

## W2 and W3 Printing Process

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## W2 and W3 Printing Process

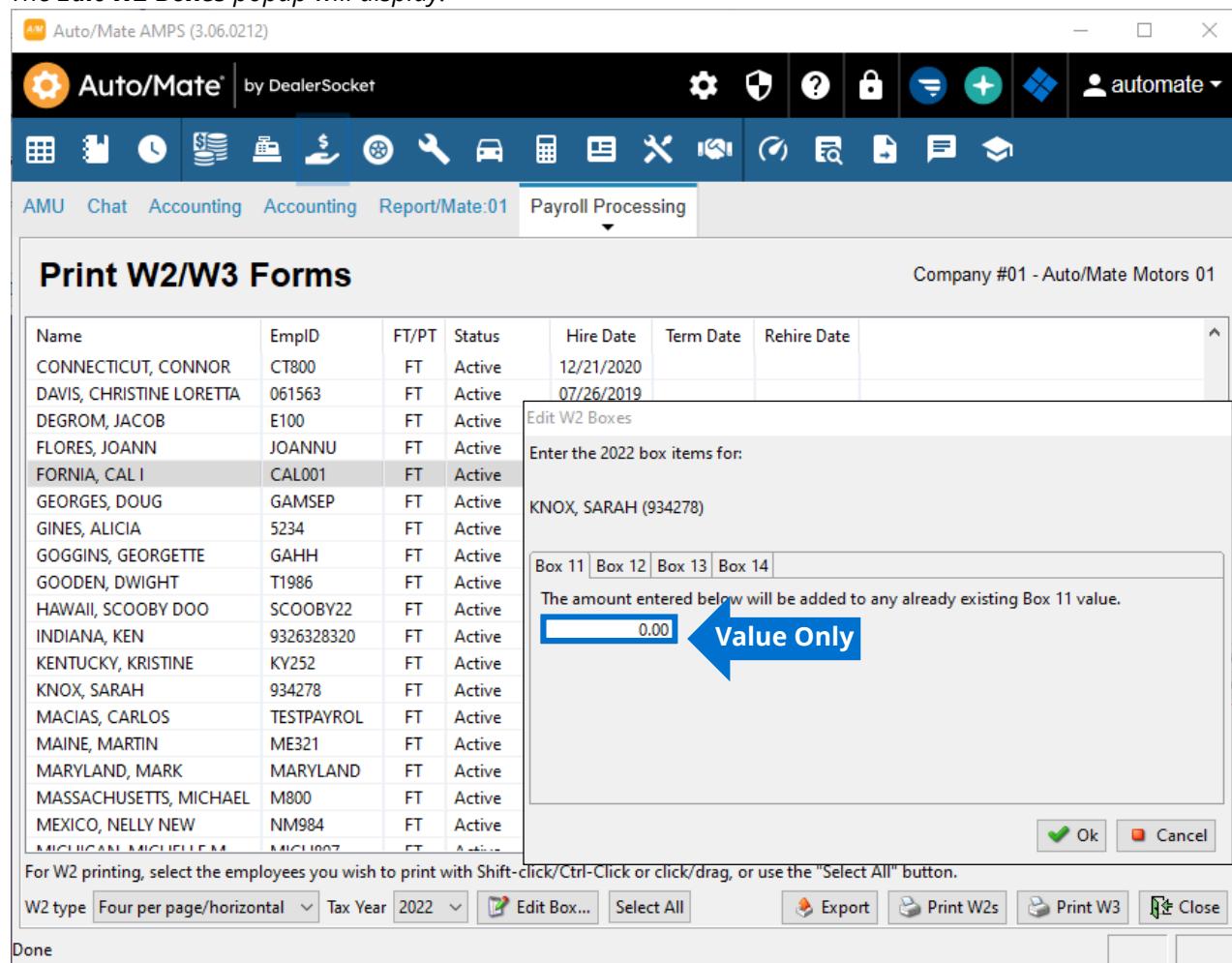
### Overview

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. Data for Box 11, 12, 13, 14 will pull from the Earnings and Deductions or Tax setups. If you need to add a value that doesn't pull from any of these, click .

