

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.

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Revision #2

Created 25 November 2025 17:44:03 by Gabe

Updated 25 November 2025 17:45:21 by Gabe