

# How to Send Emails through 1099 EMailer in **W2 Mate**<sup>®</sup>



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

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

1099 EMailer is a bulk email sending utility that allows users to automatically batch send volumes of 1099, W2 and 1098 forms in PDF format via email.

**\*\*NOTE\*\*** Please note that in order to use this feature you must purchase 1099 EMailer of the same year of W2 Mate. Also you must have W2 Mate Option #6 to create the PDF's that you want to send.

Go to > Company > Open

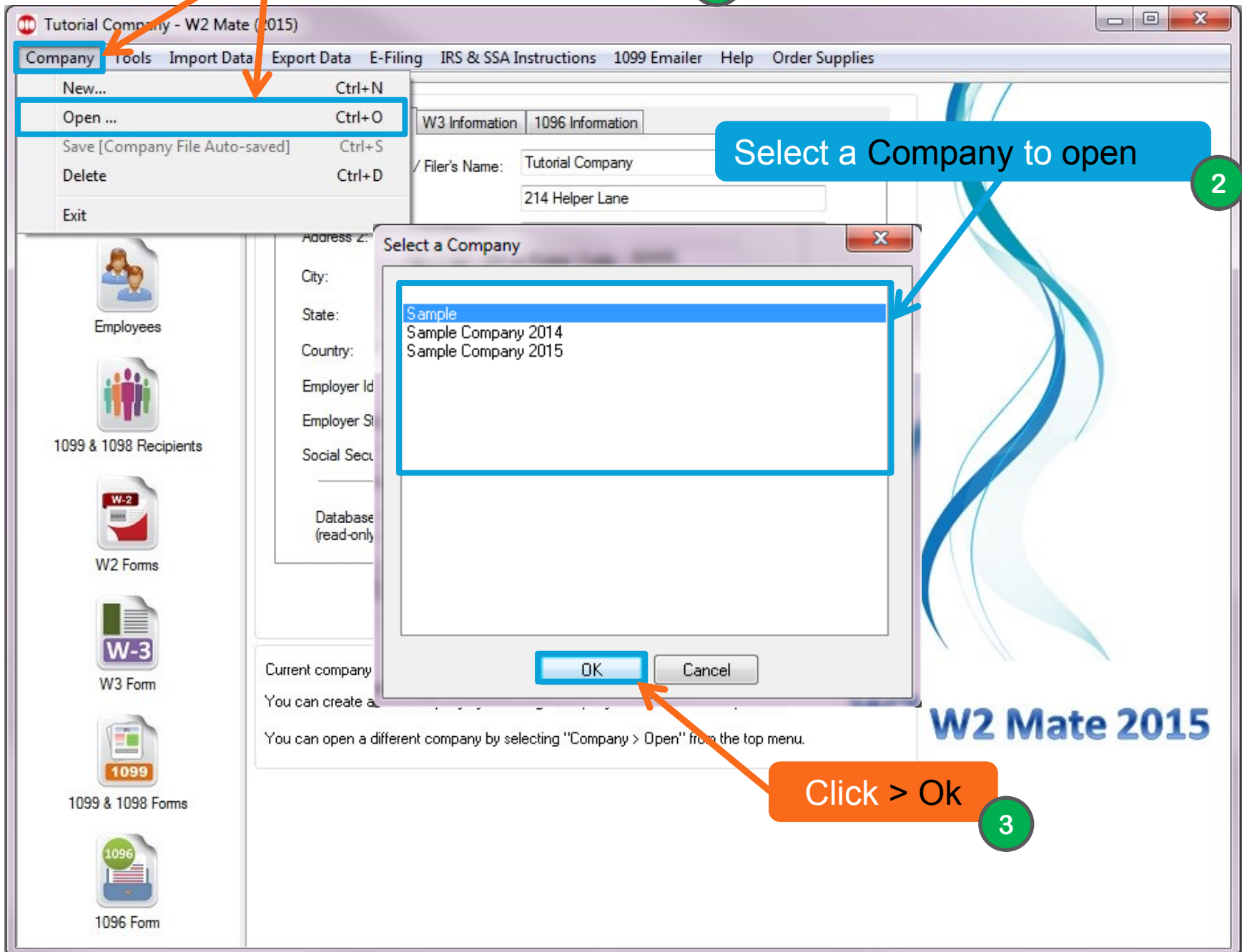
1

Select a Company to open

2

Click > Ok

3



Sample - W2 Mate (2015)

