

# How to Import 1099 Data using Sage 50 in **W2 Mate**<sup>®</sup>



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

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

The screenshot displays the 'W2 Mate 2015' software interface. The 'Import Data' menu is open, showing various options for importing data. Two callouts are present: a red one labeled '1' pointing to the 'Import Data' menu header, and a blue one labeled '2' pointing to the 'From Sage 50 / Peachtree (1099 Data)' option. The interface includes a sidebar with icons for shortcuts, company, employees, and various forms (1099 & 1098 Rec, W-2 Forms, W-3 Form, 1099, 1096 Form). The main window shows a menu bar with 'Company', 'Tools', 'Import Data', 'Export Data', 'Printer', 'Help', and 'Order Supplies'. A text box at the bottom provides instructions on creating or opening a company.

Sample - W2 Mate (2015)

Company Tools **Import Data** Export Data Printer Help Order Supplies

Shortcuts

- W2 Forms (CSV - Excel)
- 1099-MISC Forms (CSV - Excel)
- 1099-INT Forms (CSV - Excel)
- 1099-DIV Forms (CSV - Excel)
- 1099-R Forms (CSV - Excel)
- Other Forms (CSV - Excel)
- From QuickBooks (W2 and/or 1099 Data)
- From Sage 50 / Peachtree (1099 Data)**
- From Microsoft Dynamics GP (1099 Data)
- From Microsoft Dynamics GP (W-2 Data)
- From Sage DacEasy (1099 Data)
- From Sage DacEasy (W-2 Data)
- From W-2 Electronic Filing Format (EFW2 Format)
- From 1099 Electronic Filing Format (Publication 1220 Format)
- From Payroll Mate Software (W-2 Data)
- From Payroll Mate Software (1099 Data)
- Email Addresses
- Company(s) Information (CSV - Excel)

Company

Employees

1099 & 1098 Rec

W2 Forms

W3 Form

1099

1099 & 1098 Forms

1096 Form

Click > Import Data

Click > From Sage 50/ Peachtree (1099 Data)

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.

W2 Mate 2015

Sample - W2 Mate (2015)

Company Tools Import Data Export Data E

Shortcuts

General Informa

Employer's N

**Sage  
Peachtree**

1099

**IMPORT  
WIZARD**

Welcome to the Peachtree Import Wizard. This wizard will help you import 1099 data from Peachtree into W2 Mate.

W2 Mate relies on the "1099 Vendor Report" in order to import 1099 data from Peachtree. This report was introduced in Peachtree 2006. If the "1099 Vendor Report" is not available in your version of Peachtree, then you will not be able to use this import wizard and you will need to use an alternative method to import 1099 data into W2 Mate.

Most of the screens in this wizard cover the steps on how to generate the "1099 Vendor Report" properly with the correct options. We have spent a great deal of time to make the wizard screens easy to read and the instructions simple to follow.

Please read and follow the instructions in each screen carefully, this will guarantee a smooth and easy import process.

To start, please click the "Next" button...

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1096 Form

**3**

Read this wizard carefully, and understand that you will need to create a CSV file inside Peachtree/Sage50 in order to import the data.

**4**

Click > Next

< Back Next > Cancel Finish

Read these steps carefully, as they tell you that you need to load the "1099 Vendor Report" inside Peachtree and copy that data into an excel spreadsheet. Then you will need to save it as a CSV file.

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### Peachtree Import Wizard

Sage  
Peachtree



IMPORT  
WIZARD

Below is a summary of the steps for importing 1099 data from Peachtree software into W2 Mate.

- (1) Load the "1099 Vendor Report" inside Peachtree and then add all the required fields on the report by selecting the "Columns" button.
- (2) Copy the "1099 Vendor Report" Data to a Microsoft Excel Spreadsheet.
- (3) From inside Microsoft Excel save the report data as CSV (Comma Delimited) file.
- (4) Load the CSV file created in the previous step inside W2 Mate software.
- (5) W2 Mate will read the CSV file and display the 1099 data to be imported in a spreadsheet view.  
You review the data and command W2 Mate to do the actual import.

Please click the "Next" button to go to the first step.

