

# How to Import 1099 Data from QuickBooks Online into W2 Mate

The W2 Mate 1099 Utility for QuickBooks Online is used to create a CSV file to import your 1099 data into W2 Mate.

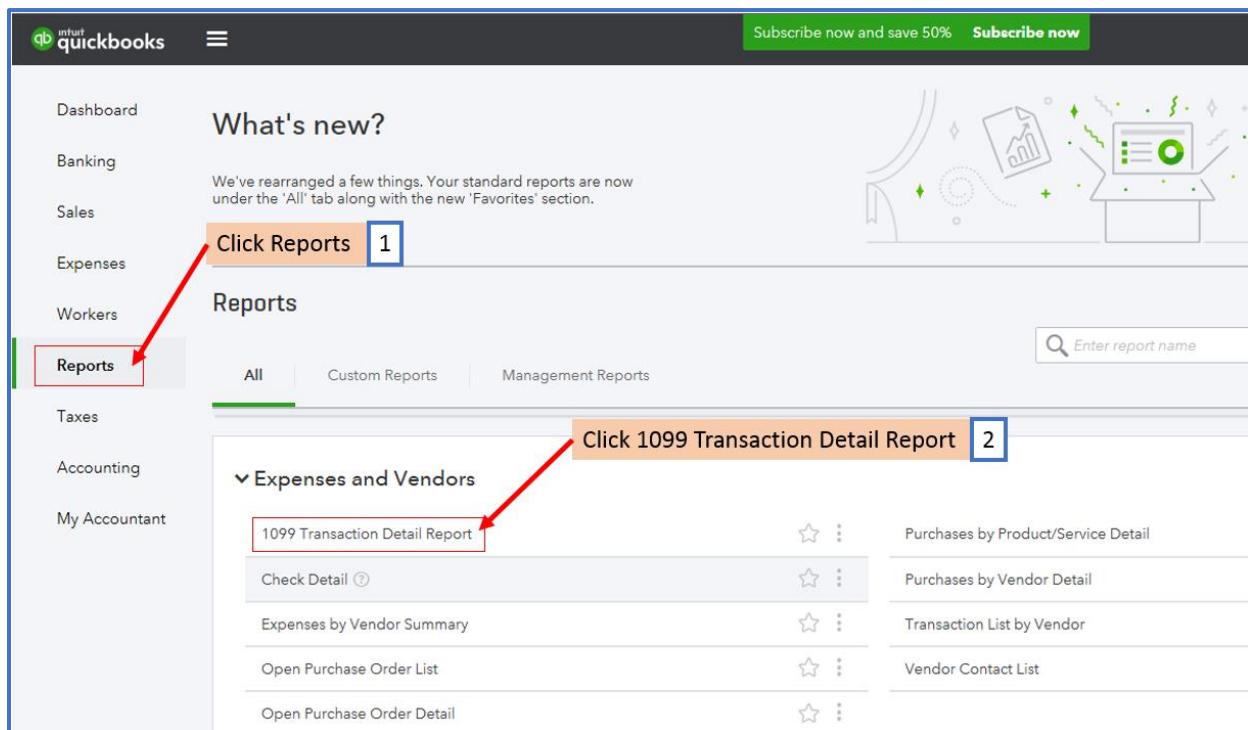
Note: In order to use this feature you must purchase and enable W2 Mate Option #3 to import

Note: You will need to export your data from QuickBooks Online to Excel spreadsheets, use the W2 Mate QuickBooks Online Helper Utility to convert the spreadsheet data to a single CSV (Comma Separated Value) spreadsheet (per company), then import the CSV data into W2 Mate. Each company will need to be created and imported separately.

**To export your data from QuickBooks Online:**  
(examples using Internet Explorer 11/Excel 2016)

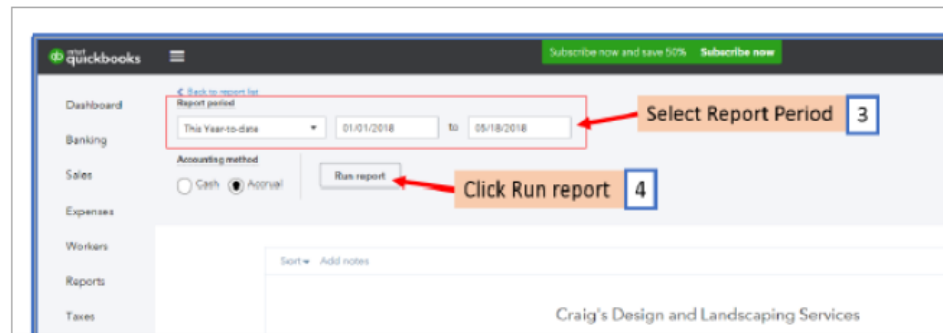
## 1099 Transaction Detail Report

1. Click on Reports from left side menu
2. Click 1099 Transaction Detail Report

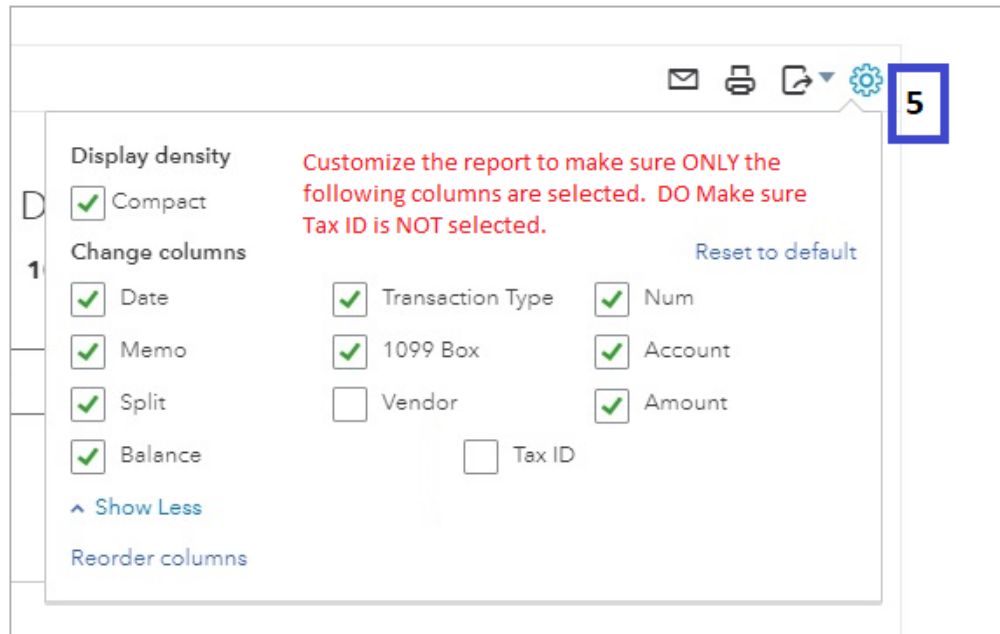


3. Select Report Period

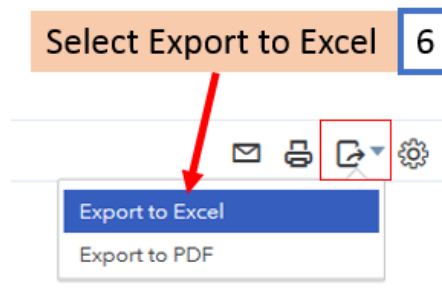
4. Click Run Report



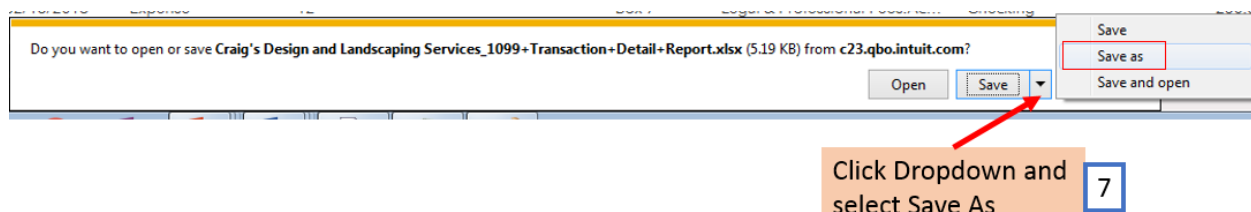
5. Customize the report and then select Export to Excel