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

Shortcuts

- Company
- Employees
- 1099 & 1098 Recipients
- W2 Forms**
- W3 Form
- 1099 & 1098 Forms
- 1096 Form

Employee: [Select] [Next] [Previous] W2: [Save] [Clear] [Print] **Create PDF W2's** [Related Tasks]

a Employee's social security number: 000-00-0000

b Employer identification number: 54-2897451

c Employer's name, address, and ZIP code: Sample, 123 Main St, Chicago, IL, 60456

d Control number: [ ]

e Employee's first name, initial, Last name, Suff.: Ann, James

f 4 State: Hometown, AL, 60456

1 Wages, tips, other compensation: 500.00

2 Federal income tax withheld: 0.00

3 Social security wages: 0.00

5 Medicare wages and tips: 0.00

7 Social security tips: 0.00

Box 9 (EIC payments) has been deleted from the W-2 Form

11 Nonqualified plans: 0.00

13 Statutory employee, Retirement plan, 3rd-party sick pay: [ ] [ ] [ ]

14 Other: [ ] [ ] [ ]

6 Medicare tax withheld: 0.00

8 Allocated tips: 0.00

10 Dependent care benefits: 0.00

See instructions for box 12

	Code	Amount
12a	[ ]	0.00
12b	[ ]	0.00
12c	[ ]	0.00
12d	[ ]	0.00

15 State Employer's state ID number: AL, AL

16 State wages, tips, etc.: 1000.00

17 State income tax: 10.00

18 Local wages, tips, etc.: 0.00

19 Local income tax: 0.00

20 Locality name: [ ] Local Tax Type: Other

Click > Create PDF W2's

Click > W2 Forms

If you want to send 1099's in the emailer continue on these steps. If not skip to slide 8.

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1099 Recipient Form 1099-B Form Type

Select Next Previous Save Clear Print **Create PDF** Related Tasks Select

Payer's name, street address, city, state, zip code, and Tel. #

Sample  
123 Main St  
chicago IL 60456  
(521) 487-5974

PAYER'S Federal ID number 54-2897451 RECIPIENT'S ID number 444667894

RECIPIENT'S name Jane Doe

Street address (including apt. no.) 332 Line Drive

City, state, and ZIP Chicago IL 51478

Account number (optional)

CUSTOMER ID

14 State name IL 15 State ID no. 123456 16 State tax WH 0.00

Applicable check box on Form 8949

2015 Form 1099-B

1a Description

1b Date acquired (mm/dd/yyyy)

1c Date sold or disposed (mm/dd/yyyy)

1d Proceeds 0.00 1e Cost or other basis 0.00

1f Code, if any

1g Adjustments 0.00

2 Type of gain or loss: Short-term  Long-term  3 Basis reported to IRS

4 Federal income tax withheld 0.00 5 Check if noncovered security

6 Reported to IRS: Gross proceeds  Net proceeds  Loss not allowed based on amount in 1d

8 Profit or (loss) realized in 2015 on closed contracts 0.00 9 Unrealized profit or (loss) on open contracts - 12/31/2014 0.00