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



The screenshot shows the Auto/Mate AMPS software interface. The main window is titled 'Print W2/W3 Forms' and displays a list of employees with their names, EmplID, FT/PT status, and hire/term/rehire dates. An 'Edit W2 Boxes' dialog is overlaid on the main window. This dialog contains a table with four columns: 'Box 11', 'Box 12', 'Box 13', and 'Box 14'. A blue arrow points to the 'Box 11' input field, which contains the value '0.00'. A label 'Value Only' is placed next to the arrow. The dialog also includes a note: 'The amount entered below will be added to any already existing Box 11 value.' At the bottom of the dialog are 'Ok' and 'Cancel' buttons. The main window has a toolbar with various icons and a menu bar with 'AMU', 'Chat', 'Accounting', 'Report/Mate:01', and 'Payroll Processing'.

**Box 12**  
**(Two-Character Description & Amount)**

Edit W2 Boxes  
 Enter the 2022 box items for:

KNOX, SARAH (934278)

Box 11   Box 12   Box 13   Box 14		
Amount(s) entered will be added to existing Box 12 value(s) for the same code(s).		
#	Description	Amount
1	DD	700.00
2		0.00

**Box 13**  
**(Check Box if employee qualifies for employer funding for retirement plan, no employee contribution)**

Edit W2 Boxes  
 Enter the 2022 box items for:

KNOX, SARAH (934278)

Box 11   Box 12   Box 13   Box 14		
<input type="checkbox"/> Employee qualifies for employer funding (No employee contribution)		

**Box 14**  
**(Eight-Character Description & Amount)**

Edit W2 Boxes  
 Enter the 2022 box items for:

KNOX, SARAH (934278)

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

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

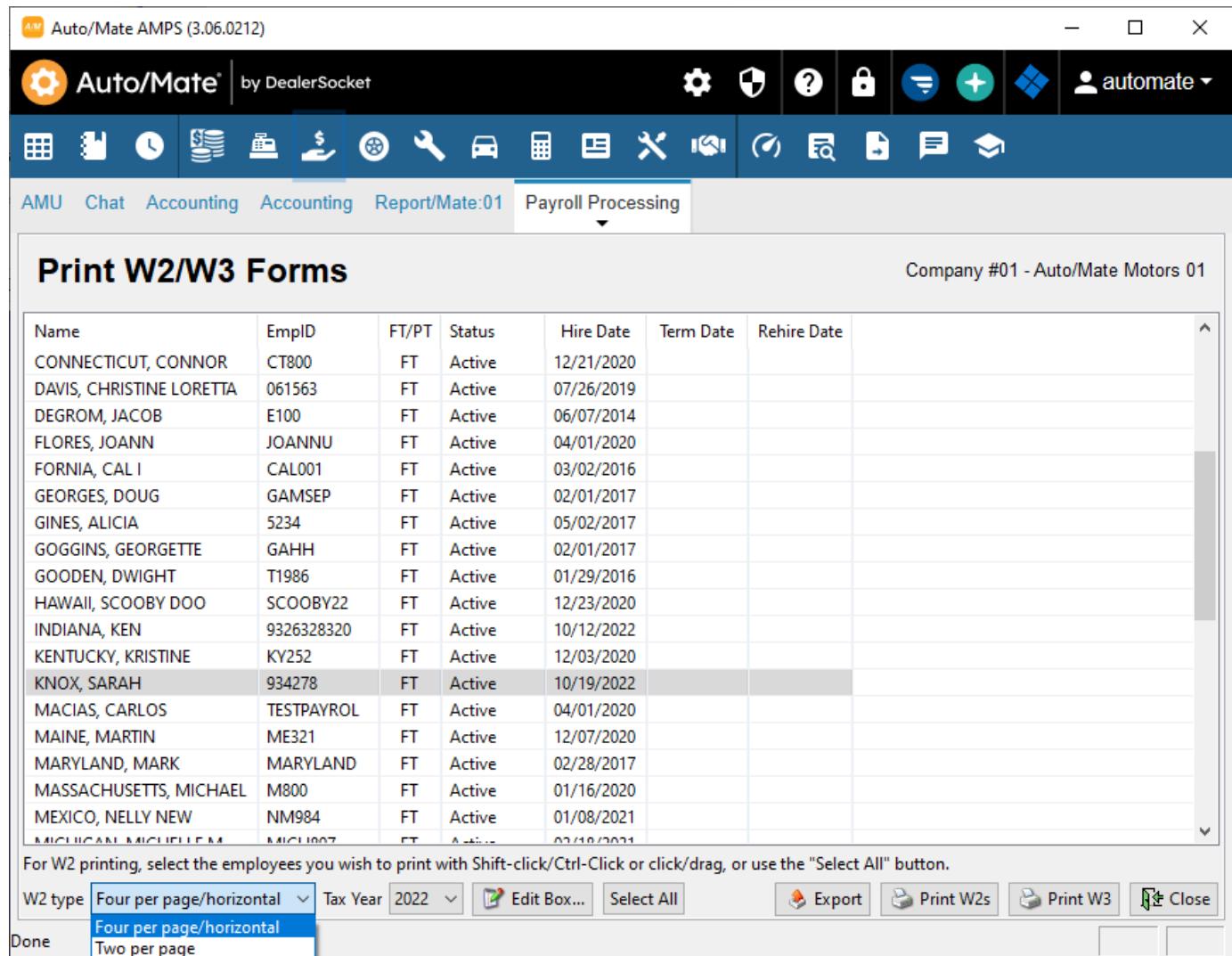
**Four items will print per W2 form. If additional items are entered, an additional W2 will print.**

