

D. 1. Optional - Transition Current W-2 Information

Optional - This step is for customers that have purchased the Payroll module AND are going to use it for payroll.

What's the purpose of this setup step?

In this step, we'll show you how to enter the current W-2 information into Control.

To transfer the current W-2 information into Control, follow these instructions:

- 1) Look in your old accounting system. Print out the current W-2 information.
- 2) Sort it into groups by the type of pay frequency (i.e. Weekly, Bi-weekly, Semi-monthly, Monthly, Quarterly, Annually.)
- 3) In Control, click **Payroll**.
- 4) Click **Adjust Payroll**.
- 5) Select the **Pay Frequency** you want to start with from the drop down list.
- 6) For **Adjustment Starting Date**, choose January 1 of the current year.
- 7) For **Adjustment Ending Date**, choose today's date.
- 8) Click **OK**.
- 9) Now you're on the Adjust payroll screen. For the **Expense Account**, choose **Wages**, or the equivalent that you have in your chart of accounts.
- 10) Scroll to the right to the column called **Base Wages**. Enter the current amount earned to this date.
- 11) Do the same for **Commissions** and any of the other columns to the right of that that apply to your company.

Note: Some column headings may have wrapped and therefore be hard to see. You can make the column wider by using your mouse to grab the right side of the column heading and dragging it to the right until the whole headings is visible.
- 12) Click **Post**.
- 13) Repeat these steps for the next **Pay Frequency**. Repeat until you've entered the information for all the pay frequencies your company uses.

Great job! You're almost done with the transition preparations. Now you're ready for the next transition task.