

# Aatrix & ProContractor - Aatrix Mapping Setups for Version 3.13.0 and Higher

Use this article to identify where to perform Aatrix mapping to create quarterly and Year end forms such as the 940, 941, W-2, ACA 1094-c / 1095-c and Family Medical Leave in Versions 3.13.0 and 3.14.0. Commonly if an Aatrix report has incorrect /wrong amounts or blank because data is not populating, it is due to mapping. [ProContractor//PR - Employees (Payroll) -PC]

## Details

Environment: ProContractor Version 3.13.x and higher, Aatrix All Versions

**Aatrix Mapping needs to be performed in the following areas listed below in ProContractor in order to create forms and reports by all Users. Viewpoint does not perform mapping as it is unique to each customers setups and state requirements.**

**! CAUTION:** For the upcoming 2023 year-end, we will release one year-end version of ProContractor that will only be compatible with those customers who have already upgraded to v4.0 and beyond.

Customers currently on v3.16.4 or below will be required to upgrade to v4.0 (which requires being on an updated version of SQL Server 2019) to upgrade to any subsequent updates including the 2023 year-end version once it is released.

[Please click on this link for FAQs and the new requirements.](#)

For installation directions, click here: [Aatrix & ProContractor - Installation / Uninstall and Mapping Setup for Version 3.13.0 and higher](#)


## Steps

### **Setup / Configuration Mapping:**

There are a few steps that need to be done in order for the right information to be collected and integrated into Aatrix.

1. **System Settings** - The Aatrix application needs a common location in which ProContractor will generate the data file for Aatrix, along with Aatrix saving in progress reports and completed forms as appropriate in this file folder. This location should be a shared location in which all Aatrix users can access. This allows for one user to start a report and another person to review and complete it if necessary.

- Go to: **Administration > Setup > "System Settings"** and set the **"Aatrix Files Folder Location" path for this shared location**. It is recommended to select a secure folder located on a server where only users who need access to Aatrix. (Cloud customers this will be set automatically for them. It will be added via script for the H drive.)

**System Settings** 

### Assign Settings

Allow Auto Assign Option for Vendor Yes

Allow Auto Assign Option for Customer / Prospect Yes

Allow Auto Assign Option for Employee Yes

Allow Auto Assign Option for User Yes

Auto Assign Format Alphanumeric

Number of Alpha Characters (1-5) 3

### Posting Date Warning Settings

Days in Past 30

Days in Future 30

### Report Server Settings

Server Name LTSIVAPERUMAL

Port Number 8080

Instance Name ReportServer\_PCMX

Root Folder Name PCMX

Domain Name LTSIVAPERUMAL

User Name MaxReportUser


User Password \*\*\*\*\*

### Aatrix Files Folder Location

Folder Path C:\ReportFiling Browse

If the folder path is assigned to a file that the computer does not have read and write permissions, the following error will appear: [Aatrix & ProContractor - Error : " Configure the Aatrix files folder location in system settings. Make sure the folder has read and write permissions."](#)

To verify, assign the file to the C drive then contact your companies IT to add permissions to the computer accessing the server

 **NOTE:** Saved copies of reports / forms will be located in a file in the Folder Path assigned above. To access saved copies, go to Employees > Quarter and Year End > "Aatrix Report Filing" or Vendors > Year End " and select "History". For more details, click here: [Aatrix & ProContractor - How to access reports or forms saved in Aatrix for Version 3.13.0 and Higher](#)

### **EXAMPLE:**

### Aatrix Files Folder Location

Folder Path C:\Aatrix Browse

This PC > Windows (C:) > Aatrix > AatrixIntegration > Companies > 361111111111 > Drafts				
	Name	Date modified	Type	Size
is	WA_PFML_FORM.aef	8/29/2019 8:29 AM	AEF File	
ts	WA_PFML_FORM.afd	8/29/2019 8:29 AM	AFD File	
ls				

**2. Tax, Deduction, and Fringe Setup** - The next step is to configure the Taxes, Deductions and Fringes, as appropriate with a mapping so Aatrix knows what information it is being provided. There is now an Aatrix mapping section that was added to the Tax, Deduction, and Fringe setup. Open up the selection window and select the appropriate item from the list that represents the appropriate tax, deduction or Fringes.