## 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**.



Print W2/W3 Forms

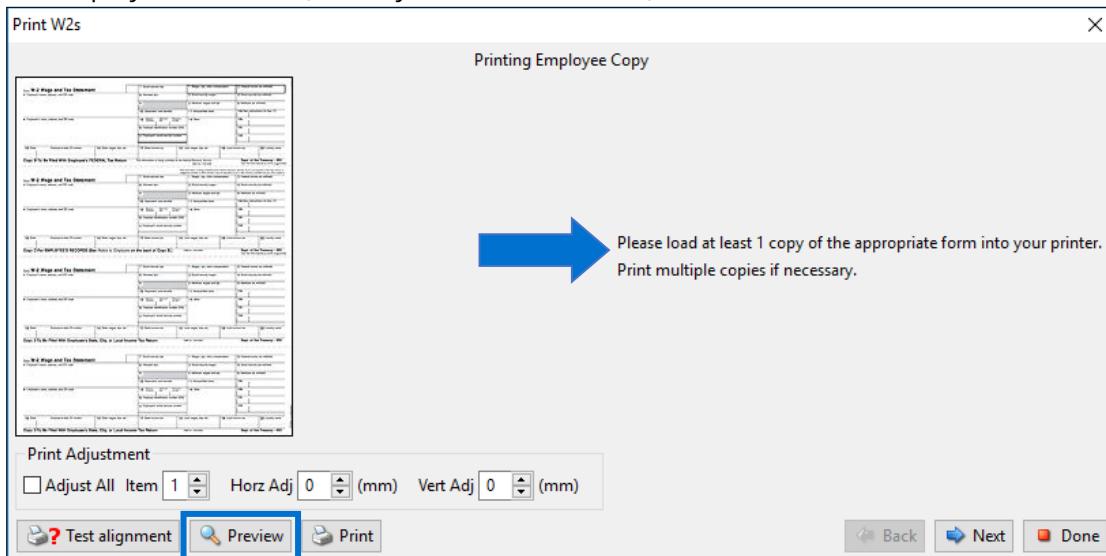
Name	EmpID	FT/PT	Status	Hire Date	Term Date	Rehire Date
CONNECTICUT, CONNOR	CT800	FT	Active	12/21/2020		
DAVIS, CHRISTINE LORETTA	061563	FT	Active	07/26/2019		
DEGROM, JACOB	E100	FT	Active	06/07/2014		
FLORES, JOANN	JOANNU	FT	Active	04/01/2020		
FORNIA, CALI	CAL001	FT	Active	03/02/2016		
GEORGES, DOUG	GAMSEP	FT	Active	02/01/2017		
GINES, ALICIA	5234	FT	Active	05/02/2017		
GOGGINS, GEORGETTE	GAHH	FT	Active	02/01/2017		
GOODEN, DWIGHT	T1986	FT	Active	01/29/2016		
HAWAII, SCOOBY DOO	SCOODY22	FT	Active	12/23/2020		
INDIANA, KEN	9326328320	FT	Active	10/12/2022		
KENTUCKY, KRISTINE	KY252	FT	Active	12/03/2020		
KNOX, SARAH	934278	FT	Active	10/19/2022		
MACIAS, CARLOS	TESTPAYROL	FT	Active	04/01/2020		
MAINE, MARTIN	ME321	FT	Active	12/07/2020		
MARYLAND, MARK	MARYLAND	FT	Active	02/28/2017		
MASSACHUSETTS, MICHAEL	M800	FT	Active	01/16/2020		
MEXICO, NELLY NEW	NM984	FT	Active	01/08/2021		
MICHIGAN, MICHELLE M	MICH1007	FT	Active	02/10/2021		

