

PayMaster Hospitality Version 8 : 2007 W2 Printing Instructions : Alignment

Step 1: Be sure you have the latest updates.

To print W2's for tax year 2007 be sure you have the latest updates.

Your reports menu should look like this:

Note: There is new 2007 alignment program ,a new 2007 printing module, and the W2 MagMedia has been renamed to EFW2 . If you donot have these three please call for update.

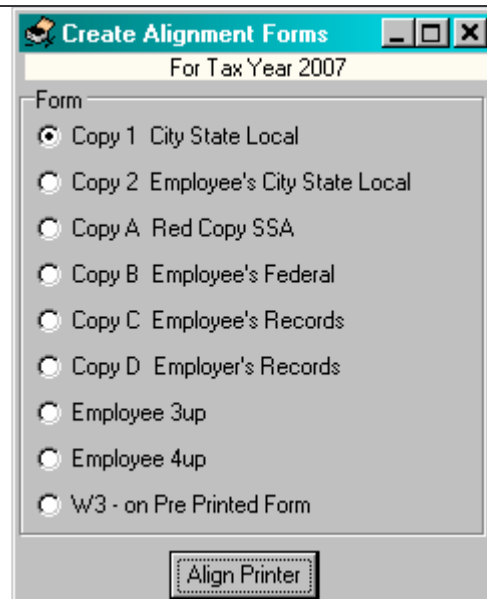


Step 2: Create Alignment W2s for each form that you will be using.

Select W2 alignment from the above menu.

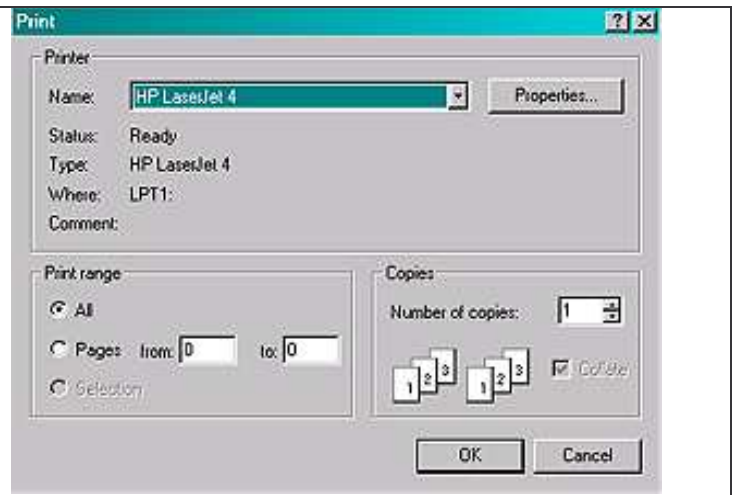
For each type of form you will be printing you must create an alignment W2 for your printer.

Select a form and press align.



Step 3: Pick the Printer.

Choose the printer that you will be using to print W2s.



Step 4: Fine Tune

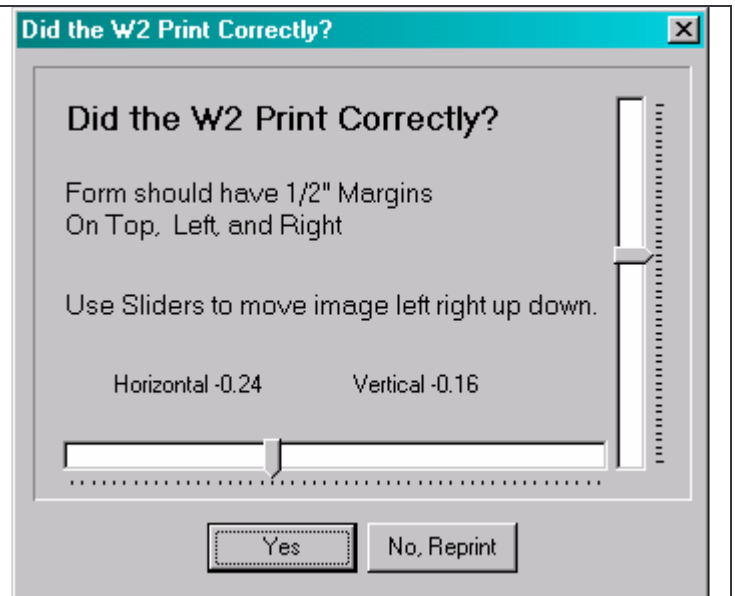
Print on blank paper and compare to the actual forms. If its not quite aligned use the sliders to move the form up/down left or right and press NO to reprint.