Click > Next

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< Back

Next >

Cancel

Finish



1096 Form

Sample - W2 Mate (2015)

Company Tools

Shortcuts

Employer's Name / Filer's Name: Sample

### Peachtree Import Wizard

**Sage Peachtree**

1099

1096 Form

**IMPORT WIZARD**

STEP 1: Load the "1099 Vendor Report" inside Peachtree software.

- (1) Open the company you would like to import the 1099 data from inside Peachtree software.
- (2) Display the "1099 Vendor Report" on the screen. This should be straightforward, but if you are not sure how to display the report please search your Peachtree software help file for "1099 Vendor Report" and follow the instructions.
- (3) Click the "Columns" button to change report columns. In the window that comes up make sure to include ALL available fields in the report by clicking the "Select All" or "Show All" button.
- (4) Click OK.

It's very important to include all available fields in the report, otherwise W2 Mate will not be able to import the 1099 data properly.

1099 Vendor Report

Columns Fonts

Show: **All** None *Click All to include ALL available fields in the report* [What is a column break?](#)

Show	Title	Column	Column Break	Col #
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Vendor ID	<input type="checkbox"/>	1
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Vendor Name	<input checked="" type="checkbox"/>	1

OK  
Cancel  
Apply

The screenshot to the left shows how to select all fields (your version of Peachtree might look different, but should be very similar)

1096

1096 Form

1096

1096 Form

Load the "1099 Vendor Report" inside Peachtree software.

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Click > Next

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Sample - W2 Mate (2015)

Company Tools

Shortcuts

Employer's Name / Filer's Name: Sample

### Copy "1099 Vendor Report" Data to a Microsoft Excel Spreadsheet.

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#### Peachtree Import Wizard

**Sage Peachtree**

1099

**IMPORT WIZARD**

STEP 2: Copy "1099 Vendor Report" Data to a Microsoft Excel Spreadsheet.

- (1) From inside the "1099 Vendor Report" screen click the Excel toolbar button.
- (2) In the window that comes up, select "Create a new Microsoft Excel workbook" under File option. And select "Raw data layout" under Report layout option. The data has to be in the raw data layout to be processed by W2 Mate.
- (3) Click OK

Copy Report to Excel

File option:

- Create a new Microsoft Excel workbook
- Add a new worksheet to an existing Microsoft Excel workbook

Excel options:

- Use freeze panes (headers and labels are visible)
- Enable automatic column filtering (Auto-filter)

Report header option:

- Send header to Page Setup in Excel
- Show header in Excel worksheet

Report layout option:

- Peachtree report layout
- Raw data layout

Example:

ALDRE	5,426.04
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The screenshot to the left shows the "Copy to Excel Screen" (your version of Peachtree might look different, but should be very similar).

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Click > Next

Back > Next > Cancel Finish

1096 Form

Sample - W2 Mate (2015)

Company Tools Import D

Shortcuts

Employer's Name / Filer's Name: Sample

**From inside Microsoft Excel save the report data as CSV file.**

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**Sage Peachtree**

1099

**IMPORT WIZARD**

**STEP 3: From inside Microsoft Excel save the report data as CSV (Comma Delimited) file.**

CSV (comma separated value) is the most common format used in order to transfer data between different types of databases. W2 Mate expects the "1099 Vendor Report" data to be saved in the CSV format in order to be able to read it.

- (1) Once Peachtree software copies the "1099 Vendor Report" data to Excel, review the data and make sure everything looks good.
- (2) Make sure the very first row includes header information (column or field names) , such as Vendor ID, Address Line 1, City ST ZIP and so on. Delete any rows before the header information row.
- (3) Inside Microsoft Excel software click "File > Save As" menu item. This brings up the "Save As" dialog.
- (4) In the Save As Type drop-down list at the bottom of the dialog box, choose the CSV (Comma delimited) option.
- (5) Use the other controls in the dialog box to specify a file name and location. It's always a good idea to select the Desktop as the path for the output file, so you can easily locate it later on.
- (6) Click on Save.
- (7) Excel may display a dialog box telling you that not all Excel features can be maintained in the format you have chosen. Click on Yes to continue saving the information in CSV format.
- (8) Close Microsoft Excel.

Now you have the 1099 data in a format ready to be processed by W2 Mate.

