

HOW TO EXPORT W2 DATA FROM PAYROLL MATE TO W2 MATE

Question

PLEASE REFER TO THE STEPS BELOW:

Answer

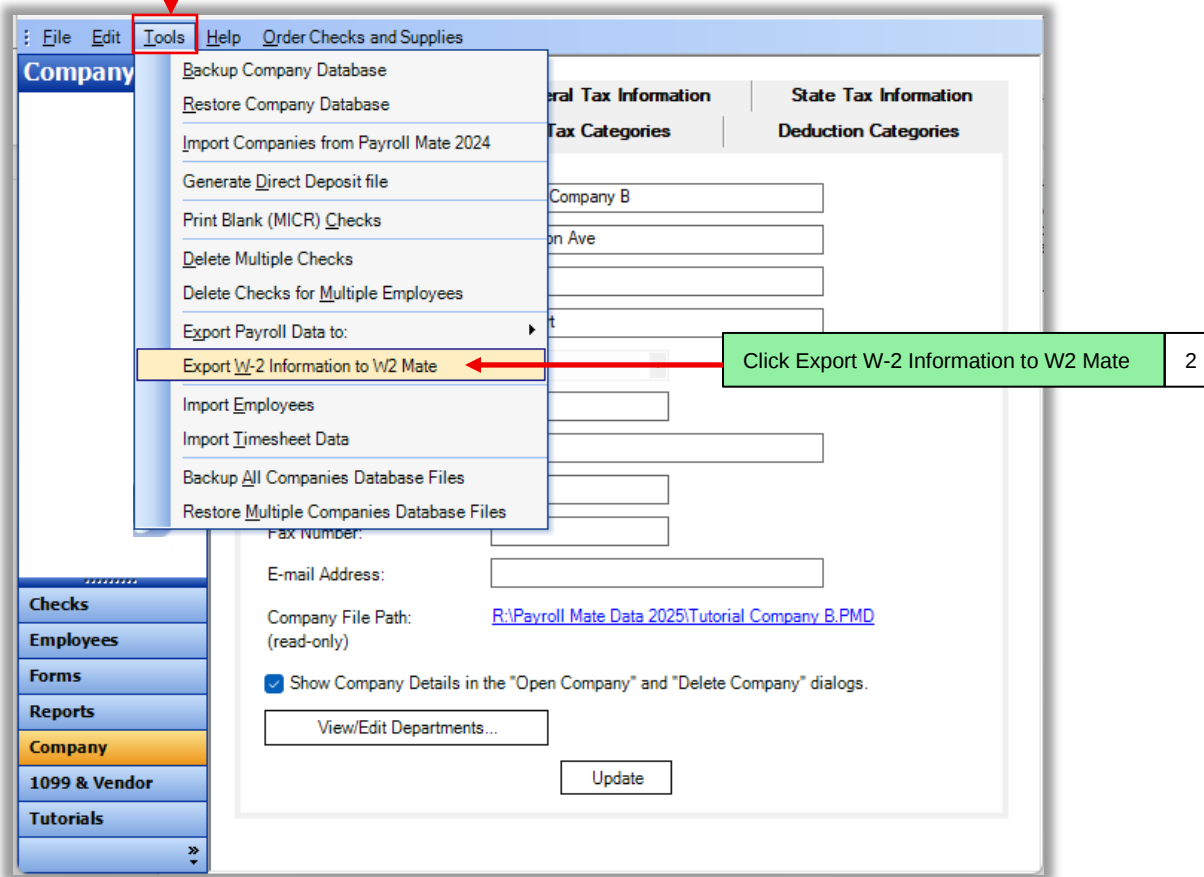
First you have to create a company in W2 Mate before you can import.
See How to Create a Company in W2 Mate tutorial.

Make sure you are in the correct company.