If it looks good press YES to continue to the next form.

You can use the sliders to fine tune the alignment for your printer here.

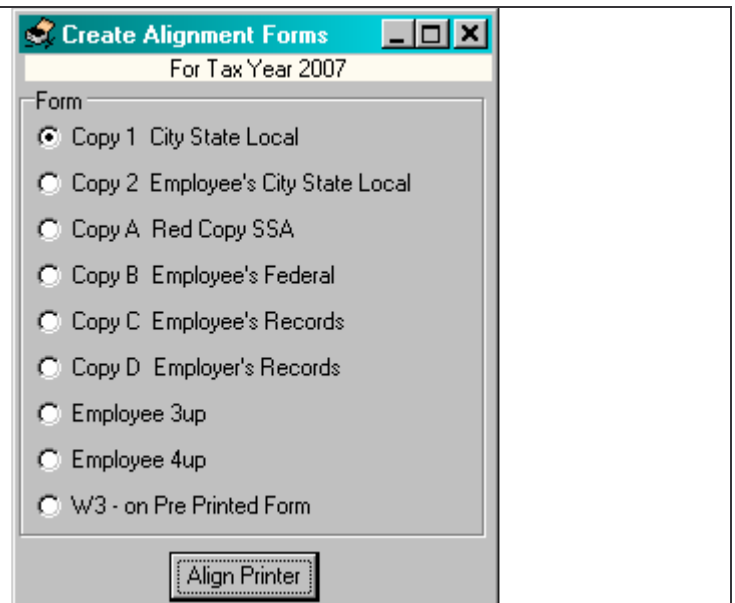
The 2up forms and the W3 should have a 1/2 margin on the right,left, and top.

On the 4up forms, be sure the right hand copies clear the middle perforation. Look for a 1/4 in margin on left, right and top.



Step 5: Repeat for each form

Repeat this process for each form that you will be using. The sliders remember your last adjustment so this process should be rather easy.



