

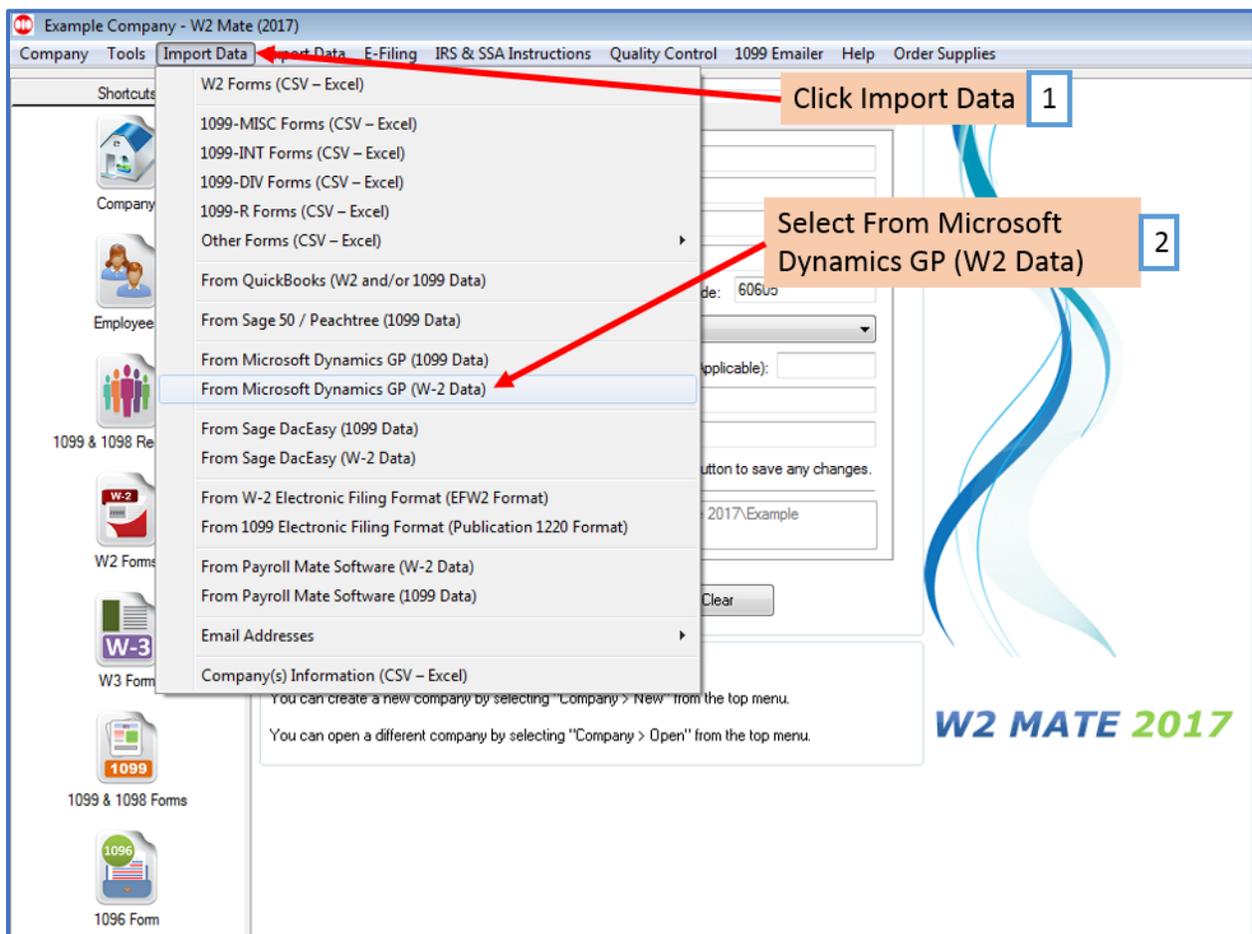
How to Import W2 Data Using Microsoft Dynamics GP

