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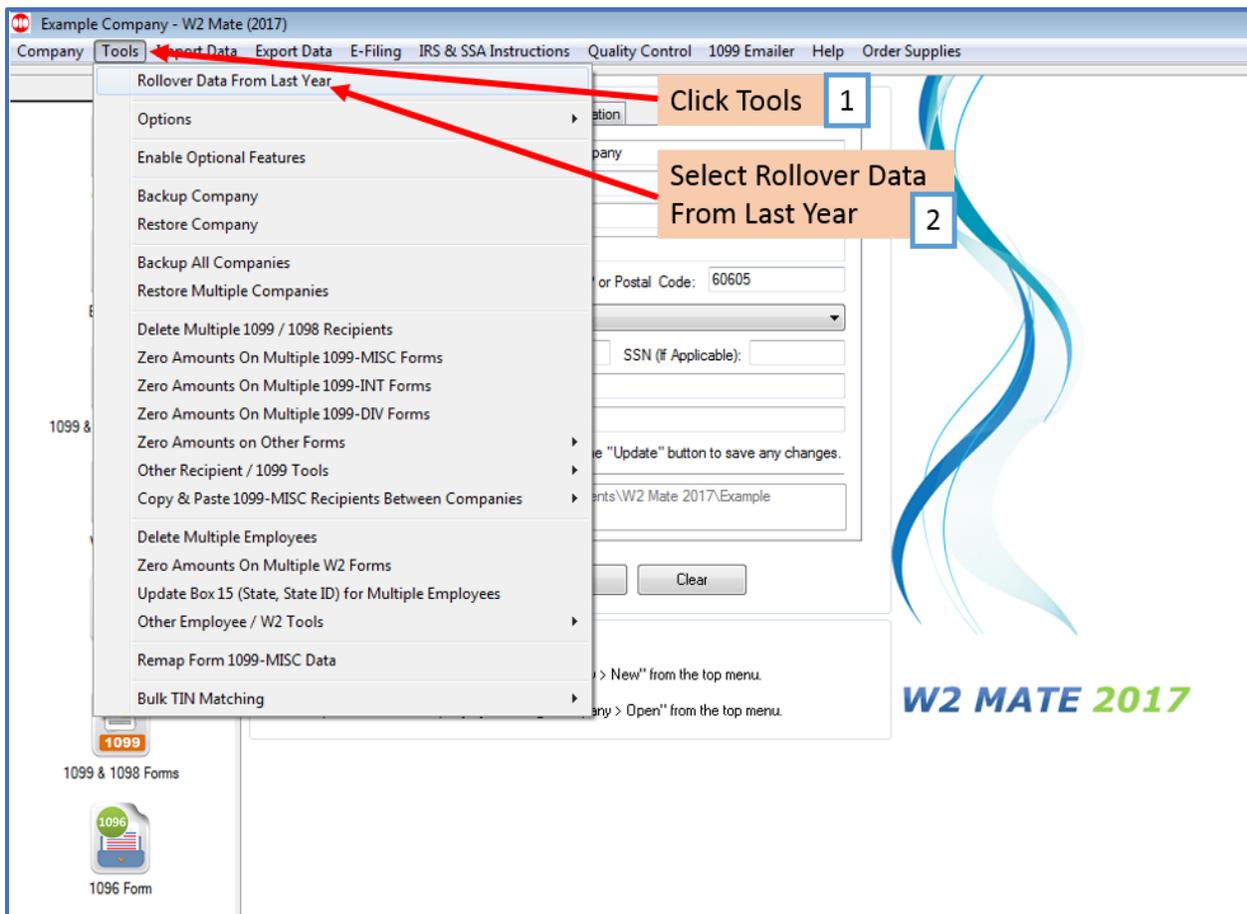
Note: Before running the W2 Mate data rollover utility make sure you have last year's and this year's software installed on the same computer. Make sure you can open last year's W2 Mate and see your data.

3. Read and Confirm software installation

4. Click Continue with Data Rollover

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

Import Process in Progress...

Import Task List:

Status	Tasks
→	Searching for W2 Mate 2016 Database Folder
→	Enumerating Companies
✕	Upgrading Companies (this might take a long time)
✕	Copying Companies to W2 Mate 2017 Database Folder
✕	Refreshing Company List