**Click > Next**

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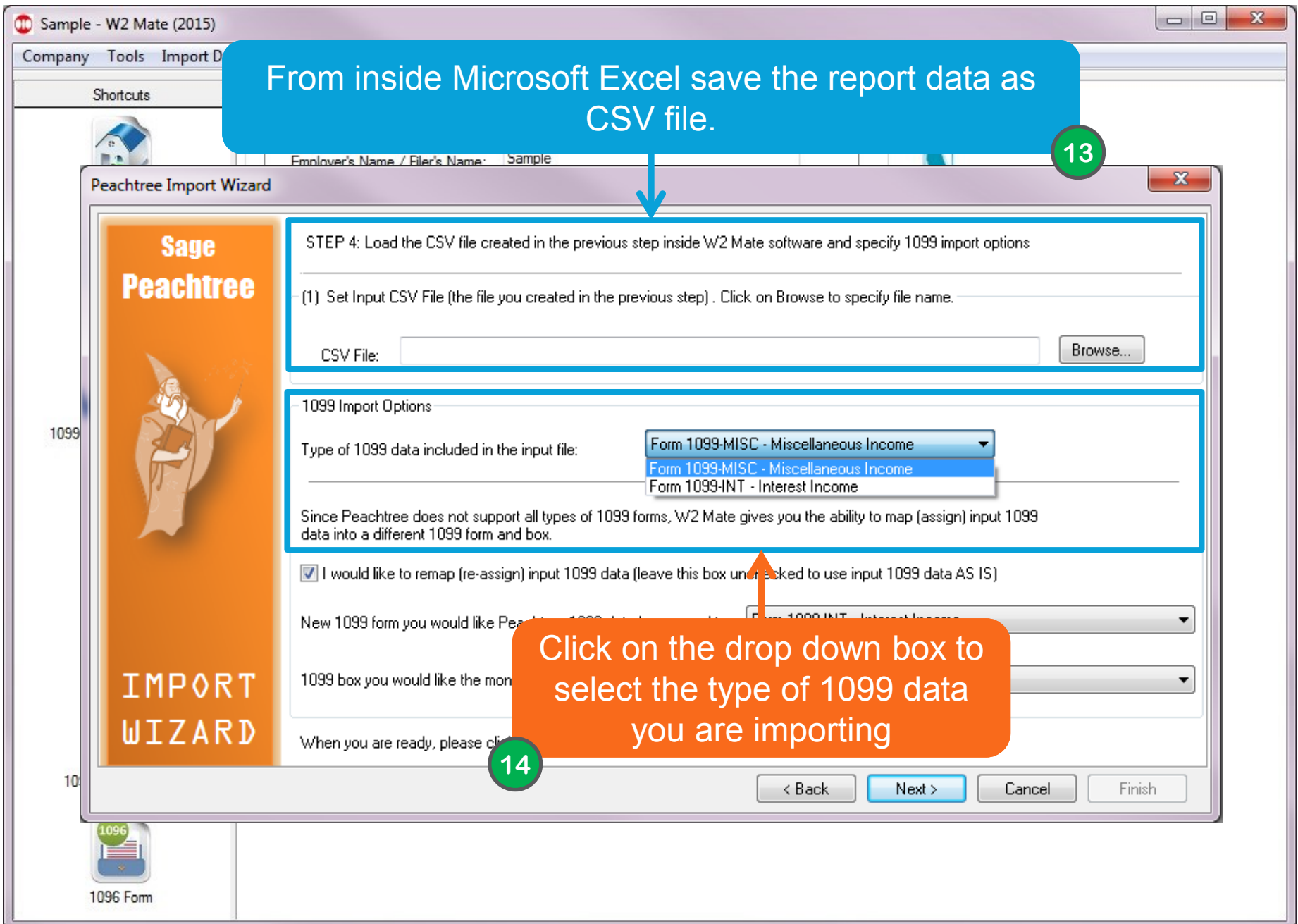
1096 Form

1096

1096 Form

Back Next > Cancel Finish





From inside Microsoft Excel save the report data as CSV file.