Note: In order to use this feature you must purchase and enable W2 Mate Option #3 to import

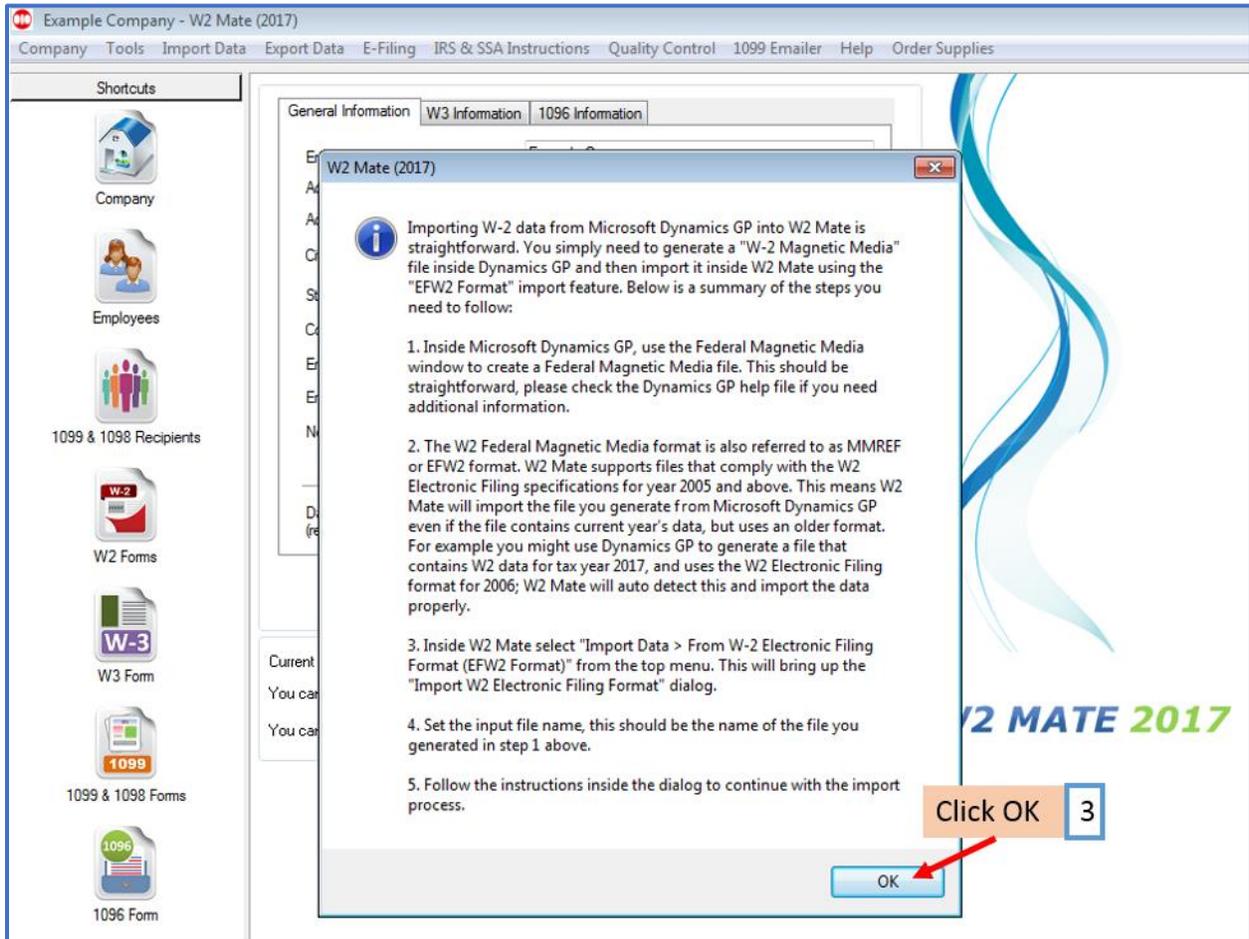
Make sure you have the correct Company open inside W2 Mate

Note: If you do not currently have this company created inside of W2 Mate you will need to create the company prior to importing the W2 data. See How to Create a New Company tutorial.

