

Yearli (Nelco) W2 Extract Instructions

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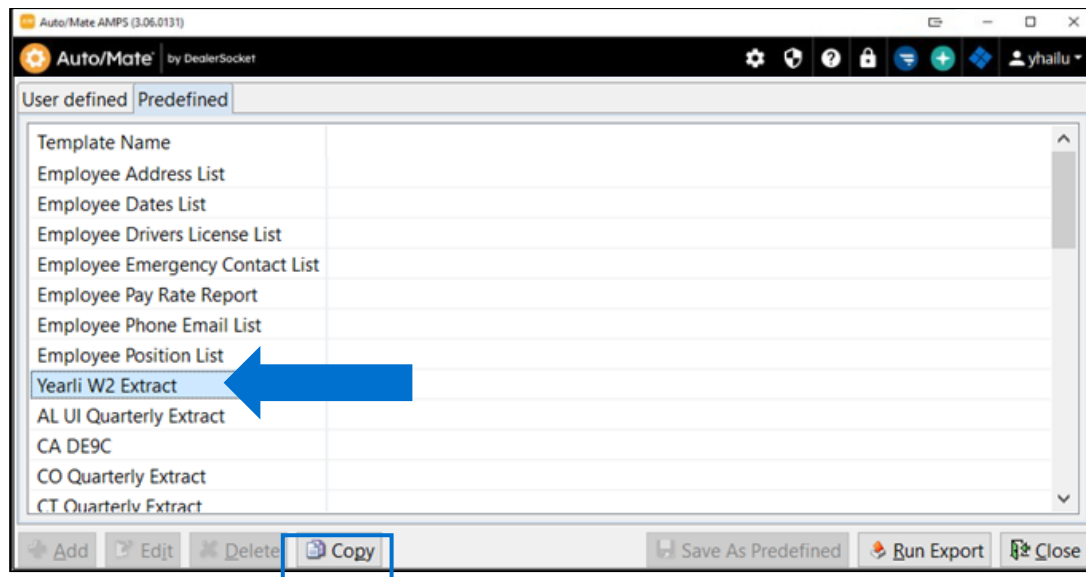
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Yearli (Nelco) W2 Extract Instructions

This feature will allow you to export W2 information from Auto/Mate and upload it to a third party, Yearli, in order 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.*)

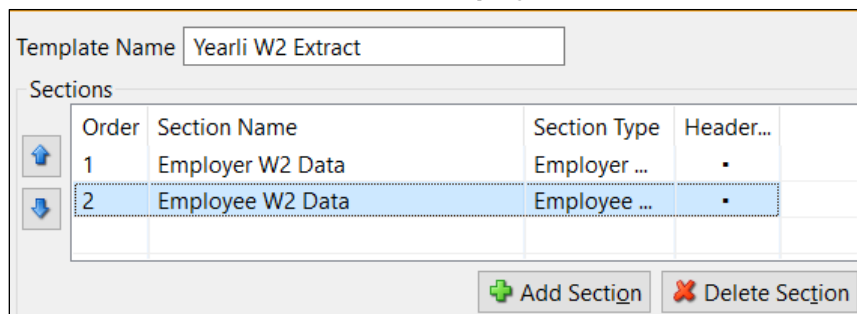
1. Access **Payroll Program 7: Tax/Wage History Reports & Exports**.
2. Select **Option 7: Employee/Wage Export**.
3. Navigate to the **Predefined Tab**.
4. Select the **Yearli W2 Extract**.
5. Click **Copy**. *The copied file to be edited will now be under the User-defined tab.*

IMPORTANT: Please do not modify the header names for the fields as these are mapped with Yearli so that the file will not error out upon upload.



Editing the Yearli File

1. Select the **Yearli W2 Extract** from the User-Defined tab.
2. Click **Edit**.
3. Once in Edit Screen, select the **Employee WZData** Section.



Several fields within the range of **21-43** will need to be edited.

- Select the applicable fields that need to be edited.