2007 W2 Printing Instructions : Printing Forms

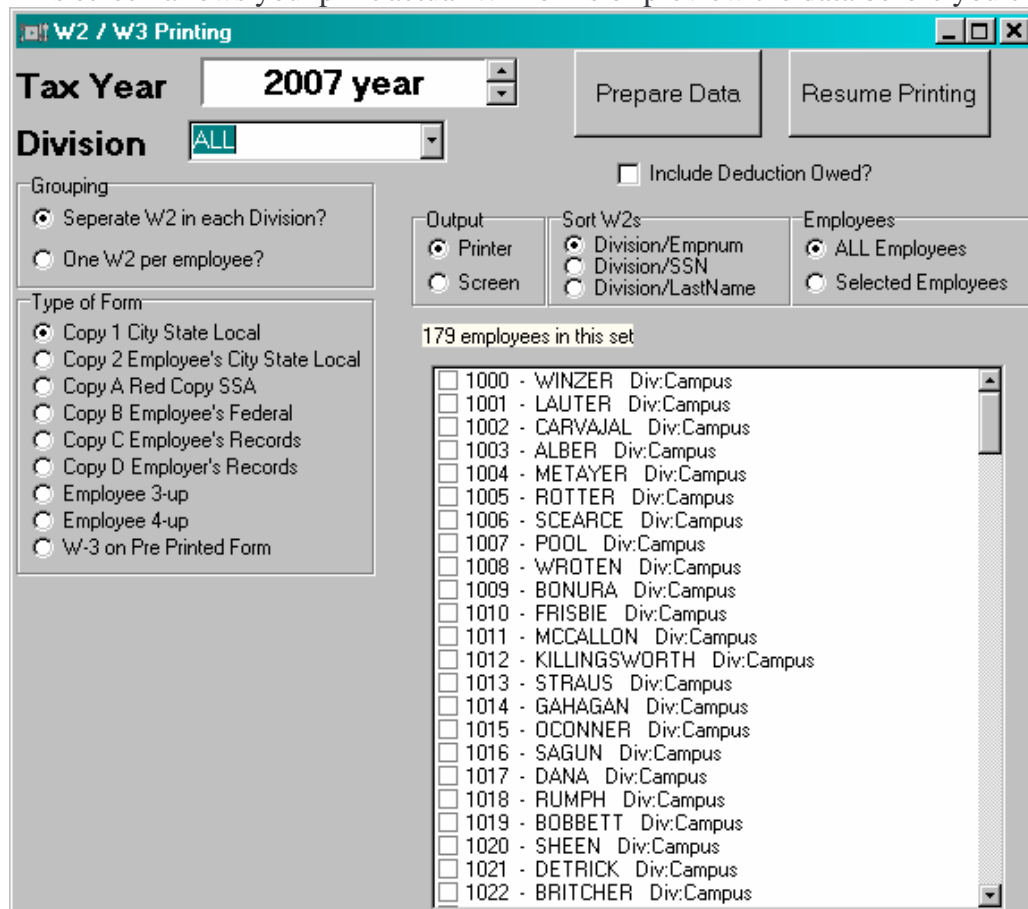
Step 1:

Now that you have created your alignment W2s you are ready to print on the actual forms.

Be sure to select 2007 W2 Printing for this years forms!



This screen allows you print actual W2 forms or preview the data before you commit to the actual forms.



Step 2: Select your Options and Print the Forms

OPTIONS :

OUTPUT :

Choose: Printer ... to print the actual Forms
OR Screen ... to print a new condensed W2 /W3 format
This option is great for previewing groups of employees during the year.
The preview will display up to 4 employees per page can be printed.

Output
 Printer
 Screen

Employees:

Choose: All to print all employees
OR Selected to print just the selected employees Selecting an employee from the list below will automatically change this option.

Employees
 ALL Employees
 Selected Employees

Include Deductions Owed?

This option pertains to all BOX 12 deductions.
Leave this unchecked to use the amount actually deducted.
Check this if you have collected all deductions owed and will be giving the employee credit for both paid and owed.

Include Deduction Owed?

Grouping:

For multi division employers.
One W2 will combine all incomes from all divisions into one W2

Grouping
 Separate W2 in each Division?
 One W2 per employee?

Once all options are selected you are ready to print W2s.

Step 3: Prepare Data

The first time you run this for the year you will have prepare the data for export to the W2 forms. Once this table is created you can continue to use this dataset for each run of paper.

If the program finds an existing W2 dataset you will get this message. If you are sure that this is the correct dataset press YES or to recalculate the W2 data press NO.

Note this could take a few minutes on large companies (>500)

Prepare Data

Question...

W2 data already exists !
Press YES to use this dataset
or NO to recalculate

Yes

No

Printing values for employee... 1065

9%

Resume

Cancel

Once you select the printer a progress bar will show you the status of the W2 creation and print progress. You can pause/ resume or cancel the printing process at this point.

Hints:

1) Be sure to verify your data before committing to paper.

