W2 / 1099 Generator Getting Started Guide
2007

Burton Software Comp

Smart Tools for smart people

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1 Installing the W-2/1099 Generator

To Install the W-2/1099 Generator program, place the W-2/1099 Generator CD in the host computer. If you are installing the W-2/1099 Generator for a network, the host computer must be the network server. You cannot install the W-2/1099 Generator for a Network from a work station.

The installation routine should start immediately. Follow the installation prompts. If you complete the installation, your W-2/1099 Generator program will be ready for use when the installation is complete.

If the installation routine fails to start immediately, take the following steps:

1. Click the **Start** Button.
2. Click **Run**.
3. Using the browse button, locate the CD drive (typically the "D" drive on most computers). **Highlight the program "launch.exe".** Click the **Open** Button.
4. Click the **OK** button on the "Run" dialog box. The installation routine should start.
5. Follow the installation prompts.

If you are installing for the first time, enter the required information about yourself and your company. **If you are installing a trial version of W-2/1099 Generator, do not enter a serial number when asked. Entering an erroneous serial number will cause W-2/1099 Generator to shut down prematurely.**

2 Trial Versions

Burton Software Company provides a trial version to prospective users so they can utilize and review the program features prior to purchasing licenses. Trial versions are fully functional with the exception that the printed documents contain a watermark "DEMONSTATION VERSION". There are no other limitations on the trial version for prospective users.

To purchase the W-2/1099 Generator, contact Burton Software Company at (800) 551-7520, by eMail at **sales@Burton-Software.com** or visit us at **www.burton-software.com (http://www.burton-software.com/)**.

3 Uninstalling the W-2/1099 Generator

To uninstall W-2/1099 Generator, follow the following steps:

1. Click the **Start** Button.
2. Double-Click the **Control Panel**.
3. Double-click **Add or Remove Programs**.
4. On the Currently installed programs listing, **find and highlight "W-2Combo 2007"**. **Click the Remove button.**

The W-2/1099 Generator program and all files, forms and installed library programs that are not being used by other programs will be removed from your computer.

4 W2/1099 Program Overview

Program Overview

The W-2/1099 Generator is used to prepare Federal and state payroll forms necessary for periodic payroll processing. These forms include both annual and quarterly reports. Forms W-2 and W-3 are printed by the W-2 module. Forms 1099, 1098, 5498 and 1096 are printed by the 1099 Module. Forms 1042, 1042-S and 1042-T are printed by the 1042 module. All modules, while sold separately, are integrated for easy transferal of data within each company or business entity. You will be able to access only those modules that you have purchased.

The W-2 module will print the following forms:

Form W-2	Form W-2c
Form W-3	Form W-3c
Form 941	Form 941-c
Form-941-V	Form 941 Schedule B
Form 940	Form 940-EZ
Form 943	Form 943 Schedule A
Form 8809	Form 944

The 1099 module will print the following forms:

Form 1096	Form 1098
Form 1098-C	Form 1098-E
Form 1098-T	Form 1099-A
Form 1099-B	Form 1099-C
Form 1099-CAP	Form 1099-DIV
Form 1099-G	Form 1099-H
Form 1099-INT	Form 1099-LTC
Form 1099-MISC	Form 1099-OID
Form 1099-PATR	Form 1099-Q
Form 1099-R	Form 1099-S
Form 1099-SA	Form 5498
Form 5498-ESA	Form 5498-SA
Form 945	Form 945 Schedule A
Form 4419	Form 8809
Form 4502	Form 4504

The 1042 module will print Form 1042, 1042-S and 1042-T.

The W-2 and 1099 modules will prepare magnetic media files for reporting of payroll data to the Social Security Administration or the Internal Revenue Service via diskette or electronic submission. These magnetic media modules are an addition to the basic package and can be purchased for a reasonable fee.

The 1099, 1042 and the W2 modules are integrated at the company and the employee(recipient) level. This is done to provide easy access and less key strokes for common data. The company file (COMPANY.DBF) is kept in the same program folder (directory) as the program. The employee file is kept by company in the Employee sub-folder.

Data files for each company are kept in either the W2data06 sub-folder, the 42data06 sub-folder or the T9data06 sub-folder. Form 1099 types (INT, DIC, MISC, etc) have separate files for each type.

5 Program Terminology

The following terms are used in the W2/1099 Generator:

Continuous Forms - Forms that are pin-fed through a dot-matrix or commercial thermal; printer.

Companies - also called Employers in the W-2 module or Payers in the 1099 or 1042 module.

Electronic Reporting - the process of filing payroll tax forms electronically, either through the submission of tape media with the IRS, or by filing electronically via the Internet with SSA or IRS. All employers or payers who must file over 250 forms for a particular Form type are required to file in this method unless an exemption is obtained.

