How to Transfer W2 Mate to a New Computer

You have the option to move a single company or to move all companies at once.

*Single Company

Open W2 Mate software on the original computer Make sure you have the correct Company open inside W2 Mate

- 1. Click Tools
- 2. Select Backup Company

💷 Example	e Company - W2 Mate (2017)			
Company Tools Heport Data Export Data E-Filing IRS & SSA Instructions Quality Control 1099 Emailer Help Order Supplies				
Company 1099 &	Tools Apport Data Export Data E-Filing IRS & SSA Instruction Rollover Data From Last Year Options Enable Optional Features Instruction Backup Company Restore Company Restore Company Instruction Backup All Companies Restore Multiple Companies Instruction 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 Copy & Paste 1099-MISC Recipients Between Companies Delete Multiple Employees Zero Amounts On Multiple W2 Forms Update Box 15 (State, State ID) for Multiple Employees Cero Amounts On Multiple W2 Forms Delete Multiple Fornloyee / W2 Tools Remap Form 1099-MISC Data Remap Form 1099-MISC Data	ns Quality Control 1099 Emailer Help Order Supplies Click Tools 1 pany Select Backup Company 2 or Postal Code: 60605 SSN (if Applicable): e "Update" button to save any changes. e "Update" button to save any changes. rtts:\W2 Mate 2017\Example Clear New" from the top menu.		
	Bulk TIN Matching	my > Open" from the top menu.		
1099	1099 & 1098 Forms 1096 Form			

3. Select Company from drop-down menu

4. Click Browse

Example Compa	iny - W2 Mate	: (2017)			4000 5 7 11 11 1	0 I 0 F		
Company Tools	Import Data	Export Data E-F	iling IRS & SSA In	nstructions Quality Control	1099 Emailer Help	Order Supplies		
Company Tools Import Data Shortcuts Company Company Employees Employees 1099 & 1098 Recipients		General Information W3 Information Employer's Name / Filer's Name: Address 1: Address 2: City: State: Country: Employer Notes (Op Step 1: Please sp Company Name:		n 1096 Information Example Company 123 Main Chicago IL V ZIP or Postal Code: 60605 United States Select Company 3 x pecify the name of the company you would like to create backup file for: :: Example Company				
W2 Forms W2 Forms W3 Form 1099 & 1098 f 1099 & 1098 f 1096 Form	ioms	(read-only) Current compan You can create You can open a	- Step 2: Please sp Backup File:	pecify the name and location of th A:\Example Company.wmb OK	e backup file:	Click Bro	Browse wse	4

5. Select the external drive

6. Click Save





8. Click OK



Repeat steps 1-8 for each company you want to move

Go to the new computer and connect to your external drive

Open W2 Mate (Install and open if you have not already installed W2 Mate)

9. Click Tools

10. Select Restore Company

💷 Example	: Company - W2 Mate (2017)			
Company Tools 🛶 Lata Export Data E-Filing IRS & SSA Instructions Quality Control 1099 Emailer Help Order Supplies				
	Rollover Data From Last Year Options Enable Optional Features Backup Company Restore Company	Ation Click Tools 9 pany Select Restore Company 10		
1099 &	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 Other Forms Other Recipient / 1099 Tools Copy & Paste 1099-MISC Recipients Between Companies 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	 or Postal Code: 60605 SSN (ff Applicable): e "Update" button to save any changes. ents:W2 Mate 2017/Example Clear > New" from the top menu. any > Open" from the top menu. 		
1099	& 1098 Forms			

11. Select external drive



12. Select Company .wmb file

13. Click Open



14. Click Yes

💭 Example Company - W2 Mate (2017)				
Company Tools Import Data Export Data E-Filing IRS & SSA Instructions Quality Control 1099 Emailer Help Order Supplies				
Shotcuts Company Employees	General Information W3 Information Employer's Name / Filer's Name: Address 1: Address 2: City: State:	n 1096 Information Example Company 123 Main Chicago IL V ZIP or Postal Code: 60605		
1099 & 1098 Recipients W2 Forms W3 Form 1099 & 1098 Forms	W2 Mate (2017) Company file was res open this company? Update Current company name is : Example Cor You can create a new company by sele You can open a different company by s	tored successfully. Would you like W2 Mate to Yes No Reset Clear mpany hoting "Company > New" from the top menu. electing "Company > Open" from the top menu.	Click Yes 14 W2 MATE 2017	

Repeat steps 9-14 for each company you want to restore

*All Companies

Open W2 Mate software on the original computer

1. Click Tools

2. Select Backup All Companies



3. Click Yes



4. Select external drive

5. Click Open



6. Click Save



7. Click Yes



8. Click Close

😳 Example Company - 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 1096 Information Employer's Name / Filer's Name: Example Company				
Company	W2 Mate				
Employees	Backup File Created Successfully and saved to: ^ E:\W2MateBatchBackup.wb2 ^ Number of files included in the backup file is 17.				
1099 & 1098 Recipients W2 Forms	1) 2) Angie's Company 3) Blue Solutions 4) Company AE 6) Dan and Associates, Inc. 7) Example Company 2016 8) Example Company 2016 8) Example Company 2016 9) Fabrikam, Inc. 10) Fabrikam, Inc. 11) Foreign Company 12) Furniture Factory 13) Goodwill CenTex 14) New Company example 15) Sample Company 2015 16) Sample Company 2015 16) Sample Company 2015				
1099 & 1098 Forms	You can open a different company by selecting "Company > Open" from the top menu.				
1096 Form					

Go to the new computer and connect to your external drive

Open W2 Mate (Install and open if you have not already installed W2 Mate)

9. Click Tools

10. Select Restore Multiple Companies

🕮 Example Company - W2 Mate (2017)				
Company Tools mont Data Export Data E-Filing IRS & SSA Instructions Quality Control 1099 Emailer Help Order Supplies				
Company	Tools Export Data Export Data E-Filing IRS & SSA Instruction Rollover Data From Last Year Options Enable Optional Features Backup Company Restore Company Backup All Companies Restore Companies Delete Multiple 1099 / 1098 Recipients Zero Amounts On Multiple 1099-MISC Forms Zero Amounts On Multiple 1099-DIV Forms Zero Amounts On Multiple 1099-DIV Forms Zero Amounts on Other Forms Other Recipient / 1099 Tools Copy & Paste 1099-MISC Recipients Between Companies Delete Multiple Employees Zero Amounts On Multiple 2095 Forms	Order Supplies Click Tools Select Restore Multiple Companies Select Restore Multiple Companies or Postal Code: 60605 sSN (ff Applicable): e "Update" button to save any changes. rnts/W2 Mate 2017/Example Clear		
1099	Opdate Box 13 (State, State ID) for Multiple Employees Other Employee / W2 Tools Remap Form 1099-MISC Data Bulk TIN Matching	New" from the top menu. any > Open" from the top menu.		

11. Select external drive



12. Select .wb2 file from external drive

13. Click Open



14. Click OK