Progress

0 %   24%   100 %

Cancel

Dialog box while rollover in process.
Click Cancel to cancel rollover.
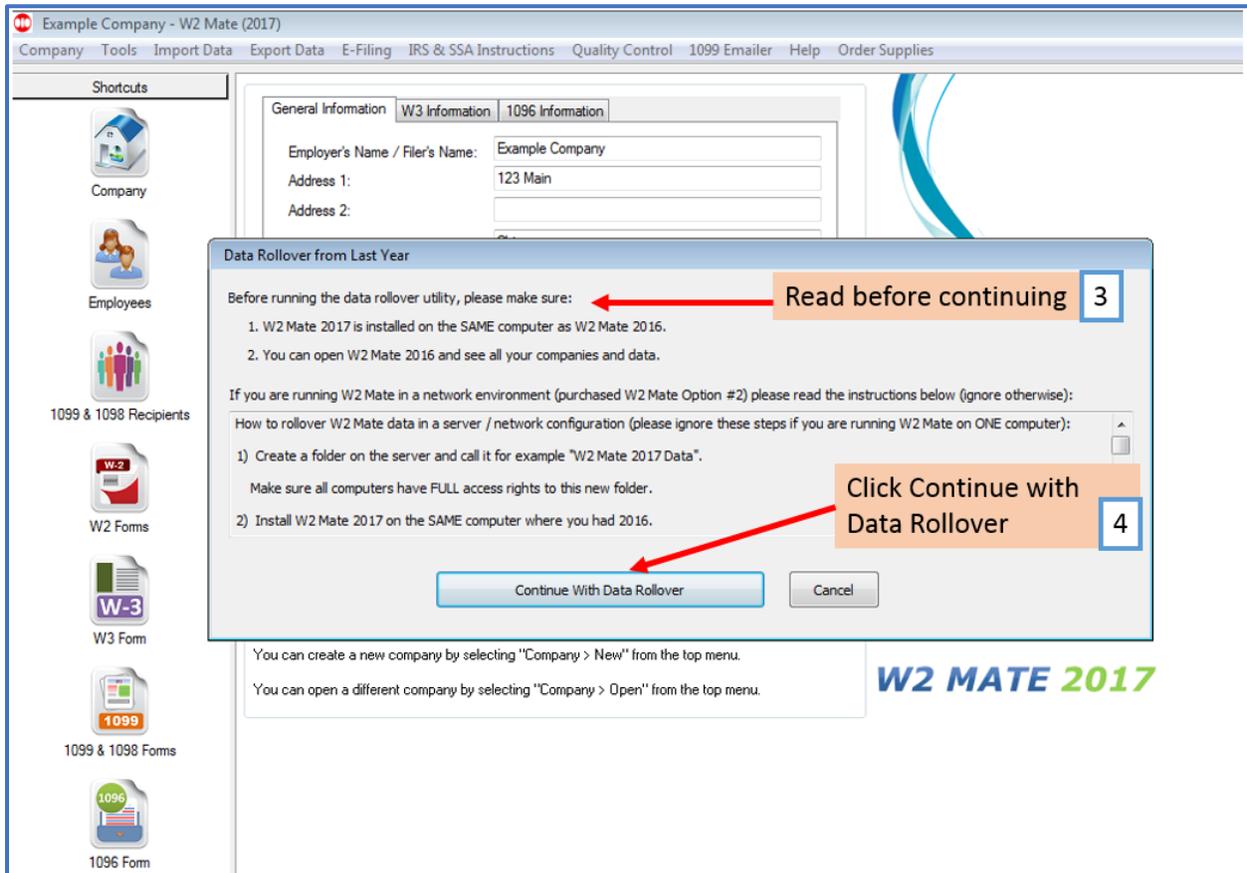