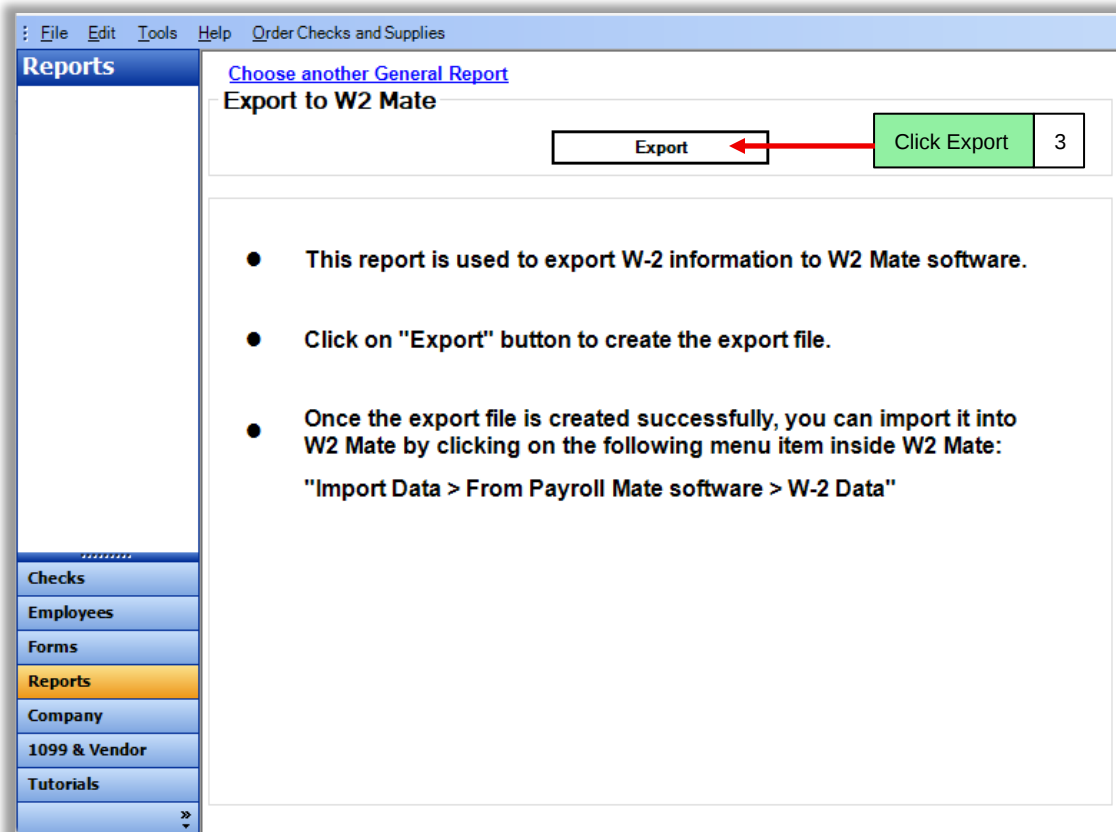
1. Click **Tools**
2. Click **Export W-2 Information to W2 Mate**