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/vertical** Tax Year: 2022 **Edit Box...** **Select All** **Export** **Print W2s** **Print W3** **Close**

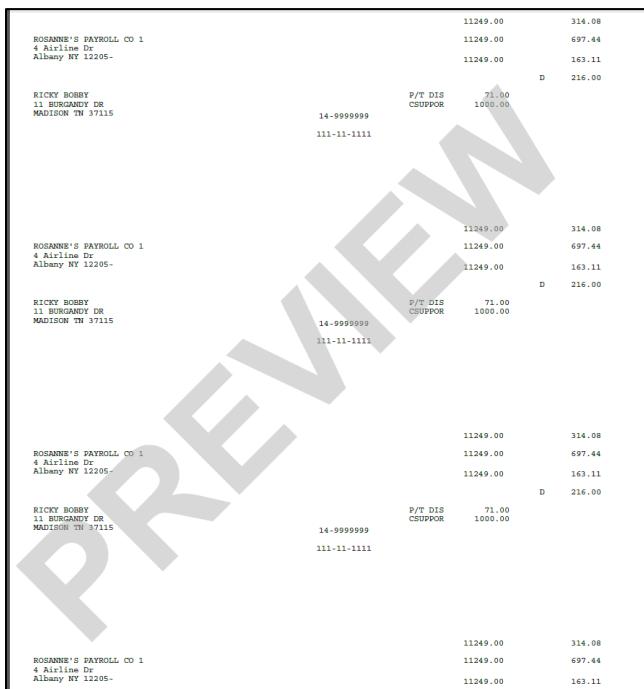
Done **Four per page/vertical** **Two per page**

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



There is also a **Print Preview** feature to review and print on plain paper  
 Use the Print Adjustment section to adjust the forms if they are not aligned correctly.

