

How to Rollover Company Data From the Previous Year in **W2 Mate**[®]



**Start by Opening
W2 Mate**[®]
Program

www.W2Mate.com

Go to > Company > Open

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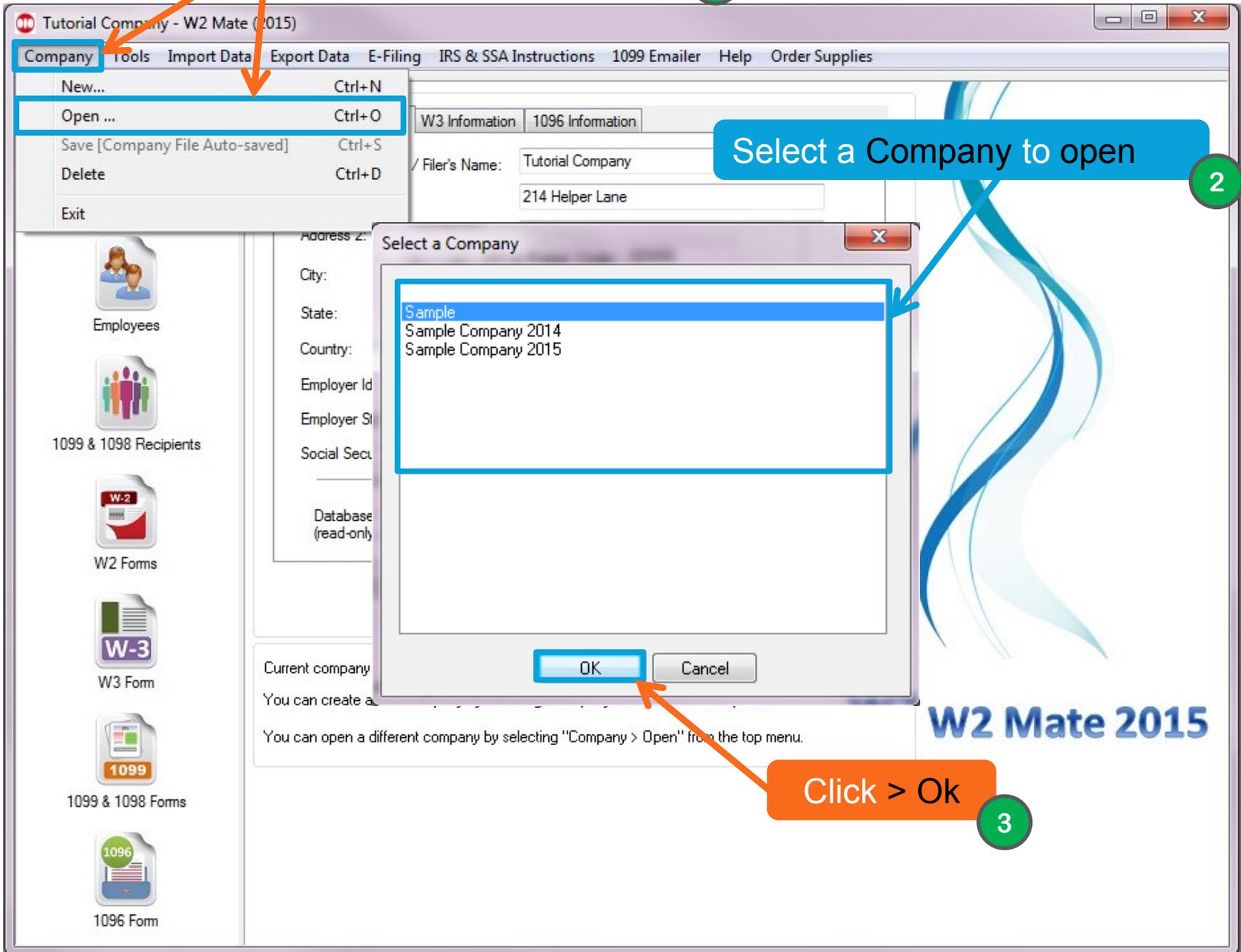
Select a Company to open

