The TimePilot system:
Paychex Preview Export

If you use Paychex Preview to process payroll and cut payroll checks, you can set up your TimePilot software to work with it.

Here's how the process works: At the end of a pay period, you'll have the TimePilot system create a file containing the employee time and attendance data it collected in a format that Paychex Preview can understand. You'll save that file, and then start Paychex Preview and tell it to import the file. Once imported, all the data collected in TimePilot will be available in Paychex Preview.

Before the process will work, however, you'll need to install and set up the Paychex Preview Export, a small software program that will prepare the data collected by TimePilot.

To confirm that Paychex Preview is configured the way you want, we recommend that you set up your employees and process a couple of payrolls through Paychex Preview manually before using TimePilot's Paychex Preview Export.

1. Installing the Export software

Before you start, you'll need to download and install TimePilot's Paychex Preview Export software. Here's how:

1. Make sure you have an active internet connection.

2. Start TimePilot Central.

3. Click the "File" menu, then "Export to Payroll..." then "Download Payroll Exports." A browser window will open to a page on the TimePilot.com web site. Click the "Paychex Preview" link.

4. Users of Internet Explorer will be asked if they want to "Run" or "Save" the file. Click "Run." Users of Mozilla Firefox will be asked if they want to save the file. Click "Save the file." The downloads box will pop up; double-click the file to run it.

5. Follow the instructions to install the export.

6. When you're done, close the browser window.

2. Setting up TimePilot

Now you'll enter the employee ID numbers from Paychex Preview into the TimePilot software. This connects an employee in TimePilot with an employee in Paychex Preview and ensures that employees will be identified correctly.

1. Have a list of your Paychex Preview ID numbers ready. (Consult your Paychex representative if you don't have the ID numbers.)

2. In TimePilot Central, click the "Setup" menu, then "Profile Setup..."

3. The Profile Setup box will open. Highlight the first name in the list of employees on the left side, then click the "Edit Profile" button.

4. The "Edit an Existing Profile" box will open. Click the "Options" tab at the top of the box. (See screenshot at right.)

5. Enter the employee's Paychex Preview ID number in the "Alternate ID" field.

6. Click "Save."

7. Repeat steps 3-6 for each employee.

8. When you're done, close the Profile Setup box.

Congratulations! Your setup is complete. See the next page for instructions on how to use the export.

Edit an existing Payroll Profile

Profile | Optional

First Name: Elba   Alternate ID: 3541
Middle Name: Government ID:
Last Name: Distler
Title: ...nce Manager   Pay Rate: $15.35
Address: 340 McKee St.
Batavia, IL 60510

Phone: 630-879-6400

Date of Birth:

Date of Hire: 10/15/2002   Clear

End Date:

Help   Save   Cancel

3. Using the Export software

Now that the setup is done, it's a simple process to use the export. Here's how:

1. In TimePilot Central, extract your pay period and make any corrections, changes etc., as described in the "Getting ready for payroll, step by step" section of the chapter on TimePilot Central in your TimePilot manual.

2. With the extracted pay period on your TimePilot Central screen (there will be a yellow bar across the top, indicating you're in an extracted pay period—if it's green, you're still in Current Transactions), click the "File" menu, then Export to Payroll > Paychex Preview.
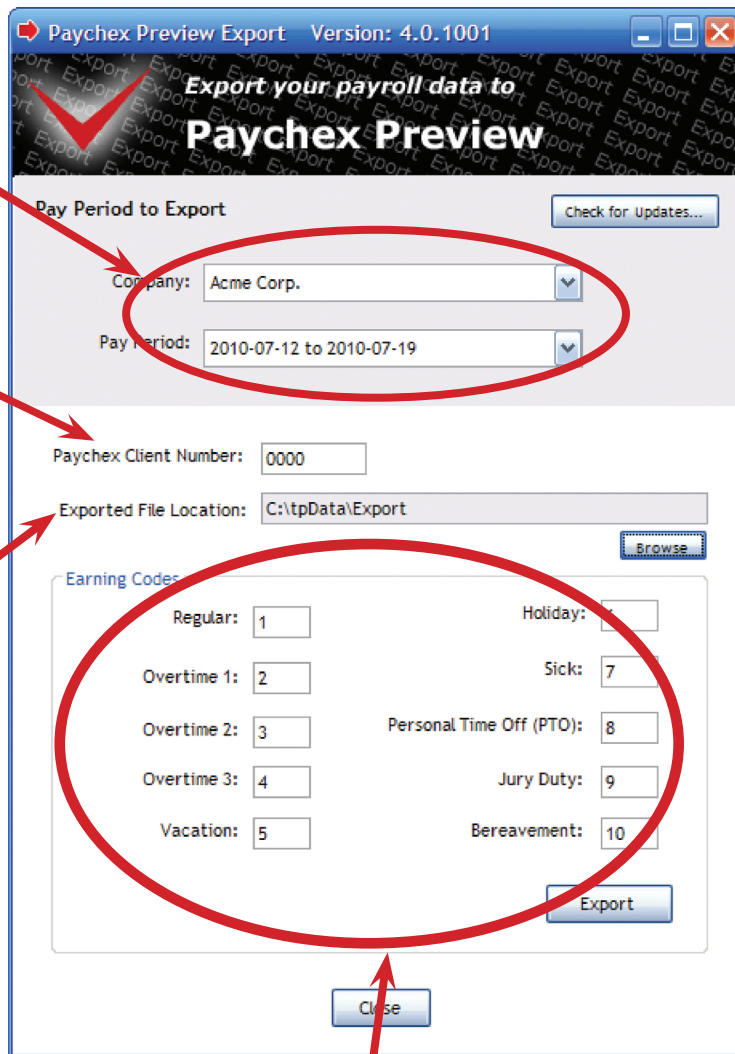
3. The Paychex Preview Export screen will appear (see screenshot at right). Make sure your company name and pay period are listed correctly. If not, choose the correct ones from the dropdown menus.

4. Enter your Paychex Client Number (available from your Paychex representative).

5. Choose a location where the software should save the file containing the TimePilot data. The default will be in a folder called "Export" in the tpData folder, which is the folder that holds the clock-in and clock-out data collected by TimePilot.

   Don't know where you keep your TimePilot Data? Here's how to find out:

   A. In TimePilot Central, click the "Help" menu, then "About."
   B. Look for "Data Path." That's where your data is.

6. Enter your Paychex Preview Earning Codes (available from your Paychex representative). Once the codes are entered, they will appear automatically the next time you use the Export.

7. Click the "Export" button to create the Export file.

8. Click the "Close" button. Congratulations! You've created a file with your TimePilot data in a format that Paychex Preview can understand.

9. Import the file (See Step 5 on where to find it) into Paychex Preview. For details on Paychex Preview's import function, contact your Paychex representative.