Employees - also called Recipients in the 1099 and 1042 module.

Forms 1042 - Forms issued to residents of foreign countries who have earned income from entities in the United States of America and who are required to file income tax returns with the Internal Revenue Service.

Forms 1099 - payroll forms issued to recipients of payments from Payers of Interest, Dividends, Non-employee compensation or other payments that are required to be filed by the Payers with the Internal Revenue Service.

Form 1099 Family - the 1099 family includes all Forms 1099, 1098, 5498 and W2-G.

Forms W-2 - payroll forms issued to Employees by their employers at the end of each year. This information is furnished to the Social Security Administration.

Importing Data - Data can be imported from any program that can produce an ASCII tab-delimited or comma-delimited file or any EXCEL file (version 97 or later). For information on importing, see the Importing Data Pamphlet distributed with this program (Master Menu > Help > Print White Papers).

IRSTAX File - File produced by the 1099 Magnetic Media Module for submission to the Internal Revenue Service.

Magnetic Media Reporting - the process of filing payroll tax forms electronically, either through the submission of tape or diskette media with the IRS, or by filing electronically via the Internet with SSA or IRS. All employers or payers who must file over 250 forms for a particular Form type are required to file in this method unless an exemption is obtained.

Migrating File Data - You can migrate a file if you want to bring forward data from the past year's files. This can occur if you have been collecting data in the past years program that is to be reported in the current year.

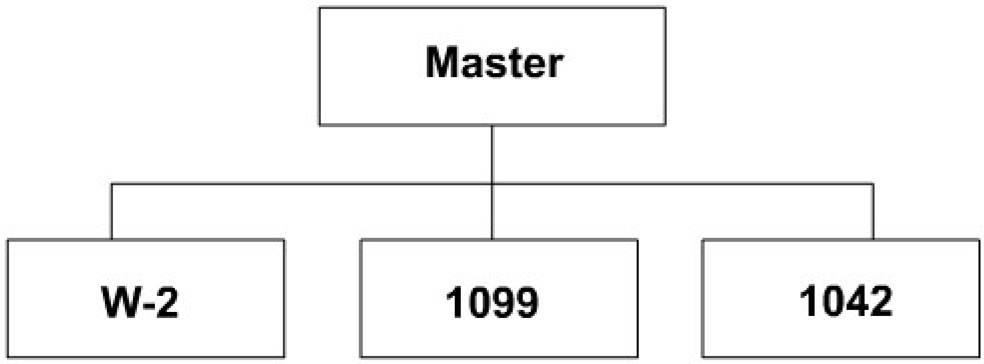
Plain Paper Forms - Forms generated by the W-2/1099 Generator on plain paper through either a laser or inkjet printer. This would include forms printed on perforated forms available from commercial vendors.

Pre-Printed Forms - Payroll Forms that are printed on forms that have been produced commercially by vendors of payroll forms. The W-2/1099 Generator prints on data on these forms.

Updating Files - Files are updated from the past year to the current year. Demographic information (Names, addresses, taxpayer ID numbers, etc) are brough forward. Data is not brough forward. When a file is updated, no data files for that company exist until created.

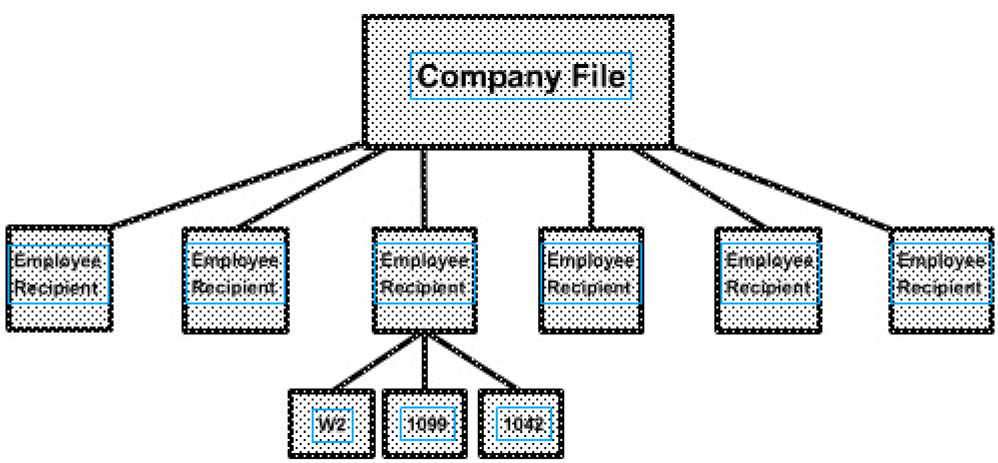
W2REPORT file - File produced by the W2 Magnetic Media Module for submission to the Social Security Administration.