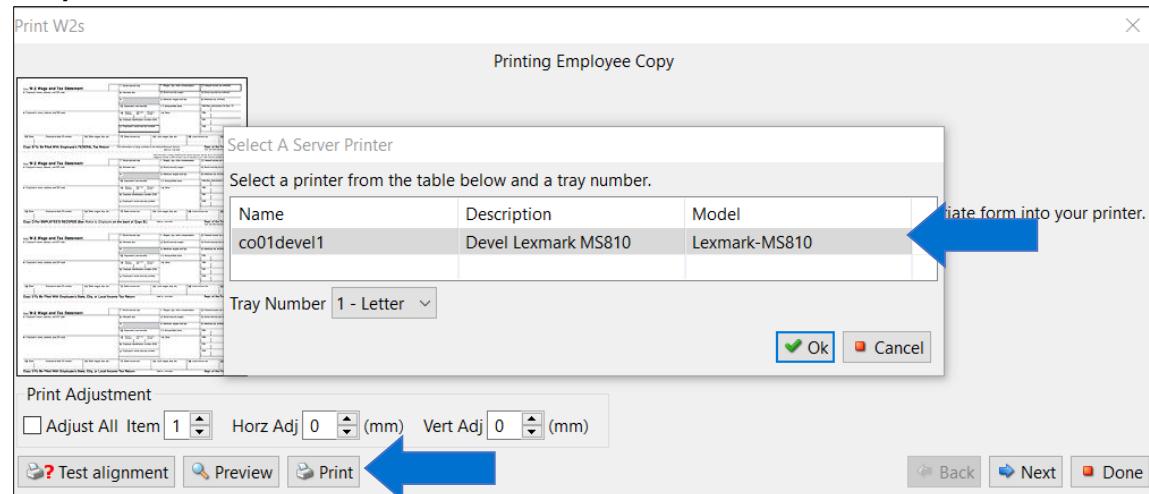
- W2 printing alignment
  - Item - Refers to the parts of the forms.
    - If 2 parts: Part 1 = the top, Part 2 = the bottom.
    - If 4 parts: Part 1 = the top, Part 2 = next section down, Part 3 = the following section, Part 4 = the bottom section
  - Horizontal Negative Value = Left
  - Horizontal Positive Value= Right
  - Vertical Negative Value= Up
  - Vertical Positive Value= Down



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

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

**Sample:**

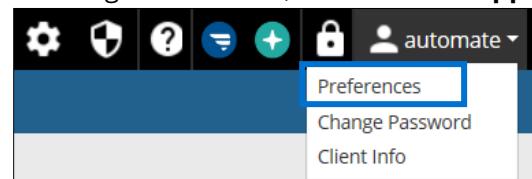


**Note:** The employee's default Auto/Mate server printer will be used to print W-2 forms.

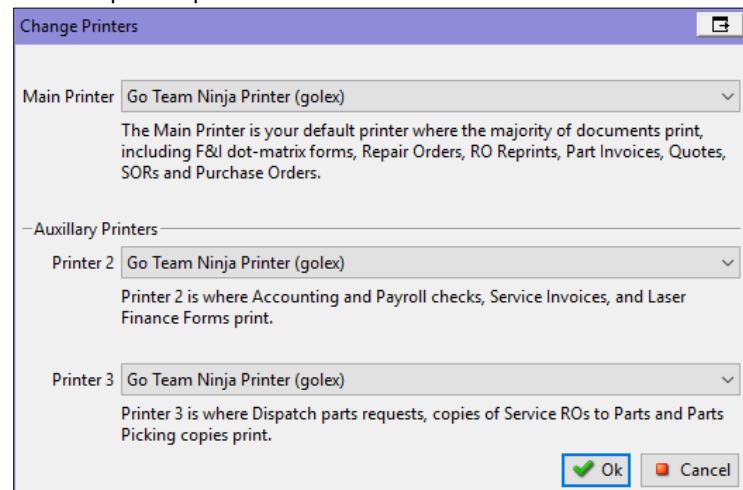
4. Select next and continue to print the other copies of the W2s.

## Changing Printers

If changing 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.