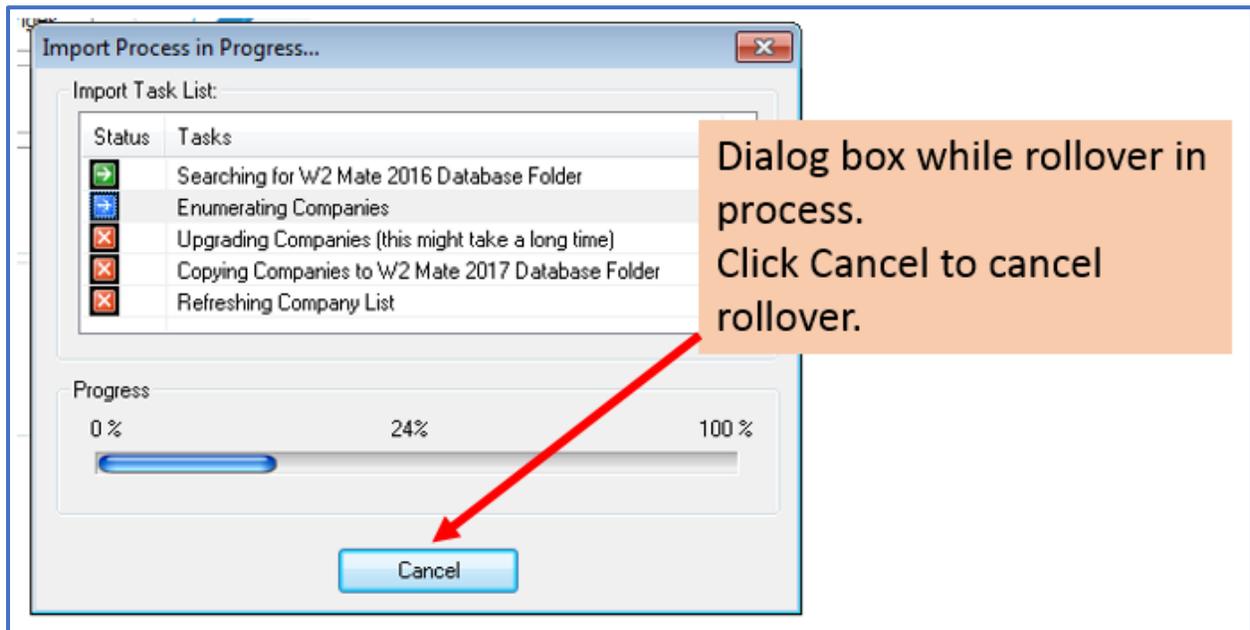
5. Click OK
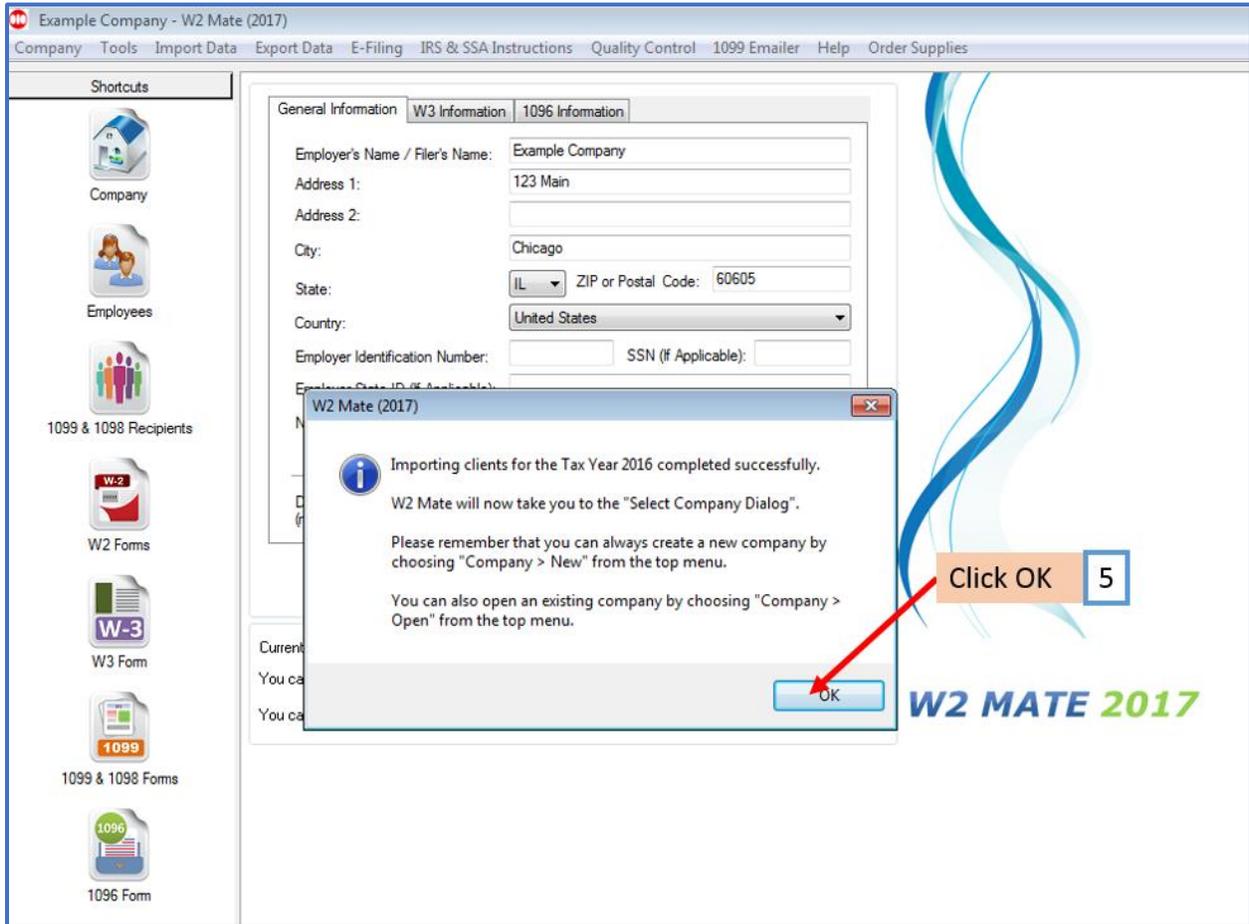
Multiple computers - Networked