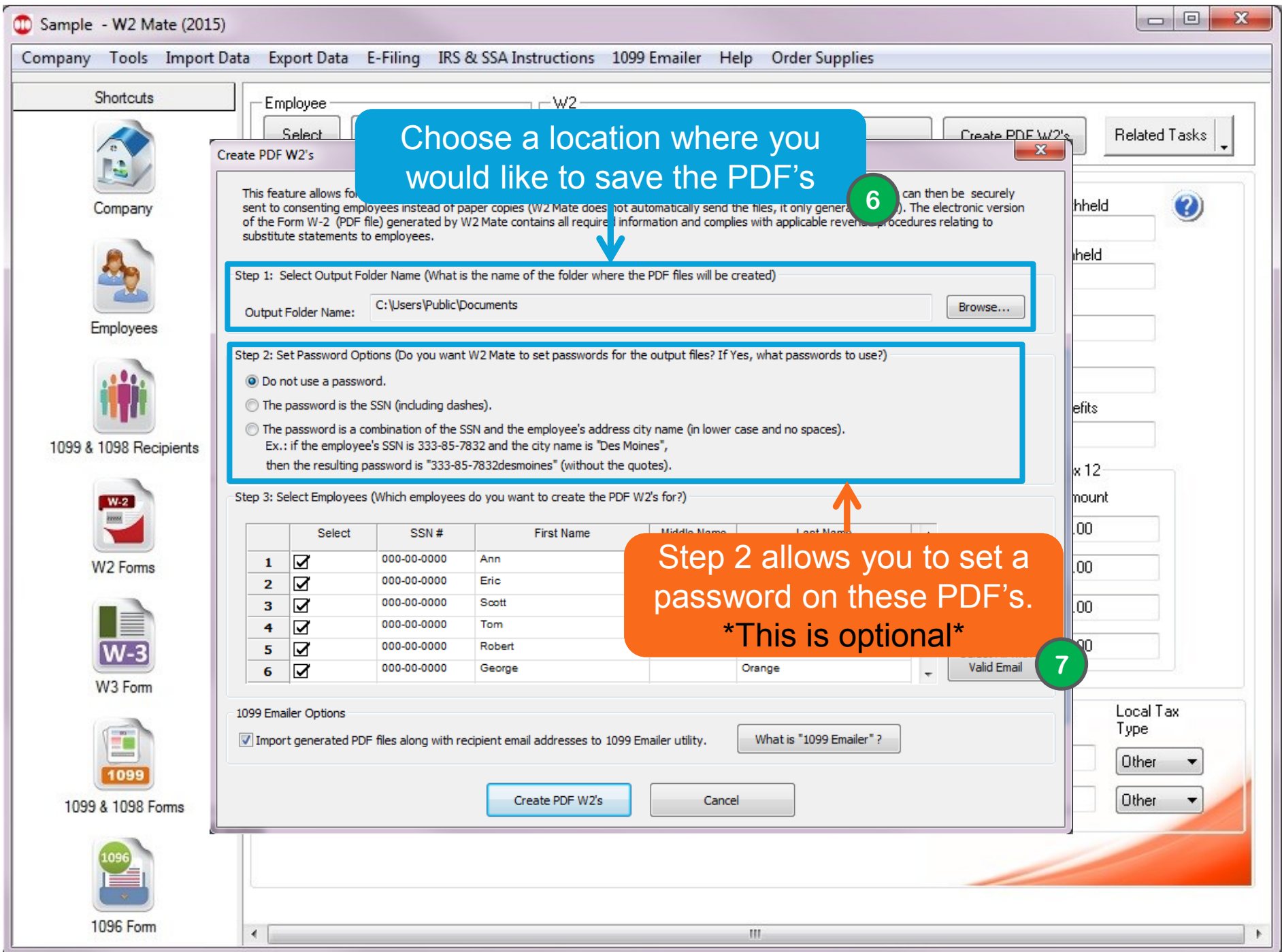
10 Unrealized profit or (loss) on open contracts - 12/31/2015 0.00 11 Aggregate profit or (loss) on contracts 0.00

12 13 Bartering 0.00

**Click > Create PDF** (5)

**Click > 1099 & 1098 Forms** (4)

The following steps are the same for either 1099's or W2's. The slides will show examples through W2's but follow these same steps for 1099's.



Choose a location where you would like to save the PDF's

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Step 1: Select Output Folder Name (What is the name of the folder where the PDF files will be created)  
Output Folder Name: C:\Users\Public\Documents

Step 2: Set Password Options (Do you want W2 Mate to set passwords for the output files? If Yes, what passwords to use?)  
 Do not use a password.  
 The password is the SSN (including dashes).  
 The password is a combination of the SSN and the employee's address city name (in lower case and no spaces).  
Ex.: if the employee's SSN is 333-85-7832 and the city name is "Des Moines", then the resulting password is "333-85-7832desmoines" (without the quotes).

Step 2 allows you to set a password on these PDF's.  
\*This is optional\*

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Step 3: Select Employees (Which employees do you want to create the PDF W2's for?)