1. Click Import Data
2. Select From Microsoft Dynamics GP (W2 Data)



3. Read the important information, then Click OK



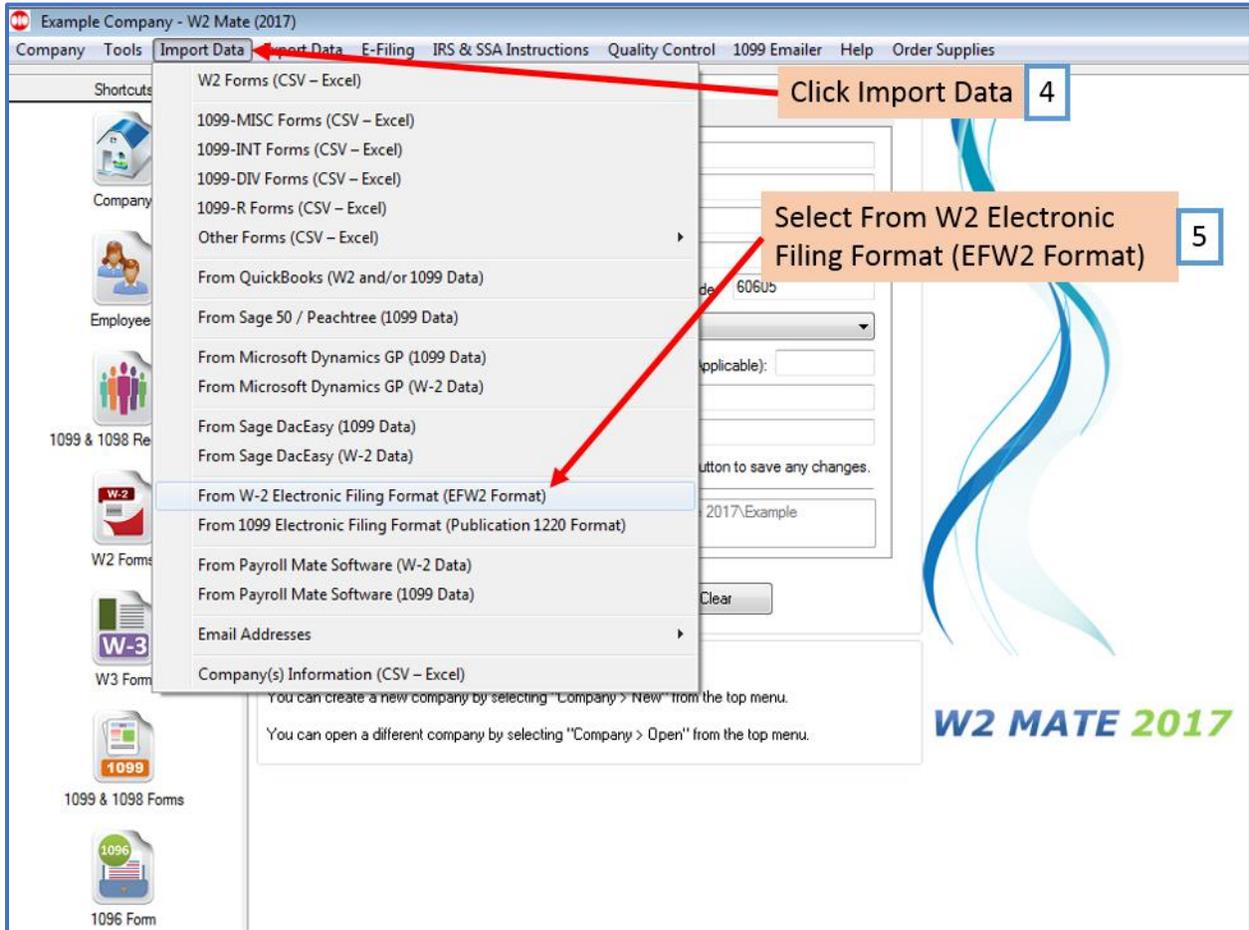
Note: You need to generate a W2 Magnetic Media file inside Microsoft Dynamics GP and then import that file into W2 Mate using the EFW2 Format import feature.

