

W2 and W3 Printing Process

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W2 and W3 Printing Process

Overview

This document will overview how to **Edit** and **Print W2 and W3 Forms** in the **New Payroll** module.

W2 and W3 Box Entry Screens

1. In the New Payroll module, select **Program 10: Annual IRS-W2/W3 Forms**.
2. Select an **employee**.
3. Click  **Edit Box...**.

The **Edit W2 Boxes** popup will display.

Print W2/W3 Forms

Company #01 - Auto/Mate Motors 01

User: automate
Fri, May 8, 2020 10:09



Name	EmpID	FT/PT	Status	Hire Date	Term Date	Rehire Date
ALASKA, ARTHUR	AK100	FT	Active	12/26/2019		
ARKANSAS, ANDREW	ARK1330	FT	Active	02/03/2020		
BAISLEY, SALVATORE	104153	FT	Active	04/27/2018		
BOBBY, RICKY	E1171	FT	Active	03/01/2016		
BOLASKI - HOAG, R	RMH	FT	Active	04/13/2004		
CASH, JOHNNY W	TN1102	FT	Active	02/22/2016		
DEERFIELD, WILLIAM	103585	FT	Active	10/10/2015		
ELF, BUDDY	OR665	FT				
GIUDICE, TERESA	NJ100	FT				
HOWLAND JR, LUCAS	103778	FT				
LANISTER, JAMIE	VJL	FT				
MARYLAND, MARK	MARYLAND	FT				
MATE, TIME	TIME100	FT				
MATTHEWS, CLAY	VCM	FT				
MISSISSIPPI, MAGGIE	MISS100	FT				
PEACH, GEORGIA	GAMJ2	FT				
PETERS, NICOLE	888	FT				
ROSE, KAYLEE	103963	FT				
SNOW, JON	JS	FT				
STARK, ARIA	VAS	FT				
WILKERSON, KRYSTLE L.	KLW	PT				

Edit W2 Boxes

Enter the 2021 box items for:

MARLEY, JACOB (V98745)

Box 11Box 12Box 13Box 14

The amount entered below will be added to any already existing Box 11

Value Only

Ok
Cancel

For W2 printing, select the employees you wish

W2 type Four per page/horizontal Tax Year 2020

Edit Box...
Select All

Export
Print W2s
Print W3
Close

Box 12 (Two-Character Description & Amount)

Edit W2 Boxes

Enter the 2021 box items for:

MARLEY, JACOB (V98745)

Box 11 | **Box 12** | Box 13 | Box 14

Amount(s) entered will be added to existing Box 12 value(s) for the same

#	Description	Amount
1	DD	700.00
2		0.00

< >

Ok Cancel

Box 13 (Employee qualifies for employer funding, No employee Contribution)

Edit W2 Boxes

Enter the 2021 box items for:

BETANCOURT, ANNETTE (ABETA)

Box 11 | Box 12 | **Box 13** | Box 14

☐ Employee qualifies for employer funding (No employee contribution)

< >

Ok Cancel

Box 14 (Eight-Character Description and Amount)

Edit W2 Boxes

Enter the 2021 box items for:

MARLEY, JACOB (V98745)

Box 11 | Box 12 | Box 13 | **Box 14**

Items added in this tab will appear after any automatically generated ones

#	Description	Amount	
1	Uniforms	200.00	✖
2		0.00	✖

< >

Ok Cancel

Special Note: The entered information is for example only. Please refer to your IRS documentation to determine which information is required for these fields.

Four items will print per W2 form. If additional items are entered, an additional W2 will print.

Print W2 Forms

The **W2/W3 Print Screen** lists all eligible employees including **Name, EmpID, FT/PT, Status, Hire Date, Term Date, and Rehire Date** (if applicable). **Print W2s** and **Print W3** appear on the same screen. Select one, multiple, or all W2s to print.

1. Click on the dropdown to select the **W2 Type**.

Auto/Mate offers two **W2 Types: Four Per Page/Horizontal** or **Two Per Page**.