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Click on the drop down box to select the type of 1099 data you are importing

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Sample - W2 Mate (2015)

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

Shortcuts

General Information W3 Information 1096 Information

Employer's Name / Filer's Name: Sample

**Peachtree Import Wizard**

**Sage Peachtree**

STEP 4: Load the CSV file created in the previous step inside W2 Mate software and specify 1099 import options

(1) Set Input CSV File (the file you created in the previous step) . Click on Browse to specify file name.

CSV File:

1099 Import Options

Type of 1099 data included in the file:

Since Peachtree does not support all types of 1099 forms, W2 Mate gives you the ability to map (assign) input 1099 data into a different 1099 form and box.

I would like to remap (re-assign) input 1099 data (leave this box unchecked to use input 1099 data AS IS)

New 1099 form you would like Peachtree 1099 data be mapped to: **Form 1099-INT - Interest Income**

1099 box you would like the money amount be mapped to:

When you are ready, please click the Next button...

1099

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1099 & 1096 Forms

1096 Form

**15** Select what data you wish to map

- Form 1099-INT - Interest Income
- Form 1099-DIV - Dividends & Distributions
- Form 1099-R - Retirement
- Form 1099-S - Proceeds From Real Estate Transactions
- Form 1098-T - Tuition Statement
- Form 1098 - Mortgage Interest Statement
- Form 1099-A - ACQ or Abandonment of Secured Property
- Form 1099-B - Proceeds From Broker & Barter Exch. Trans.
- Form 1099-C - Cancellation of Debt
- Form 1099-PATR - Taxable Dist. Rcvd From Cooperatives
- Form 1099-OID - Original Issue Discount
- Form 1099-K - Payment Card & 3rd Party Network Trans.

Sample - W2 Mate (2015)

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

Shortcuts

General Information W3 Information 1096 Information

Employer's Name / Filer's Name: Sample

### Peachtree Import Wizard

STEP 4: Load the CSV file created in the previous step inside W2 Mate software and specify 1099 import options

(1) Set Input CSV File (the file you created in the previous step) . Click on Browse to specify file name.

CSV File:  Browse...

1099 Import Options

Type of 1099 data included in the input file: Form 1099-MISC - Miscellaneous Income

Since Peachtree does not support 1099 data into a different form than the one you selected, you must map the data to a different form.

I would like to remap (re-assign) input 1099 data (leave this box unchecked to use input 1099 data AS IS)

New 1099 form you would like Peachtree 1099 data be mapped to: Form 1099-INT - Interest Income

1099 box you would like the money amount be mapped to

- 1099-INT Box 1 Interest income
- 1099-INT Box 2 Early withdrawal penalty
- 1099-INT Box 3 Interest on U.S. Savings Bonds and Treas. obligations
- 1099-INT Box 4 Federal income tax withheld
- 1099-INT Box 5 Investment expenses
- 1099-INT Box 6 Foreign tax paid
- 1099-INT Box 8 Tax-exempt interest
- 1099-INT Box 9 Specified private activity bond interest

When you are ready, please click the Next button...

1099 & 1096 Forms

1096 Form

**16** Select the box you would like the money amount to be mapped to

Sample - W2 Mate (2015)

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

Shortcuts

General Information W3 Information 1096 Information

Employer's Name / Filer's Name: Sample

### Peachtree Import Wizard

STEP 4: Load the CSV file created in the previous step inside W2 Mate software and specify 1099 import options

(1) Set Input CSV File (the file you created in the previous step) . Click on Browse to specify file name.

CSV File:  Browse...

1099

1099 Import Options

Type of 1099 data included in the input file:

- Form 1099-MISC - Miscellaneous Income
- Form 1099-MISC - Miscellaneous Income
- Form 1099-INT - Interest Income

Since Peachtree does not support all types of 1099 forms, W2 Mate gives you the ability to map (assign) input 1099 data into a different 1099 form and box.

I would like to remap (re-assign) the data.

New 1099 form you would like to use:

1099 box you would like the money amount be mapped to: 1099-INT Box 1 Interest income

When you are ready, please click the Next button...

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1096 Form

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Now you have selected and mapped your data you are importing and click on "Next."

< Back Next > Cancel Finish

**Congratulations.** You know how to  
import 1099 data into W2 Mate using  
Sage50/Peachtree!



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