	Select	SSN #	First Name	Middle Name	Last Name
1	<input checked="" type="checkbox"/>	000-00-0000	Ann		
2	<input checked="" type="checkbox"/>	000-00-0000	Eric		
3	<input checked="" type="checkbox"/>	000-00-0000	Scott		
4	<input checked="" type="checkbox"/>	000-00-0000	Tom		
5	<input checked="" type="checkbox"/>	000-00-0000	Robert		
6	<input checked="" type="checkbox"/>	000-00-0000	George	Orange	



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

Shortcuts

Employee W2

Select Next Previous Save Clear Print Create PDF W2's Related Tasks

Company

Employees

1099 & 1098 Recipients

W2 Forms

W3 Form

1099

1096 Form

**Create PDF W2's**

This feature allows for the creation of PDF W2's ( Employee copies of W-2 Form in Adobe PDF Format). The resulting PDF files can then be securely sent to consenting employees instead of paper copies (W2 Mate does not automatically send the files, it only generates them). The electronic version of the Form W-2 (PDF file) generated by W2 Mate contains all required information and complies with applicable revenue procedures relating to substitute statements to employees.

Step 1: Select Output Folder Name (What is the name of the folder where the PDF files will be created)

Output Folder Name: C:\Users\Public\Documents Browse...

Step 2: Set Password (What password do you want to use?)

- Do not use a password
- The password is the employee's SSN
- The password is a combination of the SSN and the employee's address city name (in lower case and no spaces).  
Ex.: if the employee's SSN is 333-85-7832 and the city name is "Des Moines", then the resulting password is "333-85-7832desmoines" (without the quotes).

Step 3: Select Employees (Which employees do you want to create the PDF W2's for?)

	Select	SSN #	First Name	Middle Name	Last Name
1	<input checked="" type="checkbox"/>	000-00-0000	Ann		James
2	<input checked="" type="checkbox"/>	000-00-0000	Eric		Sullivan
3	<input checked="" type="checkbox"/>	000-00-0000	Scott		Smith
4	<input checked="" type="checkbox"/>	000-00-0000	Tom		Young
5	<input checked="" type="checkbox"/>	000-00-0000	Robert		Young
6	<input checked="" type="checkbox"/>	000-00-0000	George		Orange

1099 E-mailer Options

Import generated PDF files along with recipient email addresses to 1099 E-mailer utility. What is "1099 E-mailer"?

Create PDF W2's Cancel

Select all the recipients/employees that you want to create these PDF's for 8

Make sure this is check to import these PDF's into the emailer 9

Click > Create PDF W2's 10

The screenshot shows the W2 Mate 2015 software interface. On the left is a navigation pane with icons for 'Company', 'Employees', '1099 & 1098 Recipients', 'W2 Forms', 'W-3', 'W3 Form', '1099 & 1098 Forms', and '1096 Form'. The main window has a menu bar with 'Company', '1099 E-mailer', 'Help', and 'Order Supplies'. The '1099 E-mailer' menu is open, showing options: 'What is "1099 E-mailer" software?' and 'Launch 1099 E-mailer'. The 'Launch 1099 E-mailer' option is highlighted with a blue box and an arrow pointing to a blue callout box that says 'Click > Create PDF W2's'. An orange callout box at the top left says 'Click > 1099 E-mailer' with an arrow pointing to the '1099 E-mailer' menu item. A green callout box with the number '12' is positioned over the 'Country' dropdown menu, which is set to 'United States'. The main form contains the following fields: Employer's Name / Filer's Name: Sample; Address 1: 123 Main St; Address 2: (empty); City: chicago; State: IL (dropdown); ZIP or Post: (empty); Country: United States (dropdown); Employer Identification Number: 54-2897451; Employer State ID: 123456; Social Security # (if Applicable): (empty). A note below the form says: 'Please remember to click the "Update" button to save your changes'. At the bottom of the form are three buttons: 'Update', 'Reset', and 'Clear'. Below the form, the text reads: 'Current company name is : Sample', 'You can create a new company by selecting "Company > New" from the top menu.', and 'You can open a different company by selecting "Company > Open" from the top menu.' The title bar of the window reads 'Sample - W2 Mate (2015)'. The bottom right corner of the window features the text 'W2 Mate 2015'.

