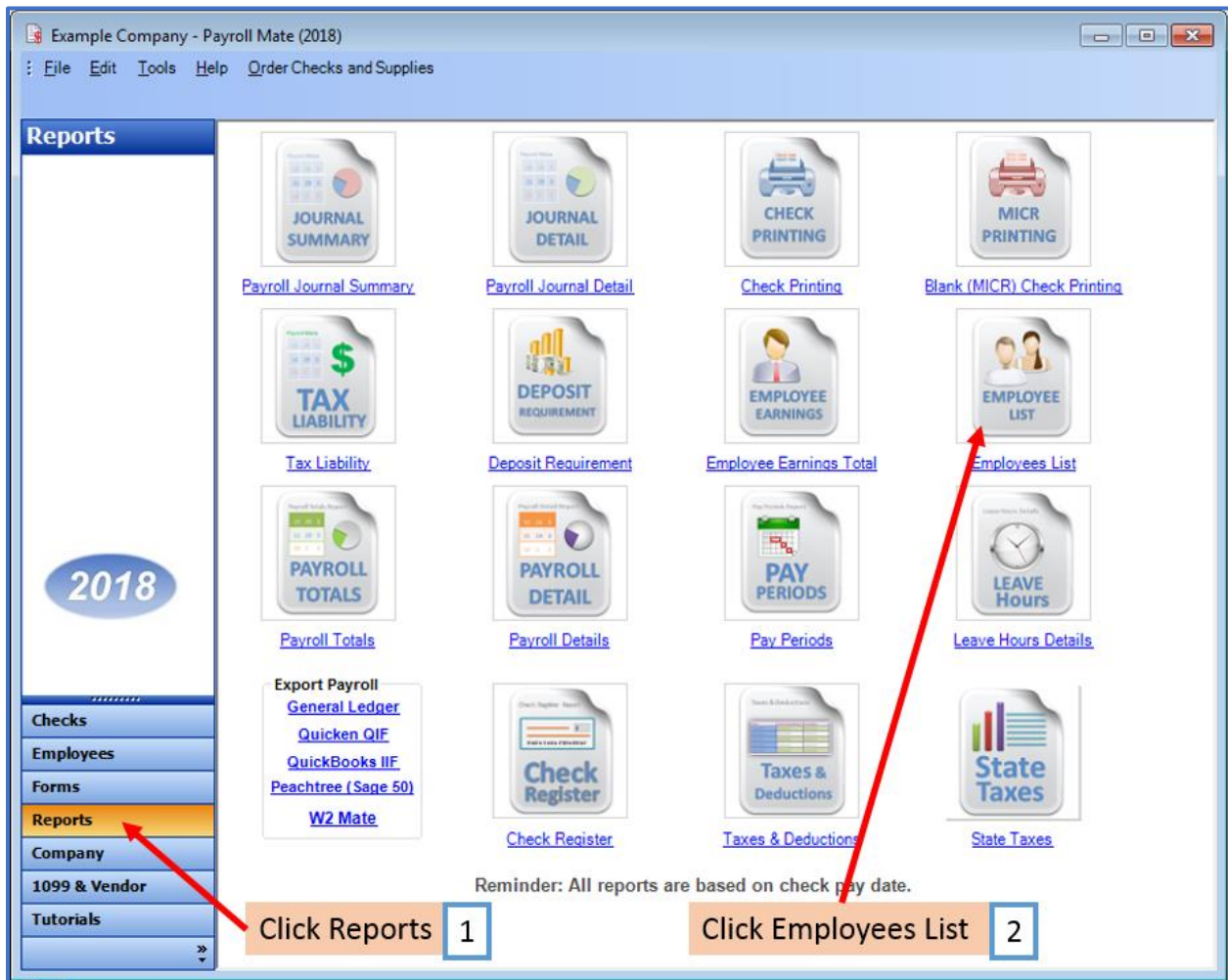
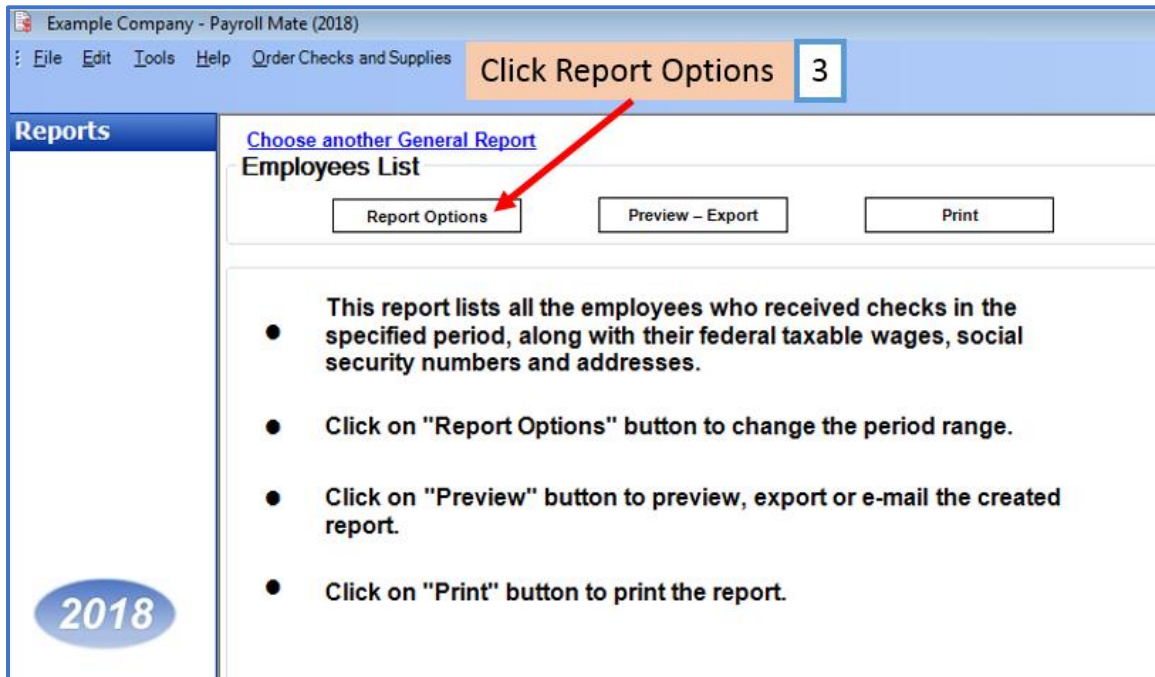


