

HOW TO ROLLOVER EMPLOYEE AND PAYROLL SET UP FROM LAST YEAR TO THIS YEAR

Question

PLEASE REFER TO THE STEPS BELOW:

Answer

In order to use this feature in Payroll Mate you will need to have the previous year of Payroll Mate and the current year of Payroll Mate installed onto the same PC/Laptop.

Install Payroll Mate:

To download and Install Payroll Mate please retrieve the download link from your email.

You can click on the live link or copy and paste the link into your URL.

Enter your Email Address and Name > Click **“Download”** > when prompted select **“Save”** to save to your hard drive.

The download will begin and new dialog box will appear, click **“Open File”**

Double-click the Payroll-Mate-XXXX-Setup.exe program file on your hard drive to start the setup program. (XXXX is the software year downloaded) > Click **“Run”**

This will prompt the **“User Account Control”** window to open > Click **“Yes”**

This will open the Payroll Mate Installation Setup Wizard to open > Click **“Next”** > carefully read the **“License Agreement”** and accept the agreement to proceed with the install.

Please note: If you select “I do not accept the agreement” you will not be able continue with the software.

Click **“Next”**

Installation wizard will recommend a default location to create the programs shortcuts.

Click **“Next”** to continue or Click **“Browse”** to select a different folder.

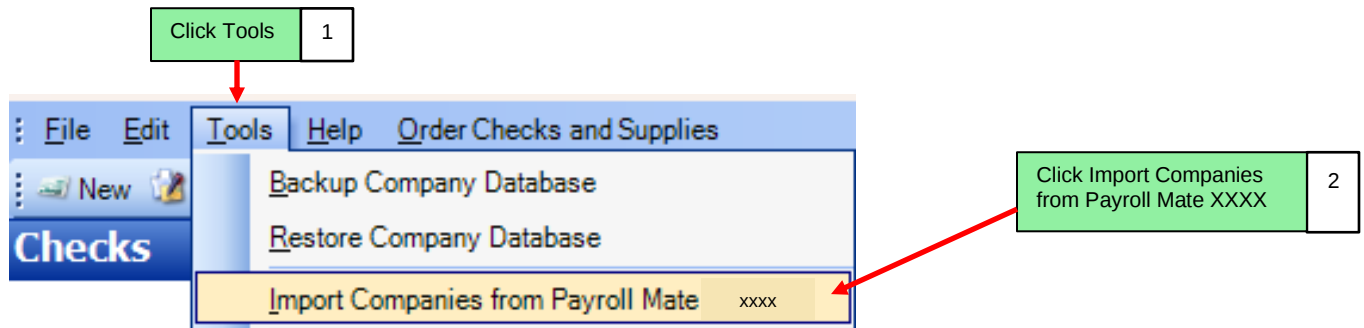
The next page is in regards additional task such as creating the desktop icon. By default, **“Additional Icons”** boxes are checked off. This will create icons on your desk top.

Click **“Next”**

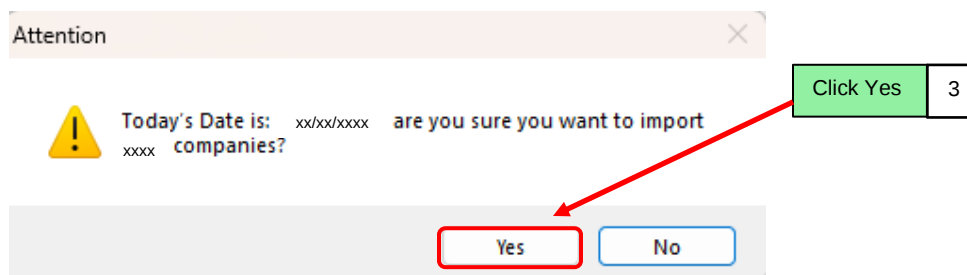
Click **“Install”** > Payroll Mate will now be installed on your computer > Click **“Finish”**
You can now double click on the Payroll Mate Icon on your desktop to open Payroll Mate.

To rollover Companies, Employees and payroll set up from a previous year:

1. Click **Tools**
2. Click **Import Companies from Payroll Mate XXXX** (xxxx is the year you are importing from)



3. A dialog box will open telling you today's date and will ask you if you are sure you want to import XXXX (number of companies) companies. Click **Yes**



4. The import will take place and a dialog box will pop up notifying you Import operation was successfully completed. Click **OK**