Click "Batch Send Emails" to send the PDF's to their recipients.  
If this is your first time doing this, then the next box that will appear will ask you to set up the emailer settings.

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Related Tasks

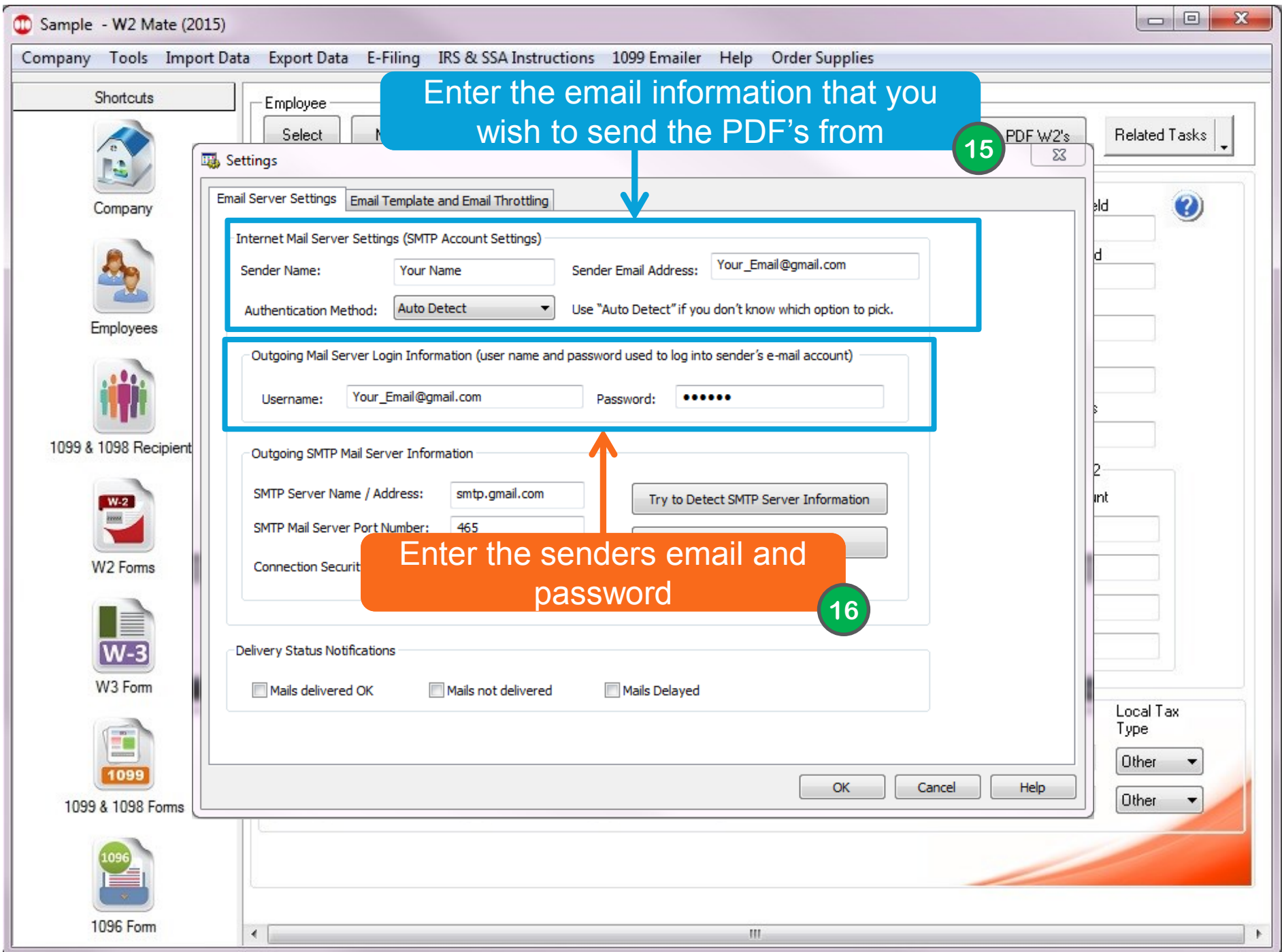
Recipient Name	Company Name	Recipient Email	Recipient Tax ID	Email Send Result
Sample Sampler	Sample	sampler@mail.com	000-00-0000	Unsent