How to Move Employees Between Companies in Payroll Mate

1. Inside Payroll Mate Software, Click Reports from Shortcuts
2. Click Employees List

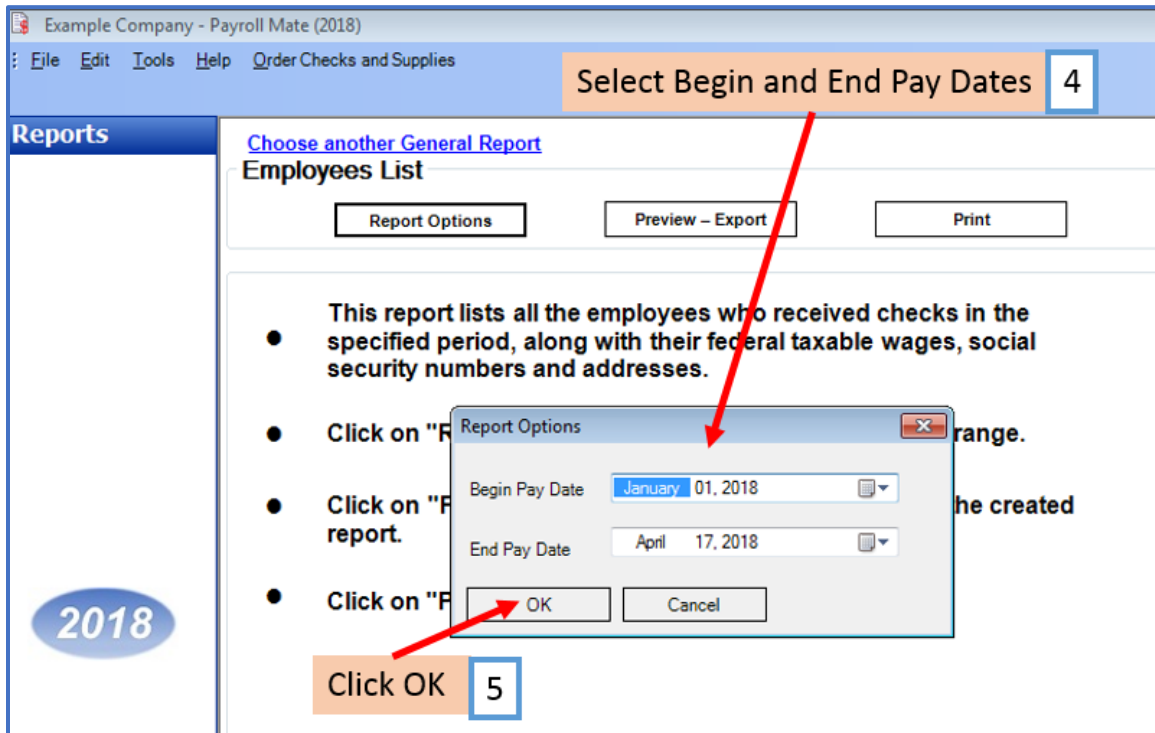


3. Click Report Options



4. Select beginning and ending pay dates

5. Click OK



6. Click Preview-Export

Example Company - Payroll Mate (2018)

File Edit Tools Help Order Checks and Supplies

Click Preview-Export 6

Reports

Choose another General Report

Employees List

Report Options Preview - Export Print

- This report lists all the employees who received checks in the specified period, along with their federal taxable wages, social security numbers and addresses.
- Click on "Report Options" button to change the period range.
- Click on "Preview" button to preview, export or e-mail the created report.
- Click on "Print" button to print the report.