Click Tools

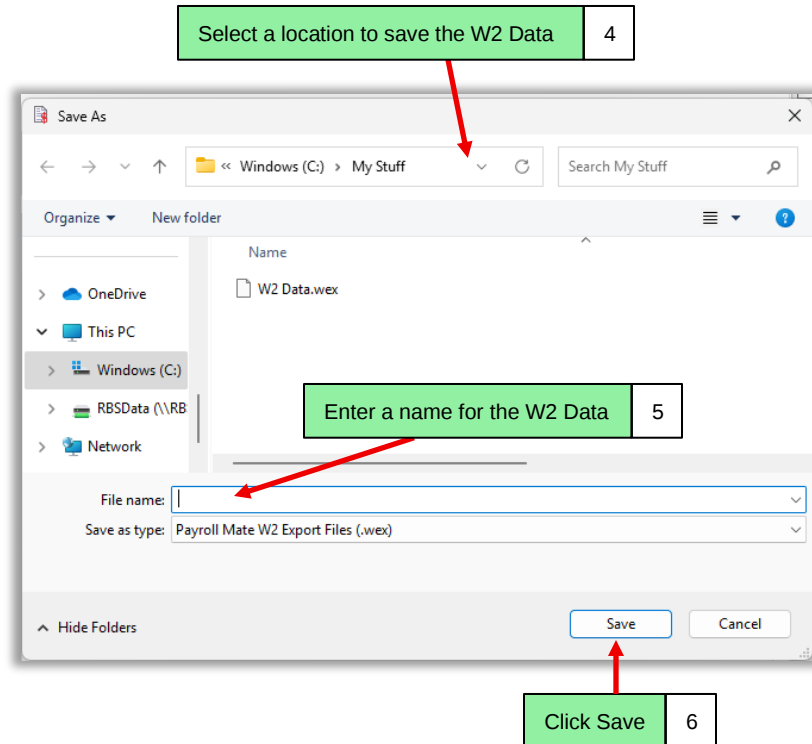
1



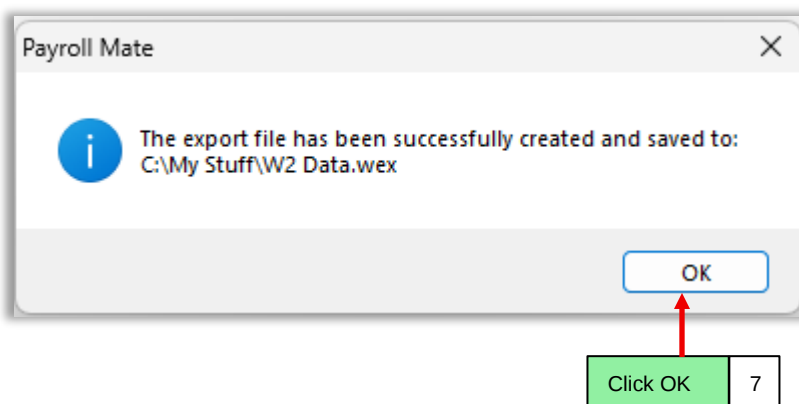
3. Click **Export**



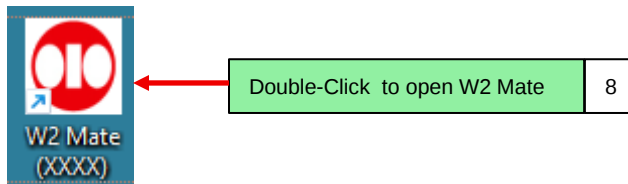
4. **Select a location** to save the W2 Data
5. **Enter a name** for the W2 data
6. Click **Save**



7. Click **OK**



8. **Close** out of your **Payroll Mate** Program and **Open** your **W2 Mate** Program

