

Kashflow Payroll

Data export guide - 2025

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Kashflow Payroll – Data Export

Introduction

This guide explains how to transfer your data from Kashflow Payroll to an Excel file and how to product in-product reports to the screen.

Before proceeding, please be aware, this process is designed for exporting **static data** from payroll, for example employee details. This method is not suitable for exporting pay period variations as all data fields are exported as standard values rather than temporary ones.

Finalise Pay period in Kashflow Payroll

Before beginning the export file process, you need to firstly ensure that your current pay period in Kashflow Payroll is finalised. Make sure you have made any necessary amendments to employees, you have processed leavers, calculated payroll and created required reports, pension output files and BACS output files.

Recommended reports

Once payroll is processed, create your reports as usual. In addition to your normal reports, we would also recommend that you produce employee P11 reports, for your records.

Other reports you may find useful for your records include employee YTD reports, which include Tax, NI and Statutory payment details for each employee. Absence reports can be produced to show absence and holiday records for the employee. These can be produced as PDF files.

QUICK

P11

ABSENCE

YTD REPORTS

Year To Date Tax Details Reports

2024/2025

Export Options

PDF Document

Employee	Year To Date		Previous Employment		This Employment	
	Gross	Tax	Gross	Tax	Gross	Tax
EVANS Martin	2799.12	182.40	0.00	0.00	2799.12	182.40
THOMPSON Phillip	2799.12	140.40	0.00	0.00	2799.12	140.40
Company Total	5598.24	322.80	0.00	0.00	5598.24	322.80

Create export files

Kashflow Payroll has a 'Data Export' feature which allows you to extract important company and employee data as an excel file. To access this, click onto the **Settings** menu, then **Data Export**:

Settings

Subscription & Billing
Profile & Password
Tenant Filing Credentials
Data Export
Employee Verification Connector
Management Dashboard
Staffology Migration
Test PDF Email Attachment

Once clicked, the **Data Export** screen will be displayed. You can opt to export data for the current company only or, if you have multiple companies, you can export the data for all companies. Select the option required and click the **Export** button.


DATA EXPORT

Data Export

Export your Company and Employee Data from KashFlow Payroll.

NOTE: Deleted Companies and Employees will not be exported. Contact our Support team if these are required.

☒ All Companies ☐ Current Company Only

 **Export**

An excel file will be created, containing data for the company, and each employee. There are handy tabs within the file, splitting data between Employee Details, YTD values, Company Details, Pension Details etc.

- End -