2018

7. Report Preview will open

Report Preview 7 Page: 1/1

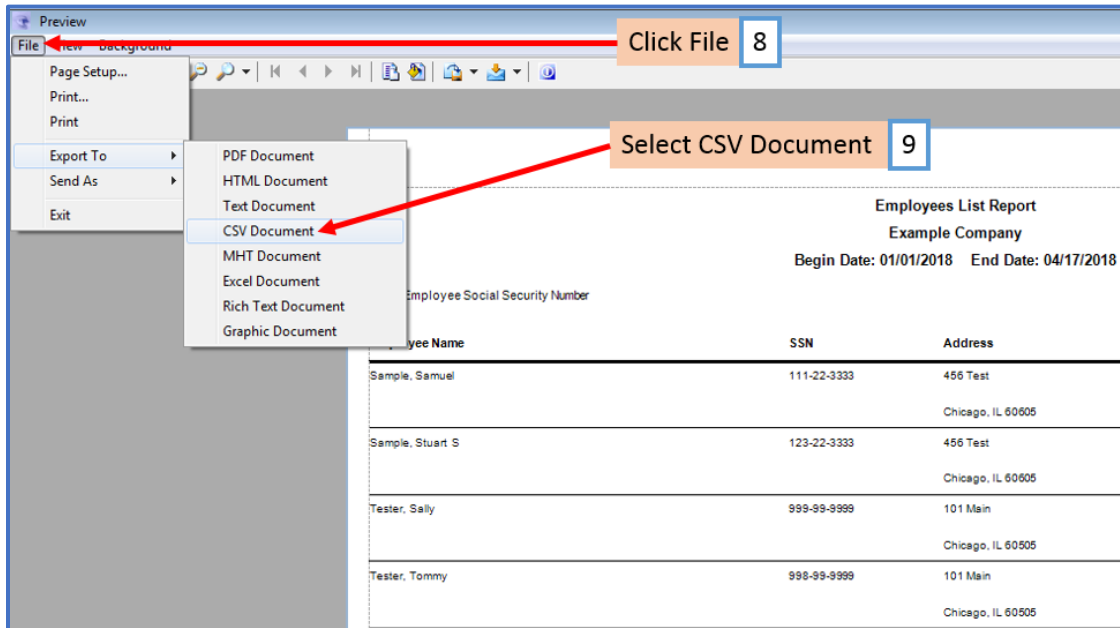
Employees List Report
Example Company
Begin Date: 01/01/2018 End Date: 04/17/2018

SSN : Employee Social Security Number

Employee Name	SSN	Address	Federal Taxable Wages
Sample, Samuel	111-22-3333	456 Test Chicago, IL 60605	0.00
Sample, Stuart S	123-22-3333	456 Test Chicago, IL 60605	0.00
Tester, Sally	999-99-9999	101 Main Chicago, IL 60505	0.00
Tester, Tommy	998-99-9999	101 Main Chicago, IL 60505	0.00

