



# 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 produce 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.



Year To Date Tax Details Reports							
2024/2025							
Employee	Year To Date		Previous Employment		This Employment		Export Options
	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

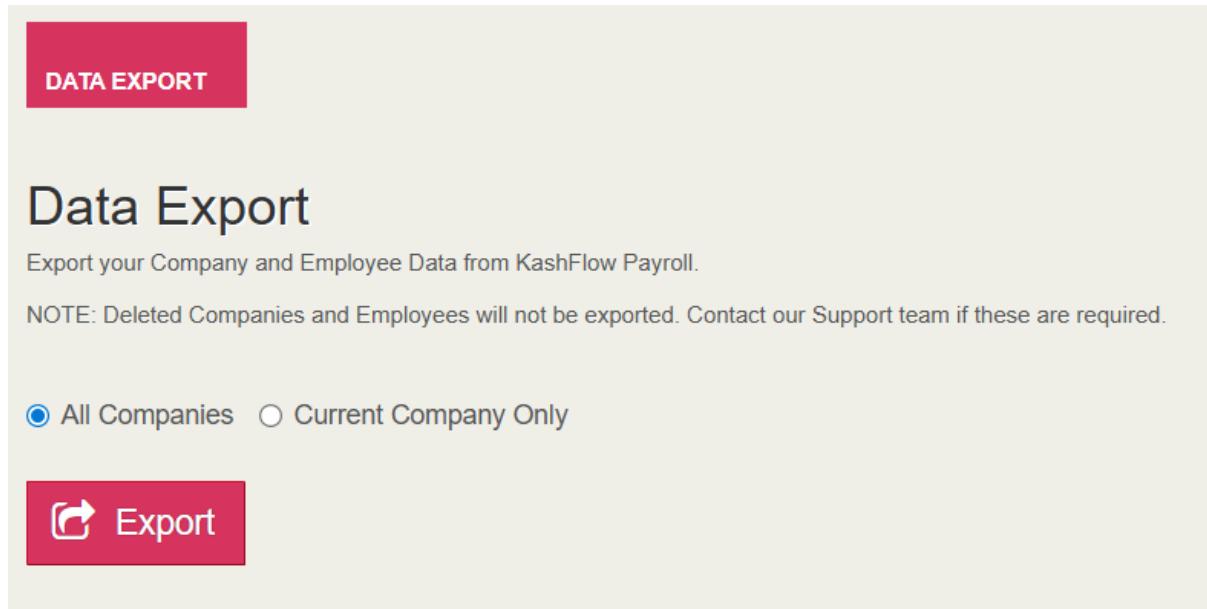
Employee Verification Connector

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.



The screenshot shows a user interface for 'Data Export'. At the top left is a red button labeled 'DATA EXPORT'. Below it is a large title 'Data Export'. Under the title, a sub-instruction says 'Export your Company and Employee Data from KashFlow Payroll.' A note below states 'NOTE: Deleted Companies and Employees will not be exported. Contact our Support team if these are required.' There are two radio buttons: one selected for 'All Companies' and one for 'Current Company Only'. At the bottom is a red button with a circular arrow icon and the word '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.

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