**! Not all Deductions or Fringes should have an Aatrix Mapping code, only the ones that are related to any appropriate regulatory reporting. Federal Tax coding is hard coded**

## TAXES

Go to **Employees > Setup > Taxes & Insurance > "Payroll Tax Authority"**  
Use the look up to select the Aatrix Tax Code

The screenshot shows the 'Payroll Tax Authority' setup window. The 'General' tab is selected. The 'Payroll Tax Authority' is set to 'PA' and the 'Name' is 'Pennsylvania'. The 'Status' is 'Active'. The 'Aatrix Mapping' section is highlighted with a red box, showing a 'Tax Code' field and a 'Name' field.

**NOTE:** The Aatrix Mapping on the general Tab of the Tax setup should be used for Income Taxes

Payroll Tax Authority 26

Country: United States

Payroll Tax Authority PA Name Pennsylvania

General

Effective Date	Annual SUTA Earnings Limit	SDI Rate	SDI Annual Earnings Limit	SDI Weekly Tax Limit	SUI Rate	SUI Annual Earnings Limit	SUI Weekly Tax Limit	Minimum
1/1/2011	8,000.00	0.00000	999,999,999.99	0.00	0.00000	999,999,999.99	0.00	
1/1/2012	8,000.00	2.00000	999,999,999.99	0.00	4.00000	999,999,999.99	0.00	
1/1/2019	999,999,999.99	2.00000	999,999,999.99	0.00	4.00000	999,999,999.99	0.00	

Local Income Tax Links

State Taxes

Company	Company Name	SDI/SUI Tax ID	State Tax ID	Effective Date	SUTA Exempt	SUTA Rate
01	JD Construction, I			1/1/2010	<input type="checkbox"/>	9.98000
				1/1/2012	<input type="checkbox"/>	6.00000
				1/1/2019	<input type="checkbox"/>	4.00000

Workers Comp / Liability

GL Accounts

Print SDI/SUI on W-2 No

Box 14 Text Information To Print Box 14

Box 14 Line 1

Box 14 Line 2

Box 14 Line 3

Aatrix Mapping



State SUTA Tax Code

State SDI Tax Code

State SUI Tax Code

## 🔑 EXAMPLE: California Mapping for Payroll Tax Authority

1. In Payroll Tax Authority, go to the "General" tab.
2. Click on the 3 dots next to the "Tax Code" field in the Aatrix Mapping. Enter "CA" in the State column of the popup box and select 1004 for "State Withholding" for CA

All Tax Types				
	Tax Code	Category	State	Name
	A	A	A ca	A
	1004	State	CA	State Withholding
	1047	State	CA	State Unemployment
	1095	State	CA	State Disability Insurance
	1113	State	CA	Workers' Compensation
	2003	Local	CA	Employment Training Tax
	9999	Local	CA	State Disability Insurance

Payroll Tax Authority

Country: United States

Payroll Tax Authority CA Name California

**General** 1

Payroll Tax Authority Type State/Province

State/Province Abbreviation CA

Local Abbreviation

Report Income Tax with Payroll Tax Authority

Report SUTA/SUI/SDI with Payroll Tax Authority

Status Active

Memo

Aatrix Mapping

Tax Code 1004

Name State With

Local Income Tax Links

State Taxes

Workers Comp / Liability

GL Accounts

- Go to the "State Taxes" tab, and select the Aatrix mapping codes that correlate for CA
- \* CA does not have SUI assigned

Click to add line

All Tax Types

Tax Code	Category	State	Name
1004	State	CA	State Withholding
1047	State	CA	State Unemployment
1095	State	CA	State Disability Insurance
1113	State	CA	Workers' Compensation
2003	Local	CA	Employment Training Tax
9999	Local	CA	State Disability Insurance

Refresh

Aatrix Mapping

State SUTA Tax Code 1047 ... State Unemployment

State SDI Tax Code 1095 ... State Disability Insurance

State SUI Tax Code ...