Output

00:53:50 PM Found 1 recipients  
00:54:58 PM Please start by configuring email settings  
01:21:12 PM Please start by configuring email settings

The recipients/employees will appear in the box

13

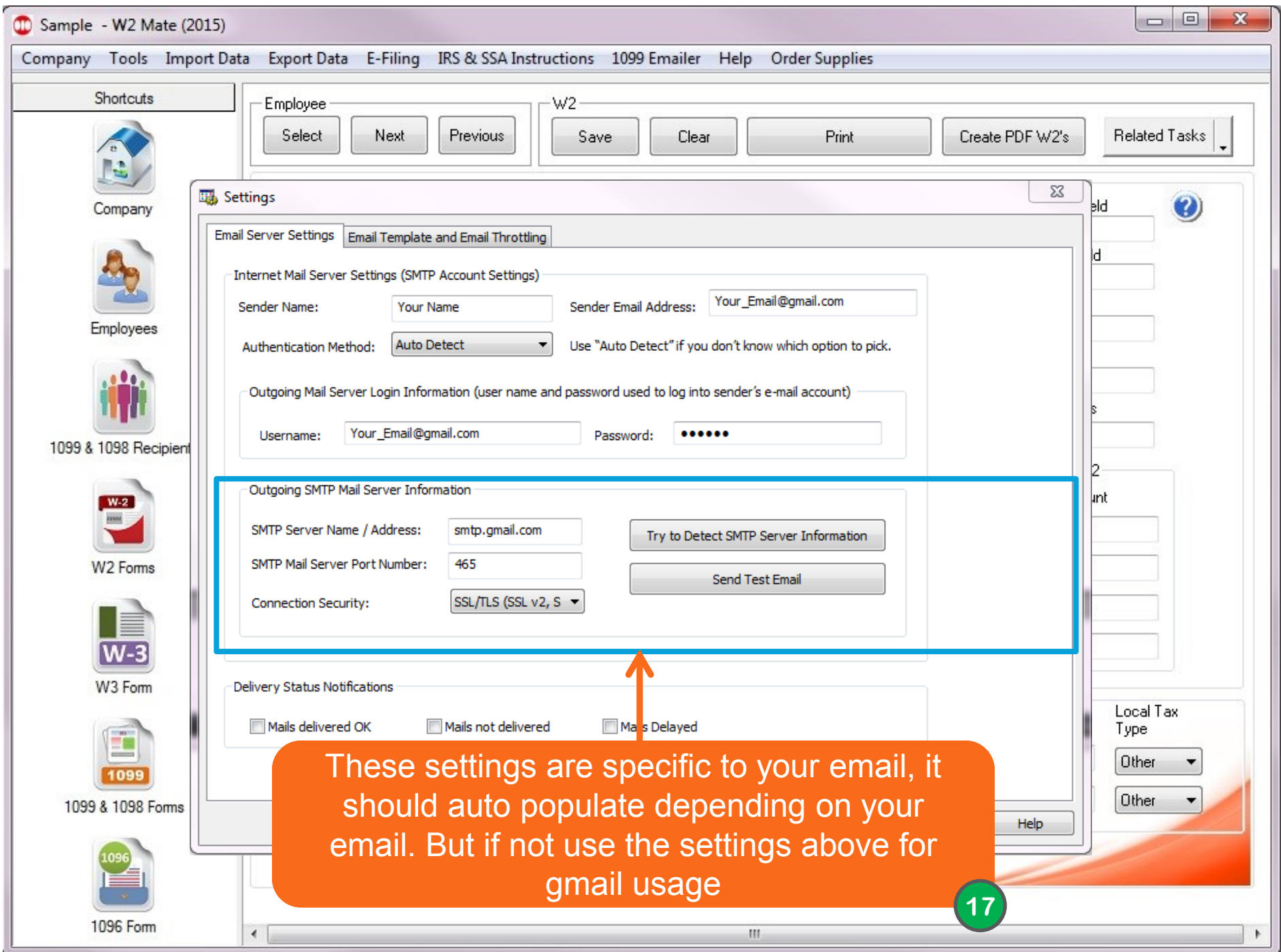


