

W2 / 1099 Generator Updating Data from 2006



Burton Software Comp

Smart Tools for smart people

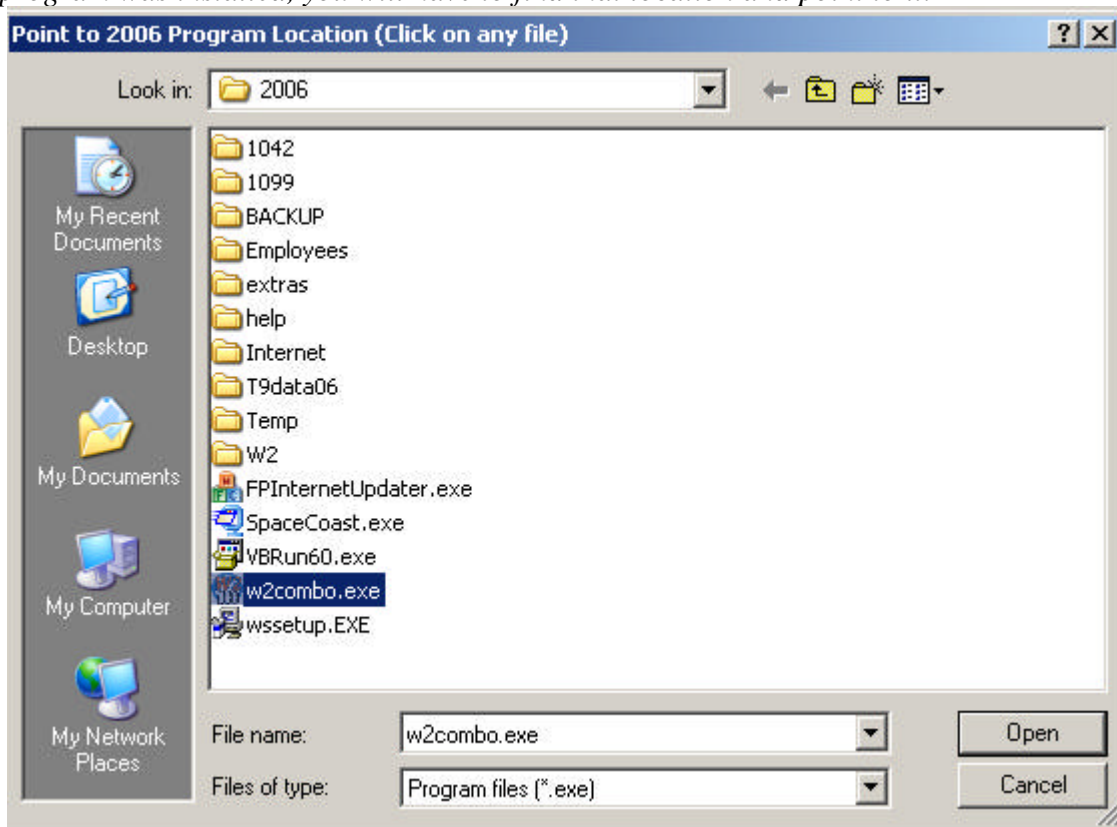
1 Updating Data from 2006 files

UPDATING COMPANIES FROM A PREVIOUS YEAR

Updating clients from a previous year is done at the master menu. Click on the **update icon**, or use the **Utilities Menu > Update 2006 Reports** selection.



You will be asked to point to the location of the previous year (2006) W2/1099 Generator. The dialog box will point to the suggested installation location if it exists on your computer. *If you have installed on a network server or have a customized location where the previous year program was installed, you will have to find that location and point to it.*



Highlight any program or file and then click open. The example above indicates that we have highlighted the W2 program, w2combo.exe.


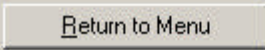
The program will access files found from the previous year to establish a list of companies used that year. To select a company for updating, click the selection box in the left column for that company. To select all companies, click the box in the header row of the left-most column.

Select Reports to Update

Check the select box for the reports you want to update for 2007. To check all companies, check the Select header.

	Select	Company	w2	99	Employer ID	CompID
1	<input type="checkbox"/>	TEST COMPANY #1		X	00-0000001	00004
2	<input type="checkbox"/>	TEST COMPANY #2		X	00-0000002	00006

If found, do not update W2 files If found, do not update 1099 files

If you want to selectively update only W-2 records or 1099 records, check the selection box "If found, do not update (W2)(1099) files" as applicable.

When you are ready to start the update process, click the **“Update”** control box at the bottom of the selection screen.

REMEMBER

Updating brings forward only demographic information (names, addresses, and social security numbers).

Your actual W-2 or 1099 file is created the first time that you select the company from the 1099 or W-2 company selection screen. When accessing employees for the first time, you can see all persons in the employee file by clicking the check box “Show all persons in the W-2/1099 employee file” at the lower left corner of the selection screen.

Select Employee

Click on the employee's name to select your choice. You may sort the grid by clicking on the column header that you want to sort data by.

	Control	Name	Social Security No	Type
1	000003	WALTERS, ROGER	345-67-8901	
2	000004	FLINTSTONE, FRED	456-78-9012	W-2
3	000005	Peacock, Walter	567-89-0123	W-2
4	000006	Smirnoff, Susan	678-90-1234	W-2
5	000007	Jones, Pamela	789-01-2345	W-2
6	000008	Wonka, Willy	890-12-3456	W-2
7	000009	Fredrickson, Tucker	901-23-4567	W-2
8	000010	Proudbody, Paula	012-34-5678	W-2
9	000011	ABRAHAMSON, DALE M	410-39-9654	1099
10	000012	ALDOUS, RONALD G	530-30-5931	1099
11	000013	ALLEN, DONALD E	174-28-8229	1099
12	000014	ALLEN, ESTELITA D	520-66-5500	1099

Show all persons in the 1099/W-2 employee file
 Do not update file index while adding employees