3

4. Go to "Workers Comp / Liability" tab, select the Aatrix mapping code 1113 for CA

Effective Date 1/1/2011

Calculation Method Percent Of Total Gross Pay

Earnings Limit 0.00

Earnings Limit Applies To

Earnings Limit Method

Earnings Limit Basis

Regular No

Overtime No

Double-Time No

Additional Pay No

Sick No

Holiday No

Vacation No

Bonus No

Miscellaneous No

5. "Save Authority"

## **DEDUCTIONS**

Go to **Employees > Setup > Deductions & Fringes > "Deductions"**

For a list of deductions mapped to print on W2's in ProContractor, go to Employees > Setup > "View

Employee Setups" and select View = "Deductions-General"

**! It is recommended to consult with a CPA or review the IRS [2023 General Instructions for Forms W-2 and W-3](#) to identify what boxes to assign deductions. Viewpoint employees are not tax consultants**

The screenshot shows the 'Deductions-General' setup screen in Viewpoint. The 'Deduction' dropdown is highlighted in yellow. The 'W-2' section contains fields for 'Print on W-2' (set to No), 'W-2 Box Number', 'Box 12 Code', and 'Box 14'. The 'State and Local Defaults' section contains six 'Reduce Wages for' fields (SIT, SUTA, SDI, SUI, Workers Compensation, LIT), all set to No. The 'Aatrix Mapping' section on the right is highlighted with a red box and contains 'Tax Code' and 'Name' fields.

**🔑 EXAMPLE:** 401K Mapping to add to W2

1. Click on 3 dots to access look up list
2. Enter W2 in "Category" column

### 3. Select Aatrix Tax Code

Deduction 401K ... Name 401K Employee (Pre-Tax)

General

W-2 and Tax Control

State and Local Overrides

W-2

Print on W-2 Yes

W-2 Box Number 12 - Requires codes

Box 12 Code D - Elective deferrals under a section 401(k) cash or deferred arrangement(includin

Box 14

State and Local Defaults

Reduce Wages for SIT No

Reduce Wages for SUTA No

Reduce Wages for SDI No

Reduce Wages for SUI No

Reduce Wages for Workers Compensation No

Reduce Wages for LIT No

All Tax Types

2

Tax Code	Category	State
3001	W2	
3101	W2	
3201	W2	
3202	W2	
3301	W2	
3302	W2	
3303	W2	
3304	W2	
3305	W2	
3306	W2	

**Once the configuration is completed, you can run the appropriate report from the Report Selection Window that appears when you Launch Aatrix Report filing**

- Select the report, enter the date, and select continue
- Aatrix will process the information that ProContractor generates and open the selected form in a new window in a form that is like a fillable PDF. Aatrix will fill in the information it has from the file generated by ProContractor and direct to complete any required missing information
- Users can print forms to complete
- It is an optional to e-file after setting up an account with Aatrix



**For Massachusetts Family and Medical Leave mapping instructions, click here: [How To Setup Massachusetts State Paid Family and Medical Leave](#)**

**For Washington Family and Medical Leave mapping instructions on Version 3.13.1 click here: [Setup Washington State Paid Family and Medical Leave](#)**

**For Oregon State setups, click here: [Aatrix & ProContractor - Mapping for Oregon State Quarterly and Year End Forms Version 3.13.0 and higher](#)**

Cause

Related Articles

[Aatrix & ProContractor - Installation and Mapping Setup for Version 3.13.0 and higher](#)

[Aatrix & ProContractor - Frequently Asked Questions and Article Links for Version 3.13.0 and higher - ProContractor](#)