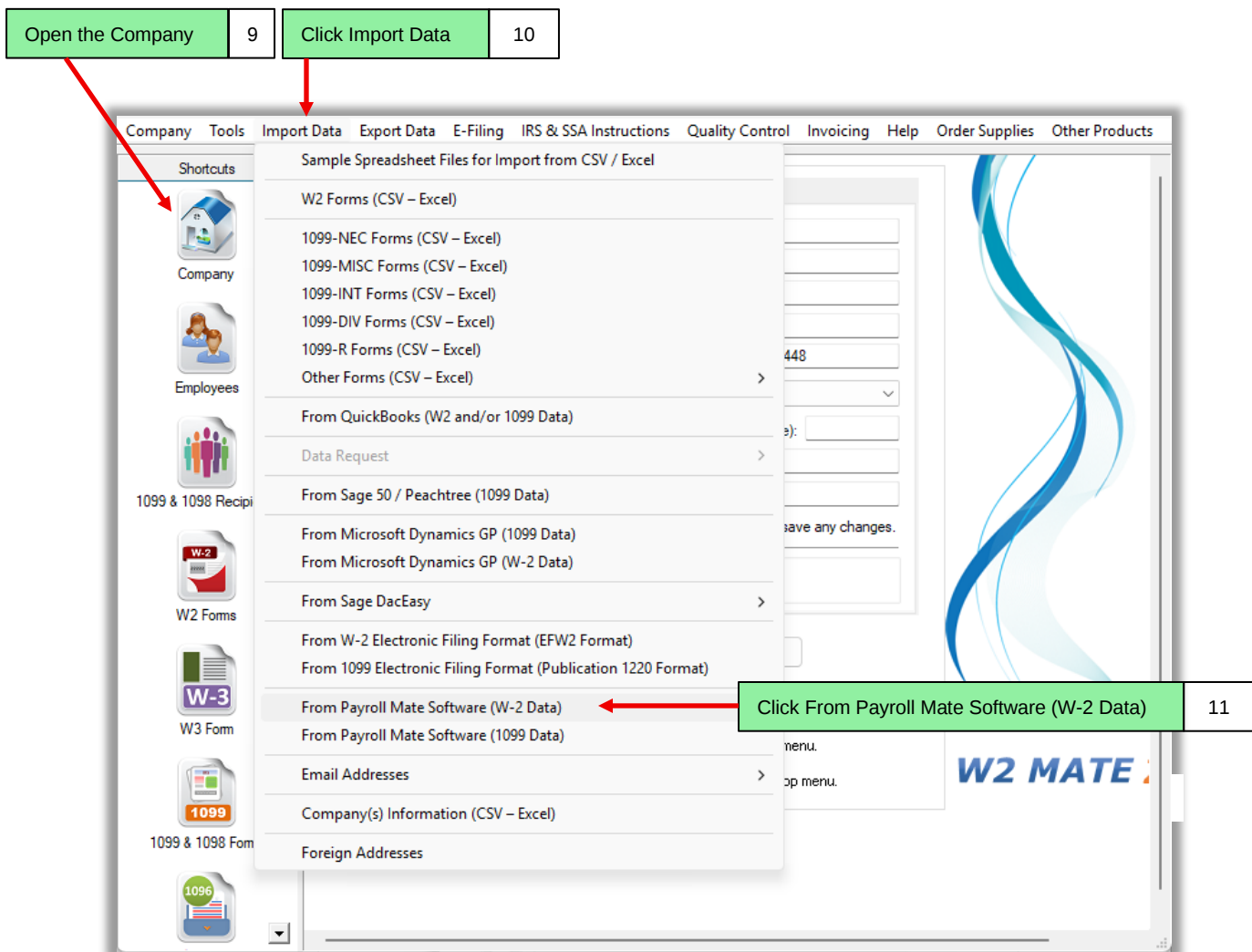


9. **Open the Company** in W2 Mate

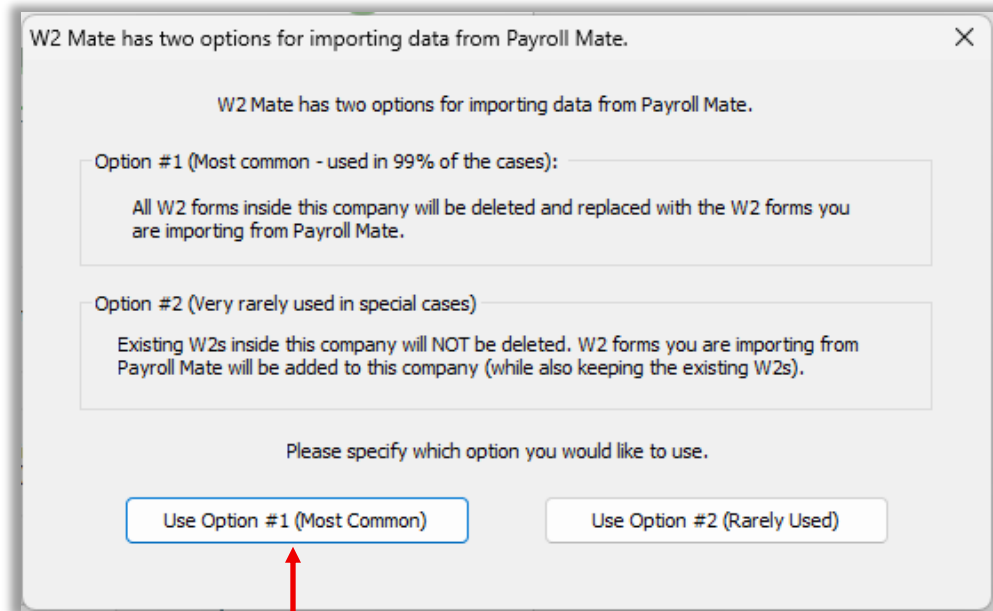
* If the Company doesn't exist in W2 Mate already, you must create it first.

