

How to Import W2 Data From Payroll Mate in **W2 Mate**[®]



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

www.W2Mate.com

Please open Payroll Mate first,
then follow these steps.

The screenshot shows a software window titled "Illinois Company - Payroll Mate". The "Tools" menu is open, listing various options. An orange callout box with a green circle containing the number "1" points to the "Tools" menu. A blue callout box with a green circle containing the number "2" points to the "Export W-2 Information to W2 Mate" option. The background shows a form for "Federal Tax Information" and "State Tax Information" with fields for Company, State (IL), Zip Code (12345), Contact Name, Telephone Number, Fax Number, and E-mail Address. A "2016" badge is visible on the left side of the interface. A sidebar on the left contains navigation buttons for Checks, Employees, Forms, Reports, Company (highlighted), 1099 & Vendor, and Tutorials. An "Update" button is located at the bottom of the form area.

Click > Tools 1

Click > Export W-2 Information to W2 Mate 2

2016

Company

Federal Tax Information | State Tax Information

Tax Categories | Deduction Categories

Company

ain

go

State: IL

Zip Code: 12345

Contact Name:

Telephone Number:

Fax Number:

E-mail Address:

Update

Checks

Employees

Forms

Reports

Company

1099 & Vendor

Tutorials

Illinois Company - Payroll Mate (2016)

File Edit Tools Help Order Checks and Supplies

Reports

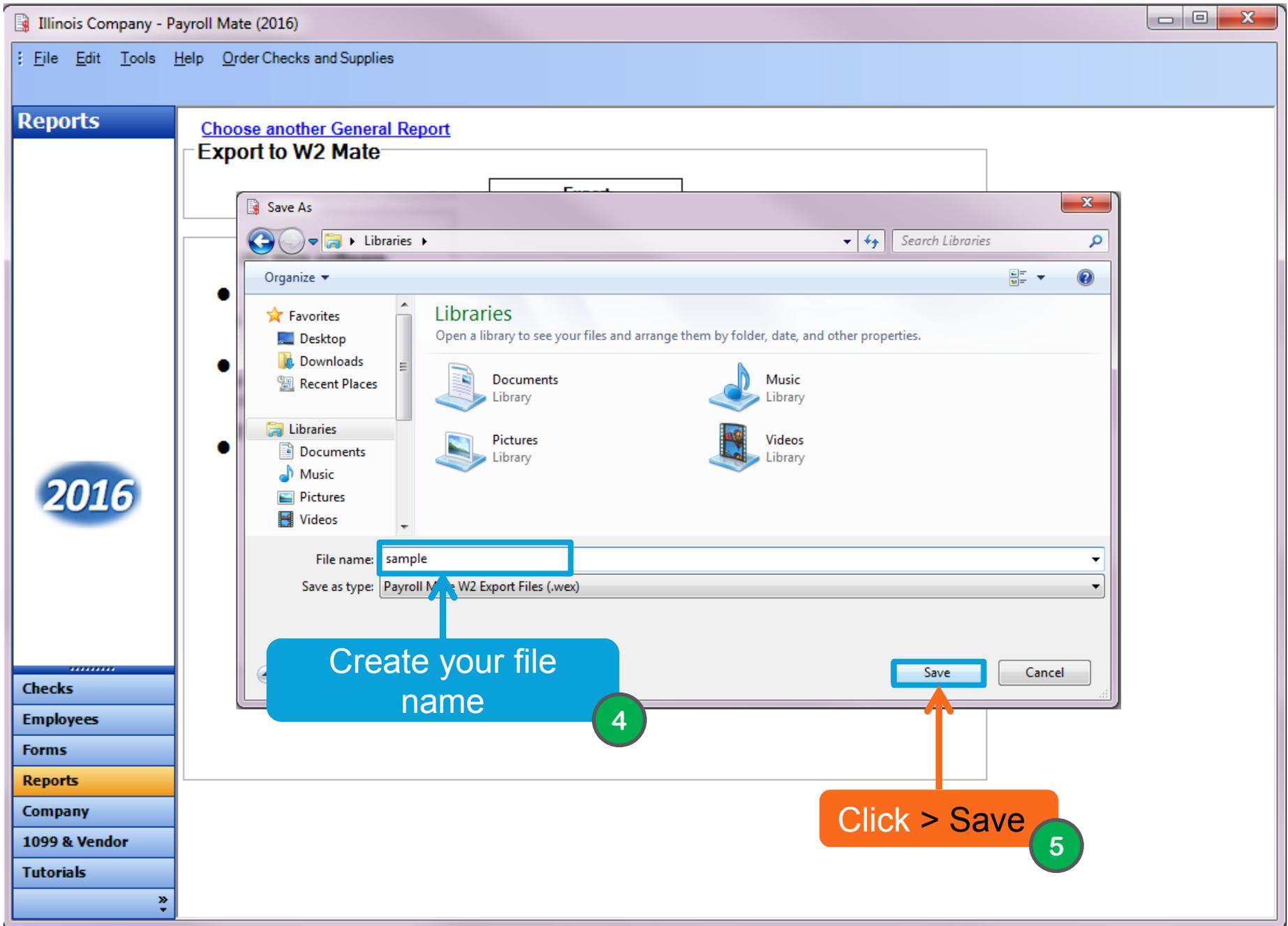
[Choose another General Report](#)
Export to W2 Mate

Export

- This report is used to export W-2 information to W2 Mate software.
- Click on "Export" **Click > Export** e.
- Once the export file is created successfully, you can import it into W2 Mate by clicking on the following menu item inside W2 Mate:
"Import Data > From Payroll Mate software > W-2 Data"

2016

Checks
Employees
Forms
Reports
Company
1099 & Vendor
Tutorials



Now open W2 Mate, and follow these steps.