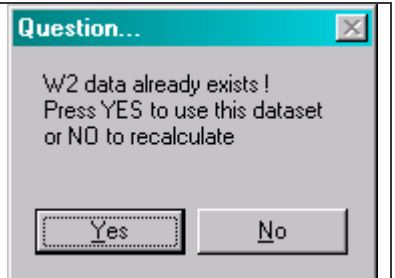
Reconcile your 4 Quarter's 941 to your W3

You can do a test run on plain paper and /or use the condensed preview style to double check each employees data and W3 data.

2) If you want just a selected employee you will have to create a new dataset.

If you select YES at this screen it will always use the last set of data you used. Once the W2/W3 data is calculated you do not have to reprocess the employee info. This is real convenient when you are printing multiple sets of forms.

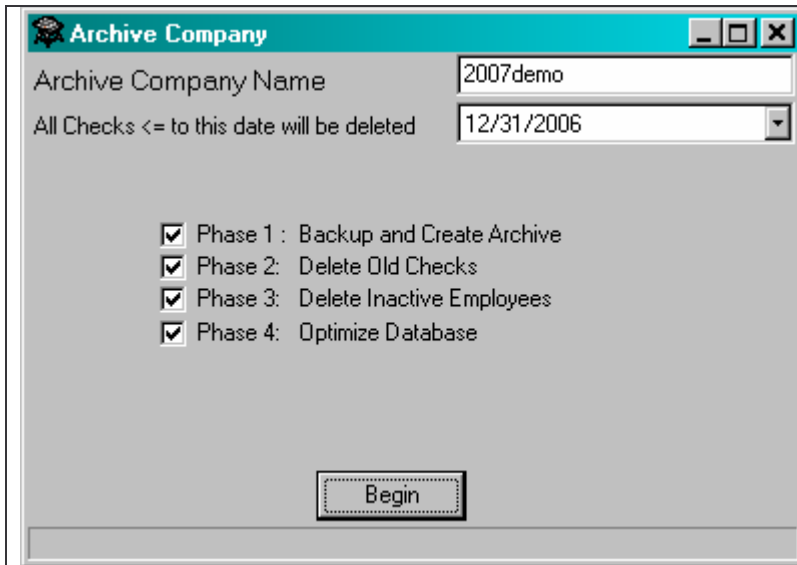
You MUST select NO if you are changing the selected employees or divisions or any of the options.



If your Paymaster is printing across a network it can be rather slow to respond.

To speed things up you can copy your mapped folder that contains Paymaster to the machine that will be printing W2s. Running locally seems to speed things up considerably. Contact PayMaster if you need help with this workaround.

NEW for 2007: Archive Company



Archive Company

Archive Company Name: 2007demo

All Checks <= to this date will be deleted: 12/31/2006

- Phase 1: Backup and Create Archive
- Phase 2: Delete Old Checks
- Phase 3: Delete Inactive Employees
- Phase 4: Optimize Database

Begin

Archive Company: This utility will backup the company for archival purposes and it can remove old data from the working database such as Old Checks and Inactive Employees to decrease the size of the working database while still keeping historic data.

Note: This procedure can take a long time depending on how many checks and employees you currently have in the system.

Step 1) Pick a name for your archive company. By default it will use the current year and company name as seen above.

Step 2) Choose an archive date. Since everything in PayMaster is based on checkdate, you are able to run this program anytime you would like (but obviously just once a year). If you have more than one year's work of data in PayMaster already you can also choose to "carry" more than one year of data as current. As pictured above I have decided to keep all my 2007 checks going into 2008 carrying one year's worth of data.

Step 3) Press Begin: The progress bar will let you know the status and as each phase is completed the checkboxes will be unchecked.

Phase 1: To create the archive company we simply create a backup of the current company and create a new database with this data.

Phase 2: Checks older than the specified date are deleted.

Phase 3: Employees that have been marked inactive and have no current checks are deleted.

Phase 4: Database is optimized. Since many rows have been deleted it's a great time to reindex and repack the database.

This program is only necessary for large companies of over 500 employees.

Smaller companies should be able to keep many of years of data without experiencing any performance issues.