How to Create a New Company in W2 Mate

1. Click Company

2. Select New

Dew Company example - W2	ate (2017)
Company Cools Import Data	Export Data E-Filing IRS & SSA Instructions Quality Control 1099 Emailer Help Order Supplies
New	Ctrl+N
Open	Ctrl+O p W3 Information 1096 Information
Save [Company File Auto sa	d] Ctrl+S
Delete	Ctrl+D Click Company 1
Exit	
Employees Employees 1099 & 1098 Recipients W2 Forms W2 Forms W3 Form	City: State: 06005 Country: United States 06005 Country: United States 00005 Employer Identification Number: 12:3123123 SSN (if Applicable): 00005 Employer State ID (if Applicable): Please click the "Update" button to save any changes. 00005 Database File Path C:\Users\Public\Documents\W2 Mate 2017\New Company 00005 Update Reset Clear
1099	Tou can open a different company by selecting Company > Open from the top menu.
1099 & 1098 Forms	
1096 Form	

3. Enter the New Company Name

4. Click OK to begin new company set up

Export Data E-Filing IRS & SSA In	structions Quality Control 1099 Emailer Help C	Order Supplies
General Information W3 Information	1096 Information	
Employer's Name / Filer's Name: Address 1:	Example Company 123 Main	
Address 2:	Chicago	
State:	IL V ZIP or Postal Code: 60605	
Country: Employer Identification Number:	United States SSN (If Applicable):	
Employer State ID (If Applicable):		
Hotes (optional neeronn held).	Please click the "Update" button to save any changes.	
Databi (read C	ompany Name 3 ^{ple}	
Update	Reset Clear	
Curren New Company		
You ca	•	W2 MATE 2017
Legal Name		
		Click OK 4
	Export Data E-Filing IRS & SSA In General Information W3 Information Employer's Name / Filer's Name: Address 1: Address 1: Address 2: City: State: Country: Employer Identification Number: Employer Identification Number: Employer State ID (if Applicable): Notes (Optional Free-form Field): Datab. Datab. Enter New C Update Update Curren Employer Name You ca Legal Name	Export Data E-Filing IRS & SSA Instructions Quality Control 1099 Emailer Help C General Information W3 Information 1096 Information Example Company Address 1: 123 Main Address 1: 123 Main Address 2: Chicago City: Chicago State: IL<

5. Click General Information tab and complete information

6. Click Update

New Company example - W2	Mate (2017)	
Company Tools Import Data	Export Data E-Filing IRS & SSA Instructions Quality Control 1099 Emailer Help	Order Supplies
Shortcuts	General Information	General Tab – Enter
Company Employees	Employer's Name / Filer's Name: New Company example Address 1:	Company Information 5
1099 & 1098 Recipients W2 Forms	Employer State ID (If Applicable): Notes (Optional Freeform Field): Please click the "Update" button to save any changes. Database File Path (read-only) C:\Users\Public\Documents\W2 Mate 2017\New Company example.pmt	Click Update 6
W3 Form W3 Form 1099 & 1098 Forms 1096 Form	Update Reset Clear Current company name is : Example Company 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 2017

7. Click Yes to save

New Company example - W2 Company Tools Import Data	Mate (2017) Export Data E-Filing IRS & SSA Instructions Quality Control 1099 Emailer Hel	lp Order Supplies
Shortcuts Company Company Employees 1099 & 1038 Recipients W2 Forms W2 Forms W3 Form 1099 & 1038 Forms	General Information W3 Information 1096 Information Employer's Name / Filer's Name: New Company example Address 1: 101 Test Iane Address 2: City: City: Chicago State: IL - ZIP or Postal Code: Country: United States Employer Identification Number: 12-3123123 Employer State ID (if Applicable): Employer State ID (if Applicable): Notes (Optional Free-form Field): Please click the "Update" button to save any changes Out Current or You can open a different company by selecting "Company > Open" from the top menu.	Click Yes 7

8. Click W3 Information tab and complete information

9. Click Update

New Company example - W2	Mate (2017)
Company Tools Import Data	Export Data E-Filing IRS & SSA Instructions Quality Control 1099 Emailer Help Order Supplies
Shortcuts	General Information W3 Information 4000 Information 8
Company	Kind of Payer 941 Third-party sick pay
Employees	Kind of Employer None apply Establishment number
	Other EIN used this year Control number
1099 & 1098 Recipients	Contact person Telephone number E-mail address Fax number
W3 Form	Update Reset Clear Current company name is : Example Company 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.
1099 & 1098 Forms	

10. Click Yes to save

New Company example - W2 Mate (2017) Company Tools Import Data Export Data	a E-Filing IRS & SSA Ins	tructions Quality Control 1099 Emailer Hel	p Order Supplies
Company Tools Import Data Export Data Shottcuts General Kind Company Company Kind Company Shottcuts General Company Shottcuts Mind Company Shottcuts General Company Shottcuts General Company Shottcuts Other Employees Other Company 1099 & 1098 Recipients W2 W2 Forms W2 W3 Form You c 1099 & 1098 Forms You c 1099 & 1098 Forms General 1096 Form Togs Form	a E-Filing IRS & SSA Insi Information W3 Information d of Payer 1 t of Employer ne apply • ablishment number er EIN used this year ontact person mail address Update Mate (2017) Are you sure you w	tructions Quality Control 1099 Emailer Hel 1096 Information Third-party sick pay Control number Fax number Fax number Reset Clear ant to save the current fields? nu Yes No	Click Yes 10

11. Click 1096 information tab and complete information

12. Click Update

New Company example - W2 Company Tools Import Data	Mate (2017) Expert Data E-Filing IRS & SSA Instructions - Quality Control - 1009 Emailer - Help - Order Supplier
Shortcuts	General Information W3 Information 1096 Information Company Information Tab – Enter Company Information 11
Company	Name of person to contact Telephone number
A	E-mail address Fax number
Employees 1099 & 1098 Recipients W2 Forms	Filer's Name (ir different from Company name) If you want to split the Filer name into 2 lines, then you can separate them by a \$. So for example if you want to use "John Doe" on 1st line and "DBA JDOE" on the 2nd then you enter "John Doe\$DBA JDOE" (No quotes). Click Update 12
W3 Form	Update Reset Clear Current company name is : Example Company You can create a new company by selecting "Company > New" from the top menu.
1099 & 1098 Forms	You can open a different company by selecting "Company > Open" from the top menu.
1096 Form	

13. Click Yes to save