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
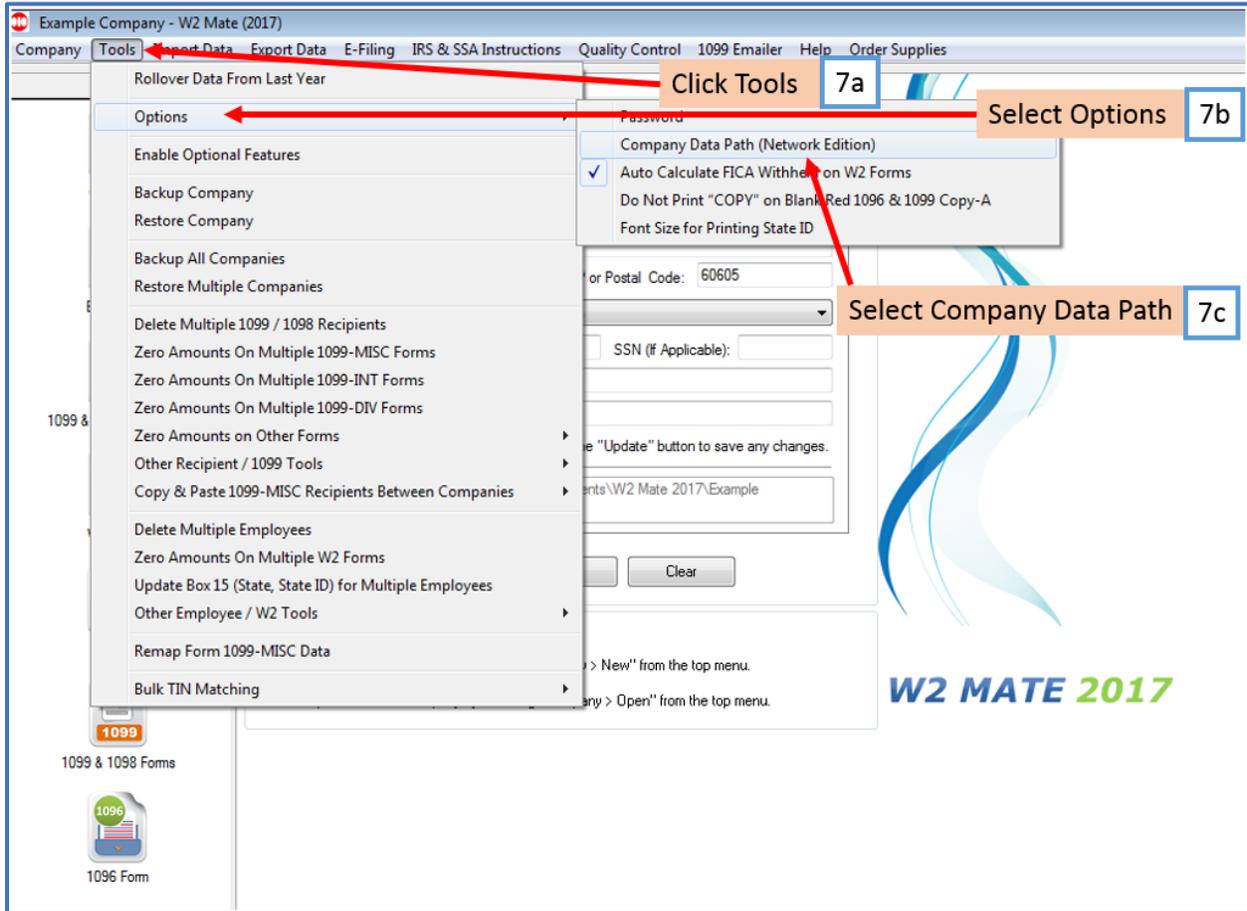
8. Select the folder on the server you created