Enter the email information that you wish to send the PDF's from

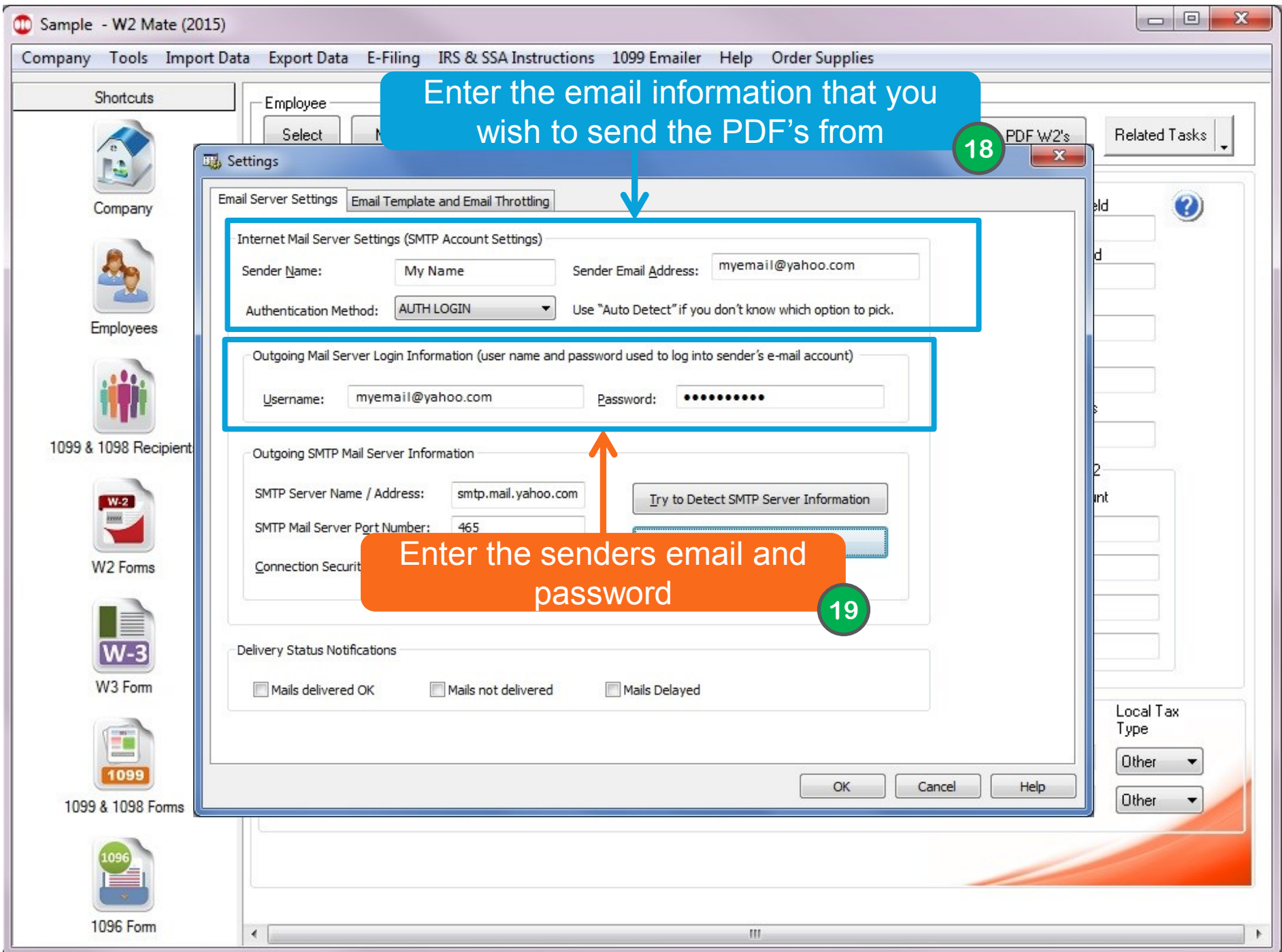
15

Enter the senders email and password

16



These settings are specific to your email, it should auto populate depending on your email. But if not use the settings above for gmail usage