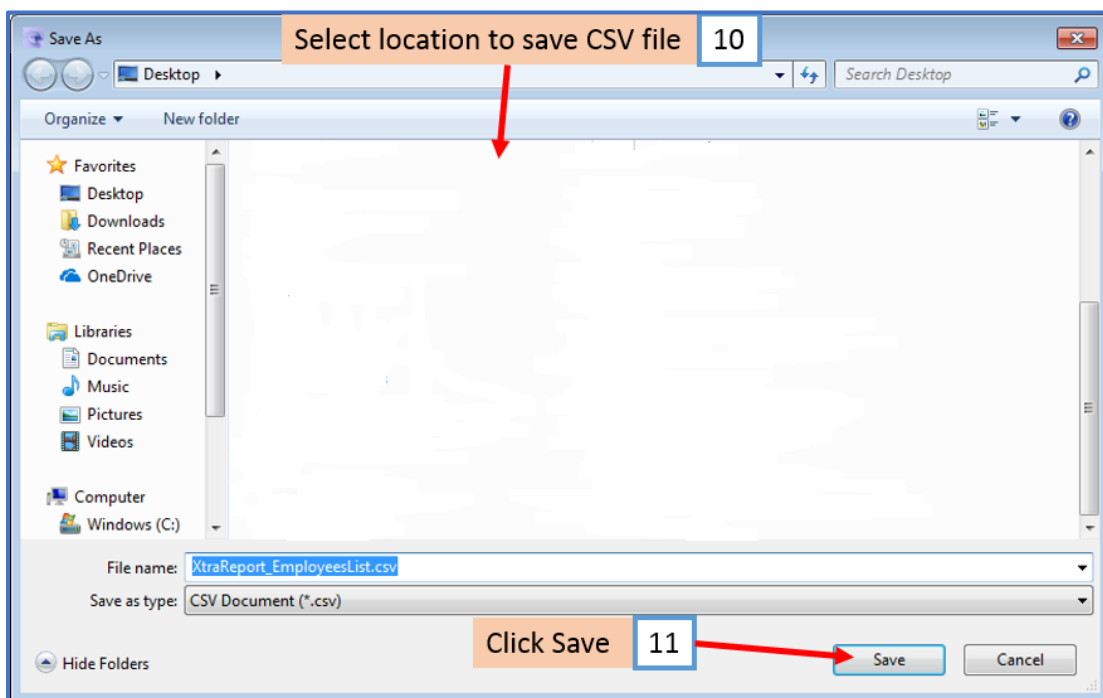
8. In Preview window, Click File

9. Select Export To → CSV Document



10. Select location to save the CSV file

11. Click Save



12. Open the CSV file inside a spreadsheet program such as Excel

13. Edit the employee data to the Payroll Mate format; Click links below to open a csv spreadsheet import example and csv import column descriptions

CSV import example:

<http://www.payrolltutorials.com/docs/pm-csv-import-columns.csv>

CSV import column descriptions

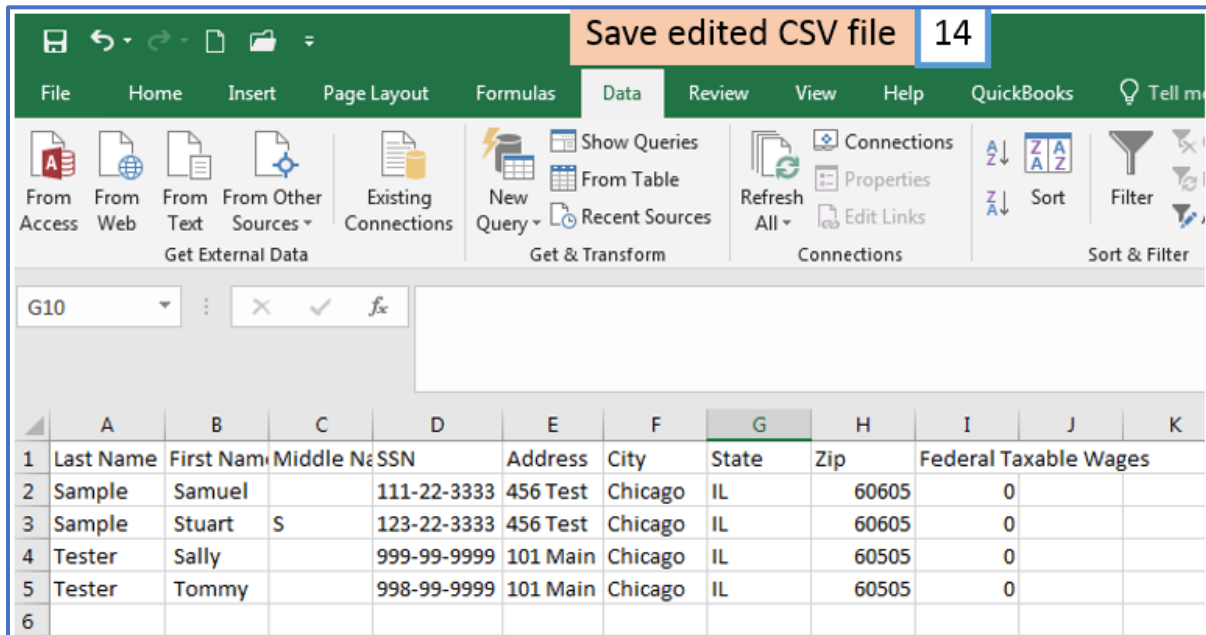
<http://www.payrolltutorials.com/docs/pm-csv-import-columns-description.doc>

Note: The first row of the CSV is expected to include header information and NOT data. The header should contain names corresponding to the fields (columns) in the file and should contain the same number of fields (columns) as the records in the rest of the CSV file.