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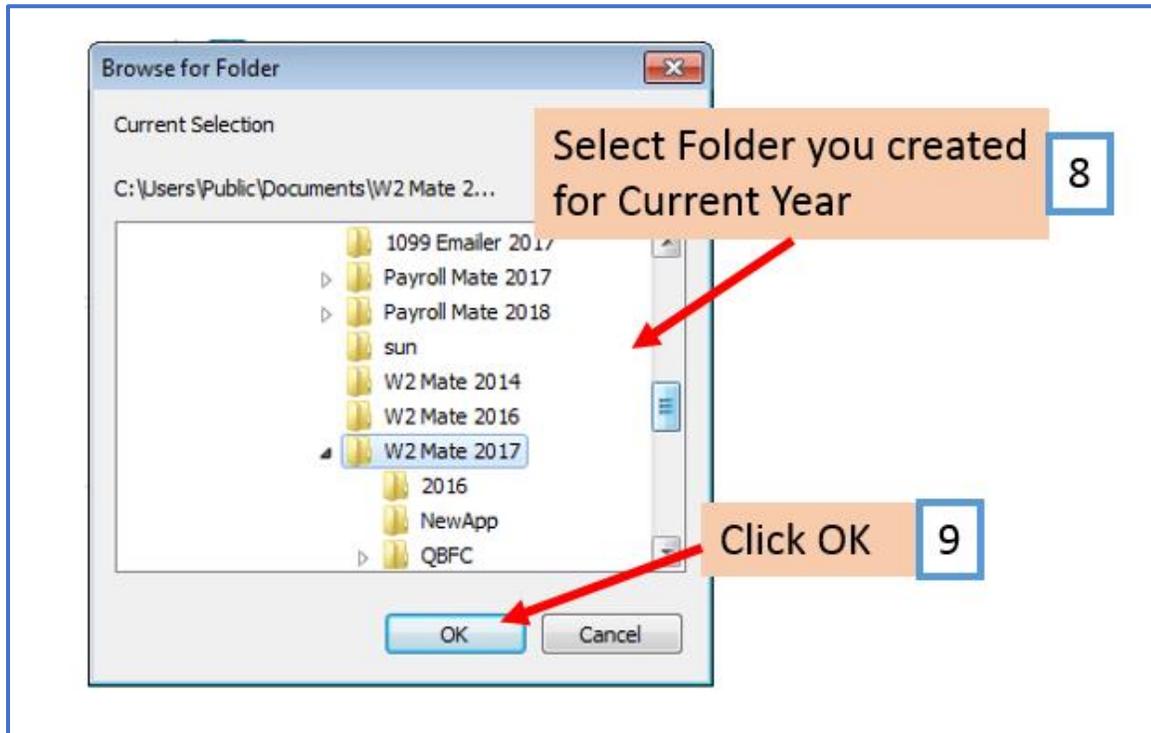
10. Click Yes for the first computer being set up only
    Each additional computer being set up Click No