6. Export to Excel

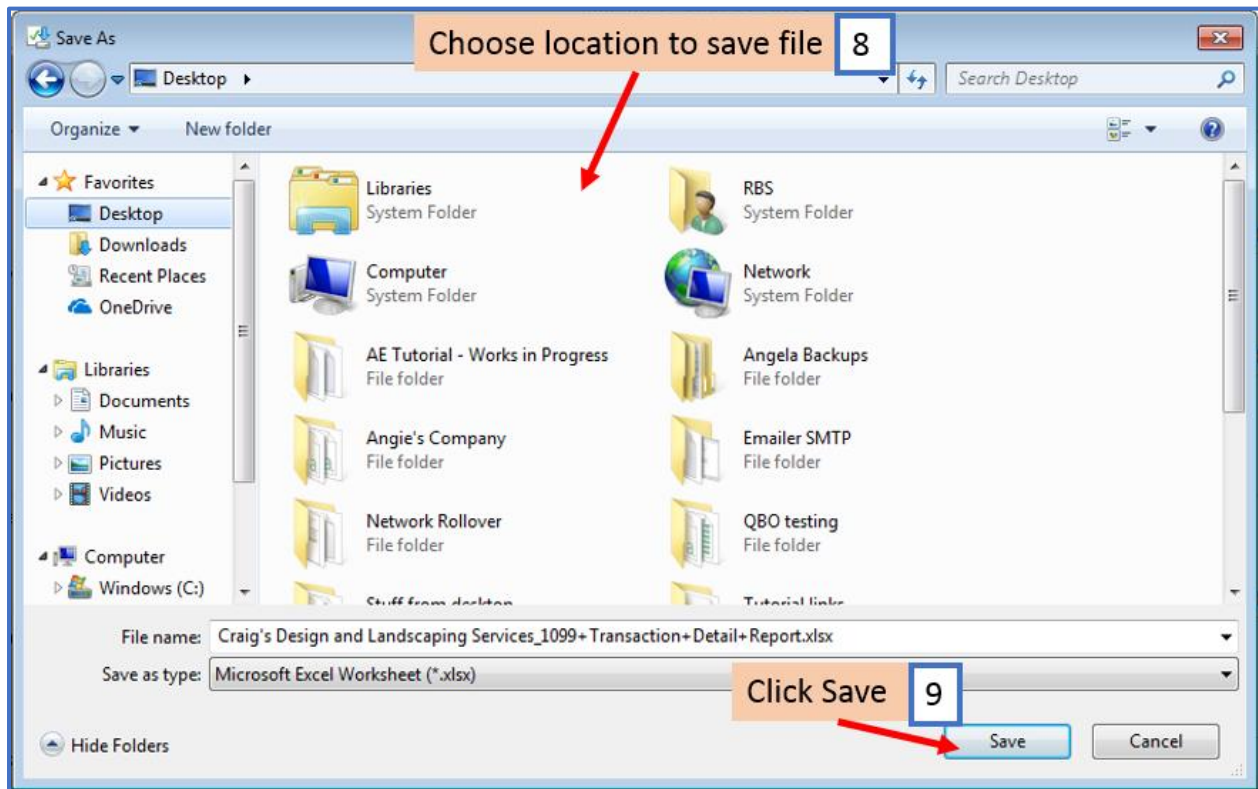


7. Click Save and Select Save As to save the Excel 1099 Transaction Detail report

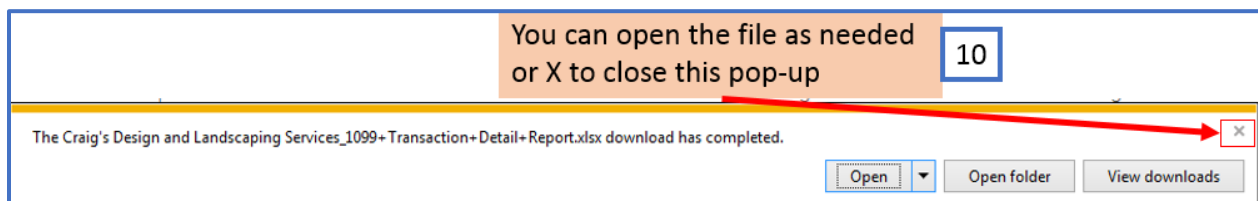


8. Choose location to save the file

9. Click Save



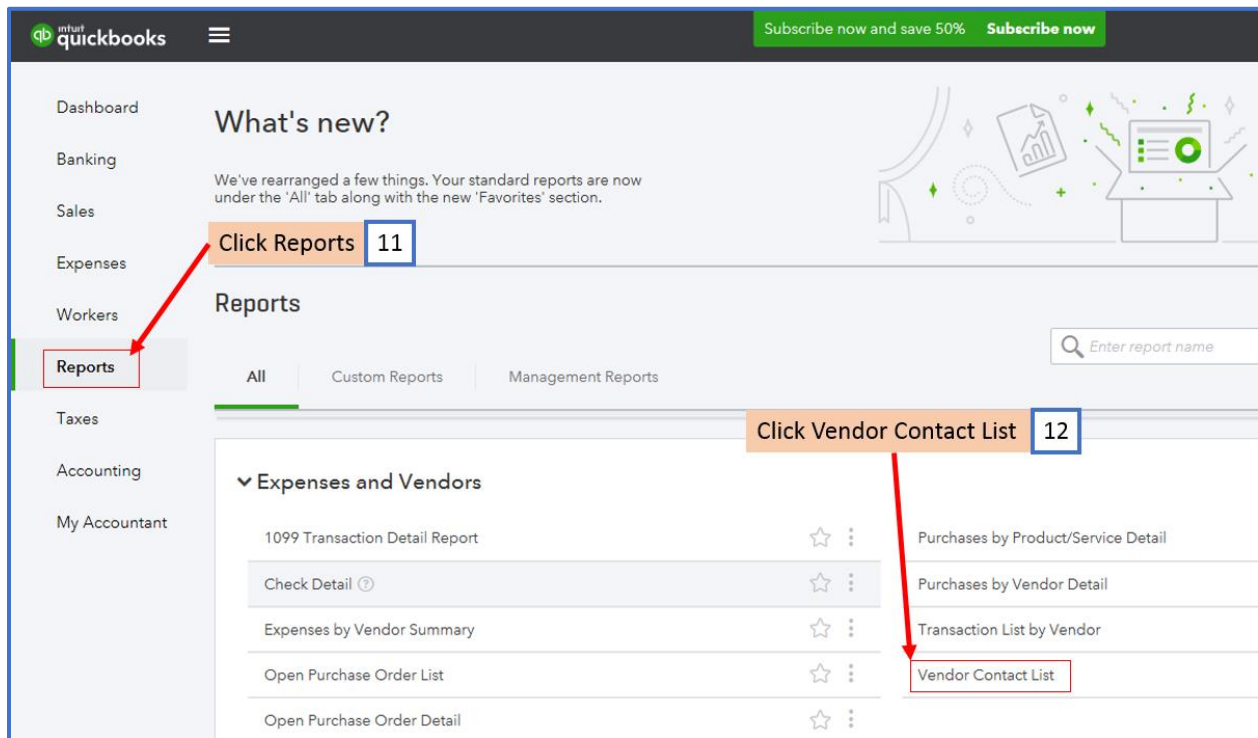
10. Click X to close the pop-up



## Vendor Contact List

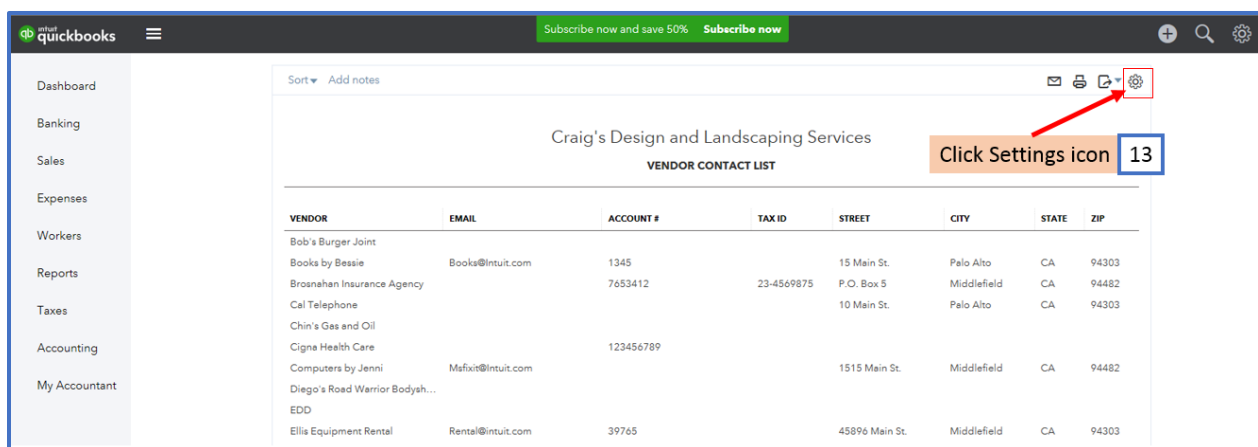
11. Click on Reports from left side menu

