

# How to Export 1099/1098 Data in **W2 Mate**<sup>®</sup>



**Start by Opening  
W2 Mate**<sup>®</sup>  
**Program**

[www.W2Mate.com](http://www.W2Mate.com)

Go to > Company > Open

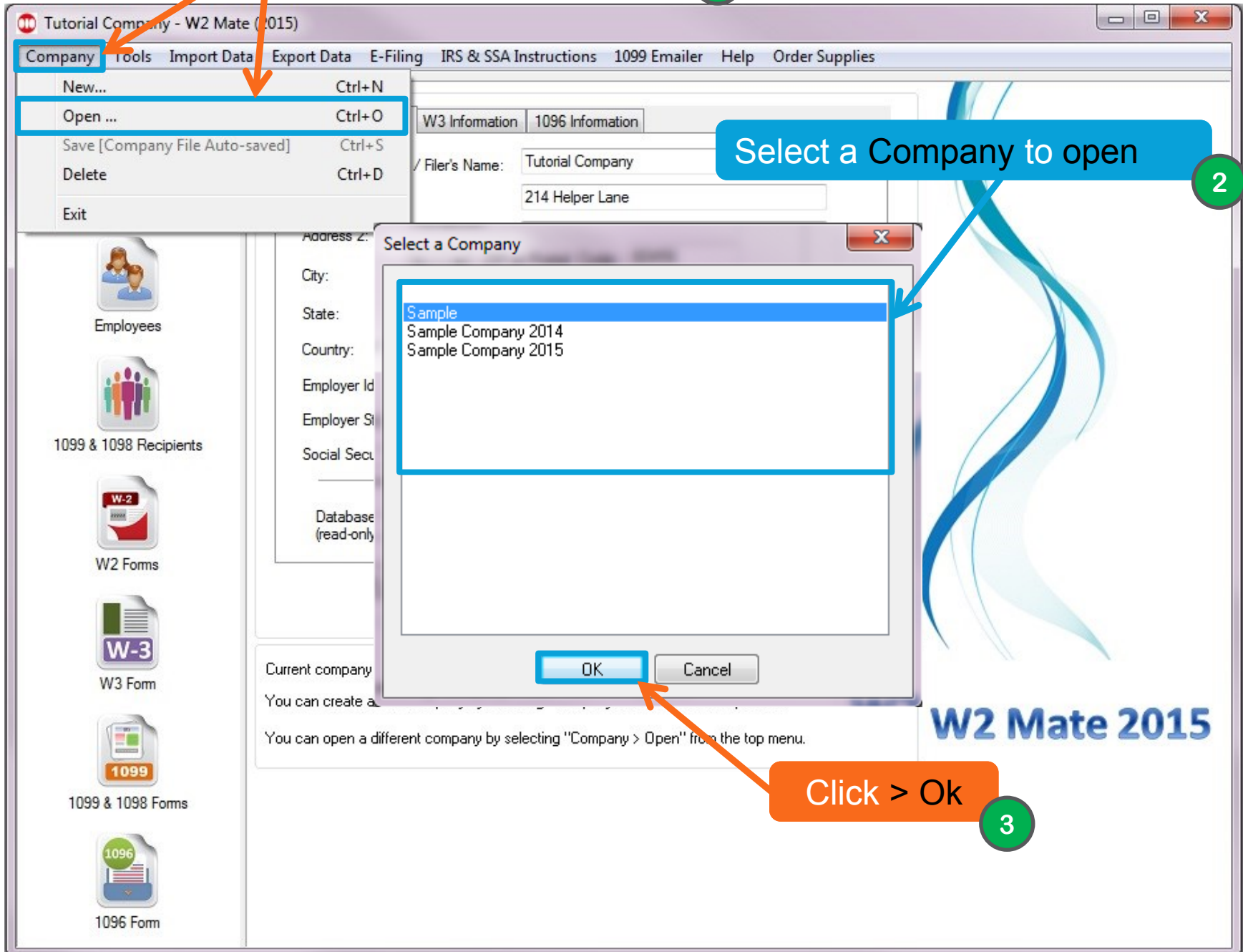
1

Select a Company to open

2

Click > Ok

3



The screenshot shows the W2 Mate 2015 software interface. The title bar reads "Sample - W2 Mate (2015)". The menu bar includes "Company", "Tools", "Import Data", "Export Data", "Filing", "IRS & SSA Instructions", "1099 Emailer", and "Order Supplies". The "Export Data" menu is open, showing a list of form types: "1099-MISC Forms", "1099-INT Forms", "1099-DIV Forms", "1099-R Forms", "Other Forms", "Employee List", "1099 / 1098 Recipient List", and "Employee Printing Labels (Avery 5160)". The "Other Forms" option is selected, and a sub-menu is open, listing: "1099-S Forms", "1099-A Forms", "1099-B Forms", "1099-C Forms", "1099-PATR Forms", "1099-OID Forms", "1098-T Forms", "1098 Forms", and "1099-K Forms".

Annotations include:

- A blue callout box with a white arrow pointing to the "Export Data" menu item, containing the text "Click > Export Data" and a green circle with the number "4".
- An orange callout box with a white arrow pointing to the "Other Forms" option in the menu, containing the text "Find the form type you want to export" and a green circle with the number "5".

At the bottom of the interface, there is a "Database File Path (read-only)" field with the value "C:\Users\Public\Documents\W2 Mate 2015\...", and three buttons: "Update", "Reset", and "Clear". Below this, a text box states: "Current company name is : Sample. You can create a new company by selecting 'Company > New' from the top menu. You can open a different company by selecting 'Company > Open' from the top menu."

The left sidebar contains icons for "Shortcuts", "Company", "Employees", "1099 & 1098 Recipient", "W2 Forms", "W3 Form", "1099 & 1098 Forms", and "1096 Form".

The text "W2 Mate 2015" is displayed in the bottom right corner of the interface.

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

Employer's Name / Filer's Name: Sample  
Address 1: 123 Main St  
Address 2:  
City: chicago  
State:  
Country:  
Employer Identification:  
Employer State ID:  
Social Security # (If A):  
Database File Path (read-only)

Update Reset Clear

W2 Mate (2015)

REMINDER:  
This feature exports 1099-MISC forms to Excel.  
DO NOT send this file to the IRS or the state.  
This is NOT an electronic submission file.  
To e-File select "E-Filing > 1099-MISC Forms" from the top Menu.

OK

Current company name is : Sample  
You can create a new company by selecting "Company > New" from the top menu.  
You can open a different company by selecting "Company > Open" from the top menu.

Click > OK

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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

Employer's Name / Filer's Name: Sample  
Address 1: 123 Main St  
Address 2:

Select the Location 7

Recent Places  
Desktop  
Libraries  
Computer  
Network

Documents Library  
Pictures Library  
Music Library  
Videos Library

Name your file 8

File name:  
Save as type: Microsoft Rich Text Format (\*.rtf)

Save Cancel

Click > Save 9

Mate 2015

**Congratulations.** You know how to  
**export 1099/1098 data!**



[www.W2Mate.com](http://www.W2Mate.com)

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