Click Yes for 1st computer set up only, each additional computer Click No

10
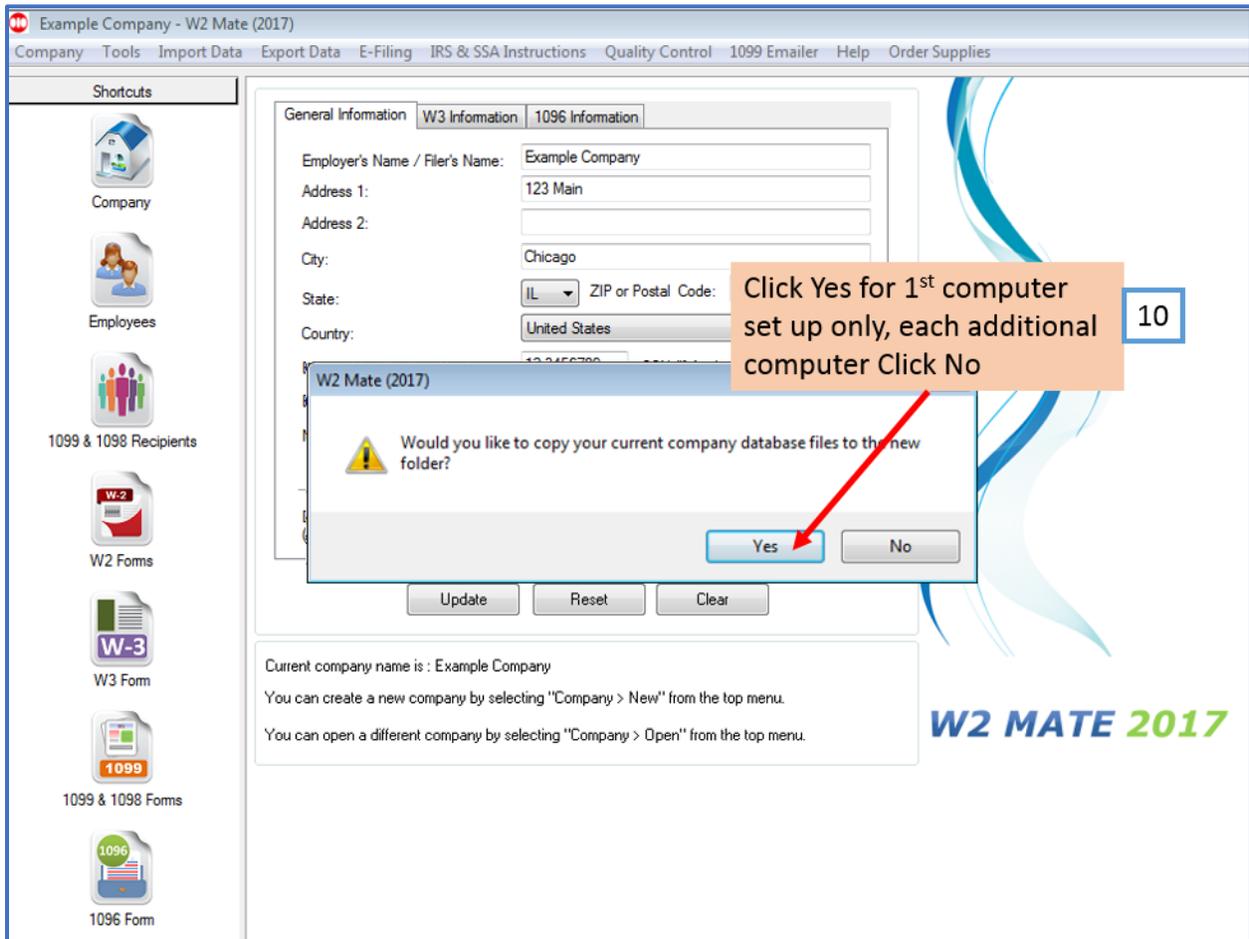
11. Click Tools

12. Select Rollover data from last year
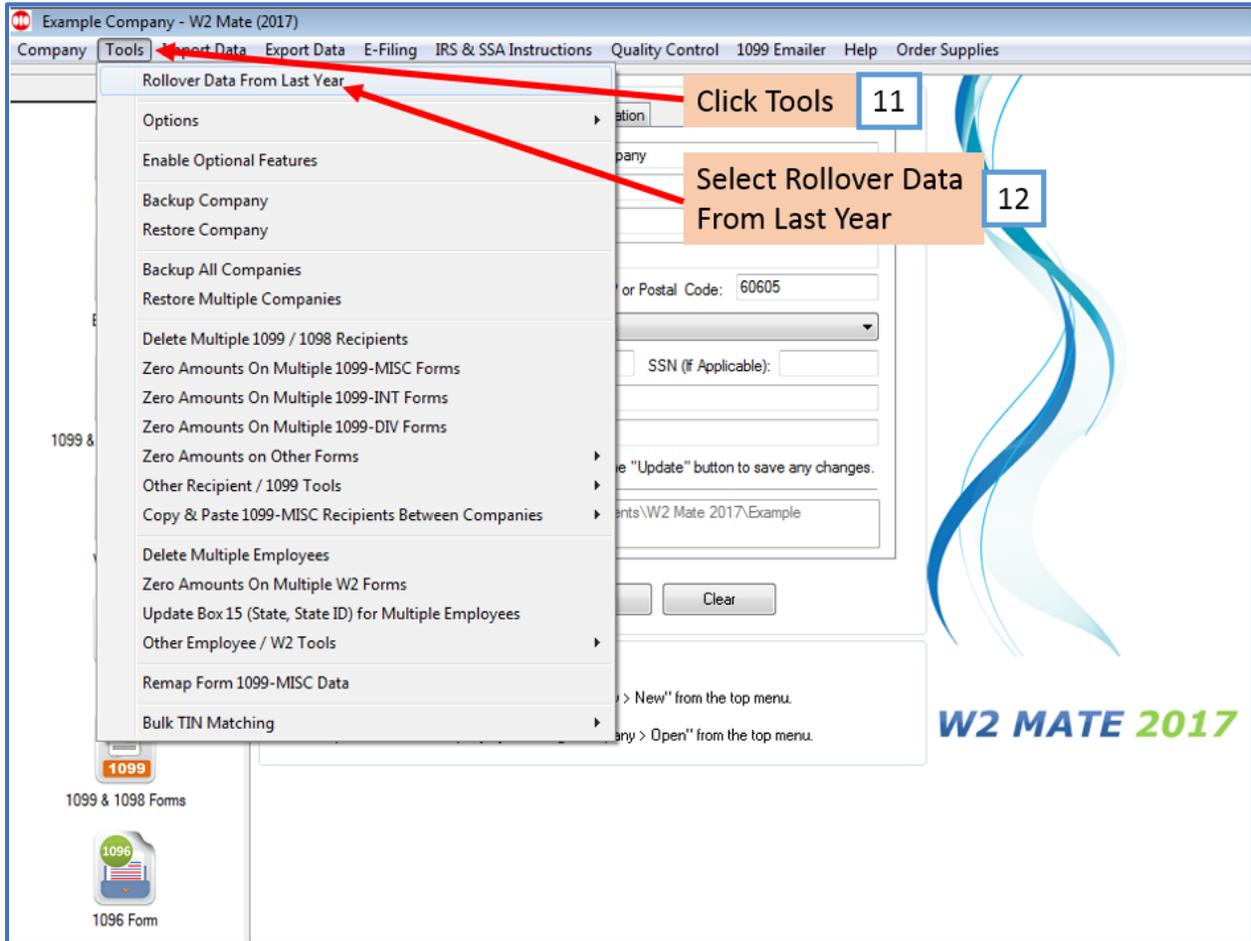
13. Read and Confirm software installation