The screenshot shows an Excel spreadsheet with the following data:

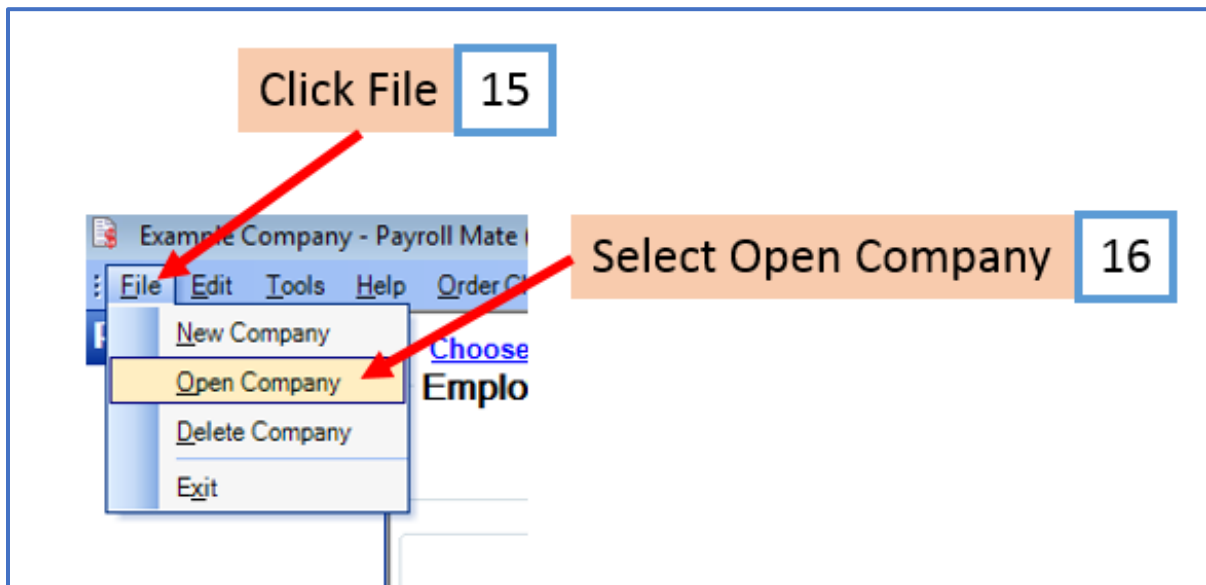
	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Page:	1-Jan											
2	Employees List Report												
3	Example Company												
4	Begin Date: 01/01/2018 End Date: 04/17/2018												
5	SSN : Employee Social Security Number												
6	Employee SSN	Address	Federal Taxable Wages										
7	Sample, S 111-22-33:456 Test		0										
8													
9	Chicago, IL 60605												
10	Sample, S 123-22-33:456 Test		0										
11													
12	Chicago, IL 60605												
13	Tester, Sa 999-99-99:101 Main		0										
14													
15	Chicago, IL 60505												
16	Tester, To 998-99-99:101 Main		0										
17													
18	Chicago, IL 60505												

