How to Rollover Company Data from Previous Year

One Computer - No networking

Make sure you have the correct Company open inside W2 Mate

- 1. Click Tools
- 2. Select Rollover data from last year

🕮 Example Company - W2 Mate (2017)			
Company	Tools Honor Data Export Data E-Filing IRS & SSA Instructions	Quality Control 1099 Emailer Help Order Supplies	
Company	Rollover Data From Last Year Options Enable Optional Features Backup Company Restore Company Backup All Companies Restore Multiple Companies Delete Multiple 1099 / 1098 Recipients Zero Amounts On Multiple 1099-MISC Forms Zero Amounts On Multiple 1099-INT Forms Zero Amounts On Multiple 1099-DIV Forms Zero Amounts On Multiple 1099-DIV Forms Zero Amounts On Other Forms Other Recipient / 1099 Tools	Click Tools 1 Party Select Rollover Data From Last Year 2 or Postal Code: 60605 SSN (if Applicable): e "Update" button to save any changes. pts/W2 Mate 2017). Example	
	Delete Multiple Employees Zero Amounts On Multiple W2 Forms Update Box 15 (State, State ID) for Multiple Employees Other Employee / W2 Tools Remap Form 1099-MISC Data Bulk TIN Matching	Clear New" from the top menu. my > Open" from the top menu. W2 MATE 2017	
1099	1099 8 1098 Forms 1096 Form		

Note: Before running the W2 Mate data rollover utility make sure you have last year's and this year's software installed on the same computer. Make sure you can open last year's W2 Mate and see your data.

3. Read and Confirm software installation

4. Click Continue with Data Rollover

Example Company - W2	Mate (2017) Data Evolut Data E-Filing IRS & SSA Instructions Quality Control 1009 Emailer Help Order Supplies
Shortcuts Company	General Information W3 Information 1096 Information Employer's Name / Filer's Name: Example Company Address 1: 123 Main Address 2: Triangle Company
Employees 1099 & 1098 Recipients W2 Forms	Data Rollover from Last Year Before running the data rollover utility, please make sure: Read before continuing 3 1. W2 Mate 2017 is installed on the SAME computer as W2 Mate 2016. 3 2. You can open W2 Mate 2016 and see all your companies and data. If you are running W2 Mate in a network environment (purchased W2 Mate Option #2) please read the instructions below (gnore otherwise): Image: Mate on ONE computer) How to rollover W2 Mate data in a server / network configuration (please ignore these steps if you are running W2 Mate on ONE computer): Image: Mate Sure all computers have FULL access rights to this new folder. 1) Create a folder on the SAME computer where you had 2016. Click Continue with Data Rollover
W3 Form W3 Form 1099 & 1098 Forms 1096 Form	Continue With Data Rollover 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

Dialog box will open during rollover in case you need to Cancel

nç —	Import Proc	ess in Progress				
	Import Task List:					
	Status	Tasks Searching for W2 Mate 2016 Database Folder Enumerating Companies Upgrading Companies (this might take a long time) Conting Companies to W2 Mate 2017 Database Folder	Dialog box while rollover in process. Click Cancel to cancel			
	Brogress	Refreshing Company List	rollover.			
		24% Cancel	100 %			

5. Click OK



Multiple computers - Networked

Networking will only work if you purchase and enable W2 Mate option #2

1. Create a folder on the server and name it (for example: W2 Mate 2017 Data). Make sure all network computers have FULL access rights to this new folder.

2. Install W2 Mate Current Year on the SAME computer where you have W2 Mate from Last Year

- 3. Enable any optional features inside W2 Mate Current Year
- 4. Close W2 Mate Current Year
- 5. Open W2 Mate from Last Year and make sure you see all your companies
- 6. Close W2 Mate Last Year and open W2 Mate Current Year

