How to Import and E-File 1099-DIV Forms in **W2 Mate**®

Start by Opening **W2 Mate**® Program

www.W2Mate.com

Go to > Company > Open ①
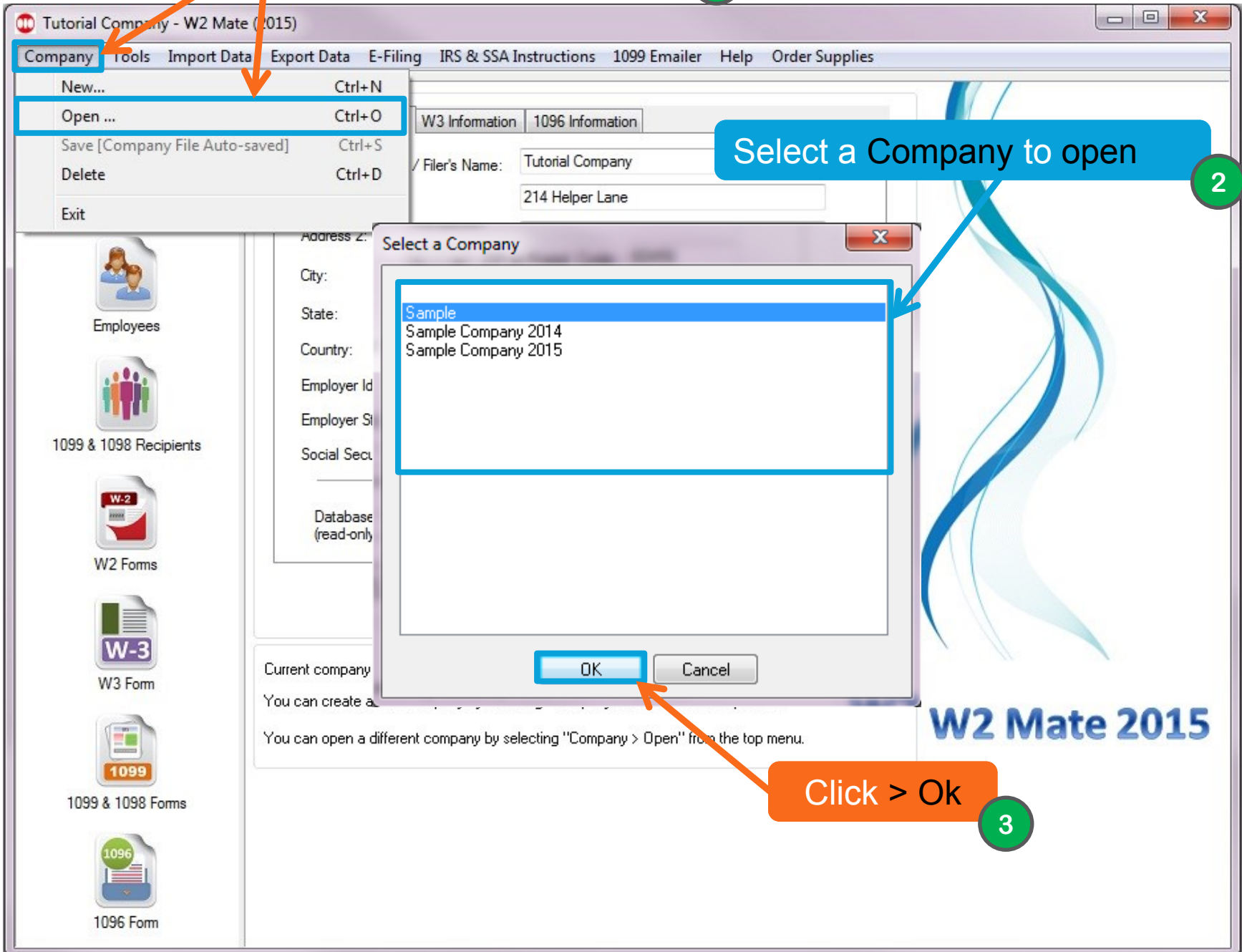
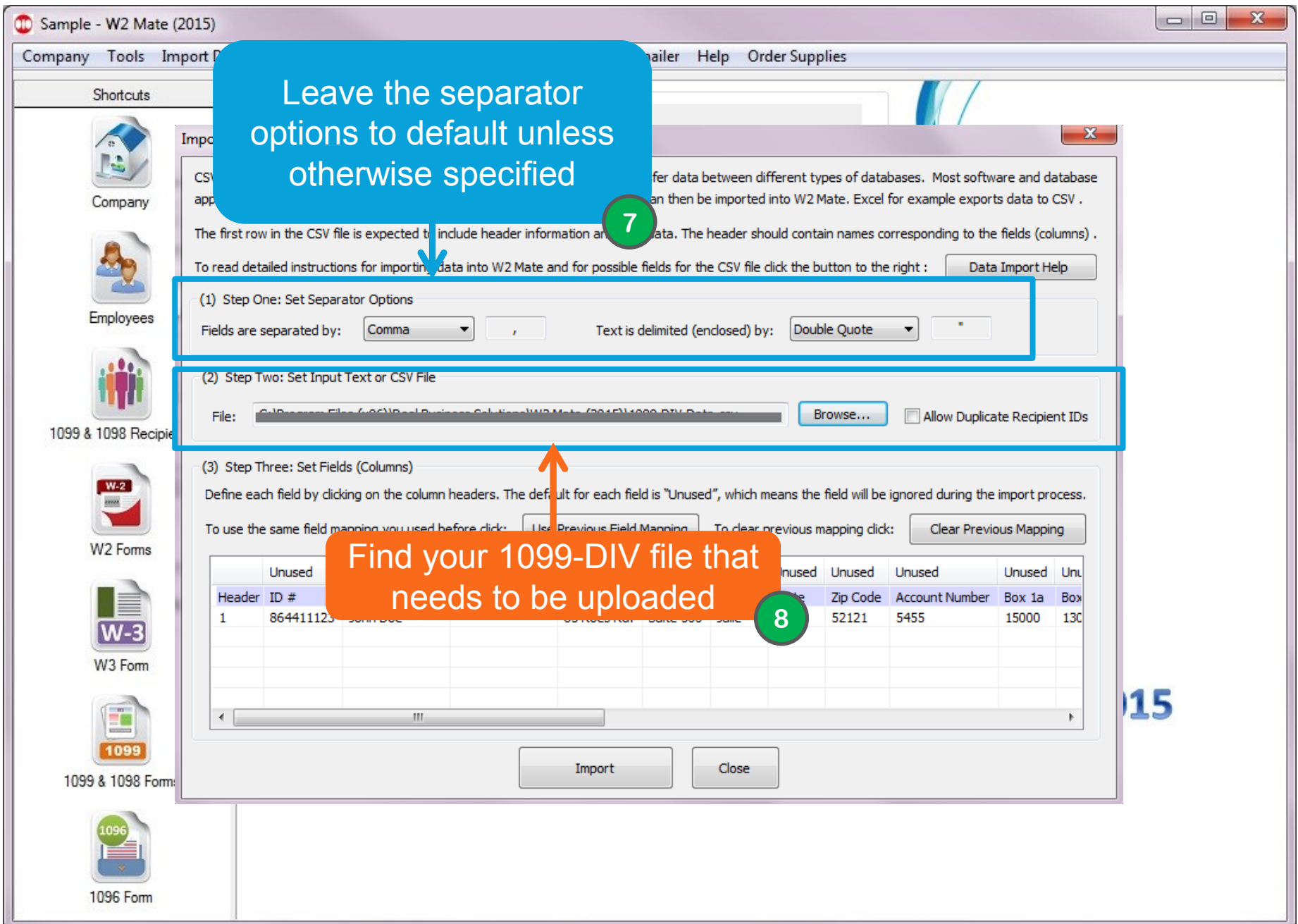**Select a Company to open** ②