The screenshot shows the 'Sample - W2 Mate (2015)' application window. The 'Import Data' menu is open, listing various data sources. The 'From Payroll Mate Software (W-2 Data)' option is highlighted with a blue box. An orange callout box with the number '6' points to the 'Import Data' menu header, and a blue callout box points to the highlighted option. The interface includes a sidebar with icons for Company, Employees, 1099 & 1098 Rec, W2 Forms, W3 Form, 1099 & 1098 Forms, and 1096 Form. The main area contains a form with fields for '60456' and a file path '2015\Sample.pmt'. The text 'W2 Mate 2015' is displayed in the bottom right corner of the window.

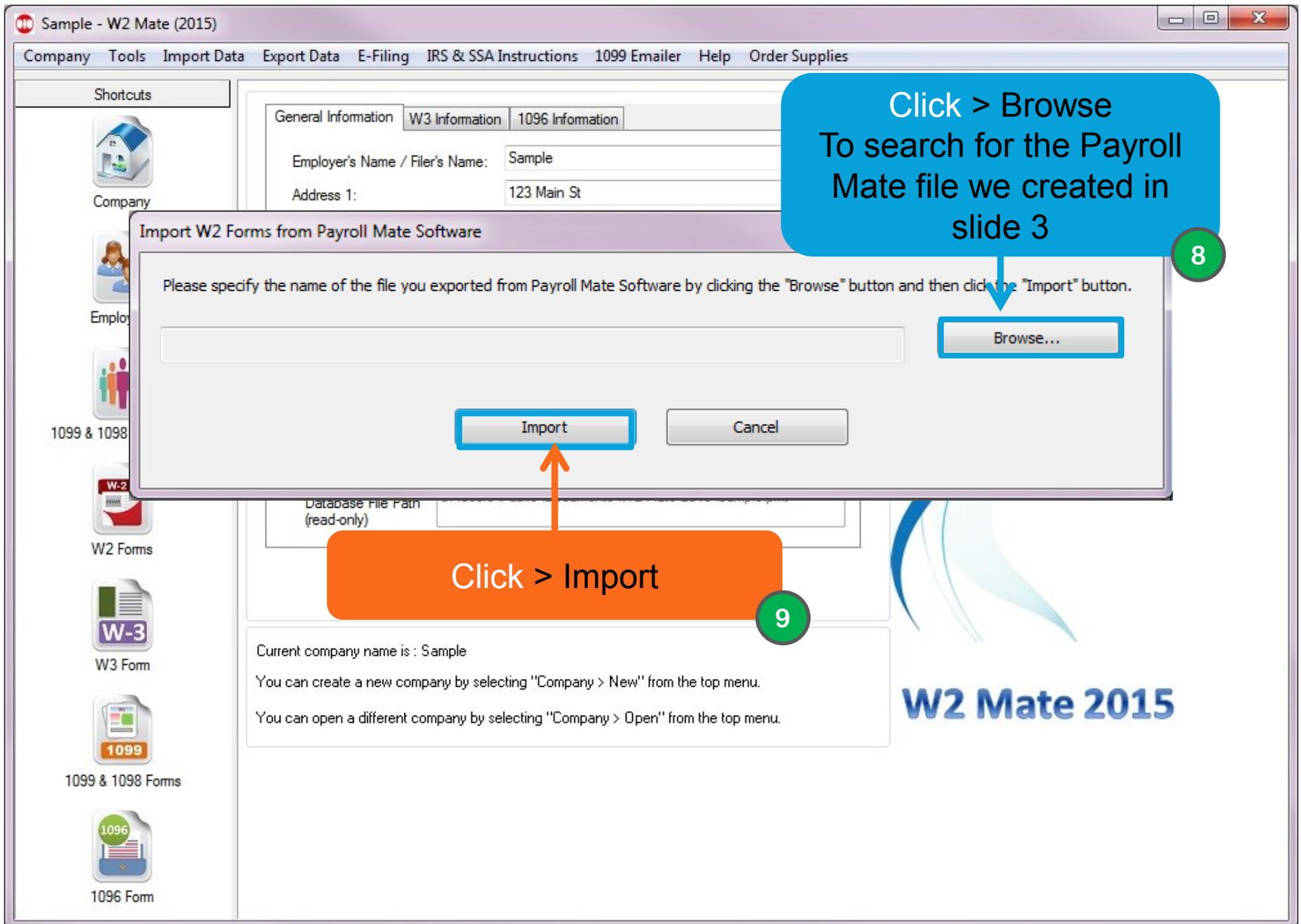
Click > Import Data

6

From Payroll Mate Software (W-2 Data)

Click > From Payroll Mate Software (W-2 Data)

W2 Mate 2015



Sample - W2 Mate (2015)

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

Shortcuts

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

General Information W3 Information 1096 Information

Employer's Name / Filer's Name: Sample
Address 1: 123 Main St
Address 2:
City: chicago
State:
Country:
Employer Identification Number:
Employer State ID:
Social Security # (if Applicable):
Database File Path (read-only): C:\U

Update Reset

W2 Mate (2015)

Import completed successfully

OK

Click > OK

10

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.

W2 Mate 2015

Congratulations. You know how to
import W2 data into W2 Mate using
Payroll Mate!



www.W2Mate.com

1-800-507-1992