6 Program Organization and Features



Module Organization

The W-2/1099 Generator program is organized to allow access to each module through the Master Module. The Master Module also controls functions that are universal to the entire program. Adding companies (employers) to a common Company data file as well certain universal program utilities (Program activation, update, backup and restoral as well as other functions) are available at the master menu. When you close a program module (W-2, 1099, or 1042), you will return to the master menu.



Data Organization

Program data is organized with a centralized Company file (Company.dbf) for all modules. Each company has its own employee (recipient) (COxxxxx.dbf) file located in the Employees folder. Employee module data is kept in their own data files located in the module folders (W07xxxxx.dbf kept in the W2data07 folder;

T9xxxxxx.dbf kept in the T9data07 folder; and T4xxxxxx.dbf kept in the 42data.dbf).

Companies are created at the master menu. All companies are available to each active forms module (W2, 1099 and 1042). The number of companies that you can have is limited to the version of the program you have purchased.

Employee folders are created in each module for the specific form family. However, employee records for a particular company are available to all modules if desired. There is no limit as to the number of employees or form recipients that you can create for ecah company.

Data files for each module are also created at the module level. Typically, each active employee will have one data record although multiple records are possible if desired.

7 Starting the W2-1099 Generator

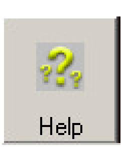
When you start the W-2/1099 Generator for the first time, you will have one sample company in the Company data base. You can use this database to review the functions of each of your purchased modules. After you have reviewed the program and gotten familiar with operations, you can delete the sample program. This will give you the maximum number of companies available to you with the version you have purchased.

The Master menu is displayed below.

Activated modules (W-2, 1099 or W-2) will be displayed and can be accessed. Modules that you have not purchased will be disabled and will not be accessible. They will appear dimmed in stature.

FIRST ACTION

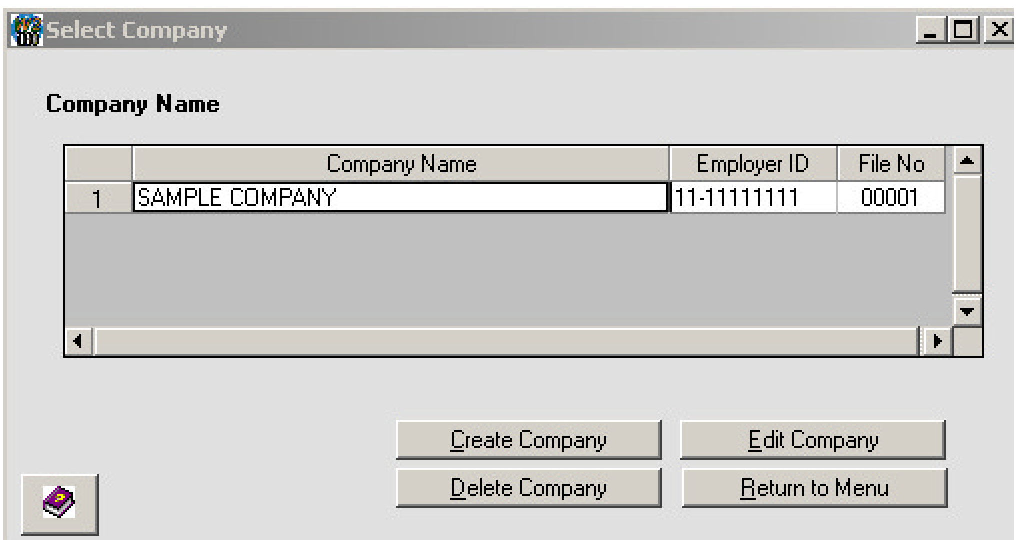
If you have purchased the W-2/1099 Generator and your program indicates that it is a demonstration version, click the "Activate" icon at left and enter your program serial number when prompted.



The icon at the left brings up the "Help" system for the selected module. Each help system is independent of other modules. All modules are available at the master menu help selections. The help system should be your first source when problems or questions arise.

If you have used the W-2/1099 Generator previously, you can update your 2005 files to the 2006 format at the master menu. Use the Update Icon (Displayed at the left).