7. Change the W2 Mate Current Year database path to point to the new folder you created on the server

- a. Click Tools
- b. Select Options
- c. Select Company Data Path

D Example Company - W2 Mate (2017)					
Company Tools Apport Data Export Data E-Filing IRS & SSA Instructions Quality Control 1099 Emailer Help Order Supplies					
	Rollover Data From Last Year Options	Click Tools 7a Select Options 7b			
	Enable Optional Features Backup Company Restore Company Backup All Companies Restore Multiple Companies	Company Data Path (Network Edition) ✓ Auto Calculate FICA Withheir on W2 Forms Do Not Print "COPY" on Blank Red 1096 & 1099 Copy-A Font Size for Printing State ID or Postal Code: 60605			
1099 &	Delete Multiple 1099 / 1098 Recipients Zero Amounts On Multiple 1099-MISC Forms Zero Amounts On Multiple 1099-INT Forms Zero Amounts On Multiple 1099-DIV Forms Zero Amounts on Other Forms Other Recipient / 1099 Tools Copy & Paste 1099-MISC Recipients Between Companies	Select Company Data Path 7c SSN (if Applicable): e "Update" button to save any changes. nts\W2 Mate 2017\Example			
	Delete Multiple Employees Zero Amounts On Multiple W2 Forms Update Box 15 (State, State ID) for Multiple Employees Other Employee / W2 Tools Remap Form 1099-MISC Data Bulk TIN Matching	Clear > New" from the top menu. any > Open" from the top menu. W2 MATE 2017			
1099	1099 8 1098 Forms 1099 096 Form 096 Form				

8. Select the folder on the server you created

9. Click OK

Current Selection	Select Folder	r you created 8
↓ 10 ↓ Pa ↓ Pa ↓ Pa ↓ W2 ↓ W2	ror Current Y ore Emiler 2017 yroll Mate 2017 Wate 2014 Mate 2016 Mate 2017 2016	/ear
Þ	NewApp OBFC Clic	kOK 9

10. Click Yes for the first computer being set up only Each additional computer being set up Click No

Example Company - W2 Mate	e (2017)				
Company Tools Import Data	Export Data E-Filing IRS & SSA In	nstructions Quality Control	1099 Emailer Help Orde	r Supplies	
Company	General Information W3 Informatio Employer's Name / Filer's Name: Address 1: Address 2:	n 1096 Information Example Company 123 Main			
Employees	State: Country:	IL ▼ ZIP or Postal Code: United States	Click Yes for 1 set up only, ea computer Clic	st computer ach additional k No	10
1099 & 1098 Recipients W2 Forms	Would you like	to copy your current compan	y database files to the new Yes No		
W-3 W3 Form 1099 & 1098 Forms	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.			2017	
1096 Form					

11. Click Tools

12. Select Rollover data from last year

😳 Example Company - W2 Mate (2017)			
Company	Tools toos Data Export Data E-Filing IRS & SSA Instructi	ions Quality Control 1099 Emailer Help Order Supplies	
Company	Rollover Data From Last Year Options Enable Optional Features Backup Company Restore Company Backup All Companies Restore Multiple Companies Delete Multiple 1099 / 1098 Recipients Zero Amounts On Multiple 1099-MISC Forms Zero Amounts On Multiple 1099-INT Forms Zero Amounts On Multiple 1099-INT Forms Zero Amounts on Other Forms Other Recipient / 1099 Tools Copy & Paste 1099-MISC Recipients Between Companies	Click Tools 11 Pariy Select Rollover Data From Last Year Or Postal Code: 60605 SSN (if Applicable): e "Update" button to save any changes. rtts\W2 Mate 2017\Example	
1099	Delete Multiple Employees Zero Amounts On Multiple W2 Forms Update Box 15 (State, State ID) for Multiple Employees Other Employee / W2 Tools Remap Form 1099-MISC Data Bulk TIN Matching	Clear > New" from the top menu. any > Open" from the top menu. W2 MATE 2017	
	096 Form		

13. Read and Confirm software installation

14. Click Continue with Data Rollover



	Import Proc	ess in Progress			
	Import Ta:	sk List:			
-	Status	Tasks	Dialog box while rollover in		
		Searching for W2 Mate 2016 Database Folder	Dialog box while rohover in		
		Enumerating Companies	process.		
_		Upgrading Companies (this might take a long time)	Click Cancel to cancel		
		Copying Companies to W2 Mate 2017 Database Folder	Click Calicer to calicer		
		Refreshing Company List	rollover.		
	Progress				
-	0%	24%	100 %		
	Cancel				

Dialog box will open during rollover in case you need to Cancel



16. Make sure you can see all your companies from the prior year inside W2 Mate Current Year before you proceed to the next step

17. For each additional computer, install W2 Mate Current Year on that computer and change database path to point to the folder you created on the server. To do this select "Tools > Options > Company Data Path" from the top menu inside W2 Mate and select the created folder on the server. If you are asked to "copy existing company Files to the new folder" select "No".