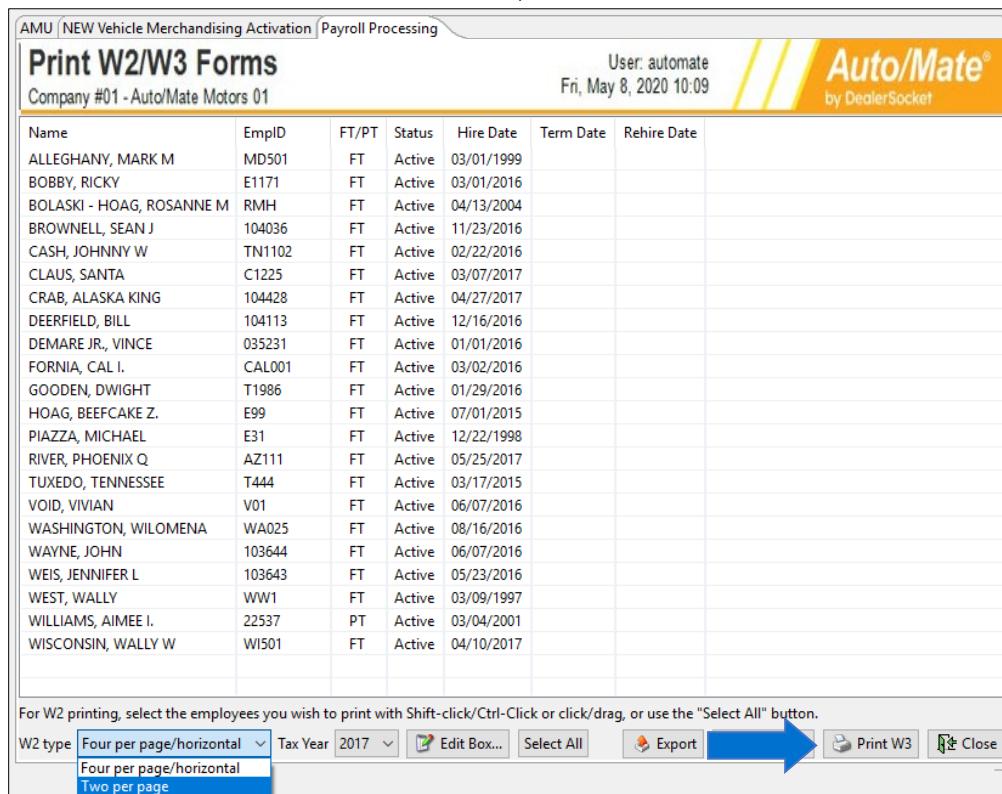


The W2 print options will come from the Main Printer and Printer 2.



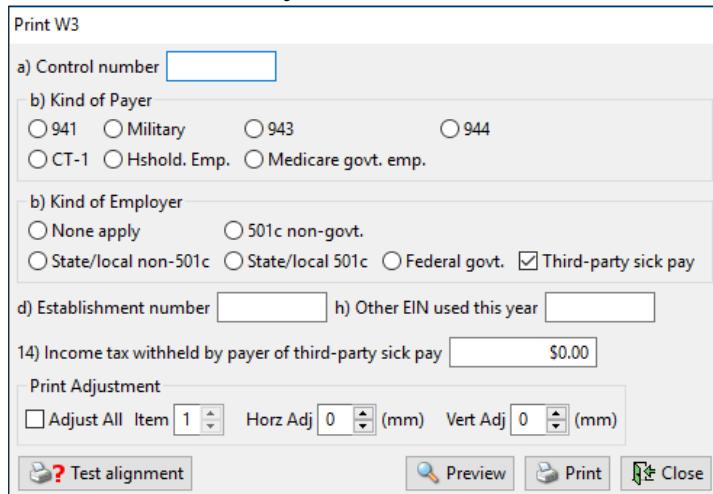
## Print W3 Forms

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



The screenshot shows the 'Print W2/W3 Forms' screen. At the top, there are tabs for 'AMU', 'NEW Vehicle Merchandising Activation', and 'Payroll Processing'. The main area displays a table of employees with columns for Name, EmplID, FT/PT, Status, Hire Date, Term Date, and Rehire Date. The table lists numerous employees with names like ALLEGHANY, MARK M; BOBBY, RICKY; and WISCONSIN, WALLY W. The status for most employees is 'Active'. The 'User' is 'automate' and the 'Date' is 'Fri, May 8, 2020 10:09'. The 'Auto/Mate' logo is in the top right corner. Below the table, there is a note: 'For W2 printing, select the employees you wish to print with Shift-click/Ctrl-Click or click/drag, or use the "Select All" button.' A blue arrow points to the 'Print W3' button at the bottom right of the screen.