Inside Microsoft Dynamics GP, use the Magnetic Media dialog box to create a W2 magnetic media file. Please check the Microsoft Dynamics GP help file if you need additional information to create this file.

Note: The W2 Magnetic Media format is also referred to as a MMREF or EFW2 format. W2 Mate supports files that comply with the W2 Electronic Filing specifications for tax year 2005 and above. This means W2 Mate will import the file you generate from Microsoft Dynamics GP even if the file contains current year's data but uses an older format. W2 Mate will auto detect the older format and import the data properly.

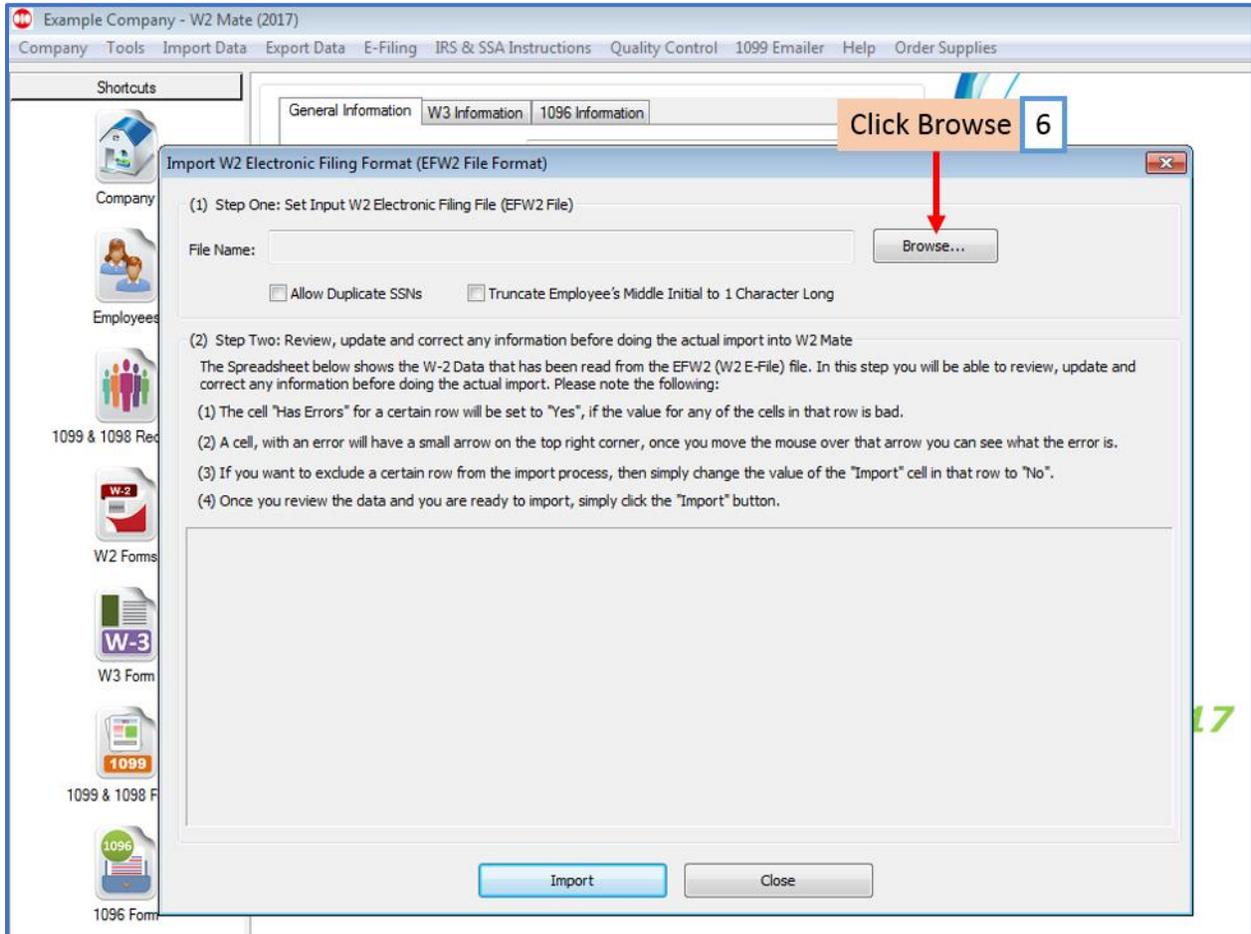
4. Inside W2 Mate Select Import Data

5. Select From W2 Electronic Filing Format (EFW2 Format)



This will bring up the Import W2 Electronic Filing Format dialog

6. Click Browse to select the file to import – this should be the file you generated from Microsoft Dynamics GP



7. Review the data that is pulled in.

8. Click Import

Example Company - W2 Mate (2017)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions Quality Control 1099 Emailer 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: Example Company

Import W2 Electronic Filing Format (EFW2 File Format)

(1) Step One: Set Input W2 Electronic Filing File (EFW2 File)

File Name: Y:\Angela\W2 MATE\IMPORT examples\W2REPORT-EXAMPLE-COMPANY.txt

Allow Duplicate SSNs Truncate Employee's Middle Initial to 1 Character Long

Review Data 7

(2) Step Two: Review, update and correct any information before doing the actual import into W2 Mate

The Spreadsheet below shows the W-2 Data that has been read from the EFW2 (W2 E-File) file. In this step you will be able to review, update and correct any information before doing the actual import. Please note the following:

(1) The cell "Has Errors" for a certain row will be set to "Yes", if the value for any of the cells in that row is bad.

(2) A cell, with an error will have a small arrow on the top right corner, once you move the mouse over that arrow you can see what the error is.

(3) If you want to exclude a certain row from the import process, then simply change the value of the "Import" cell in that row to "No".

(4) Once you review the data and you are ready to import, simply click the "Import" button.

	Has Errors	Import	SSN #	First Name	Middle Name	Last Name	Suff.	Address
1	No	Yes	111-22-3333	SAMUEL	S	SAMPLE		456 TEST
2	No	Yes	999-99-9999	SALLY		TESTER		101 MAIN

Click Import 8

9. Click OK

The screenshot shows the W2 Mate (2017) software interface. The main window has a menu bar with options: Company, Tools, Import Data, Export Data, E-Filing, IRS & SSA Instructions, Quality Control, 1099 E-mailer, Help, and Order Supplies. On the left is a 'Shortcuts' sidebar with icons for Company, Employees, 1099 & 1098 Recipients, W2 Forms, W3 Form, 1099 & 1098 Forms, and 1096 Form. The main area contains buttons for 'New Employee', 'Modify Employee', and 'Delete Employee', along with a 'Sort Employees By:' dropdown menu set to 'Last Name'. Below these is a table with the following data:

	Social Security Number	First Name	Middle Name	Last Name
1	123-22-3333	Stuart	S	Sample
2	111-22-3333	SAMUEL	S	SAMPLE
3	998-99-9999	Tommy		Tester
4	999-99-9999	SALLY		TESTER

An 'Import Process Completed Successfully' dialog box is overlaid on the table. The dialog box contains the text: 'Import Process Completed Successfully. You will now be directed to the Employees screen'. A red arrow points from the text 'Click OK' (which is next to a circled number '9') to the 'OK' button in the dialog box.