

Reporting

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How to setup Payroll and run a report

Summary

This tutorial guides you through configuring payroll settings and generating payroll reports in BuilderPal. Proper payroll setup ensures accurate tracking of team hours, compliance with payment schedules, and efficient financial management, reducing errors and supporting timely compensations for your team.

How-To Video

<https://www.youtube.com/embed/vPGtapvPbKY?si=1DX7AqvGdp9mPP8z>

Prerequisites

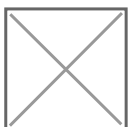
- An active BuilderPal Pro account with administrative access.
- Relevant team roles such as Admin or Finance Manager.
- Submitted timesheets from team members for the reporting period.

Steps

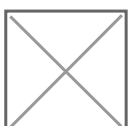
1. **Navigate to the Timesheet Settings section in BuilderPal.**



2. **Click Configure Payroll to select your pay period and start date, then click Save to apply the settings.**



3. **Navigate to the Payroll Report page, set the desired time period, and apply any necessary filters.**



4. **Click Export Report, select a format, and choose to preview or finalize; if finalizing, check Include past non-finalized entries as needed.**



5. **The exported report will download automatically; view finalized reports by clicking Finalized reports or the document icon in the top right.**



Confirmation

Exported forms will automatically download. You can also view finalized reports by clicking "finalized reports" or clicking the document icon in the top right corner.

FAQ

What happens when I finalize a payroll report?

Finalizing marks all included time entries as approved and paid, preventing them from being included in future reports to avoid duplicate payments.

How can I include unpaid entries from past periods in a new report?

Select the option to Include past non-finalized entries before exporting to pull in any outstanding entries from previous pay periods.

Can I edit payroll settings after initial setup?

Yes, return to Timesheet Settings and click Configure Payroll to update the pay period or start date as needed.

Why might some time entries not appear in the report?

Entries may be excluded if they fall outside the selected time period, have already been finalized in a previous report, or don't match applied filters.

What report formats are available for export?

Common formats include CSV, PDF, or Excel; select the one that best suits your payroll processing needs.

Related Articles

- [How to approve timesheets](#)
- [Roles & Permissions Overview](#)
- [Setting up team members](#)
- [Generating time reports](#)

Upgrade to BuilderPal Pro for this feature → <https://www.builderpal.com/pro>

Approve Time

Summary

This tutorial guides you through approving time entries in BuilderPal's Team Office. Accurate time approval ensures proper payroll processing, project cost tracking, and compliance with labor regulations.

Prerequisites

- A BuilderPal account with one of the following roles: Admin, Team Project Manager, Team Finance Manager, or Team Supervisor.
- Time entries submitted by team members.

Steps

1. **Navigate to the Time Approval page** — go to your Team Office in BuilderPal and select the Time Approval section.



2. **Apply filters to time entries** — use the filters at the top to narrow down by day, project, cost code, group, user, or approval status, then click **Generate** to refresh the list.



3. **Review the timesheets** — click the **edit** button to open and inspect the details of the selected entries.



4. **Approve the entries** — choose to approve individually or select **approve all** for the group of entries.



Confirmation

The approved entries will update their status to approved in the list, making them ready for payroll export or further processing.

FAQ

What if I need to reject or edit a time entry?

During review, you can edit details or choose not to approve if issues are found; unapproved entries remain pending for correction.

Can I approve time for multiple projects at once?

Yes, use the filters to include multiple projects before generating the list, then approve in bulk via **approve all**.

What happens if no filters are applied?

The full list of available time entries will display, but applying filters is recommended for focused reviews to avoid overload.

How do I handle edge cases like overlapping time entries?

The system may flag duplicates during review; edit as needed to resolve before approval.

Who can see approved time entries?

Approved entries are visible to admins and managers with payroll access, ensuring secure handling.

Related Articles

- Enter Time as Employee
- Export Approved Time to Payroll
- Manage Cost Codes
- Assign Team Roles
- View Time Reports

Upgrade to BuilderPal Pro for this feature → <https://www.builderpal.com/pro>

Generate Time Report

Summary

This tutorial guides you through generating a time report in BuilderPal, including accessing the report, applying filters for date, project, or user, and exporting the details. This is essential for managers to track team hours, analyze productivity, and prepare payroll efficiently.

How-To Video

https://www.youtube.com/embed/UwL9EP_d9Eo?si=D4jH_cpfydwqUVAm

Prerequisites

- A BuilderPal account with access to Team Office.
- Relevant role such as Admin or Manager.
- Existing time entries in the system for the report to populate data.

Steps

1. **Navigate to Team Office from the main dashboard.** — Click the Team Office icon or link on the main dashboard to access team management features.
2. **Go to the Timesheets section inside Team Office.** — Within Team Office, select the Timesheets option to view time tracking tools.
3. **Select the Time Report tab.** — Switch to the Time Report tab to display charts and data summaries of logged hours.
4. **Apply filters for date range, project, or user.** — Use the filter options to specify the date range, select specific projects or users, and refine the criteria as needed.
5. **Click Export to generate and download the report.** — Once filters are applied, click the Export button to download the detailed time report, typically as a PDF for payroll purposes.

Confirmation

The report will download as a file (e.g., PDF), displaying detailed time entries, totals, and breakdowns based on your filters. Confirm by opening the file and verifying the data matches your selections.

FAQ

Q: What if no data appears in the Time Report?

A: Ensure time entries have been logged for the selected filters. If none exist, the report will be

empty—try broadening the date range or checking timesheet submissions.