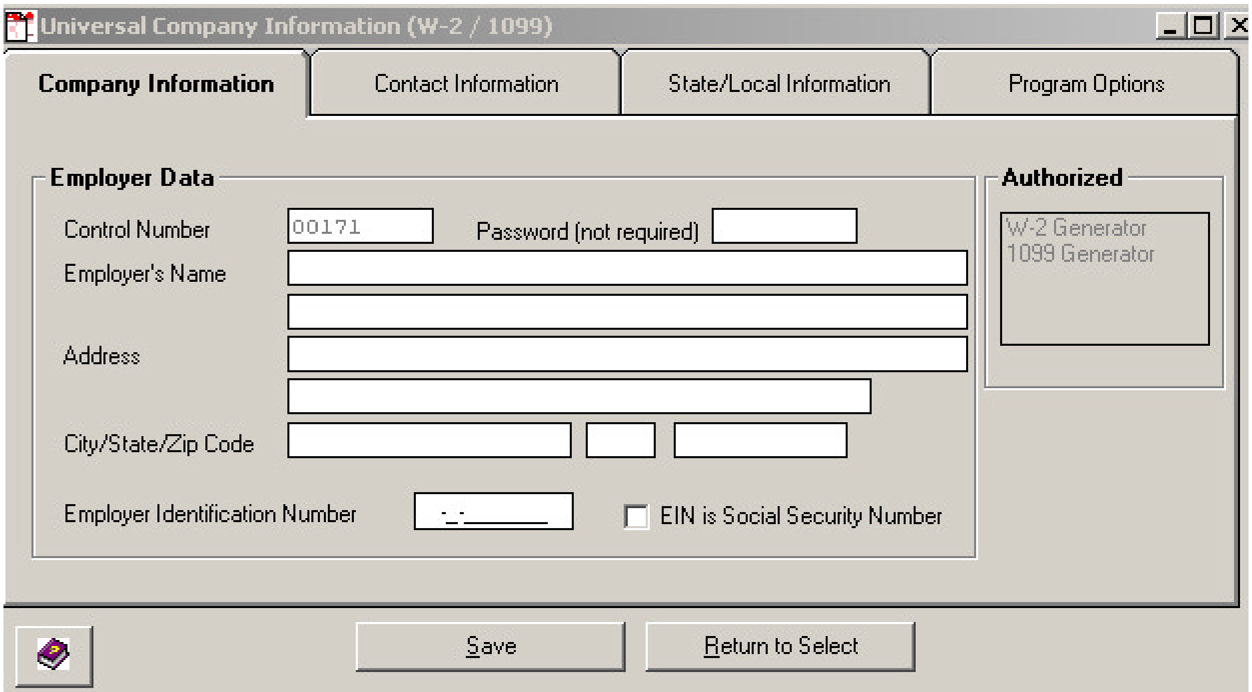
If you are new to the W-2/1099 Generator, you should review the SAMPLE COMPANY provided with the program or enter your Company information by clicking on the Company Icon on the master menu tool bar. You will cause following selection screen to appear: (This is where all companies are added to the Company file!)



Make your choice by selecting one of the command buttons. You can select to Create, Edit or Delete a Company record at this screen. Click on the "**Create Company**" button to create a company.

8 Entering Company Data

ENTERING COMPANY DATA



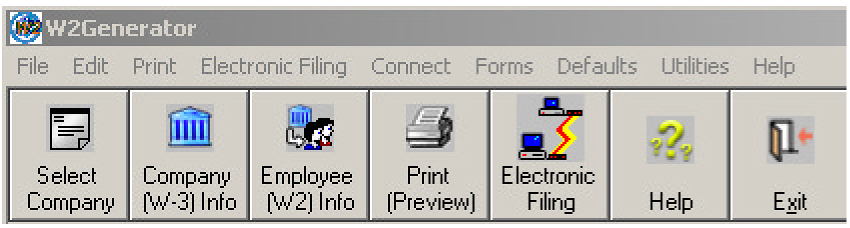
Enter your company data on each of the four tabs. You must enter an Employer Name and Employer Identification Number. If you want to password protect this record, enter a password. (Be sure you remember it! There is no recovery for a missing password!)

The icon at left is available at each data screen. It is your link to instant help for the screen you are displaying.

When you have completed entering company data, click one of the module icons below to enter the module of your choice. All modules are similar with one exception. The 1099 company selection screen differs from the W-2 and 1042 selection screens. The difference is explained later in this pamphlet and in the 1099 help system.

9 Using the W2 Module

If you have chosen the W-2 module, you will see the W2 Menu. The tool bar and menu is displayed below.



If this is an evaluation version, the Electronic Filing Icon will be disabled. All other functionality is available for an evaluation version.

The W-2 tool bar displays the most common functions of the W-2 program. The menu, above the tool bar allows you to select more functions that are beyond the scope of this pamphlet. See the module help system for amplifying details as required.