Fields 21, 23, 25, 27

Box 12: Code A-D (ex. D, E, F, S, AA, BB, EE, G, H)

Section Name		Employee W2 Data	☒ Include Header
Section Type		☒ Employee Data	☐ Employer Data
Order	Field Name	Field Type	
21	Box 12 Code A	Text	 
22	Box 12 Amount A	Deduction Amount - [02,05,401A]	
23	Box 12 Code B	Text	
24	Box 12 Amount B	Deduction Amount - [07,VOL,VOLP]	
25	Box 12 Code C	Text	
26	Box 12 Amount C	Text	
27	Box 12 Code D	Text	
28	Box 12 Amount D	Text	

- For each deduction applicable, enter the proper code needed for Box 12 A-D. *If not all Box 12 Code fields are needed, leave the constant text value blank for unused fields.*

Constant Text Value
Enter the constant text you would like to appear for this field.
D

Fields 22, 24, 26, 28: Box 12 A-D Amount (ex. 401K)

Section Name		Employee W2 Data	☒ Include Header
Section Type		☒ Employee Data	☐ Employer Data
Order	Field Name	Field Type	
22	Box 12 Amount A	Deduction Amount - [02,05,401A]	
23	Box 12 Code B	Text	
24	Box 12 Amount B	Deduction Amount - [07,VOL,VOLP]	
25	Box 12 Code C	Text	
26	Box 12 Amount C	Text	
27	Box 12 Code D	Text	
28	Box 12 Amount D	Text	

- For each Box 12 amount that relates to a Box 12 Code, select the specific applicable deductions. *If not all Box 12 amount fields are needed, leave the deduction codes unchecked.*

Field Name

Select the deduction codes that will be totaled for this export field

Code	Description
☐ 01	A/R
☐ 02	401K
☐ 03	HEALTH INSURANCE - HSA
☐ 04	CHILD SUPPORT
☐ 05	401K
☐ 06	UNIFORMS
☒ 07	ROTH IRA
☐ 08	DRAW PAYBACK
☐ 09	HEALTH INSURANCE - TRADITIONAL
☐ 10	HEALTH SAVINGS CONTRIBUTION
☐ 11	AFLAC PRETAX DISABILITY
☐ 307	Pay-307
☐ LN1	Loan 1
☐ LN2	Loan 2
☐ LN3	Loan 3
☐ 401A	After Tax 401K
☐ XMASCLUB	CHRISTMAS CLUB EE
☐ HSAS	Single Hsa
☒ VOL	Voluntary Retirement
☐ NOMATCH	401K/NO MATCH
☐ GARNISH	Tax Garnishment
☐ FMLA	NY FMLA

Fields 29 and 31: Box 14 Other Amount (ex. NYSDI \$)

Section Name ☒ Include Header

Section Type ☒ Employee Data ☐ Employer Data

Order	Field Name	Field Type
27	Box 12 Code D	Text
28	Box 12 Amount D	Text
29	Box 14 Other Line 1	Deduction Amount - [03]
30	Box 14 Other Line ...	Text
31	Box 14 Other Line ...	Deduction Amount - [04]
32	Box 14 Other Line ...	Text

7. For each Box 14 amount that relates to a Box 14 Code, select the specific applicable deductions. If not all Box 14 amount fields are needed, leave the deduction codes unchecked. See screenshot above.

Field 30 and 32: Box 14 Other Code (ex. NYSDI)

Section Name		Employee W2 Data	☒ Include Header
Section Type		☒ Employee Data	☐ Employer Data
Order	Field Name	Field Type	
30	Box 14 Other Line ...	Text	
31	Box 14 Other Line ...	Deduction Amount - [04]	
32	Box 14 Other Line ...	Text	

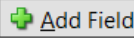
8. For the deduction applicable, enter the proper code needed for Box 14. *If not all Box 14 Code fields are needed, leave the constant text value blank for unused fields.*

Fields 34-43 State and Local Wages

Below is an example of employees residing in multiple states and local tax being withheld.

9. These fields will need to be updated based on the states (localities) tax is withheld for. *To modify the state/local withholding and wage bases, the below fields will need to be added.*
10. Click **Add Field**.

Section Name		Employee W2 Data	☒ Include Header
Section Type		☒ Employee Data	☐ Employer Data
Order	Field Name	Field Type	
34	State ID 1	Tax ID - KY	
35	State Wages Tips E...	Wage Base - KY	
36	State Income Tax 1	Withholding - KY	
37	Local Wages Tips E...	Wage Base - 001PA	
38	Local Income Tax 1	Withholding - 001PA	
39	Local Name 1	Text	
40	State Name 2	Text	
41	State ID 2	Tax ID - WV	
42	State Wages Tips E...	Wage Base - WV	
43	State Income Tax 2	Withholding - WV	



The Select a Field to Add screen will display.