12. Click Vendor Contact List



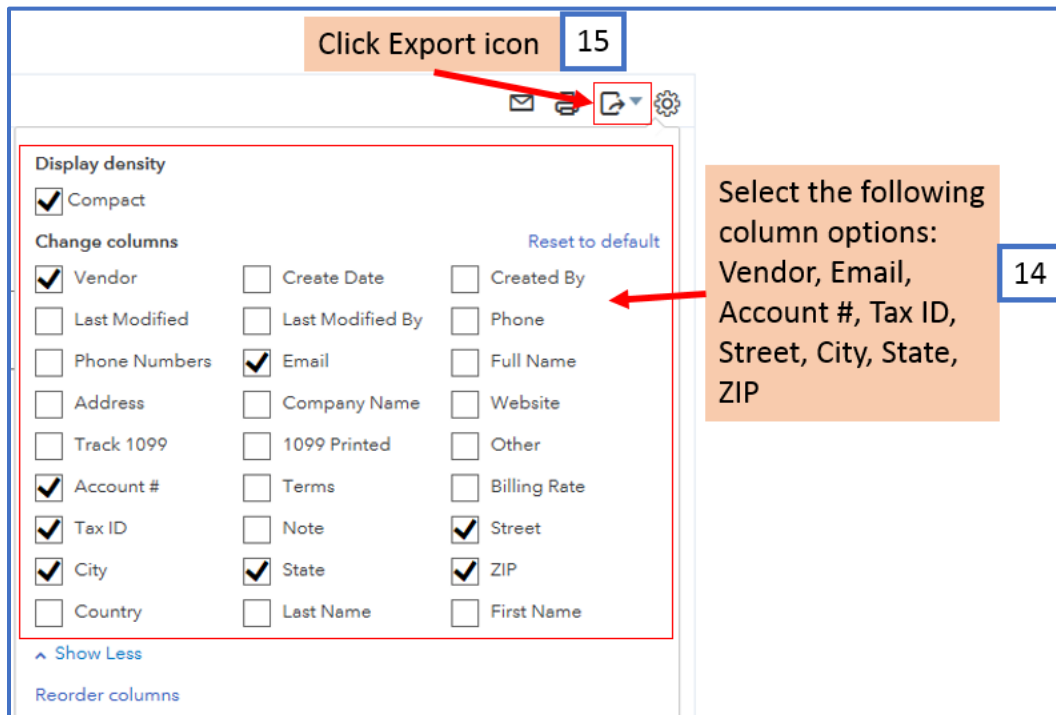
Vendor List will be displayed

13. Click Settings icon

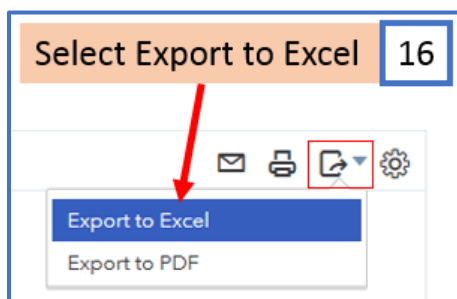


14. Select the following column options: Vendor, Email, Account #, Tax ID, Street, City, State, Zip

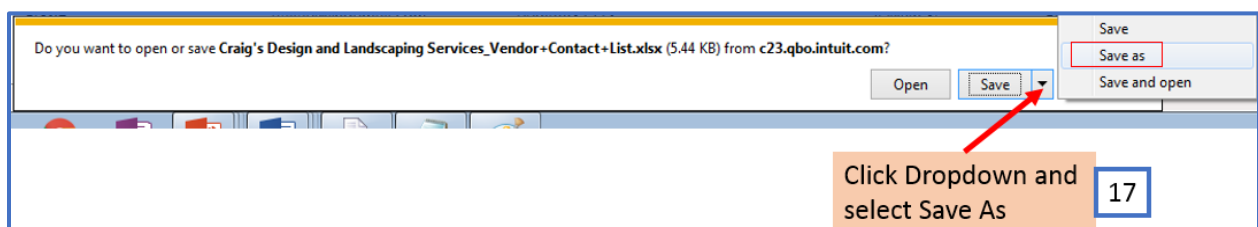
15. Click Export icon



16. Select Export to Excel

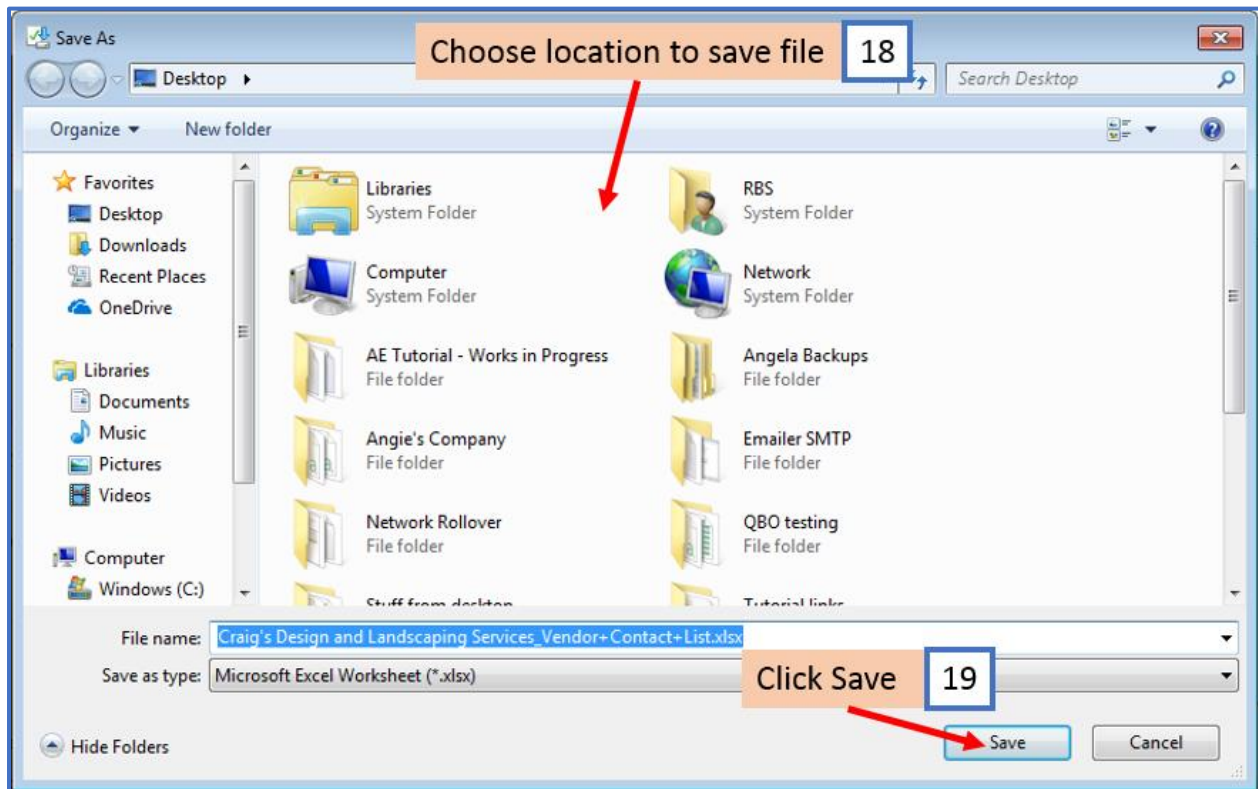


17. Click Save and Select Save As to save the Excel Vendor Contact list

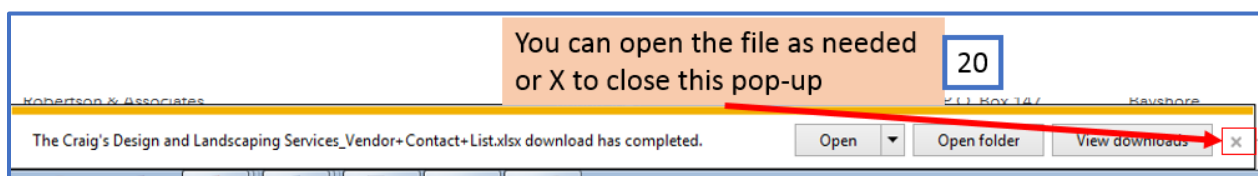


18. Choose location to save the file

19. Click Save



20. Click X to close the pop-up



To create a new CSV file, Click the link below to open the W2 Mate QB Online Helper download:

<http://www.1099tutorial.com/download/w2-mate-QB-online-helper-1.html>

## 21. Click Download Now


### W2 Mate QB Online 1099 Helper

**DOWNLOAD NOW**

Click Download Now 21


If you face problems downloading the setup file, please follow these instructions :

**Internet Explorer users:**



1. Download the file by clicking the Download Now Button (above).
2. When prompted with a window to "Save" or "Run", select "Save" to save the file to your hard disk.
3. Double-click the W2MateQBOnlineHelper.exe program file on your hard disk to start the setup program.
4. Follow the instructions on the screen to complete the installation.
5. Once the installation is complete, open the program by clicking on the program's icon on the desktop.

**Mozilla Firefox users:**



1. Download the file by clicking the Download Now Button (above).
2. When prompted with a window to "Save" or "Run", select "Save" to save the file to your hard disk.
3. Double-click the W2MateQBOnlineHelper.exe program file on your hard disk to start the setup program.
4. If you can't locate the setup file, then click on "Tools > Downloads" menu to view the list of downloaded files and double click on the setup file in the list.
5. Follow the instructions on the screen to complete the installation.
6. Once the installation is complete, open the program by clicking on the program's icon on the desktop.