9.1 Setting W-2 Defaults

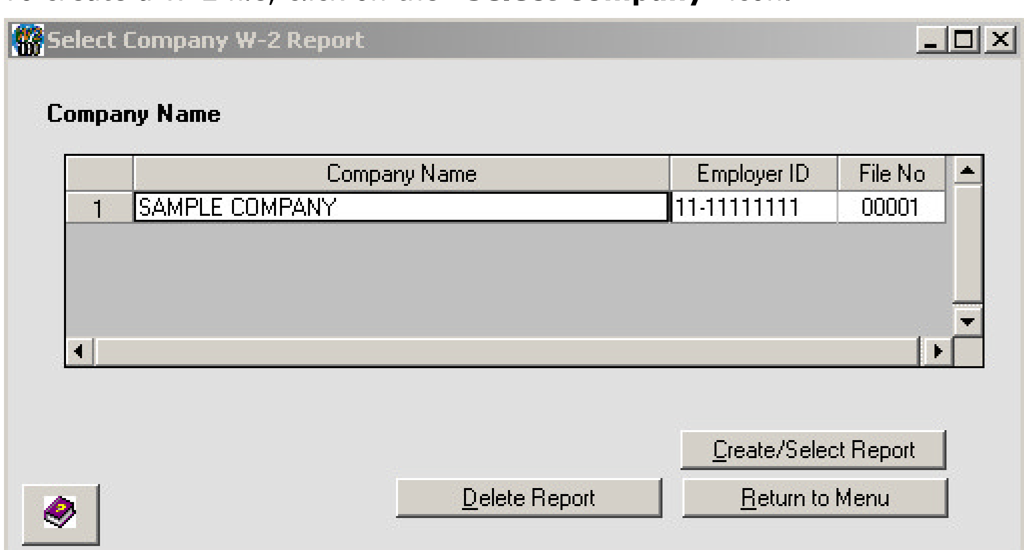
FIRST STEP: SET YOUR W-2 DEFAULTS

Before creating a W-2 file, first go to the Defaults Menu and select "Set Default Values". See values to assist you in entering or editing your W2 data records. Press the help button (lower left hand corner) for an explanation of all the fields