Click > Ok ③

Tutorial Company - W2 Mate (2015)

Company   Tools   Import Data   Export Data   E-Filing   IRS & SSA Instructions   1099 Emailer   Help   Order Supplies

New...   Ctrl+N
Open ...   Ctrl+O
Save [Company File Auto-saved]   Ctrl+S
Delete   Ctrl+D
Exit

W3 Information   1096 Information

/ Filer's Name: Tutorial Company

                   214 Helper Lane

Address 2:
City:
State:
Country:
Employer Id
Employer St
Social Secu

Employees

1099 & 1098 Recipients

W-2
W2 Forms

W-3
W3 Form

1099
1099 & 1098 Forms

1096
1096 Form

Database
(read-only

Select a Company

Sample
Sample Company 2014
Sample Company 2015

OK   Cancel

Current company
You can create a
You can open a different company by selecting "Company > Open" from the top menu.

W2 Mate 2015

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Sample - W2 Mate (2015)

Company   Tools   Import Data   Export Data   E-Filing   IRS & SSA Instructions   1099 Emailer   Help   Order Supplies

Shortcuts

Company

Employees

1099 & 1098 Recipients

W2 Forms

W3 Form

1099 & 1098 Forms

1096 Form

General Information | W3 Information | 1096 Information

Import 1099-DIV Forms

CSV (comma separated value) is the most common format used in order to transfer data between different types of databases. Most software and database applications will allow you to export W2 and 1099 data into CSV format, which can then be imported into W2 Mate. Excel for example exports data to CSV .

The first row in the CSV file is expected to include header information and NOT data. The header should contain names corresponding to the fields (columns) .

To read detailed instructions for importing data into W2 Mate and for possible fields for the CSV file click the button to the right :   [Data Import Help]

(1) Step One: Set Separator Options

Fields are separated by: [Comma ▾] [,]   Text is delimited (enclosed) by: [Double Quote ▾] ["]

(2) Step Two: Set Input Text or CSV File

File: [C:\Program ...] [Browse...]   ☐ Allow Duplicate Recipient IDs

Map your fields correctly (9)

(3) Step Three: Set

Define each field by clicking on the column headers. The default for each field is "Unused" means the field will be ignored during the import process.

To use the same field mapping you used before click: [Use Previous Field Mapping]   To clear previous mapping click: [Clear Previous Mapping]

	Unused	Unused	Unused	Unused	Unused	Unused	Unused	Unused	Unused	Unused	Unu
Header	ID #	Name (line one)	Name (line two)	Address1	Address2	City	State	Zip Code	Account Number	Box 1a	Box
1	864411123	John Doe		65 Roes Rd.	Suite 500	Julie	SC	52121	5455	15000	130

[Import]   [Close]

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Sample - W2 Mate (2015)

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(1) Step One: Set Separator Options

Fields are separated by: [Comma ▼]   [,]   Text is delimited (enclosed) by: [Double Quote ▼]   ["]