14. Save edited CSV file, then close the CSV file



15. Inside Payroll Mate, Click File

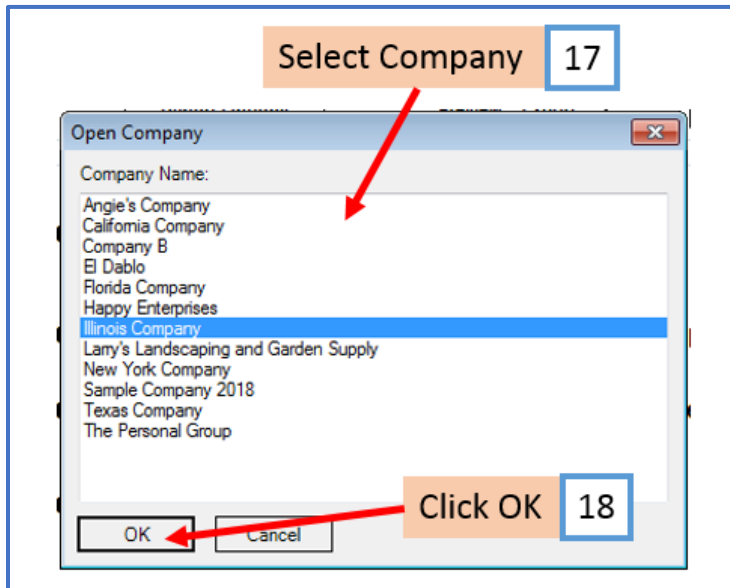
16. Select Open Company



17. Select the correct Company to import employees into

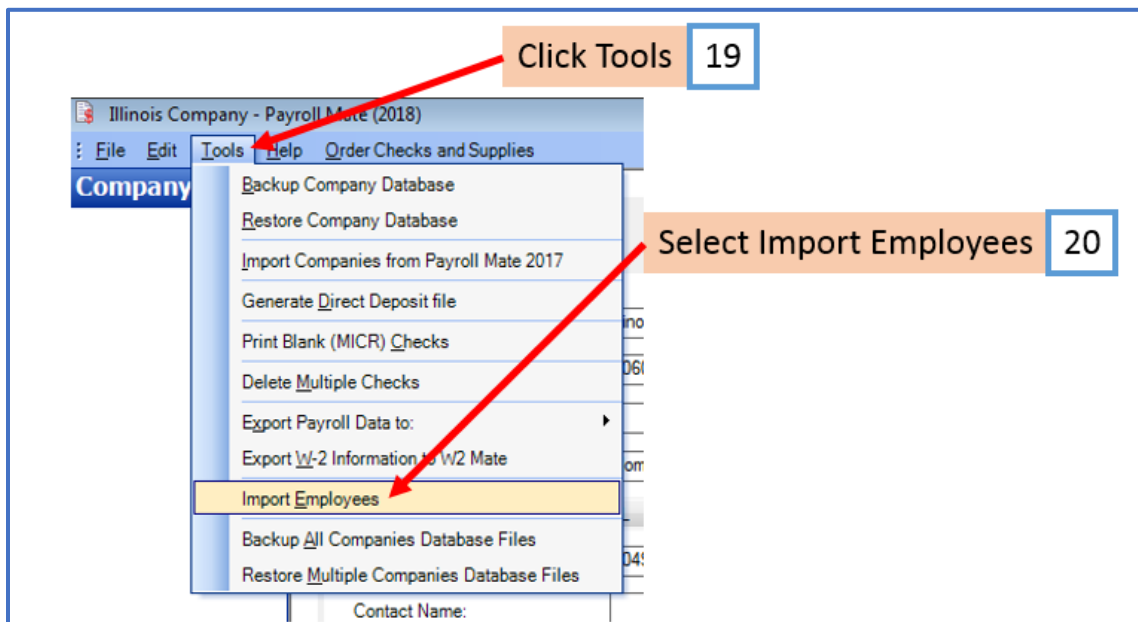
Note: If you do not currently have this company created inside of Payroll Mate you will need to create the company prior to importing the data. See How to Create a New Company tutorial.