14. Click Continue with Data Rollover

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

Dialog box while rollover in process.
Click Cancel to cancel rollover.
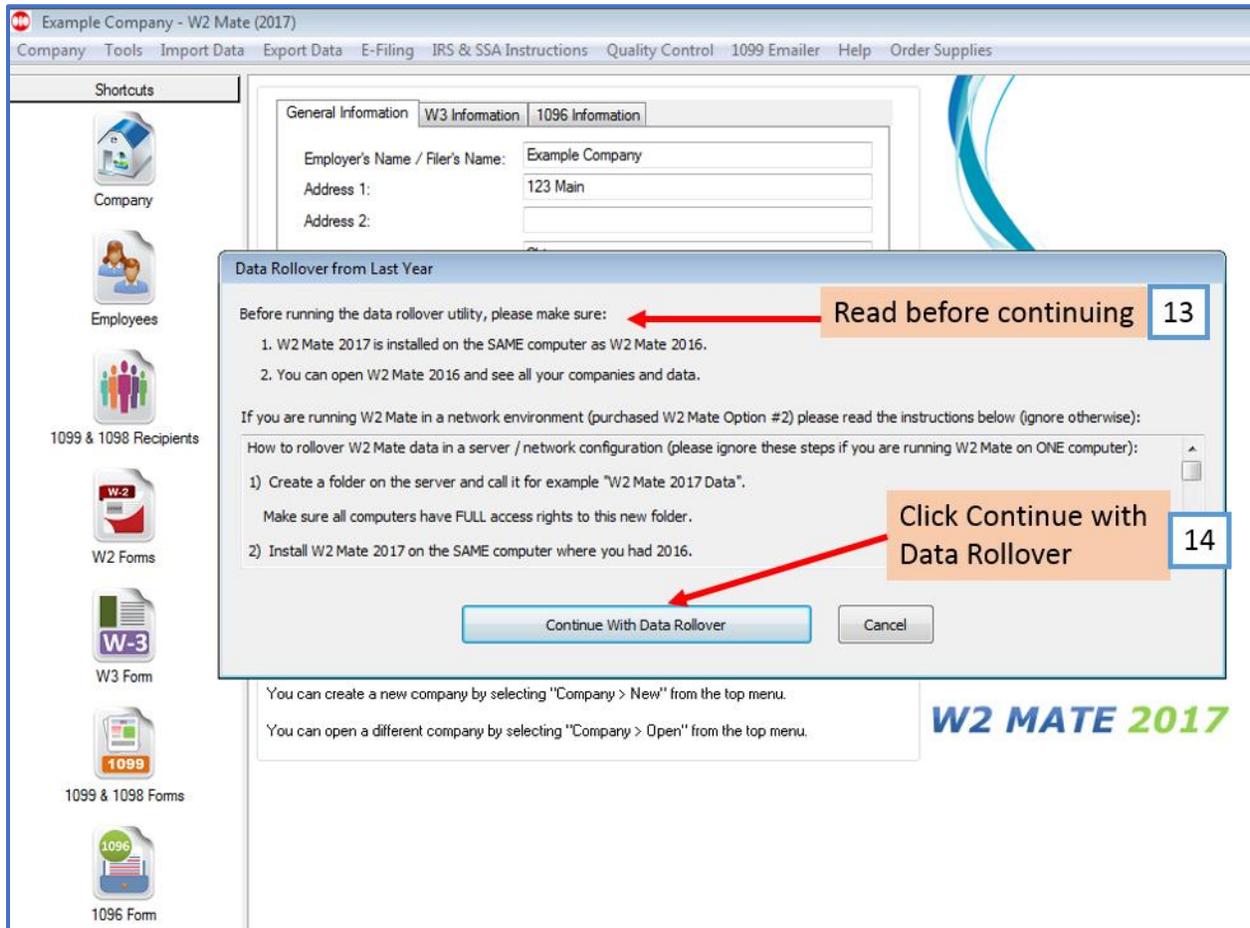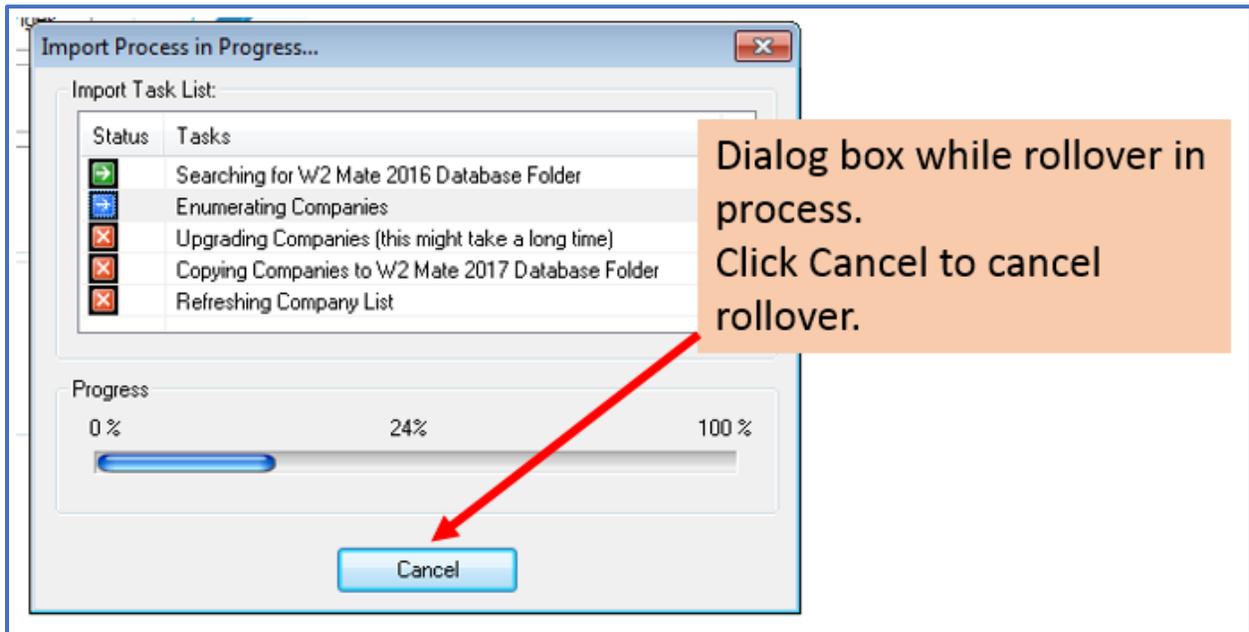