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



The screenshot shows the 'Print W3' configuration screen. It includes fields for:
 

- 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
  - Horz Adj  (mm)
  - Vert Adj  (mm)

The Print Preview feature allows you to review and print on plain paper.

Use the Print Adjustment section to adjust the forms if they are not aligned correctly.

- W2 printing alignment
  - Horizontal Negative Value = Left
  - Horizontal Positive Value= Right
  - Vertical Negative Value= Up
  - Vertical Positive Value= Down

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

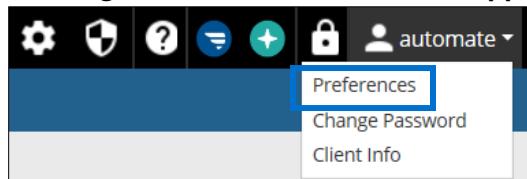
Tray Number **1 - Letter** 

 **Ok**  **Cancel**

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

## Changing Printers

If changing 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.



The W2 print options will come from the Main Printer and Printer 2.

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**



**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

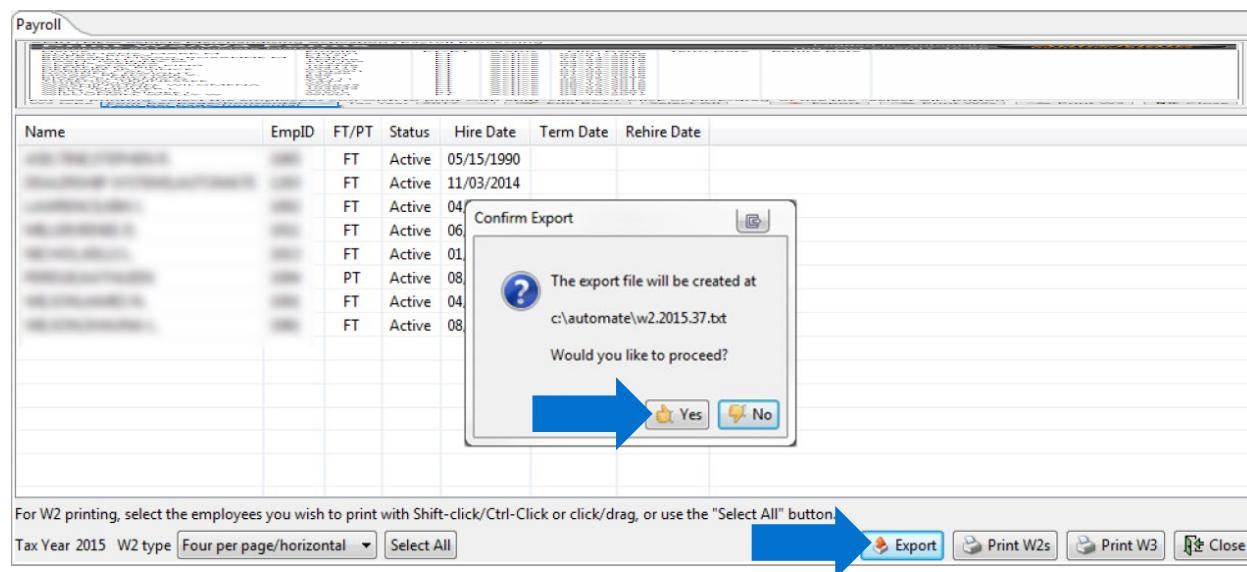
*The Account Ability software must be purchased. The software must be installed on a PC. If you do not have administrative rights to do this, contact your dealership IT Manager.*

**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.



**Note:** 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 keyword **"Yearli"**. The information will walk you through the process to create the export file to be uploaded on the Yearli Website.