AMU NEW Vehicle Merchandising Activation Payroll Processing

Print W2/W3 Forms

User: automate
Fri, May 8, 2020 10:09



Company #01 - Auto/Mate Motors 01

Name	EmpID	FT/PT	Status	Hire Date	Term Date	Rehire Date
ALLEGHANY, MARK M	MD501	FT	Active	03/01/1999		
BOBBY, RICKY	E1171	FT	Active	03/01/2016		
BOLASKI - HOAG, ROSANNE M	RMH	FT	Active	04/13/2004		
BROWNELL, SEAN J	104036	FT	Active	11/23/2016		
CASH, JOHNNY W	TN1102	FT	Active	02/22/2016		
CLAUS, SANTA	C1225	FT	Active	03/07/2017		
CRAB, ALASKA KING	104428	FT	Active	04/27/2017		
DEERFIELD, BILL	104113	FT	Active	12/16/2016		
DEMARE JR., VINCE	035231	FT	Active	01/01/2016		
FORNIA, CAL I.	CAL001	FT	Active	03/02/2016		
GOODEN, DWIGHT	T1986	FT	Active	01/29/2016		
HOAG, BEEFCAKE Z.	E99	FT	Active	07/01/2015		
PIAZZA, MICHAEL	E31	FT	Active	12/22/1998		
RIVER, PHOENIX Q	AZ111	FT	Active	05/25/2017		
TUXEDO, TENNESSEE	T444	FT	Active	03/17/2015		
VOID, VIVIAN	V01	FT	Active	06/07/2016		
WASHINGTON, WILOMENA	WA025	FT	Active	08/16/2016		
WAYNE, JOHN	103644	FT	Active	06/07/2016		
WEIS, JENNIFER L	103643	FT	Active	05/23/2016		
WEST, WALLY	WW1	FT	Active	03/09/1997		
WILLIAMS, AIMEE I.	22537	PT	Active	03/04/2001		
WISCONSIN, WALLY W	WI501	FT	Active	04/10/2017		

For W2 printing, select the employees you wish to print with Shift-click/Ctrl-Click or click/drag, or use the "Select All" button.

W2 type

Four per page/horizontal
Four per page/horizontal
Two per page

Tax Year
2017

Edit Box...

Select All

Export

Print W2s

Print W3

Close

- The next screen advises the number of **forms** necessary to load based on the number of employees selected (and any overflow of Box 14).

Print W2s

Printing Employee Copy

Please load at least 1 copy of the appropriate form into your printer. Print multiple copies if necessary.

Print Adjustment

☐ Adjust All Item **1** Horiz Adj **0** (mm) Vert Adj **0** (mm)

There is also a **Print Preview** feature to review and print on plain paper

ROSANNE'S PAYROLL CO 1	11249.00	314.08
4 Airline Dr	11249.00	697.44
Albany NY 12205-	11249.00	163.11
		D 216.00
RICKY BOBBY	P/T DIS 71.00	
11 BURGANDY DR	CSUPPOR 1000.00	
MADISON TN 37115	14-9999999	
	111-11-1111	
	11249.00	314.08
ROSANNE'S PAYROLL CO 1	11249.00	697.44
4 Airline Dr	11249.00	163.11
Albany NY 12205-		D 216.00
RICKY BOBBY	P/T DIS 71.00	
11 BURGANDY DR	CSUPPOR 1000.00	
MADISON TN 37115	14-9999999	
	111-11-1111	
	11249.00	314.08
ROSANNE'S PAYROLL CO 1	11249.00	697.44
4 Airline Dr	11249.00	163.11
Albany NY 12205-		D 216.00
RICKY BOBBY	P/T DIS 71.00	
11 BURGANDY DR	CSUPPOR 1000.00	
MADISON TN 37115	14-9999999	
	111-11-1111	
	11249.00	314.08
ROSANNE'S PAYROLL CO 1	11249.00	697.44
4 Airline Dr	11249.00	163.11
Albany NY 12205-		

- Click **Print** to print Employee copies.

Make sure to load the appropriate form and the correct number of copies to be printed.

Sample:

Print W2s

Printing Employee Copy

Select A Server Printer

Select a printer from the table below and a tray number.

Name	Description	Model
co01devel1	Devel Lexmark MS810	Lexmark-MS810

Tray Number 1 - Letter

Ok Cancel

Print Adjustment

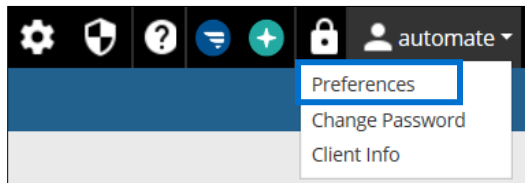
☐ Adjust All Item 1 Horz Adj 0 (mm) Vert Adj 0 (mm)

Test alignment Preview Print Back Next Done

Note: The employee's default Auto/Mate server printer will be used to print W-2 forms.