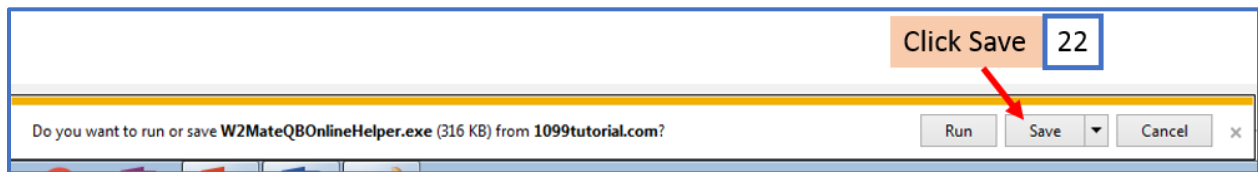
Real Business Solutions - 18313 Distinctive Drive - Orland Park, IL 60467

[Live Chat](#) or [Email](#)

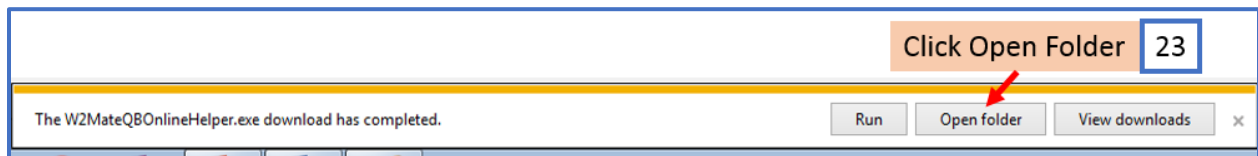
1-800-507-1992 | 1-708-479-8731 | 1-708-590-6376

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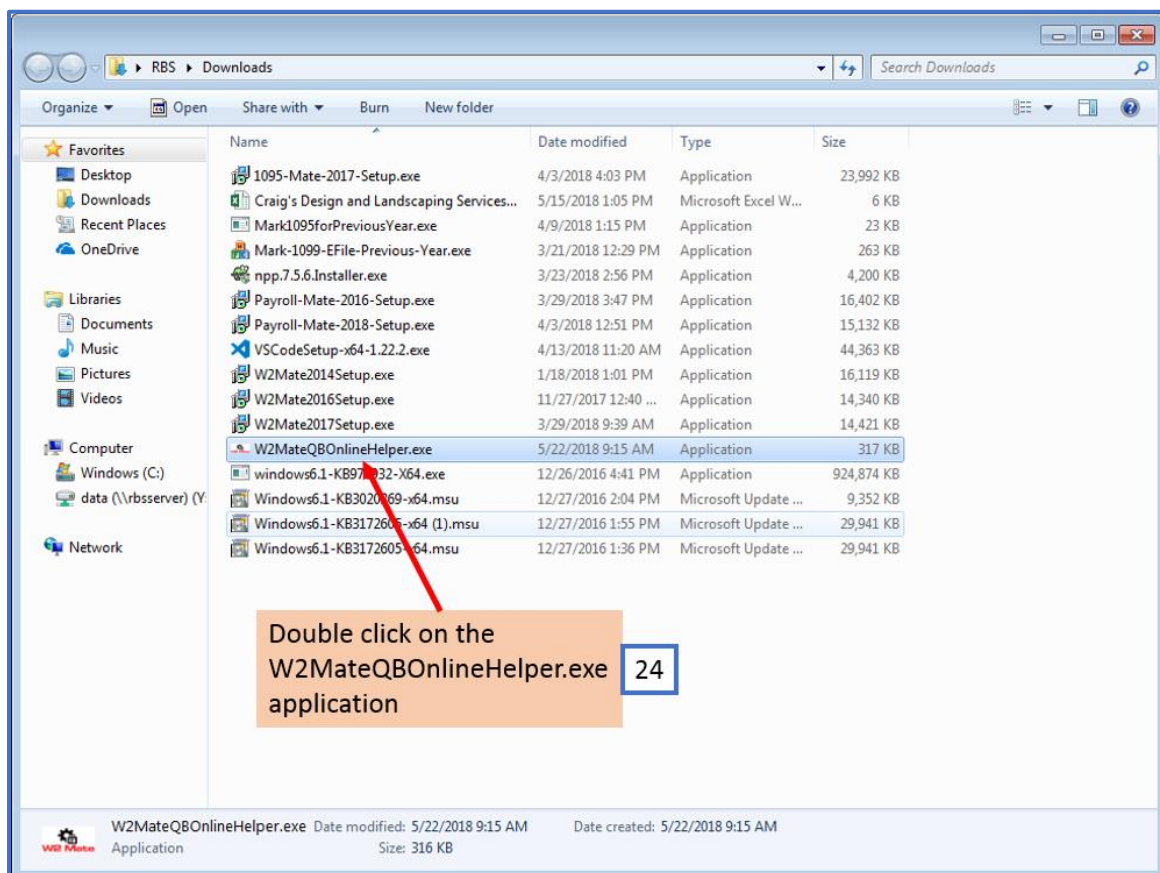
22. Click Save