**Click > Unused
and match the column
with the header column**   ⑩

015)\1099-DIV-Data.csv   [Browse...]   ☐ Allow Duplicate Recipient IDs
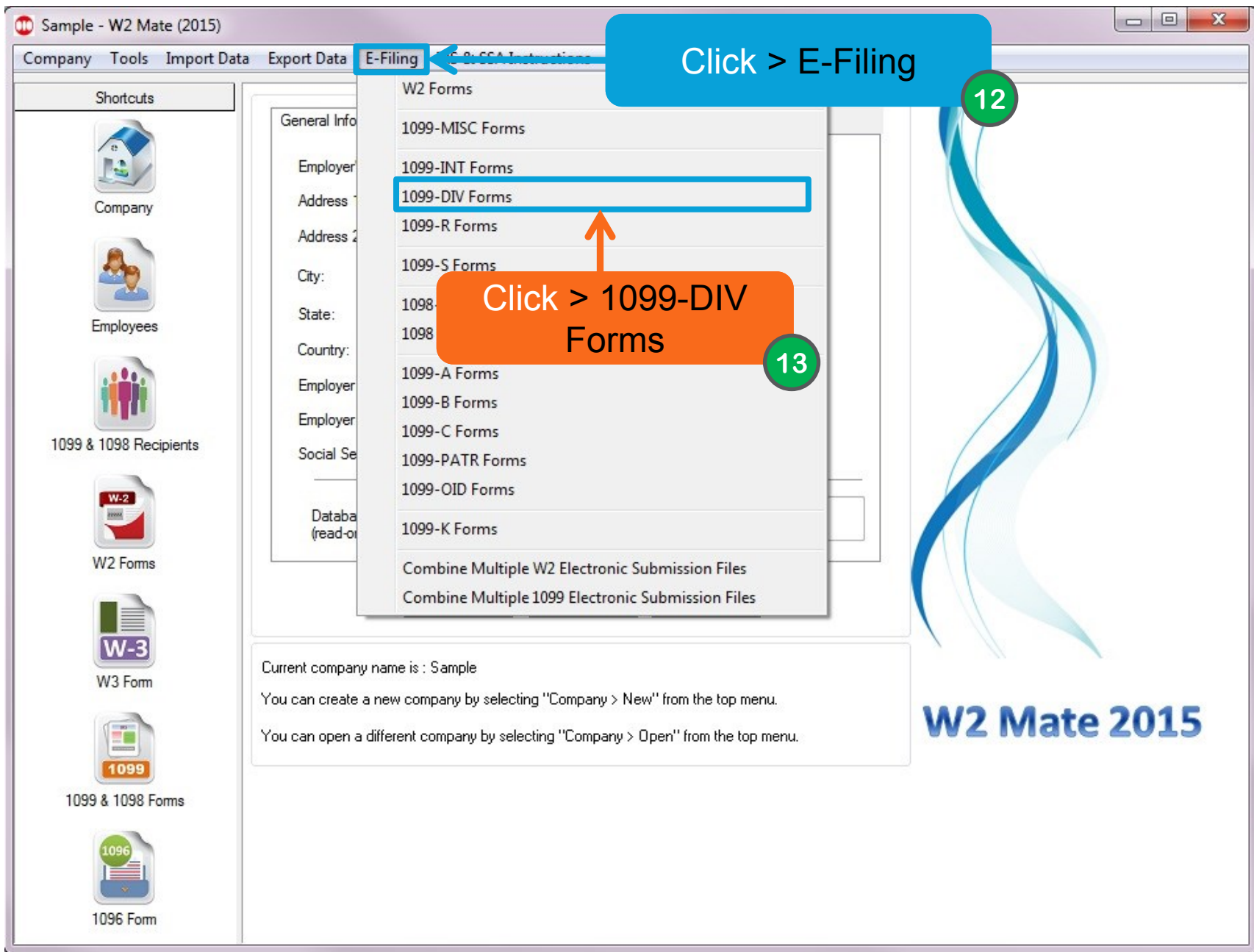
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	Unused	Unused	Unused		Unused	Unused	Unused	Unused	Unused	Unused		Unused	Unu
Header	I	Recipient Information ▶		wo)	Address1	Address2	City	State	Zip Code	Account Number		Box 1a	Box
1	8	Reported Amounts ▶			65 Roes Rd.	Suite 500	Julie	SC	52121	5455		15000	130
		Unused											

[Import]   [Close]

Click > Import   ⑪

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Sample - W2 Mate (2015)

Company   Tools   Import Data   Export Data   E-Filing   IRS & SSA Instructions   1099 Emailer   Help   Order Supplies

Electronic Filing Transmitter Setup

Transmitter Information (Information of the company or person who registered with the IRS in order to file electronically.)

Transmitter Name Line 1:   Sampler   TIN (Tax Identification Number):   000000000   **HELP**

Transmitter Name Line 2:   TCC (Transmitter Control Code):   00000

Company Associated With Correspondence Address (Company that the IRS will contact with any issues related to the file)

Company Name Line 1:   Sample   City: Chicago

Company Name Line 2:   State: IL

Company Address: 123 Michigan Ave   Zip Code: 11111

Save / Load
When preparing 1099s for multiple companies and you want to be the point of contact for all of them, you can save and load your info here.