Q: Can I export the report in formats other than PDF?

A: The primary export is PDF for payroll, but check for CSV or Excel options in the export menu if available for your subscription.

Q: How do I filter for multiple users or projects?

A: In the filters section, select multiple items from the dropdowns for users or projects to include them in the report.

Q: Is the Time Report available on mobile?

A: Yes, but for best viewing of charts and exports, use the desktop version of BuilderPal.

Q: What roles can access the Time Report?

A: Typically Admins and Managers; regular users may only see their own timesheets unless permissions are granted.

Related Articles

- [How to Submit a Timesheet](#)
- [How to Approve Timesheets](#)
- [Understanding Time Tracking Charts](#)
- [Managing Team Permissions](#)
- [Exporting Reports in BuilderPal](#)

Export Employee Data from QuickBooks Desktop for Import into BuilderPal

Summary

This tutorial guides you through exporting employee data from QuickBooks Desktop as an IIF file, converting it to CSV, and verifying it for import into BuilderPal. This ensures seamless data transfer for team setup, avoiding errors in live environments.

Prerequisites

- QuickBooks Desktop installed with access to your company file.
- Use a test or sample company file to prevent impacting live data.
- Microsoft Excel or a similar tool for converting IIF to CSV.

Steps

1. **Open QuickBooks Desktop and load a test company file.** Go to **File > Open or Restore Company > Open a company file**, then select a sample file to avoid affecting real data.
2. **Access the export feature.** Navigate to **File > Utilities > Export > Lists to IIF Files**.
3. **Select the Employee list.** Check the **Employees** box and click **OK**. Save the file as employees.iif.
4. **Convert the IIF file to CSV.** Open the IIF file in Excel or a text editor, ensure fields like EmployeeID, FirstName, and LastName are present, then save as a CSV file.
5. **Verify the fields in the CSV.** Open the CSV in Excel and confirm required fields such as EmployeeID and SSN match BuilderPal's import structure; adjust headers if necessary.
6. **Test the import into your system.** Upload the CSV into BuilderPal, mapping EmployeeID to prevent duplicates.
7. **Validate the imported data.** Review records in BuilderPal to ensure names, addresses, and IDs imported correctly and align for syncing.

Confirmation

The CSV file is successfully created and validated, with all employee records appearing correctly in BuilderPal without errors or duplicates.

FAQ

Why use a test company file?

Testing prevents accidental changes to live payroll or employee data in QuickBooks.

What if the IIF file doesn't open in Excel?

IIF files are text-based; open them in Notepad first, copy the content, and paste into Excel for conversion.

Can I export directly to CSV without IIF?

QuickBooks Desktop exports lists to IIF by default; for CSV, use reports like Employee Contact List and export via Excel.

What fields are essential for BuilderPal import?

Key fields include EmployeeID, FirstName, LastName, Email, and Phone; ensure they match to avoid import failures.

How do I handle SSN or sensitive data?

Mask or remove sensitive fields during testing; only include necessary data for BuilderPal.

Related Articles

- [Create Team Members](#)
- [Invite Contacts](#)
- [Edit Team Profile](#)
- [Manage People](#)
- [Team & Company Settings](#)

Export Employee Data from Sage 50 Desktop

Summary

This tutorial covers the process of exporting employee data from Sage 50 Desktop to a CSV file for integration with BuilderPal or other payroll and timesheet systems. This is useful for construction teams to sync employee details, time entries, and payroll information efficiently.

Prerequisites

- Access to Sage 50 Desktop software.
- A sample company file for testing (to avoid modifying live data).
- A text editor (e.g., Notepad) for verifying the CSV file.

Steps

1. **Open Sage 50 Desktop.** Use a sample company file (e.g., File > Open Company > Sample Company) to avoid modifying live data.
2. **Access Payroll Data Export.** Go to File > Data Export > Payroll Data Export.
3. **Select Employee Details.** Choose Employee Details and click Next. Select fields to export (e.g., EmployeeID, FirstName, LastName, Address, SSN, Phone, Email, HireDate).
4. **Save CSV File.** Click Browse to choose a save location, ensure "Include column headings" is checked, and save as a CSV file (e.g., employees.csv).
5. **Verify CSV.** Open the CSV in a text editor (not Excel, to avoid formatting issues) to confirm fields match your system's requirements. Rename to sage.csv if importing into systems like BrightPay that require it.
6. **Test Import.** Import the CSV into your system, mapping EmployeeID to your system's unique identifier to ensure proper syncing.
7. **Validate Data.** Check that records (e.g., names, IDs) imported correctly and align for future syncs with time entries or payroll.

Confirmation

The exported CSV file will contain the selected employee fields and can be successfully imported into BuilderPal or other systems, with data matching the source records.

FAQ

Q: Why is EmployeeID critical?

A: EmployeeID ensures accurate syncing with systems like BuilderPal for payroll or time tracking.

Q: Why test with demo data?

A: Using a sample company file verifies field compatibility without risking live data changes.

Q: Why avoid opening the CSV in Excel?

A: Excel may reformat sensitive fields like SSN or sort codes, leading to import errors in BuilderPal.

Q: What if I need more fields like PayRate or Department?

A: Select additional fields during the export step to customize the dataset for BuilderPal integration.

Q: How do I handle mid-year exports?

A: Export Employee Year-to-Date Figures separately via the same menu to include payroll balances in BuilderPal.

Related Articles

- [Time Tracking](#)
- [Manage People](#)
- [Team & Company Settings](#)
- [Reporting](#)
- [Financial Settings](#)