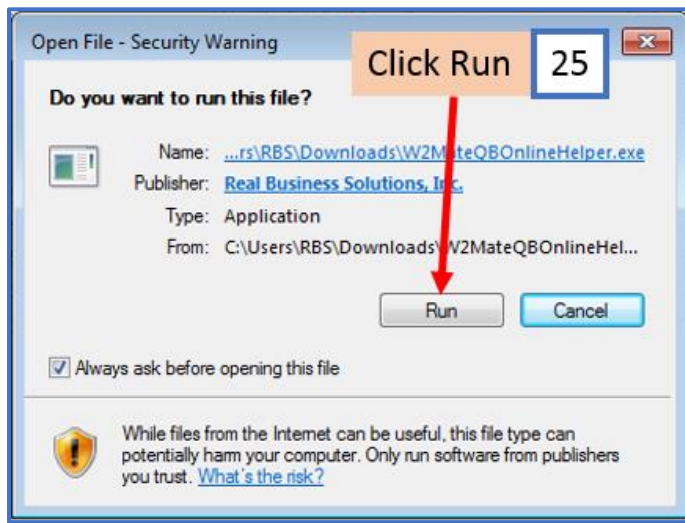
23. Click Open Folder



24. Double-click on the W2MateQBOnlineHelper.exe application

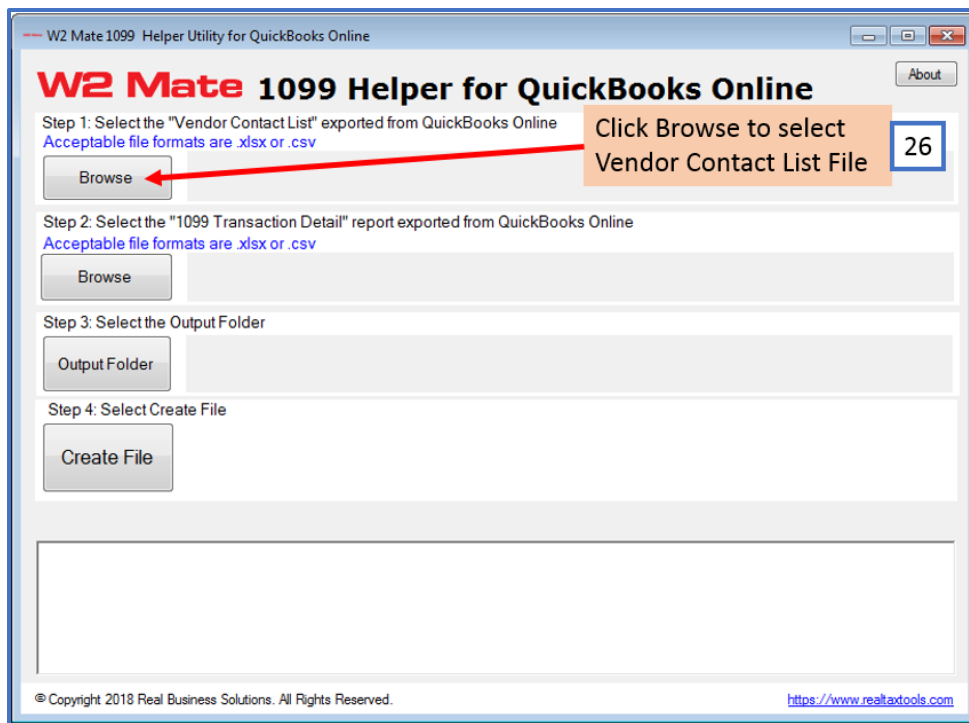


25. Click Run



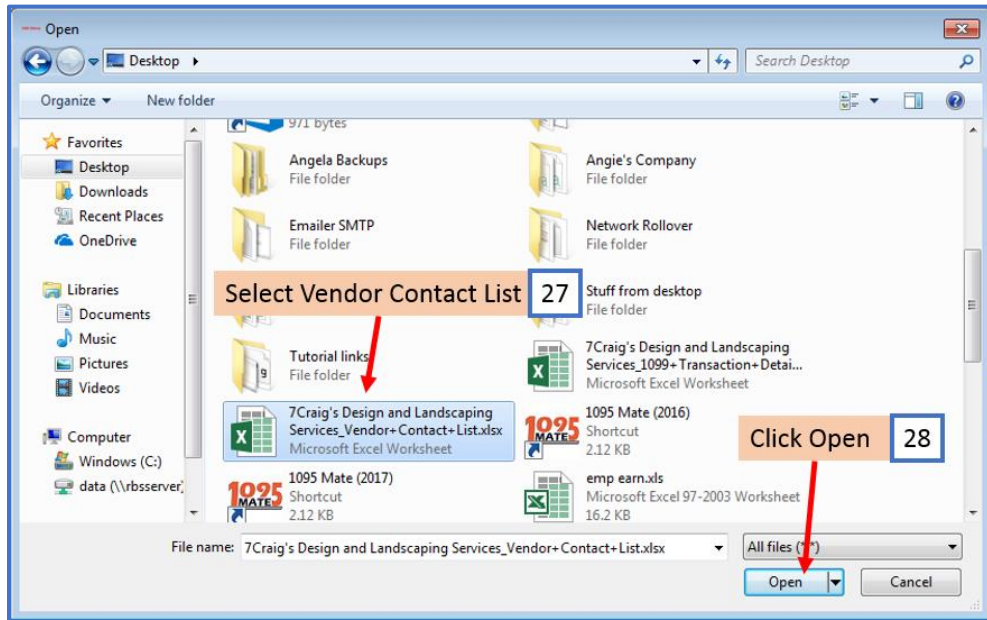
Once the W2 Mate QB Online Helper is open:

26. Click Browse to select the Vendor Contact list file saved from QuickBooks Online

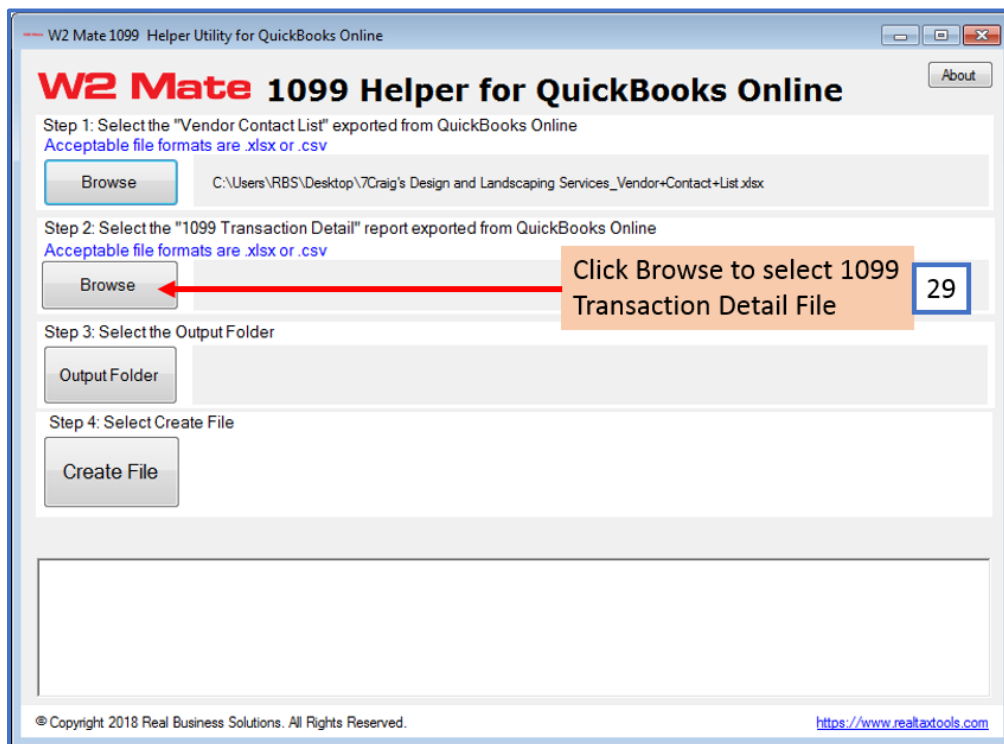


27. Select Vendor Contact List file

28. Click Open

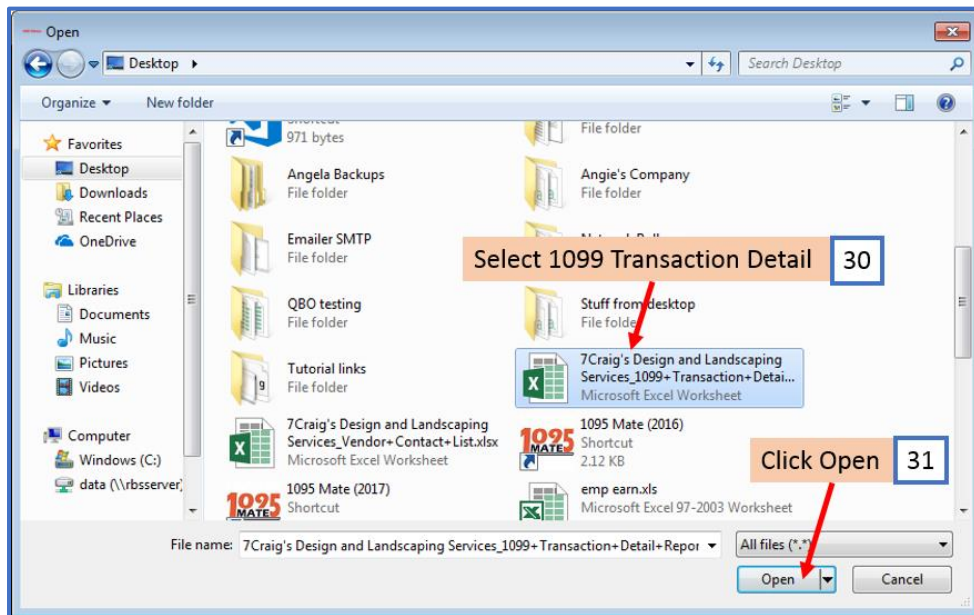


29. Click Browse to select the 1099 Transaction Detail report file saved from QuickBooks Online

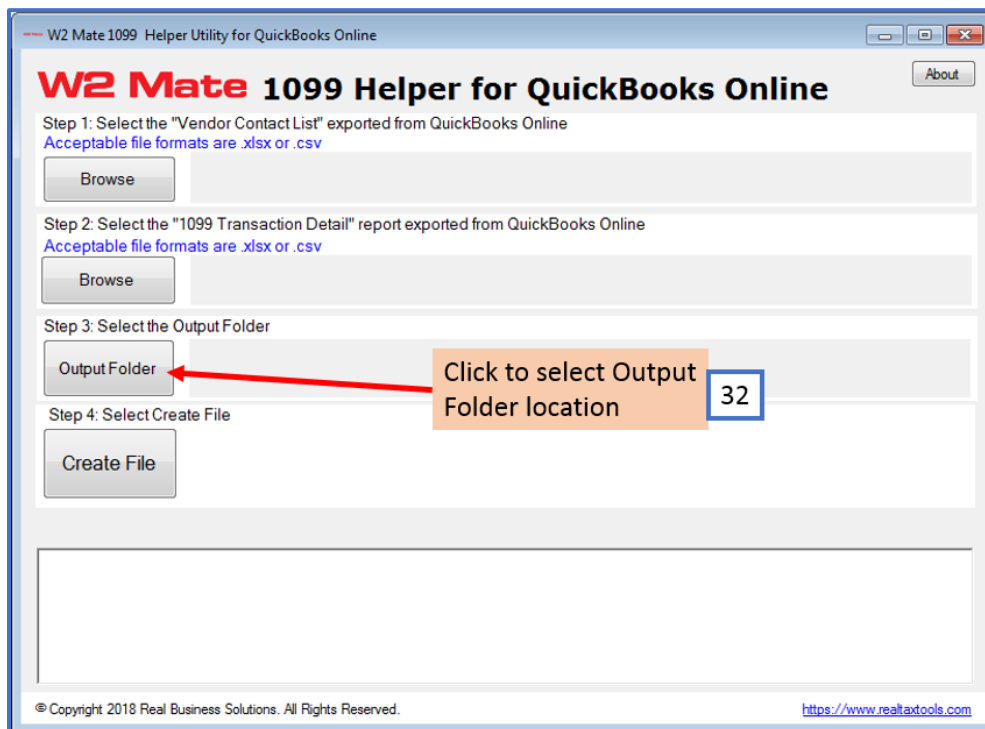


30. Select 1099 Transaction Detail file

31. Click Open

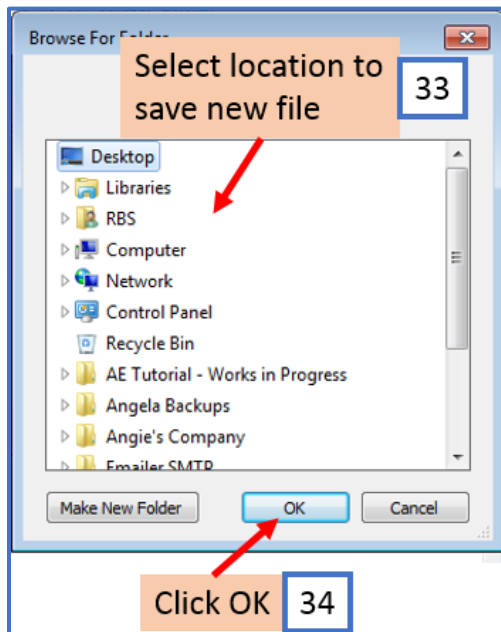


32. Click Output Folder to select the location to save the new CSV file

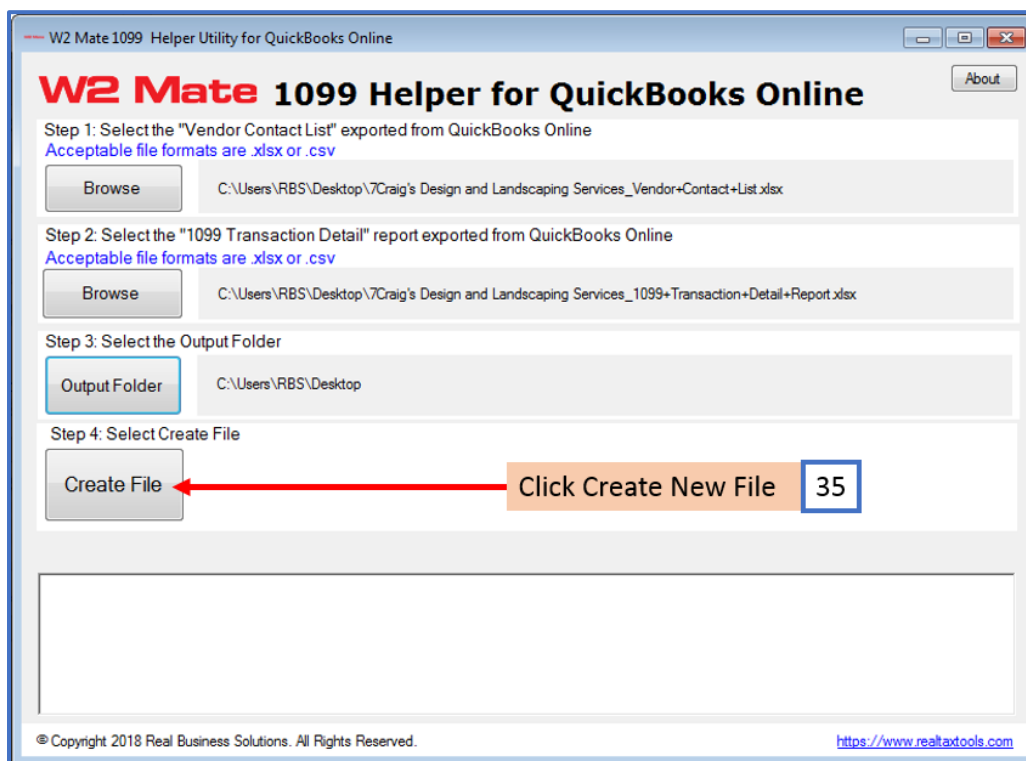


33. Select location to save the new CSV file

34. Click OK

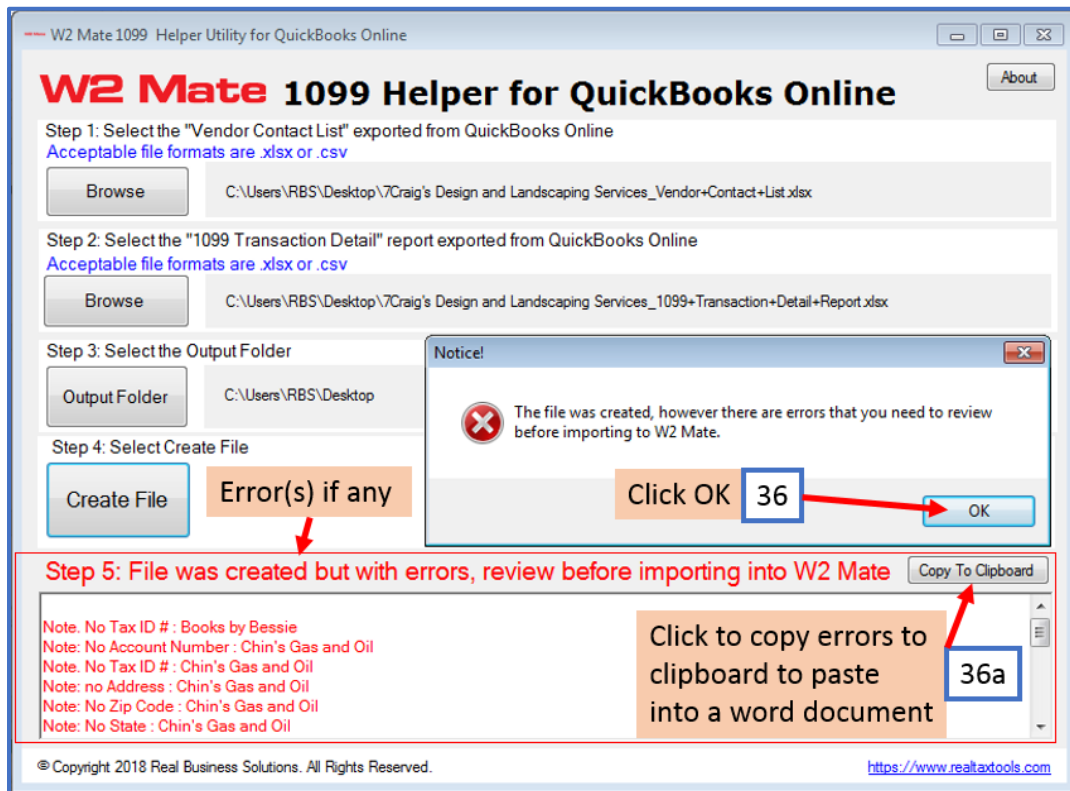


35. Click Create File

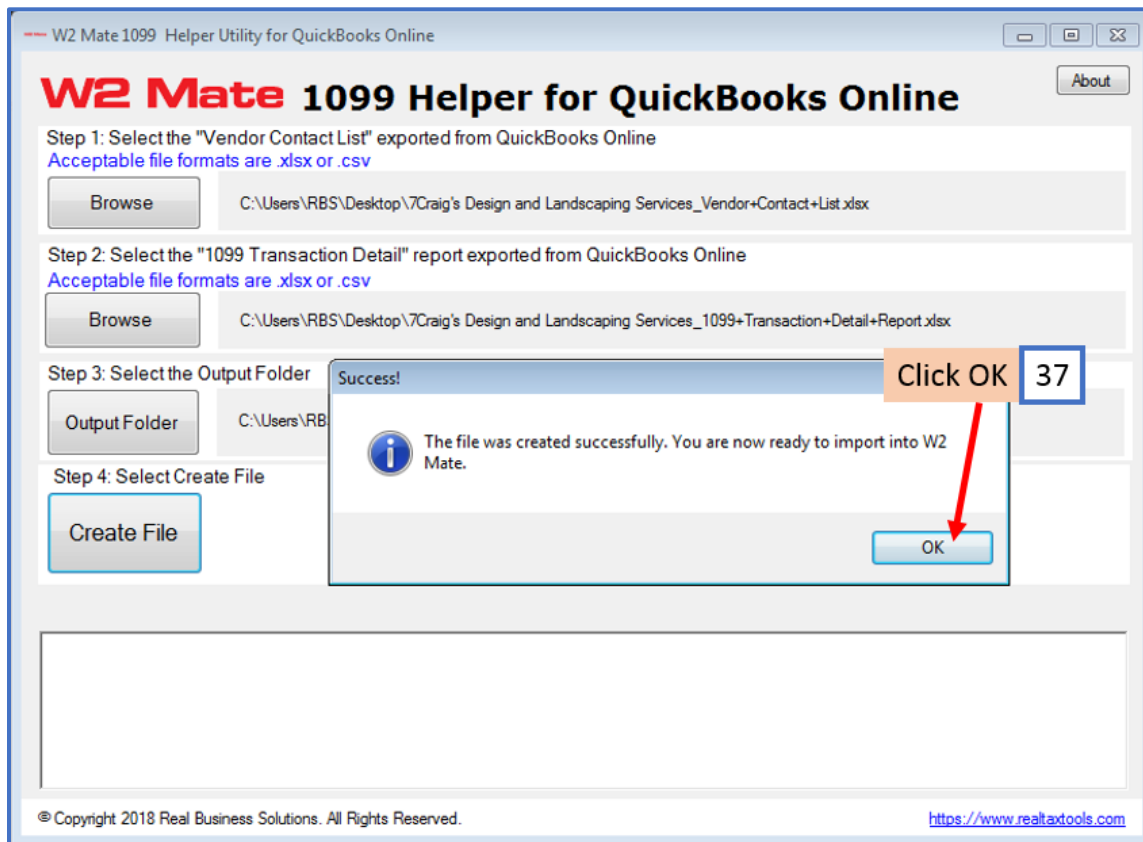


36. If there are errors in the CSV file, they will be listed in Step 5. Click OK

36a. Click Copy to Clipboard (if desired) then paste the data into a word document and print out to assist you with correcting any errors found