Contact Information (Person that the IRS will contact with any issues related to the file)

Name: sample   Phone #:   1234567890   E-mail: sample@mail.com

Fill in all transmitter and company information   **14**

Enter Contact Information   **15**

Combined Federal/State Filing Program (available only for 1099-MISC, R, B, DIV, INT, OID & K)

Through the Combined Federal/State Filing Program, the IRS will forward information returns filed to participating states free of charge for approved filers.

Filers must submit a test file (between Nov 1 & Feb 15) in order to sign up for the program.

Which States Participate?

☐ Include "Combined Federal/State Filing Program" Information
[Do not check if you will send this e-file directly to the state , unless the state participates in the program]

Test File
☐ Create a TEST file

Corrected Return
Only use when filing corrections

☐ Mark Payee Records as "C"

☐ Mark Payee Records as "G"

Output File (This is the name and path of the file which you need to send to the IRS or state)

File Name and Path: C:\Users\kbs\Documents\IRSTAX-SAMPLE-   **Browse...**

OK   **Cancel**

Short
Comp
Empl
1099 & 1098
W2 F
W3 F
1099 & 10
1096 Form

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Sample - W2 Mate (2015)

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TCC (Transmitter Control Code): 00000

...y that the IRS will contact with any issues related to the file)

City: Chicago

State: IL

Zip Code: 11111

Save / Load

...any issues related to the file)

Name: sampl   Phone #: 1234567890   E-mail: sample@mail.com   Save   Load

Check the combined Fed/State program filing box if your state participates in the program and you want to include state data in your electronic submission file.

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Select Create a TEST file. To create a test file, if needed.

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Output File (This is the name and path of the file which you need to send to the IRS or state)

File Name and Path: C:\Users\Rbs\Documents\IRSTAX-SAMPLE-   Browse...

OK   Cancel

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Output File (This is the name and path of the file which you need to send to the IRS or state)

File Name and Path: C:\users\RBS\Documents\IRSTAX-SAMPLE-   [Browse...]

☐ Mark Payee Records as "C"

☐ Mark Payee Records as "G"

[OK]   [Cancel]

> Click browse to select the location for the file to be saved to

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> Click > OK

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Comp

Emplo

1099 & 1098

W2 F

W3 F

1099 & 10

1096 Form

21. Now go to the IRS FIRE website to upload your 1099 electronic submission file.

Click > IRS & SSA Instructions

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E-File   IRS & SSA Instructions   1099 Emailer   Help   Order Supplies

Online IRS Instructions   ▶
Online SSA Instructions   ▶

Visit IRS Website
Visit SSA Website

Go to IRS FIRE System Website (1099 Electronic Filing)
Go to SSA Business Services Online Website (W2 Electronic Filing)

IRS Contact Information (1099 Forms)
SSA Contact Information (W2 Forms)

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Click > Go to IRS FIRE System Website (1099 Electronic Filing)

Company

Employees

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Select   Next

Form Type

Related Tasks   Select

Payer's name, street ad

Sample

123 Main St

chicago

(521) 487-5974

No. 1545-0115

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1099-MISC

tax withheld

health care payments

PAYER'S Federal ID

54-2897451

RECIPIENT'S name

Jane Doe

Street address (including apt. no.)

332 Line Drive

City, state, and ZIP code

Chicago   IL   51478

Account number (optional)   ☐ FATCA Filing REQ   ☐ 2nd TIN not.

15a Section 409A deferrals   15b Section 409A income

0.00   0.00

9 Payer made direct sales of $5,000 or more of consumer products to a buyer for resale   ☐

10 Crop insurance proceeds

0.00

11   12

0.00

13 Excess golden parach.

0.00

14 Gross proceeds paid to an attorney

0.00

16 State tax withheld   17 State / Payer's State Number   18 State income

0.00   IL ▼   123456   0.00

0.00   ▼   0.00

yments in lieu of dividends or int

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You will be rerouted to the IRS FIRE Website, where you must log in to submit the file you have created. If you have any questions regarding the IRS FIRE system website call **(866)-455-7438.**

Congratulations. You know how to import and e-file 1099-DIV forms!

www.W2Mate.com   1-800-507-1992