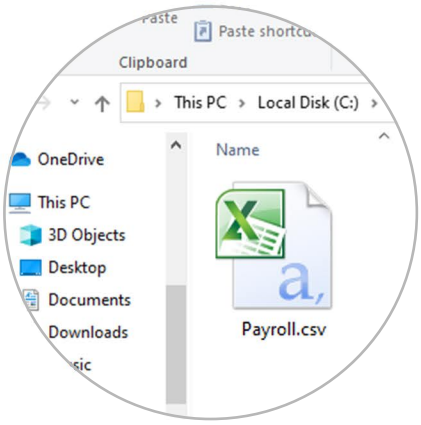
How to upload your payroll file with SFTP

1 Save payroll data into a .csv file on your computer

1. Download or export your payroll data (from your payroll software) into a csv file and save to a folder of your choosing.

2. Make sure your csv has all required fields and does not use invalid characters
   - See the guide for E-Pay format options.
   - It does not matter what you name the .csv file, but you'll want to keep the name the exact same each pay period for the automated task.
   - Remember to create a new payroll.csv file each pay period, to replace the old.

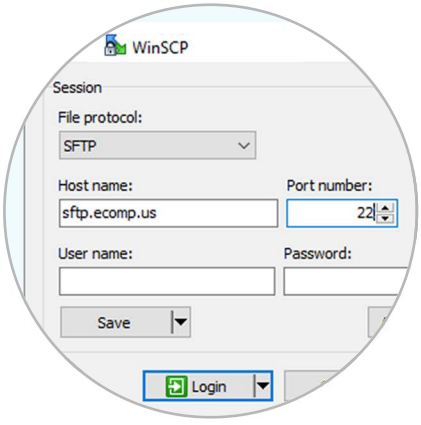


Step 1.1

2 Setup the program WinSCP to transfer the payroll file

1. Download the SFTP program WinSCP to your PC or server, from https://winscp.net and install.

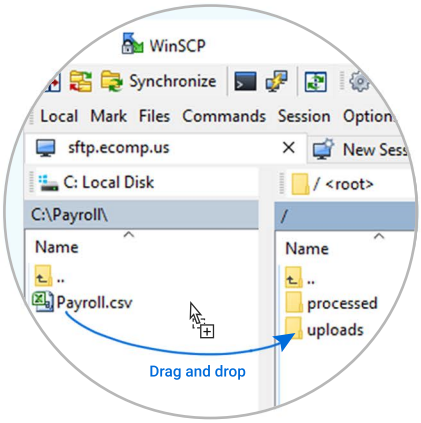
2. Open WinSCP and a new login screen should appear, type in the following details:
   - Host Name: sftp.ecomp.us
   - Port: 22
   - User name: **your Ecomp web login email or username**
   - Password: **your Ecomp web login password**



Step 2.2

3. Click “Login” and accept any other prompts if they appear.
   - If connected to the Ecomp server succesfully: there will be a left window with your computer files and a right window with two Ecomp folders.
   - If you receive an error when trying to connect, contact Ecomp or your company IT employee for help.

4. Drag and drop your payroll .csv file from your computer into the Ecomp **Uploads** folder. That’s it!
   - If you don’t need to upload yet, you can close WinSCP.



Step 2.4

How to automate the payroll transfer is continued on the next page...

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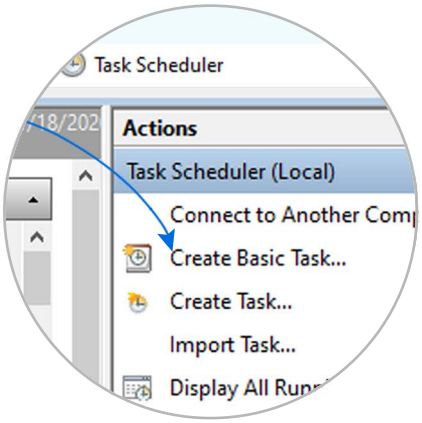
3 Create an automated task to transfer the payroll file

1. Open the Task Scheduler in Windows
   - Go to Windows Start Menu and type “Task Scheduler” in the search.

2. In the Task Scheduler, click the "Create Basic Task..." link in the actions panel.

3. For the name field, type "Ecomp payroll transfer", then click “Next”.



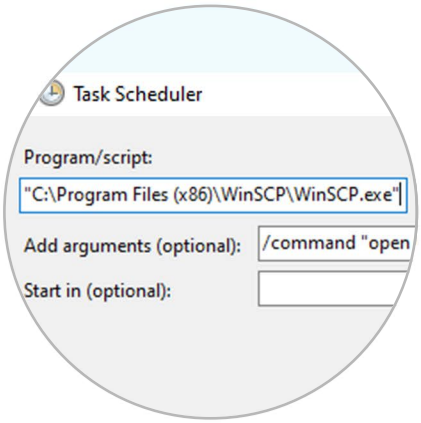
Step 3.2

4. Select when you want the task to start, then click “Next”.
   - Likely this will be “Weekly” or “Monthly”

5. Set when the task should recur, then click “Next”.
   - This is the date when your payroll.csv file is completed each pay period.
   - Example: Start: 11/20/2020 5:00:00 PM, Recur every: 2 weeks on Friday

6. Select “Start a program”, then click “Next”.

7. For the “Program/Script” field: Click the “Browse..” button and select the WinSCP.exe program.
   - Example: "C:\Program Files (x86)\WinSCP\WinSCP.exe"

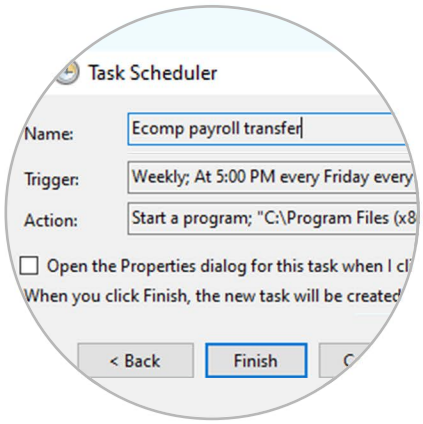


Step 3.7

8. For "Add Arguments (optional)", enter code below, then click “Next”.
   - Enter the following line of code but first **change the username and password** to your Ecomp credentials and **change the payroll.csv path** to your payroll file:

```
/command "open sftp://user:password@sftp.ecomp.us" "put "C:\payroll.csv" uploads\ "exit"
```

9. Review the task, then click “Finish”. That’s it! Your payroll file will be uploaded to Ecomp automatically on the date scheduled.



Step 3.9

** Make sure you keep your payroll file in a secure location on your PC.

** Schedule a reminder to replace the payroll file each pay period.

** Ask your IT associate for help or contact Ecomp.