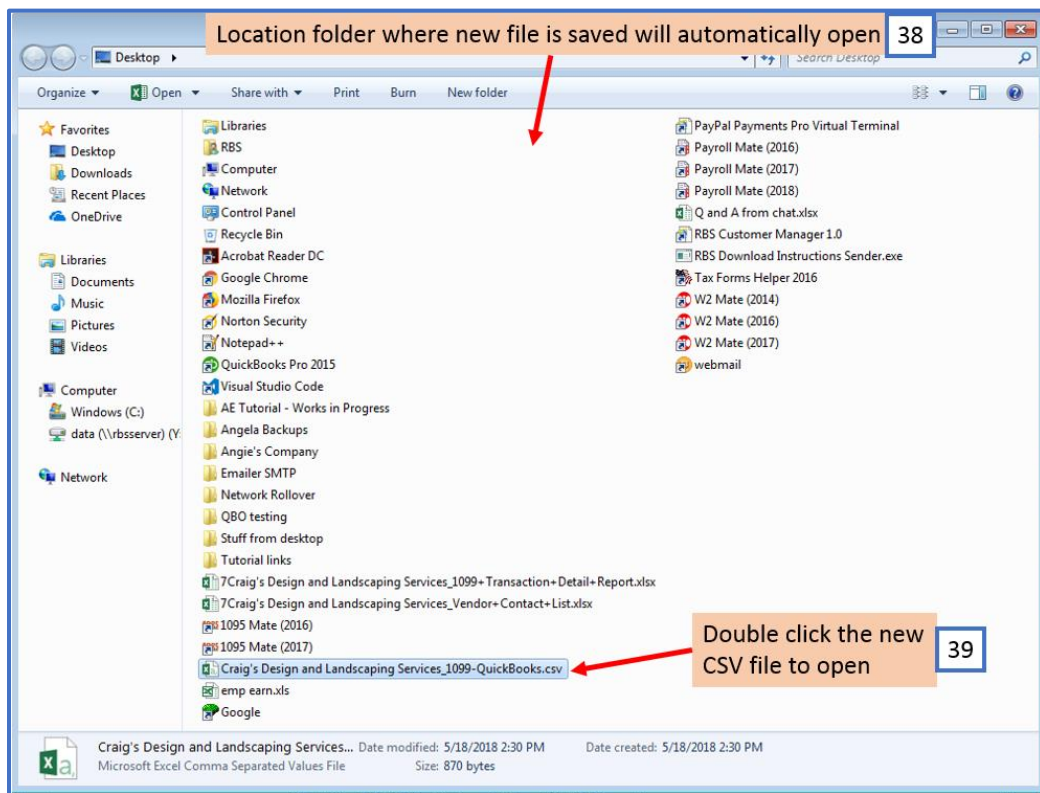


37. If no errors are found, you will receive this message. Click OK



38. The location folder will automatically open to where the new CSV file is saved

39. Double click the CSV file to open the spreadsheet



40. Review your data. If changes need to be made, edit applicable information and re-save the file as a CSV file type.

Review data, edit as needed, then save CSV file 40

	A	B	C	D	E	F	G	H	I	J	K	L
	Vendor Name (line 1)	Vendor Name (line 2)	Account	Tax ID	City	State	Zip	Address (Line 1)	Address (Line 2)	Email	Amount	
1	Books by Bessie		1345		Palo Alto	CA	94303	15 Main St.			130	
2	Brosnahan Insurance Agency		7653412	23-4569875	Middlefield	CA	94482	P.O. Box 5			2000	
3	Chin's Gas and Oil										301.56	
4	Hicks Hardware		556223		Middlefield	CA	94303	42 Main St.			465.66	
5	Mahoney Mugs										18.08	
6	Pam Seitz		64132549		Bayshore	CA	94326	P.O. Box 15			114.09	
7	PG&E		649587213		Palo Alto	CA	94303	4 Main St.			75	
8	Robertson & Associates		5641		Bayshore	CA	94326	P.O. Box 147			550	
9	Tania's Nursery		2154		Middlefield	CA	94482	1111 Elm St.			244.16	
10	Tim Philip Masonry		78965	55-5555555	Middlefield	CA	94482	3948 Elm St.			666	

Note: Any missing data (Tax ID, Address, etc.) will cause that recipient to NOT import

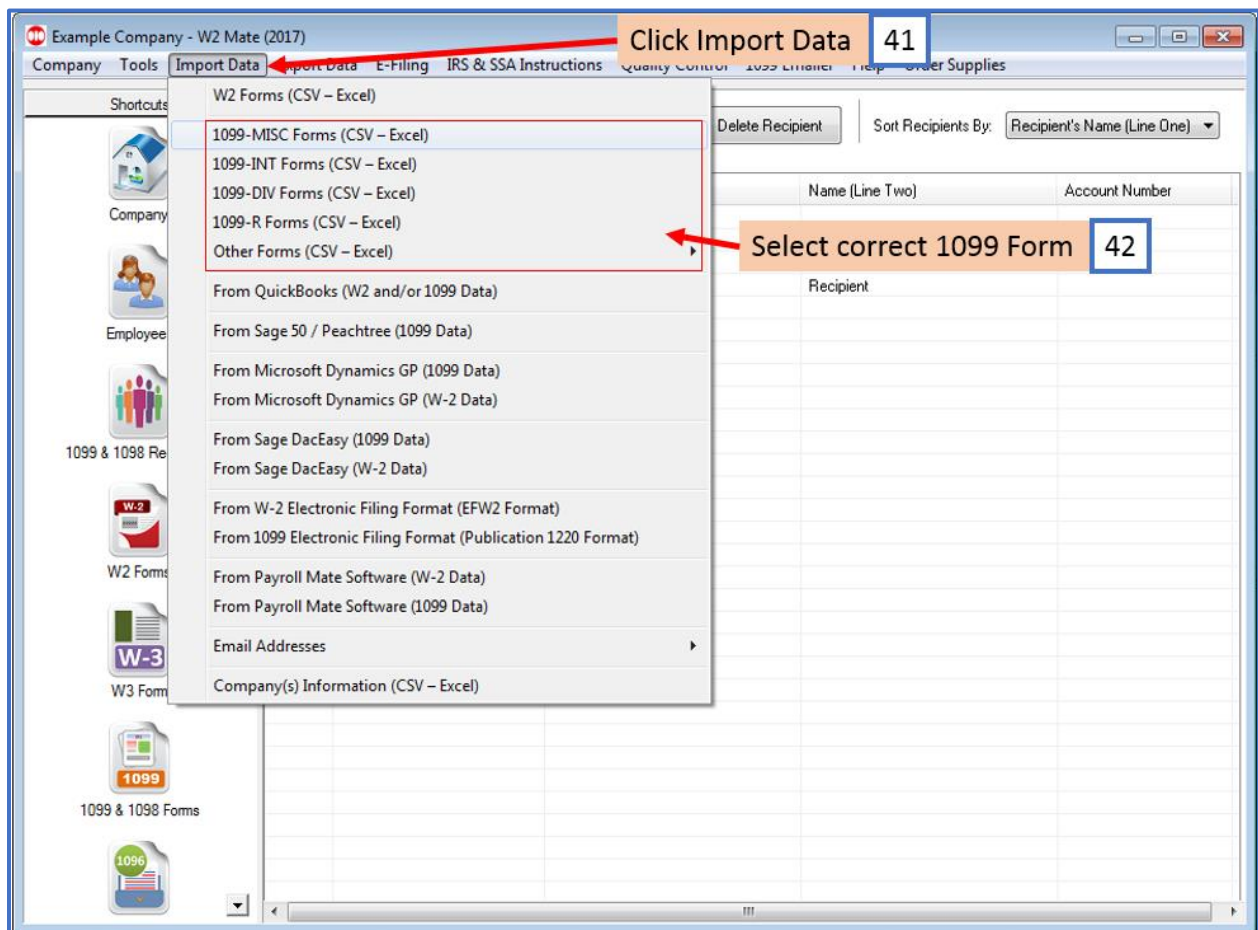
Now you are ready to import your 1099 data into W2 Mate  
Data will need to be imported one company at a time