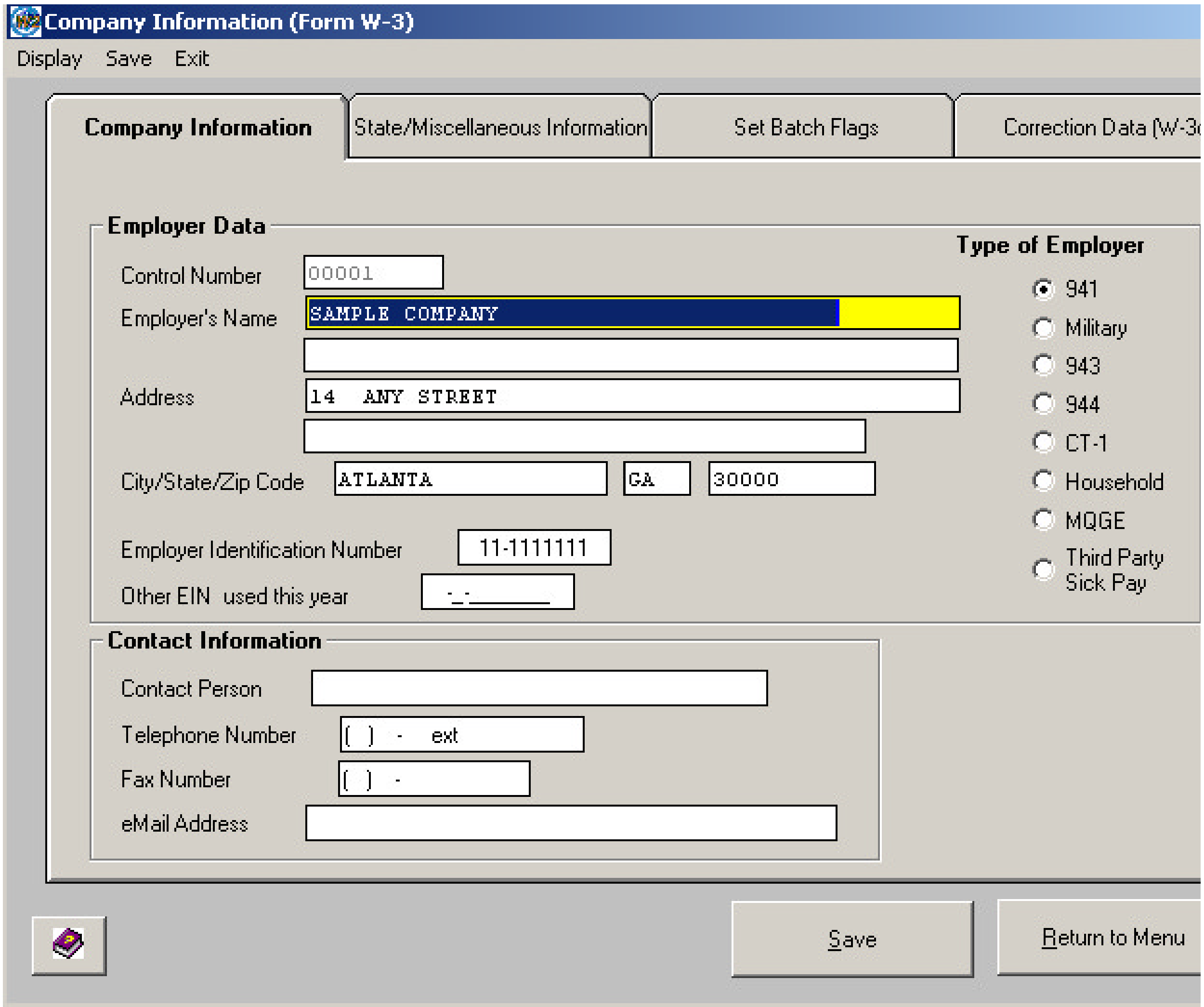
9.2 Creating a W-2 File

STEP TWO: CREATE A W-2 FILE

To create a W-2 file, click on the **"Select Company"** icon.



You can select a company by highlighting the appropriate grid line and clicking on the **"Create/Select"** button. Remember, If you need to add a company, you do so at the Master Menu.



Note that the Company W-2 screen is nearly identical to the screen at the master menu. However, there are significant differences on Tabs two, three and four where information that is applicable to W-2 forms is collected. Questions ? Consult the help button at the corner of each tab.....

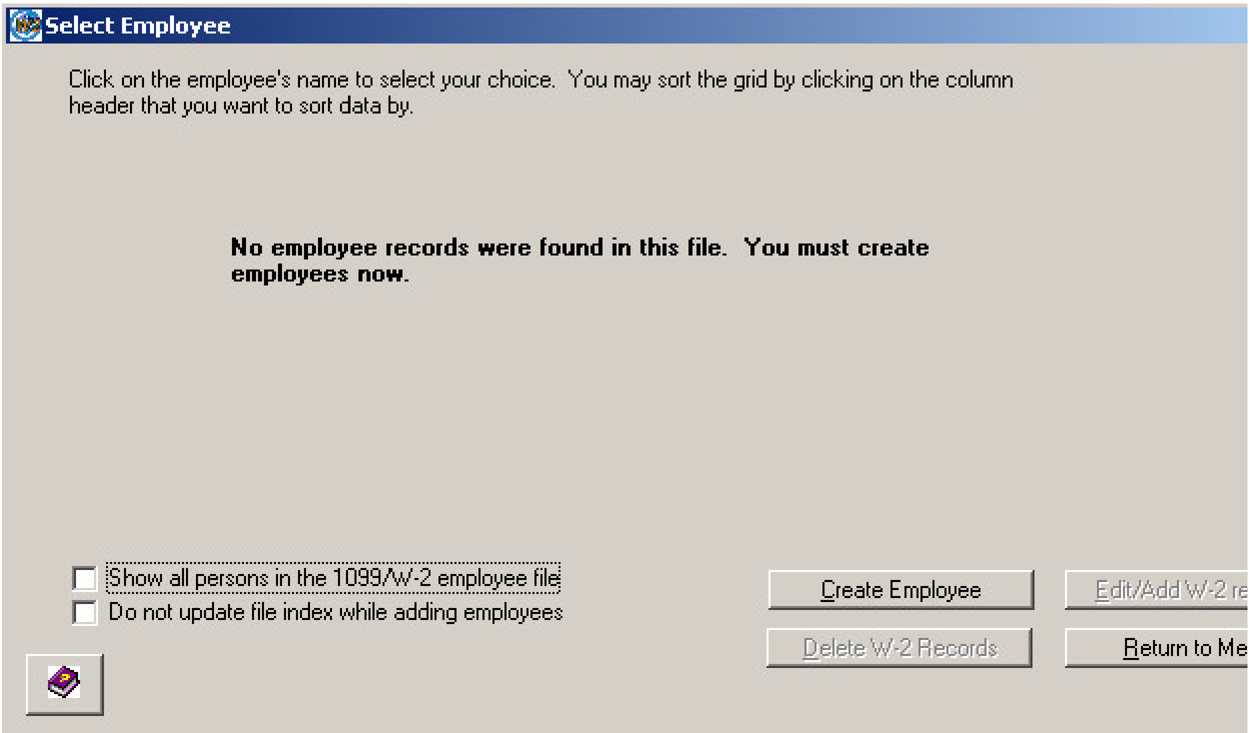
SPECIAL NOTE

While viewing tab two, click the "Default Values" button at the lower right hand corner of the tab. This will allow you to set certain values that apply only to this company. Here you can override the defaults that you set in step one as desired.

9.3 Creating Employee Records

STEP THREE: CREATE EMPLOYEE RECORDS

Click the employee icon on the tool bar.