10. Click **Import Data**

11. Click **From Payroll Mate Software (W-2 Data)**



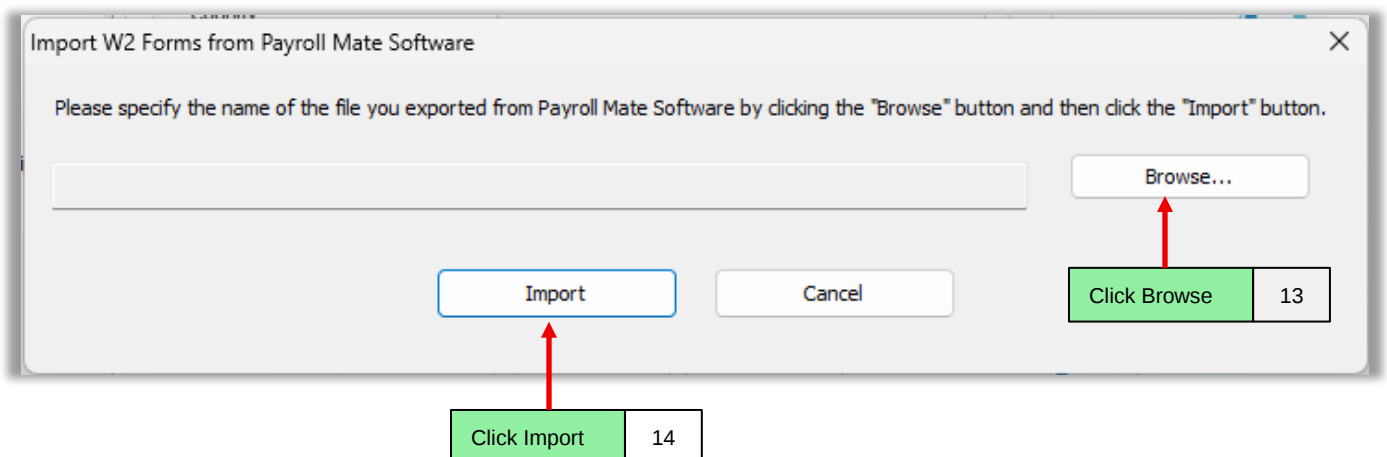
12. Click **Use Option #1 (Most Common)** * unless you need to use option #2.



Click Use Option #1 (Most Common)

12

13. Click **Browse** to locate and select the location and name of the file you created in step 4 & 5.
14. Click **Import**



Click Import

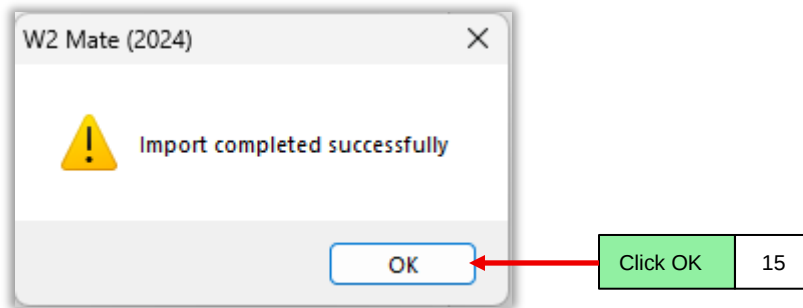
14

Click Browse

13

You will receive a message: Import completed successfully

15. Click **OK**



Congratulations. You have exported W2 data from Payroll Mate into W2 Mate!