Changing Printers

If changing the printer is necessary, it can be done by clicking Auto/Mate in the upper right-hand corner, selecting **Preferences**, then **Console Applications**, and finally **Configure Printers** options.



Change the Main Printer

Change Printers

Main Printer Go Team Ninja Printer (golex)

The Main Printer is your default printer where the majority of documents print, including F&I dot-matrix forms, Repair Orders, RO Reprints, Part Invoices, Quotes, SORs and Purchase Orders.

Auxillary Printers

Printer 2 Go Team Ninja Printer (golex)

Printer 2 is where Accounting and Payroll checks, Service Invoices, and Laser Finance Forms print.

Printer 3 Go Team Ninja Printer (golex)

Printer 3 is where Dispatch parts requests, copies of Service ROs to Parts and Parts Picking copies print.

Ok Cancel

Print W3 Forms

- From the **Print W2/W3 Forms** screen, select **Print W3**.

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Print W2/W3 Forms User: automate
Company #01 - Auto/Mate Motors 01 Fri, May 8, 2020 10:09

Name	EmpID	FT/PT	Status	Hire Date	Term Date	Rehire Date
ALLEGHANY, MARK M	MD501	FT	Active	03/01/1999		
BOBBY, RICKY	E1171	FT	Active	03/01/2016		
BOLASKI - HOAG, ROSANNE M	RMH	FT	Active	04/13/2004		
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VOID, VIVIAN	V01	FT	Active	06/07/2016		
WASHINGTON, WILOMENA	WA025	FT	Active	08/16/2016		
WAYNE, JOHN	103644	FT	Active	06/07/2016		
WEIS, JENNIFER L	103643	FT	Active	05/23/2016		
WEST, WALLY	WW1	FT	Active	03/09/1997		
WILLIAMS, AIMEE I.	22537	PT	Active	03/04/2001		
WISCONSIN, WALLY W	WI501	FT	Active	04/10/2017		

For W2 printing, select the employees you wish to print with Shift-click/Ctrl-Click or click/drag, or use the "Select All" button.

W2 type: Four per page/horizontal Tax Year: 2017 Edit Box... Select All Export Print W3 Close

- Enter the necessary information and click **Print** or **Preview**.

Print W3

a) Control number

b) Kind of Payer
☐ 941 ☐ Military ☐ 943 ☐ 944
☐ CT-1 ☐ Hshold. Emp. ☐ Medicare govt. emp.

b) Kind of Employer
☐ None apply ☐ 501c non-govt.
☐ State/local non-501c ☐ State/local 501c ☐ Federal govt. ☒ Third-party sick pay

d) Establishment number h) Other EIN used this year

14) Income tax withheld by payer of third-party sick pay \$0.00

Print Adjustment
☐ Adjust All Item 1 Horz Adj 0 (mm) Vert Adj 0 (mm)

Test alignment Preview Print Close

3. To print, select **Print** and then select the Printer and tray assignment if needed.

Select A Server Printer

Select a printer from the table below and a tray number.

Name	Description	Model
lex1	Development Lexmark MS810dn	Lexmark_MS810_Series

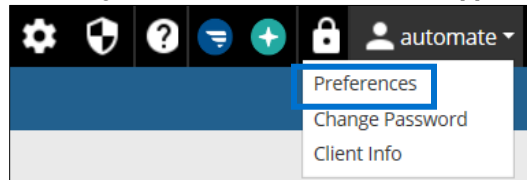
Tray Number 1 - Letter 

 **Ok**  **Cancel**

Note: The employee's default Auto/Mate server printer will be used to print W-3 forms.

Changing Printers

If changing the printer is necessary, it can be done by clicking Auto/Mate in the upper right-hand corner, selecting **Preferences**, then **Console Applications**, and finally **Configure Printers** options.



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Change Printers

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Printer 3 is where Dispatch parts requests, copies of Service ROs to Parts and Parts Picking copies print.

 **Ok**  **Cancel**



Note: Four-Part Forms look similar, however, they are two different types.