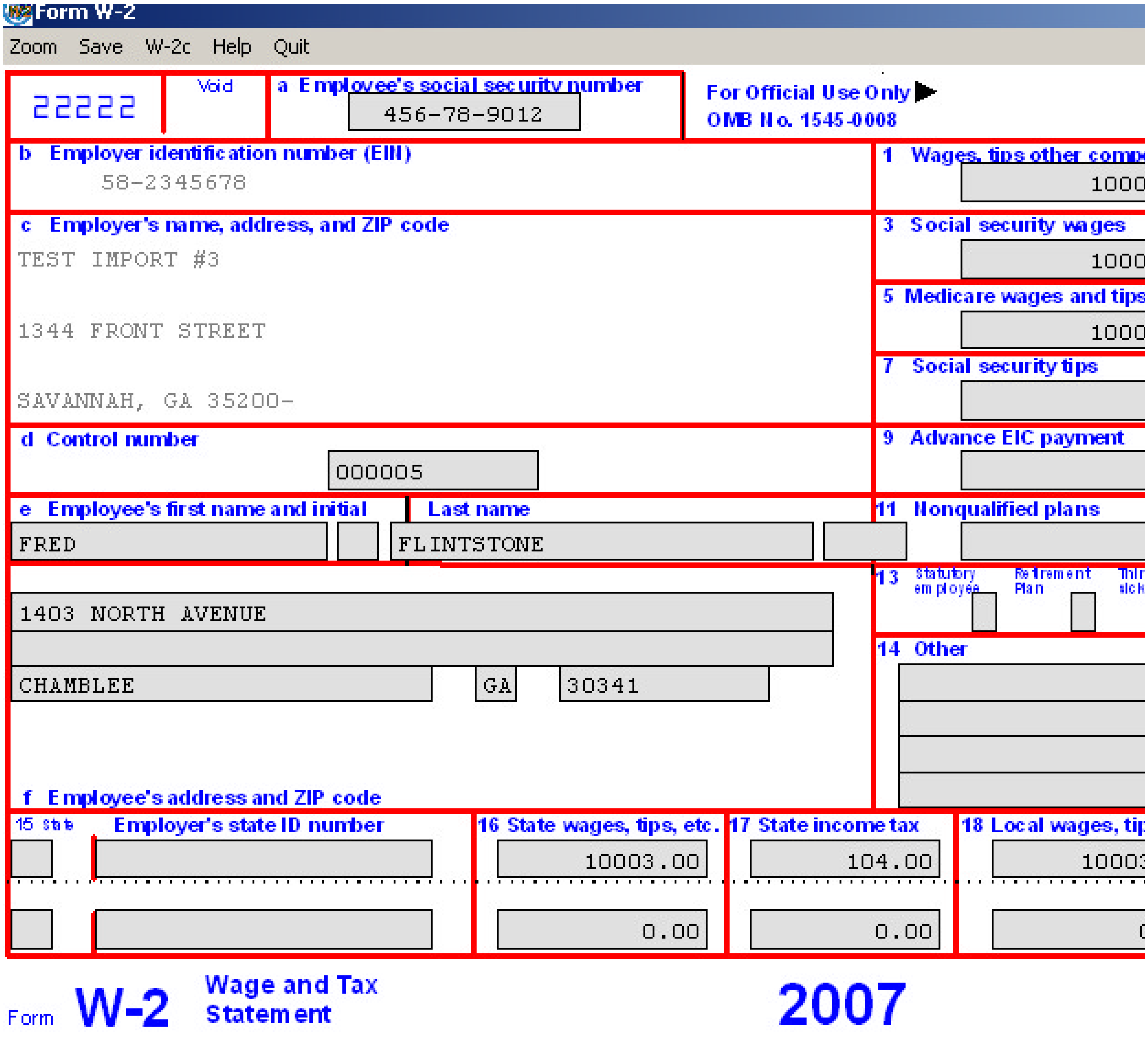
Click the "Create Employee" button to add your employee and data to the Employee file and the W-2 data file.

NOTE

If you updated your file from 2005 and your employees are not showing check the box "Show all persons in the 1099/W2 employee file" and your employees will appear!

Add as many employees as necessary. Edit a few also. <u>If you delete at this selection screen, you will not delete the employee - you will only delete the W-2 data from the W-2 file</u>. (Want to delete the entire employee record ? You can do so at the Utilities Menu > Delete Employees. *Be careful: You will not only delete the employee record and the W-2 record but also any 1099 records as well....)*

Enter employee W-2 data on the screen displayed below:

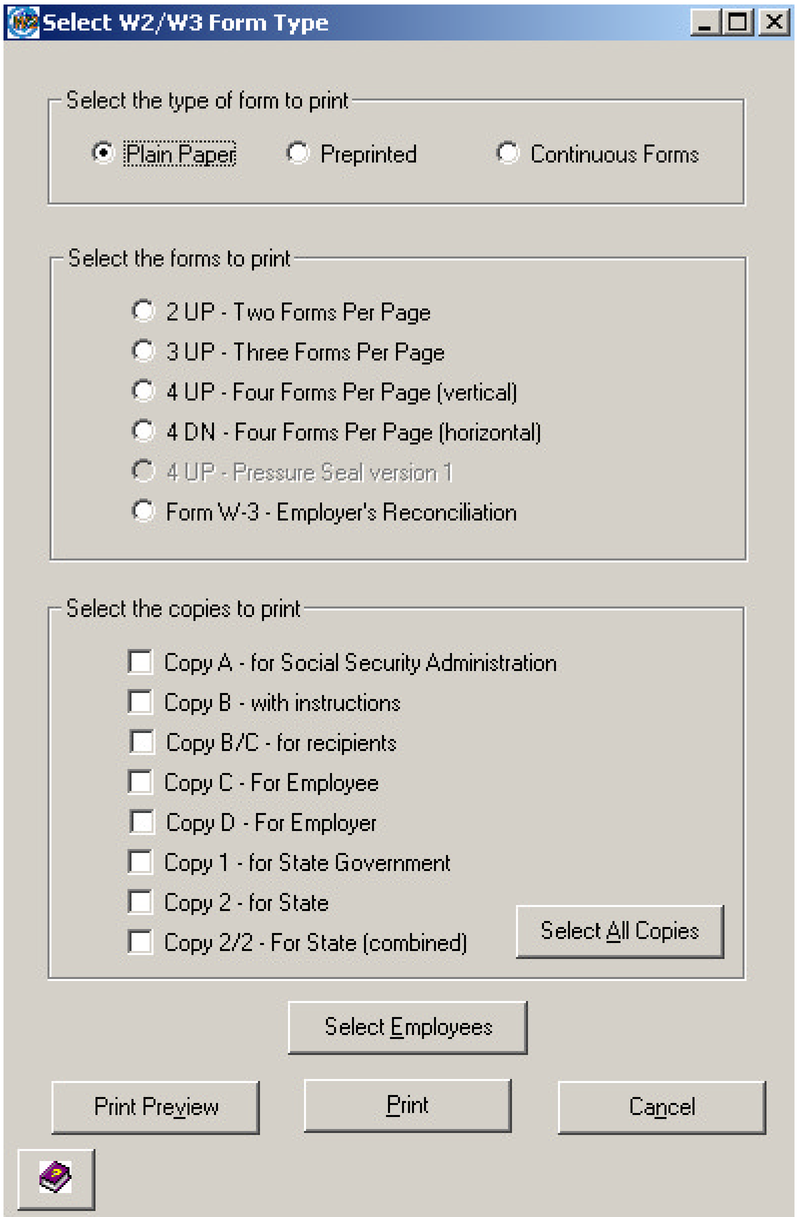

Form W-2
Zoom Save W-2c Help Quit
22222
Void
a Employee's social security number 456-78-9012
For Official Use Only ▶
OMB No. 1545-0008
b Employer identification number (EIN) 58-2345678
1 Wages, tips other comp 1000
c Employer's name, address, and ZIP code
TEST IMPORT #3
1344 FRONT STREET
SAVANNAH, GA 35200-
3 Social security wages 1000
5 Medicare wages and tips 1000
7 Social security tips
d Control number 000005
9 Advance EIC payment
e Employee's first name and initial FRED
Last name FLINTSTONE
11 Nonqualified plans
1403 NORTH AVENUE
CHAMBLEE GA 30341
13 Statutory employee Retirement Plan Thir sick
14 Other
f Employee's address and ZIP code
15 State Employer's state ID number
16 State wages, tips, etc. 10003.00 0.00
17 State income tax 104.00 0.00
18 Local wages, tip 1000
Form W-2 Wage and Tax Statement 2007

Save your data by using the Menu at the upper left hand corner of the screen. The menu is also the selection point for form help and for entering correction data for Forms W-2c.

9.4 Printing your W-2 Forms

STEP FOUR: PRINT YOUR W-2 FORMS

Click the "Print (Preview") icon on the tool bar. Select W-2 forms from the frame in the center of the W-2 menu. The print director appears:



Select a paper type (Preprinted forms, Plain Paper forms, or Continuous forms). Select the Form style (2 per page, or 2-UP; 3 copies per page, or 3-UP, etc) and the copies that you want to print. All employees will print unless you select employees individually (use the Select Employees button).

You can preview your forms or print them by clicking the "Preview" or "Print" button.

STEP FIVE: SMILE. YOU HAVE JUST CREATED AND PRINTED YOUR W-2 FORMS.

If you will be preparing electronic files, print the White Paper "Preparing Magnetic Media Files" available at the Master Menu > Help Menu >White Papers selection or consult your W-2 help system.

10 Things To Remember

Remember - The Help Button is available at any screen within the W-2/1099 Generator!

NOTES