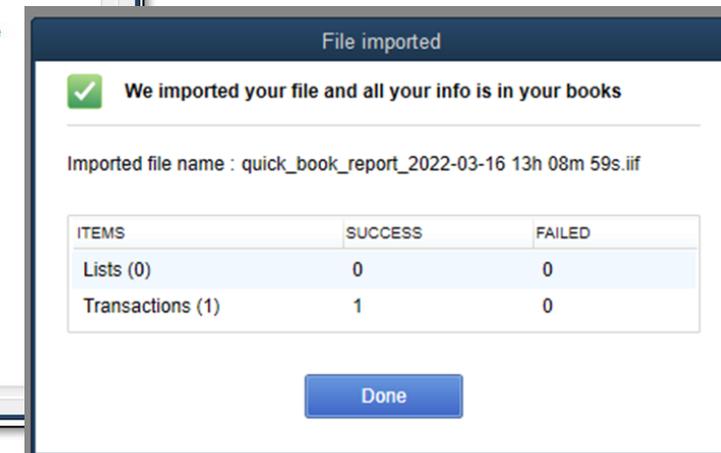
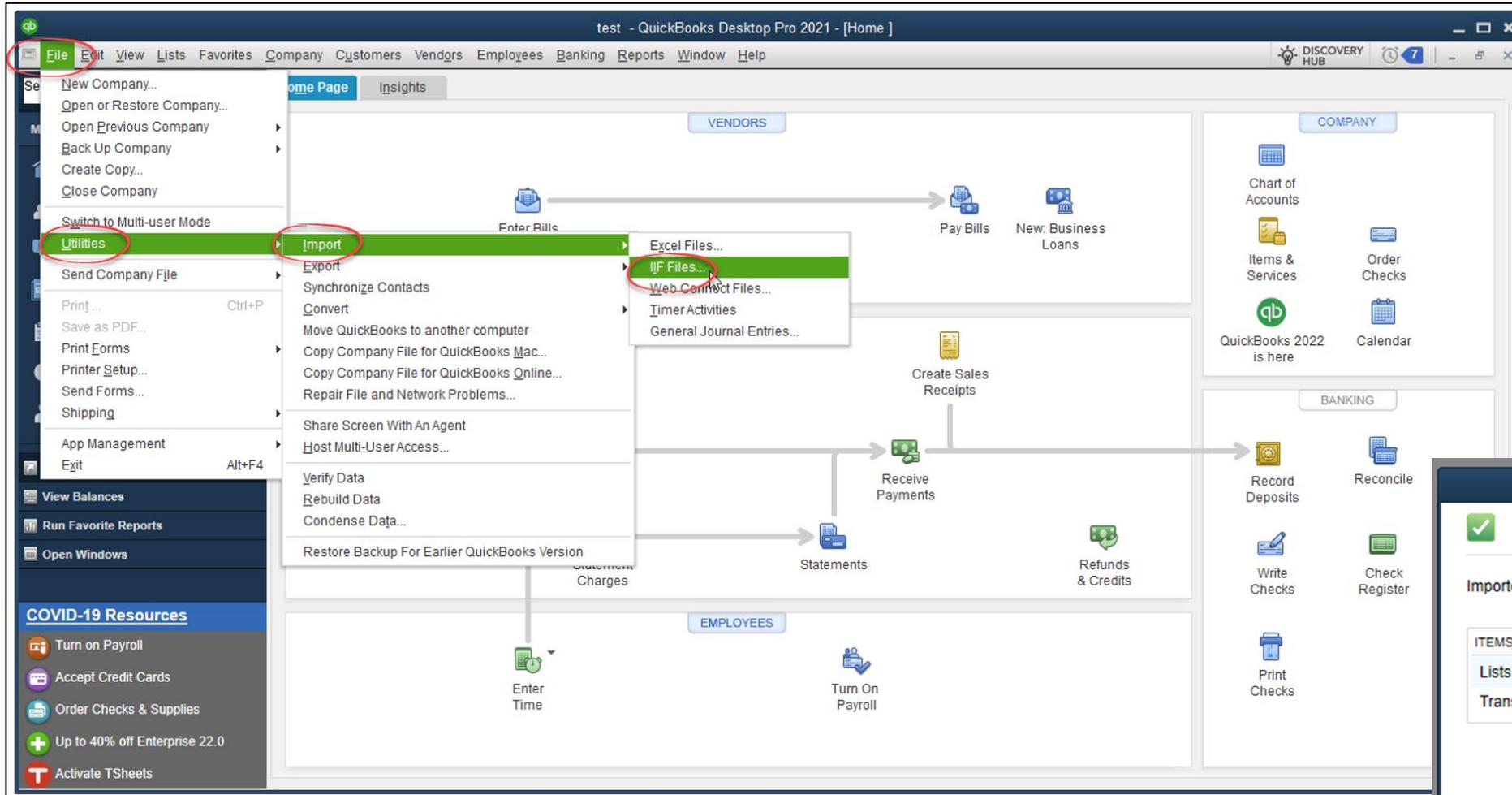
Downloading the file will prompt you to name and save the report

NOTE: Only reconciled tickets will be included the download

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



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.