Select A Field To Add

> Check Date
 Company Number

> Reporting Year
 > Tax ID
 Text
 Wage
 > Wage Base

< >

11. Once the applicable state (local) information has been selected, move the fields above the current existing fields and delete the sample fields.
12. If you only have one State Tax you withhold for, remove fields 37-43.
13. If you only have one State and Locality tax you withhold for, remove fields 40-43.
14. If you have multiple localities that you withhold for, add additional local fields after field 39.

Special Note for Fields 39 and 40

Fields 39 and 40 are **Text** fields.

15. Enter the local tax name for Field 39 (based on example above) and a two-letter state name for additional states being withheld for Field 40 (based on example above).

If there are multiple local taxes, a local tax name will be needed for each local tax withheld.

Constant Text Value

Enter the constant text you would like to appear for this field.

BUCKS COUNTY

Exporting the Yearli File

1. From the **User-Defined tab**, select the **Yearli W2 Extract**.
2. Click **Run Export**. *The Custom Export popup will display.*
3. From the **Choose Date Range** dropdown, change the date range to the Last Year.

Employee/Wage Exports Company #01 - Auto/Mate Motors 01

User defined
Predefined

Template Name	# Of Sections	# Of Data Fields Per Section
hours worked		
IL IDES Mthly		
IL IDES Quar		
IN UI Quarter		
MA ICESA Qu		
NC UI Quarte		
NCDOR W2 E		
phone list		
Remaining S		
SIMPLE EXPC		
Simple Mode 3.6.023		
SUTA test		
testing		
TX TWC Wage Report	1	Employee Data: 5
WA UI Quarterly Extract	6	A Record: 18, B Record: 7, E Record: 23, S Record: 24, T Record: 28, F Record: 13
wage	3	Data: 3 (with header), Data: 1, Data: 1
Yearli W2 Extract	2	Employer W2 Data: 12 (with header), Employee W2 Data: 43 (with header)

Exporting Template: Yearli W2 Extract

Export File: C:\Users\amarshall\Yearli W2 Extract.csv

Date Range: Choose Date Range: 10/01/2020 -

Current Quarter
 Current Month
 Last Month
 Last Quarter
 Current Quarter
 Current Year
Last Year
 Year to Date
 Custom

Employment Status

☒ Active

☒ Inactive

☒ Terminated

Report Options

☒ Hide SSN (except last 4 digits) on report

If you are running a SUTA Extract, ensure the SUTA Account Number

Run Export **Print as PDF** **Cancel**

Add
Edit
Delete
Copy
Save As Predefined
Run Export
Print As PDF
Close

4. Click **Run Export**.

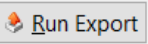
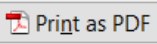
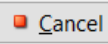
Custom Export

Exporting Template: Yearli W2 Extract

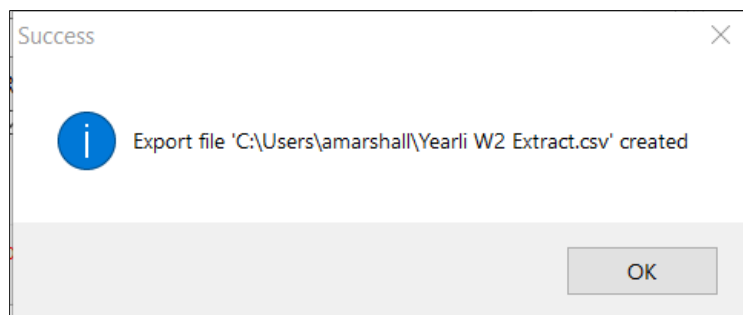
Export File 

Date Range Choose Date Range Current Year 01/01/2020 - 12/31/2020	Employment Status ☒ Active ☒ Inactive ☒ Terminated	Report Options ☒ Hide SSN (except last 4 digits) on report
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If you are running a SUTA Extract, please make sure the SUTA Account Number is in the predefined tax definition!

Note: Once the file is exported, it can be found in the following directory on your PC: C:\Users\Your User Name\Yearli W2 Extract.csv



Uploading the Yearli File on the Yearli Website

Once the data file is created within Auto/Mate and exported, please follow the steps below to upload it.

1. Access <https://yearli.com/integrations/auto-mate> to display the Yearli/AutoMate page.
2. Click on **Create Core Account** or **Create Performance Account**. See page for details.
3. Enter your **User Information** and click **Continue**.
4. At the *Your Filing Home Screen*, select **Start New Forms**.
5. Select the **Import Data** option.
6. Select **Auto/Mate**.
7. Read the **Import Instructions** and click **Browse For File**.