1. **#5206 Employee Copy** (Prints one employee per page)
2. **#5204 Employer Copy** (Prints four employees per page)

To differentiate between the Employee and Employer copy, click **Next**. The **Form Type** is located at the bottom right-hand side of the form.

Option to Export for Account Ability

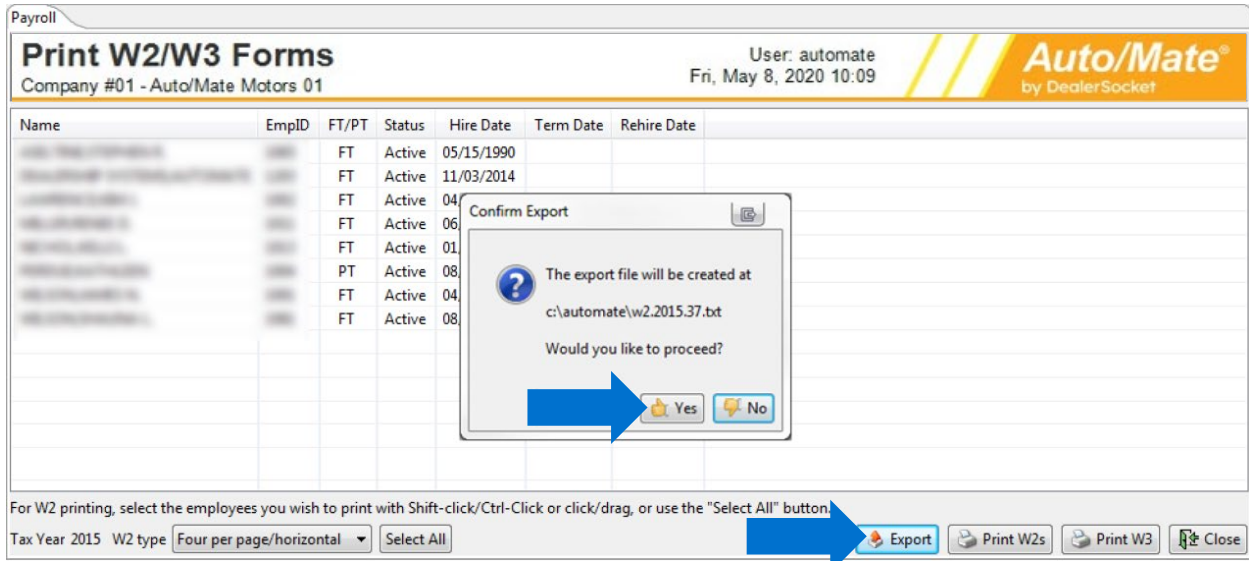
The Account Ability software must be purchased. The software must be installed on a PC. If you do not have administrative rights to do this, contact your dealership, or IT Manager.

Website Link: <http://www.idmsinc.com>

Auto/Mate creates the file used with Account Ability. From there, all subsequent concerns will be managed by Account Ability. The A/M file is already formatted to the Account Ability software.

Toll-Free Phone Support: 1-888-IDMSINC (436-7462)

To export the file, click **Export** at the bottom of the screen and **Yes** to confirm the export.



Name	EmpID	FT/PT	Status	Hire Date	Term Date	Rehire Date
		FT	Active	05/15/1990		
		FT	Active	11/03/2014		
		FT	Active	04		
		FT	Active	06		
		FT	Active	01		
		PT	Active	08		
		FT	Active	04		
		FT	Active	08		

For W2 printing, select the employees you wish to print with Shift-click/Ctrl-Click or click/drag, or use the "Select All" button.

Tax Year 2015 W2 type Four per page/horizontal Select All

Export Print W2s Print W3 Close

Note: The export file is for Account Ability electronic filling. Only the first three **Box 14** entries are accepted (see additional documentation if you need to export W2 information).

Yearli (Nelco) W2 Extract Instructions

This feature will allow you to export W2 information from Auto/Mate and upload it to a third party, Yearli, to produce W2 files. This file will need to be modified based on the dealership's W2 needs (i.e. Box 12/14 Codes, state taxing, etc.)

This information is available in a separate document that can be found in AMU with the keyword "Yearli". The information will walk you through the process to create the export file to be uploaded on the Yearli Website.