18. Click OK



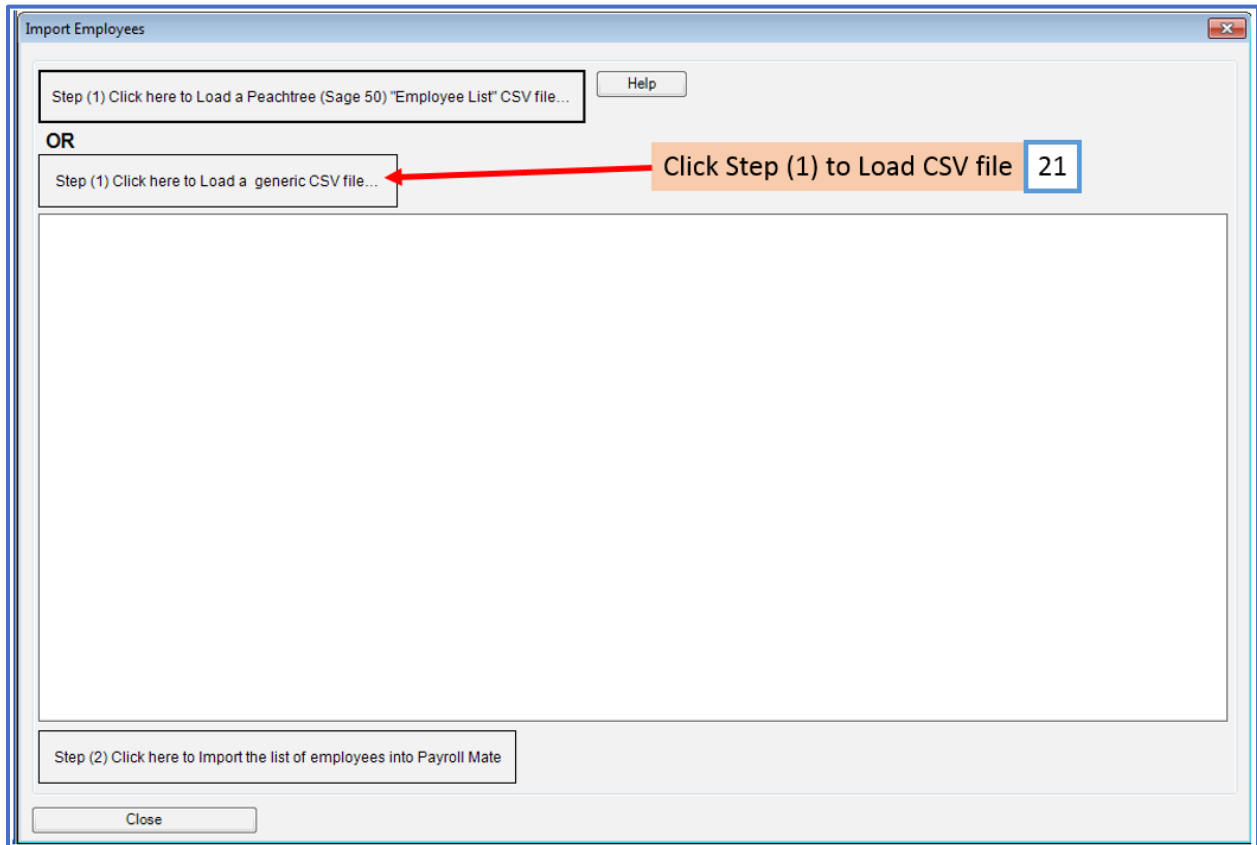
19. Click Tools

20. Select Import Employees



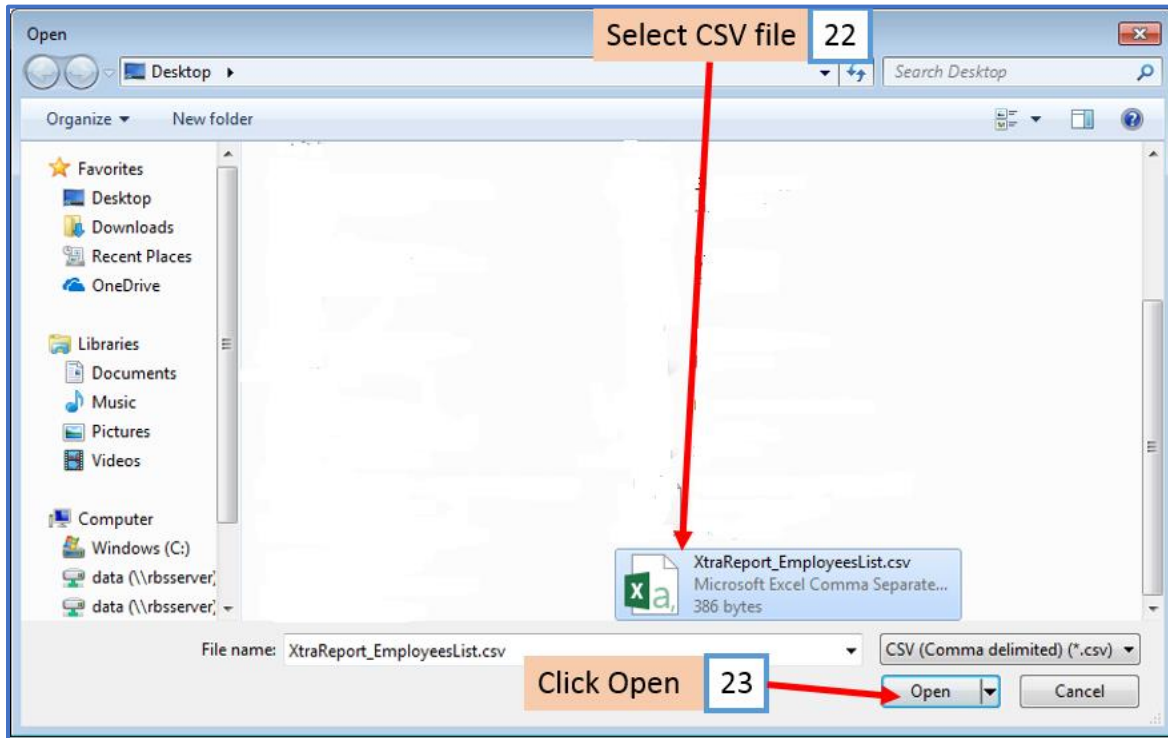
Payroll Mate Import utility will open

21. Click Step (1) Click here to Load a generic CSV file



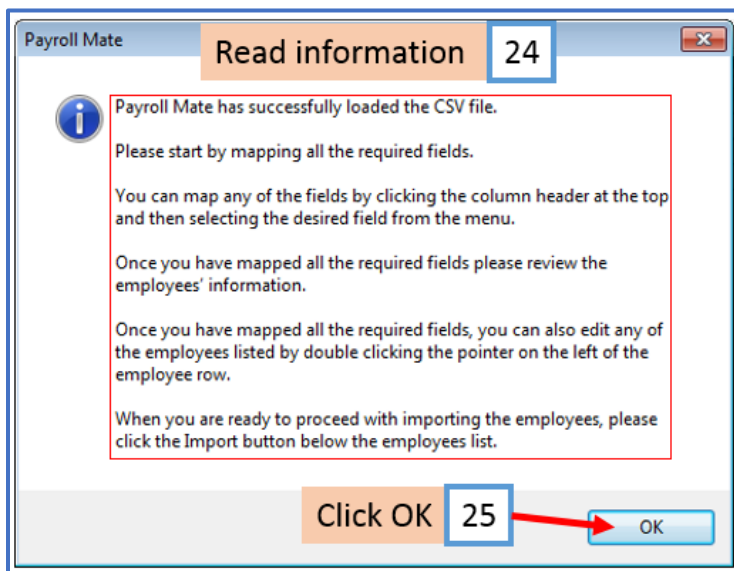
22. Select CSV file saved in step 14

23. Click Open



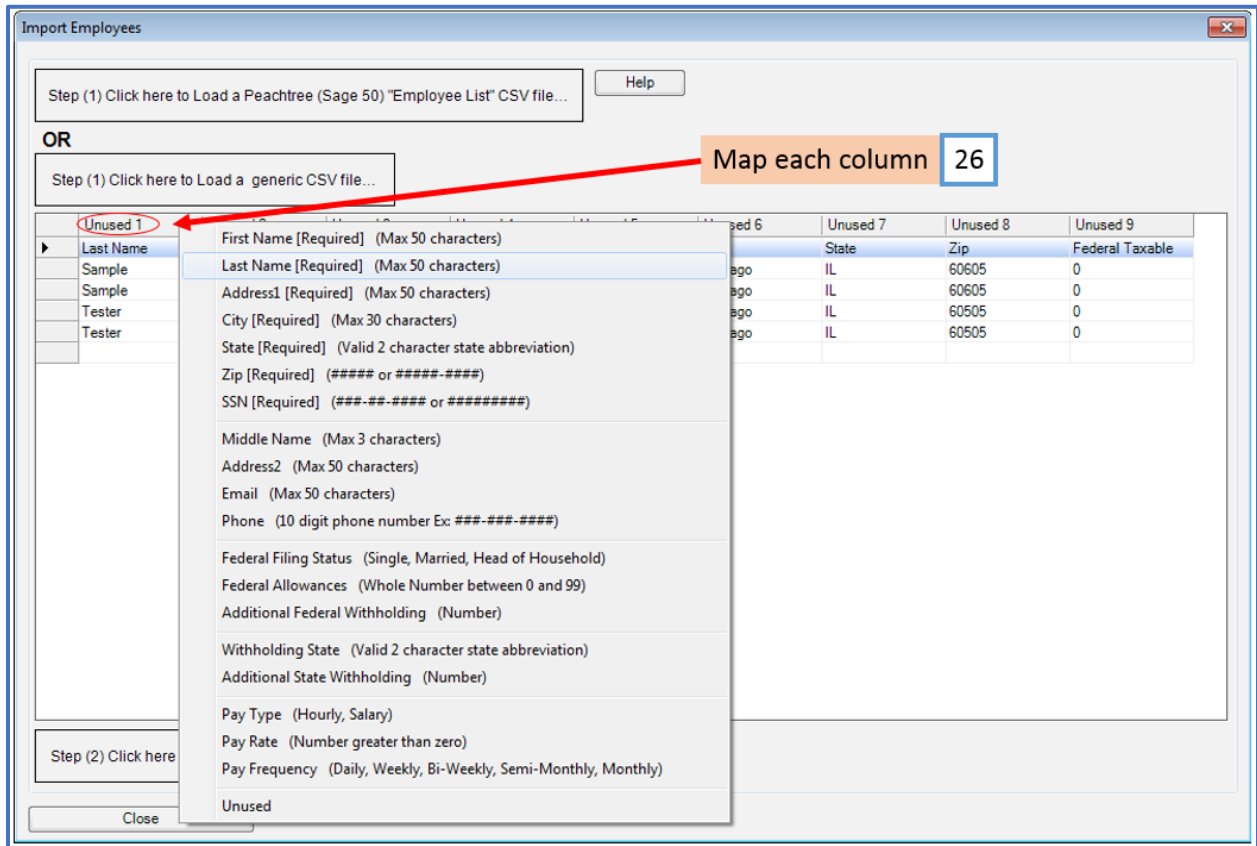
24. Read the import information regarding importing employees

25. Click OK



26. Map each column

When mapping your columns, click the word “Unused” for each column and select the correct column data description to use for mapping the column



27. Click Step (2) Click here to Import the list of employees into Payroll Mate

Step (1) Click here to Load a Peachtree (Sage 50) "Employee List" CSV file...

OR

Step (1) Click here to Load a generic CSV file...

Last Name	First Name	Middle Name	SSN	Address1	City	State	Zip	Federal Allowance
Sample	Samuel		111-22-3333	456 Test	Chicago	IL	60605	0
Sample	Stuart	S	123-22-3333	456 Test	Chicago	IL	60605	0
Tester	Sally		999-99-9999	101 Main	Chicago	IL	60505	0
Tester	Tommy		998-99-9999	101 Main	Chicago	IL	60505	0

Click Step (2) Import 27

Step (2) Click here to Import the list of employees into Payroll Mate

28. Imported Employee data is now visible inside this company
Employee data can be edited as needed

Imported Employees are now visible inside this company 28

First Name	Middle	Last Name	SSNumber	Phone Number	Address1
Sally		Tester	999-99-9999		101 Main
Samuel		Sample	111-22-3333		456 Test
Stuart	S	Sample	123-22-3333		456 Test
Tommy		Tester	998-99-9999		101 Main