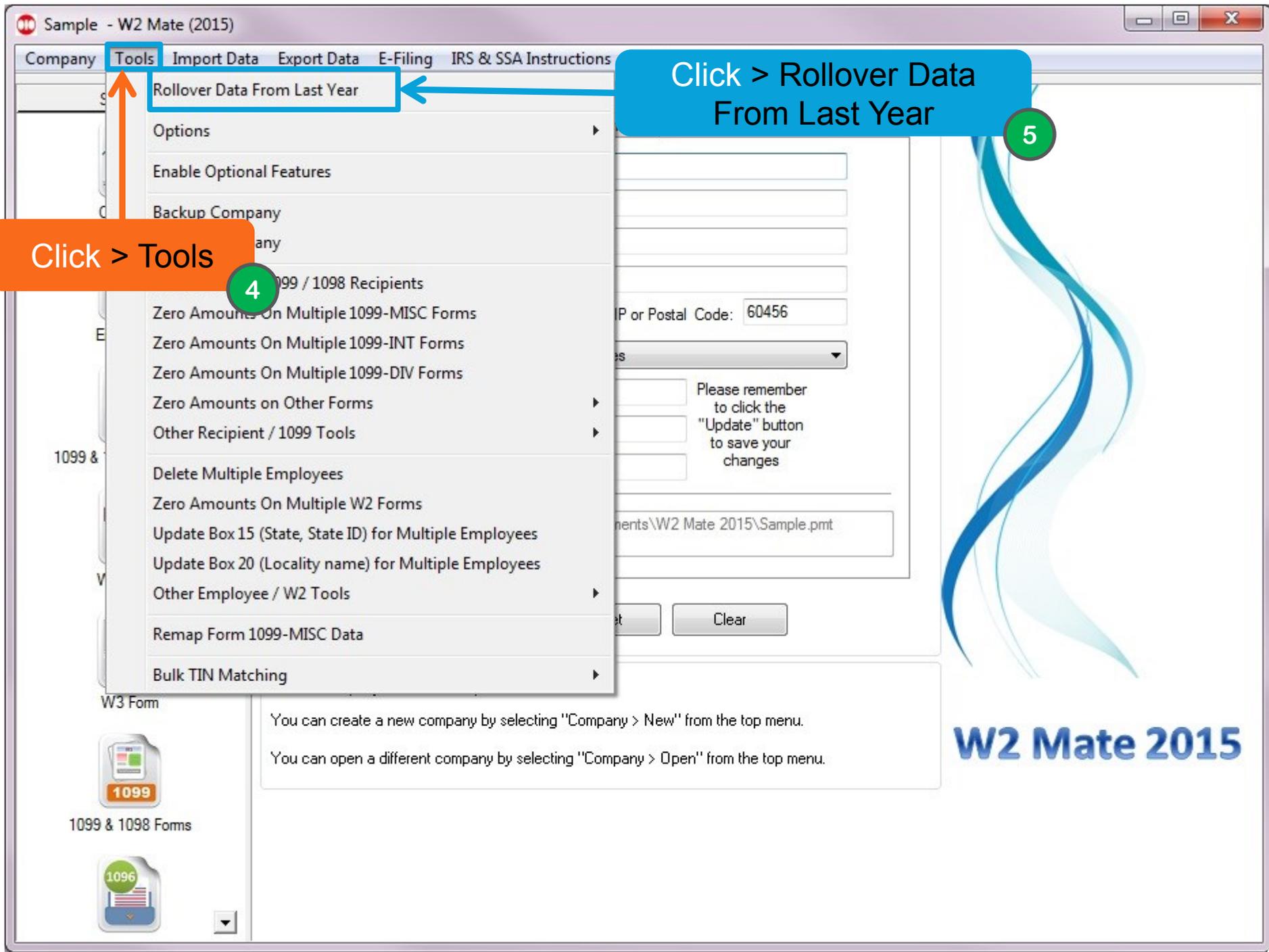
2

OK

Click > Ok

3





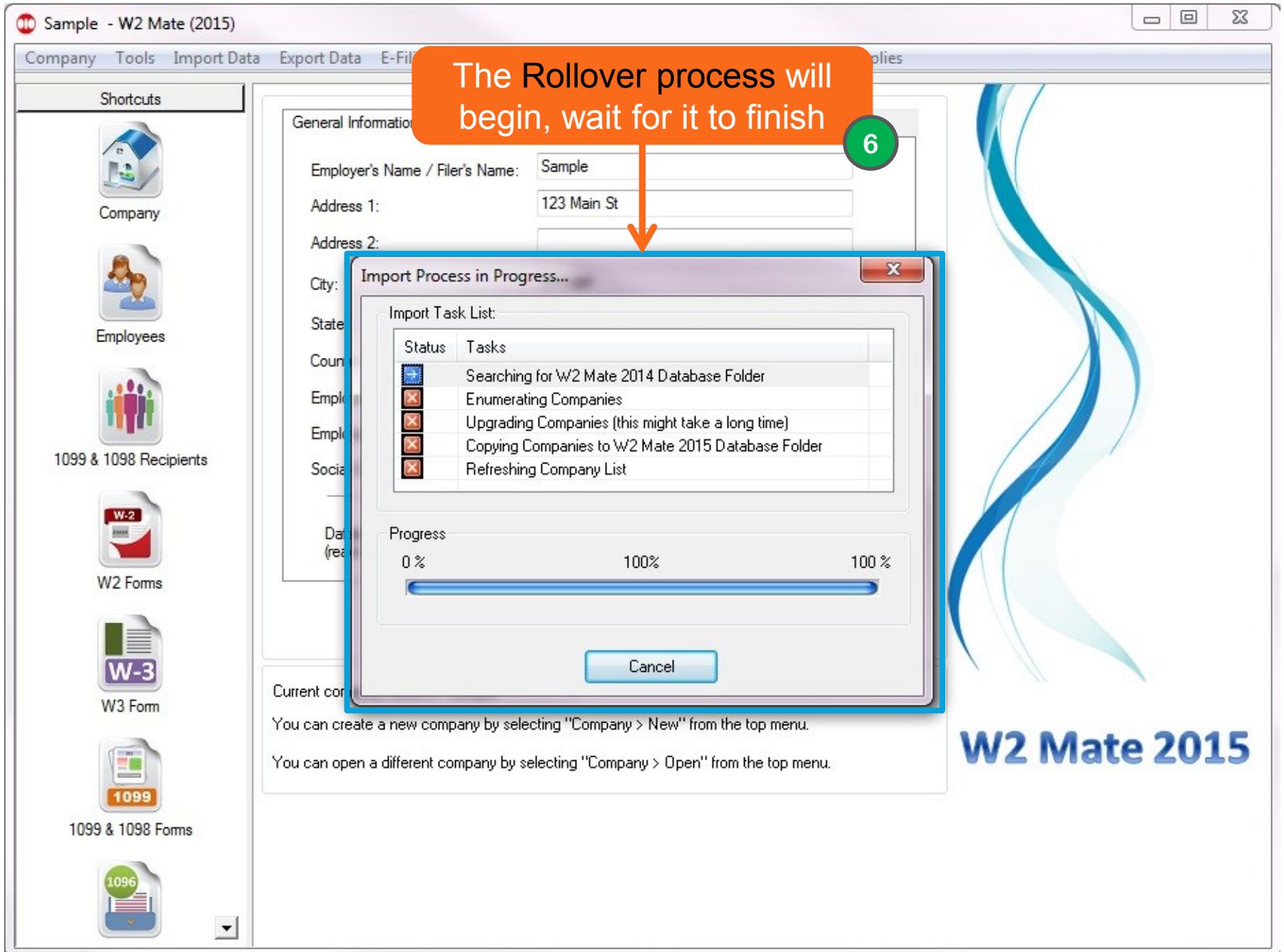
Click > Tools

4

Click > Rollover Data From Last Year

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W2 Mate 2015



Sample - W2 Mate (2015)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions 1099 Emailer Help Order Supplies

Shortcuts

- Company
- Employees
- 1099 & 1098 Recipients
- W2 Forms
- W3 Form
- 1099 & 1098 Forms

General Information W3 Information 1096 Information

Employer's Name / Filer's Name: Sample

Address 1: 123 Main St

Address 2:

City: chicago

W2 Mate (2015)

Importing clients for the Tax Year 2014 completed successfully.

W2 Mate will now take you to the "Select Company Dialog".

Please remember that you can always create a new company by choosing "Company > New" from the top menu.

You can also open an existing company by choosing "Company > Open" from the top menu.

OK

Current company name is : Sample

You can create a new company by selecting "Company > New" from the top menu.

You can open a different company by selecting "Company > Open" from the top menu.

Click > OK

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W2 Mate 2015

Sample - W2 Mate (2015)

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Shortcuts

- Company
- Employees
- 1099 & 1098 Recipients
- W2 Forms
- W3 Form
- 1099 & 1098 Forms
- 1096

General Information

Employer's Name: [Text Field]

Address 1: 123 Main St

Address 2: [Text Field]

City: [Text Field]

State: [Text Field]

Country: [Text Field]

Employer ID: [Text Field]

Employer S: [Text Field]

Social Sec: [Text Field]

Databases (read-only)

Current company: [Text Field]

You can create a new company by selecting "Company > New" from the top menu.

You can open a different company by selecting "Company > Open" from the top menu.

Select the Company you rolled over

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Select a Company

- Car Title Company
- Sample
- Sample
- Sample Company 2014
- Sample Company 2015
- Tutorial Company
- Young Company

OK Cancel

Click > Ok

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W2 Mate 2015

Congratulations. You know how to
rollover data from the previous year!



www.W2Mate.com

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