15. Click OK
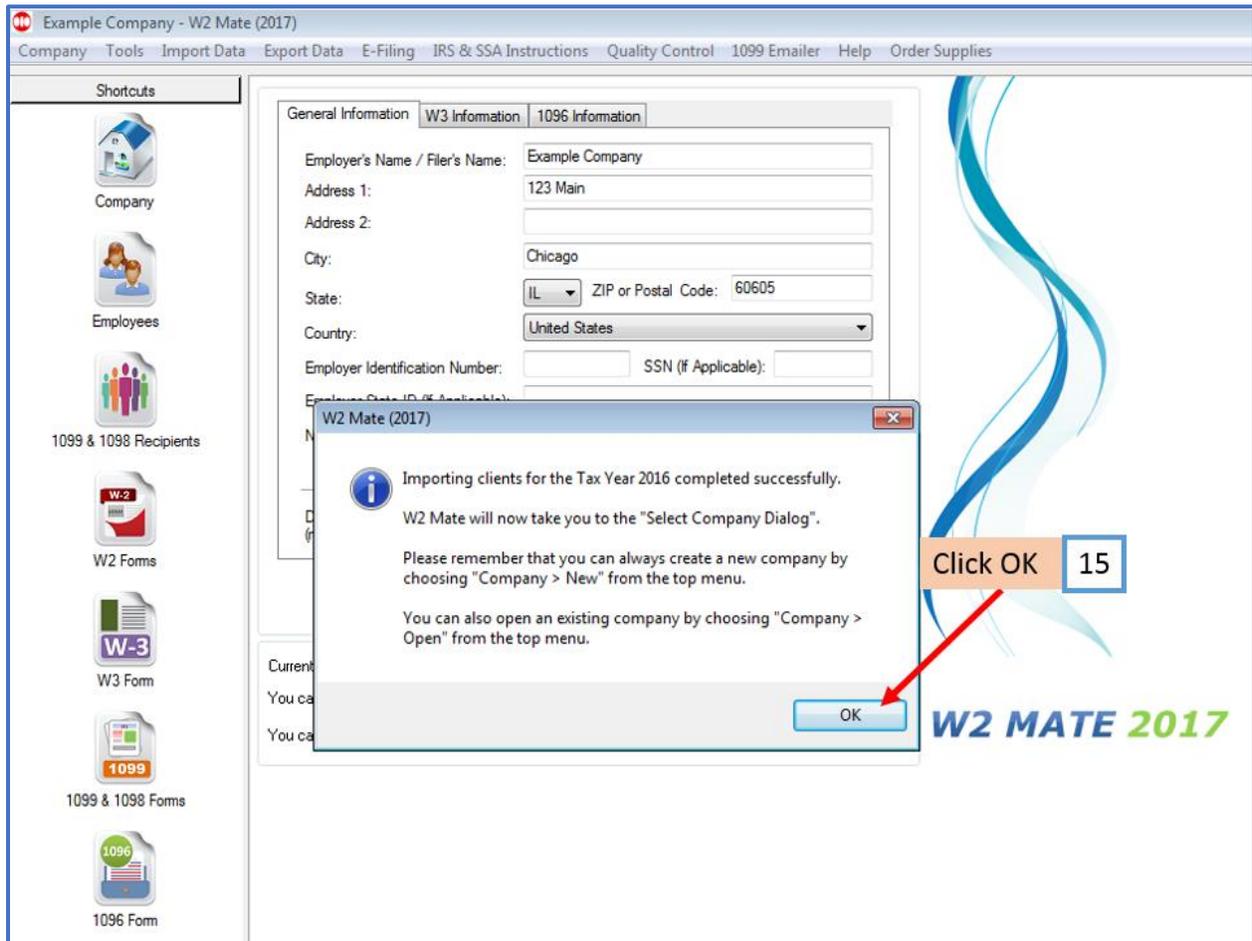
16. Make sure you can see all your companies from the prior year inside W2 Mate Current Year before you proceed to the next step

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".