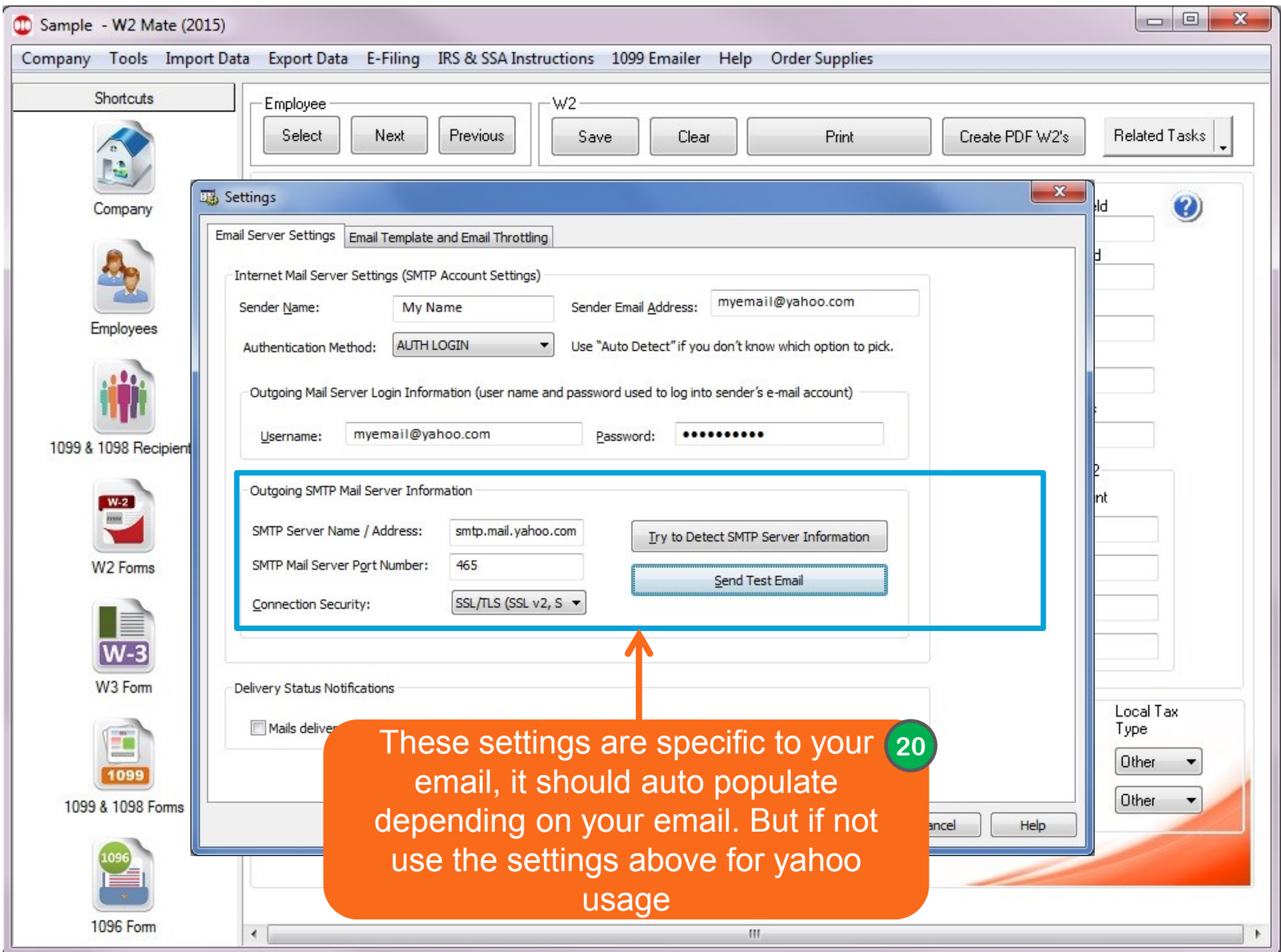


Enter the email information that you wish to send the PDF's from

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Enter the senders email and password

19



These settings are specific to your email, it should auto populate depending on your email. But if not use the settings above for yahoo usage

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After you set up your email, Click  
“Batch Send Emails” as you  
originally did and send them.



**Congratulations.** You know how to send PDF's using the 1099 emailer!



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

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