**To import your data into W2 Mate:**

Make sure you have the correct Company open inside W2 Mate

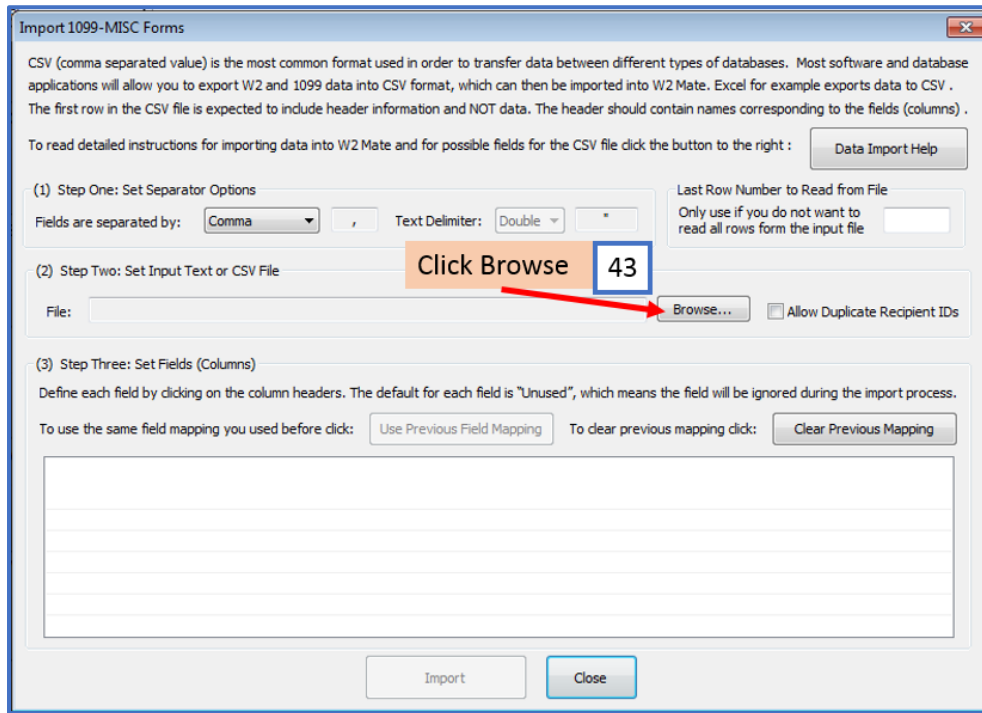
41. Click Import Data

42. Select correct 1099 Form



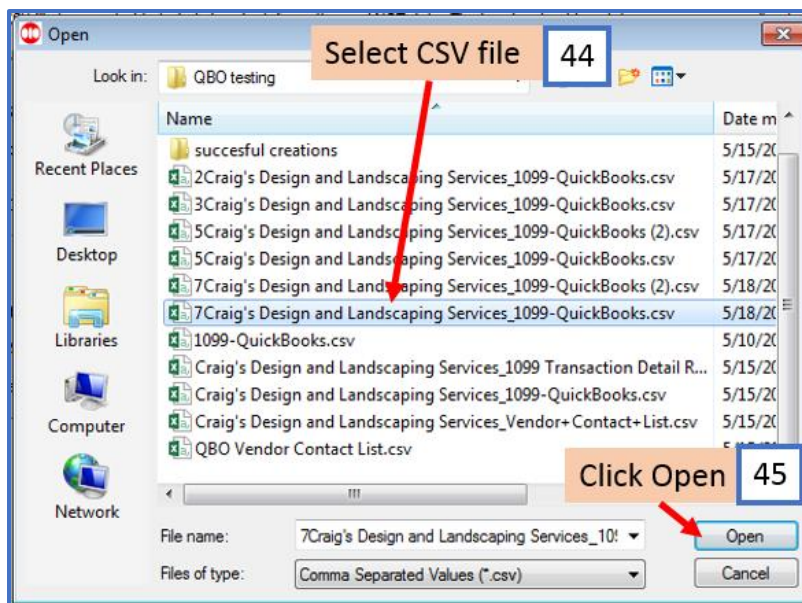
This will open the Import 1099 Forms wizard (for this example 1099-MISC is used)

43. Click Browse to select the correct CSV data file to import



44. Select the CSV file created by W2 Mate QuickBooks Online Helper

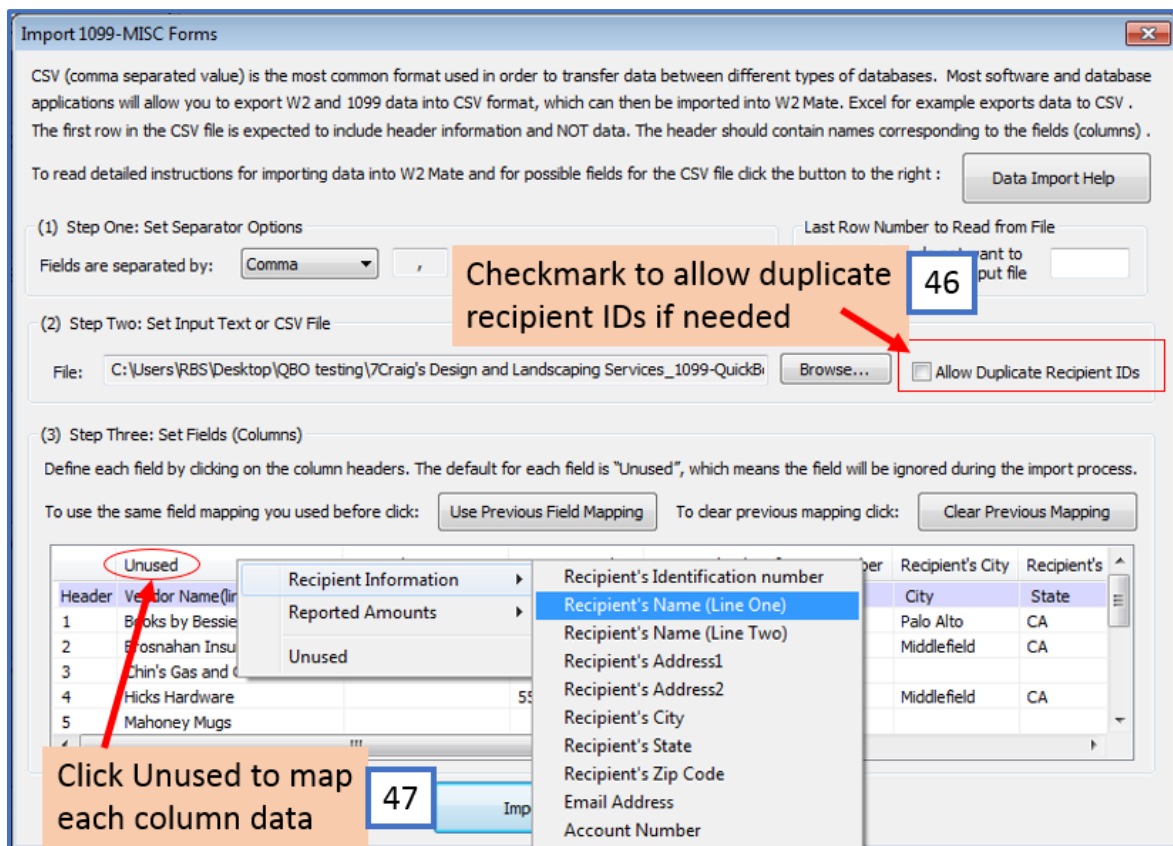
45. Click Open



46. Checkmark to allow duplicate recipient IDs if needed

47. Map each field by clicking on each column and selecting the correct column data

Note: When mapping your columns, click the word “Unused” for each column and select the correct column description to use for mapping the data



Note: Any column with missing data in this panel (Tax ID, Address, etc.) will cause that recipient to NOT import into W2 Mate

#### 48. When you have all the fields mapped, Click Import

Import 1099-MISC 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:  , Text Delimiter:  \*

Last Row Number to Read from File  
Only use if you do not want to read all rows from the input file

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

File:  [Browse...](#) ☐ Allow Duplicate Recipient IDs

(3) Step Three: Set Fields (Columns)

Define each field by clicking on the column headers. The default for each field is "Unused", which 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](#)

	Recipient's Name (Line One)	Unused	Account Number	Recipient's Identification number	Recipient's City	Recipient's State
Header	Vendor Name (line 1)	Vendor Name (line 2)	Account	Tax ID	City	State
1	Books by Bessie		1345		Palo Alto	CA
2	Brosnahan Insurance Agency		7653		Middlefield	CA
3	Chin's Gas and Oil					
4	Hicks Hardware		556223		Middlefield	CA
5	Mahoney Mugs					

[Click Import](#) 48

[Import](#) [Close](#)

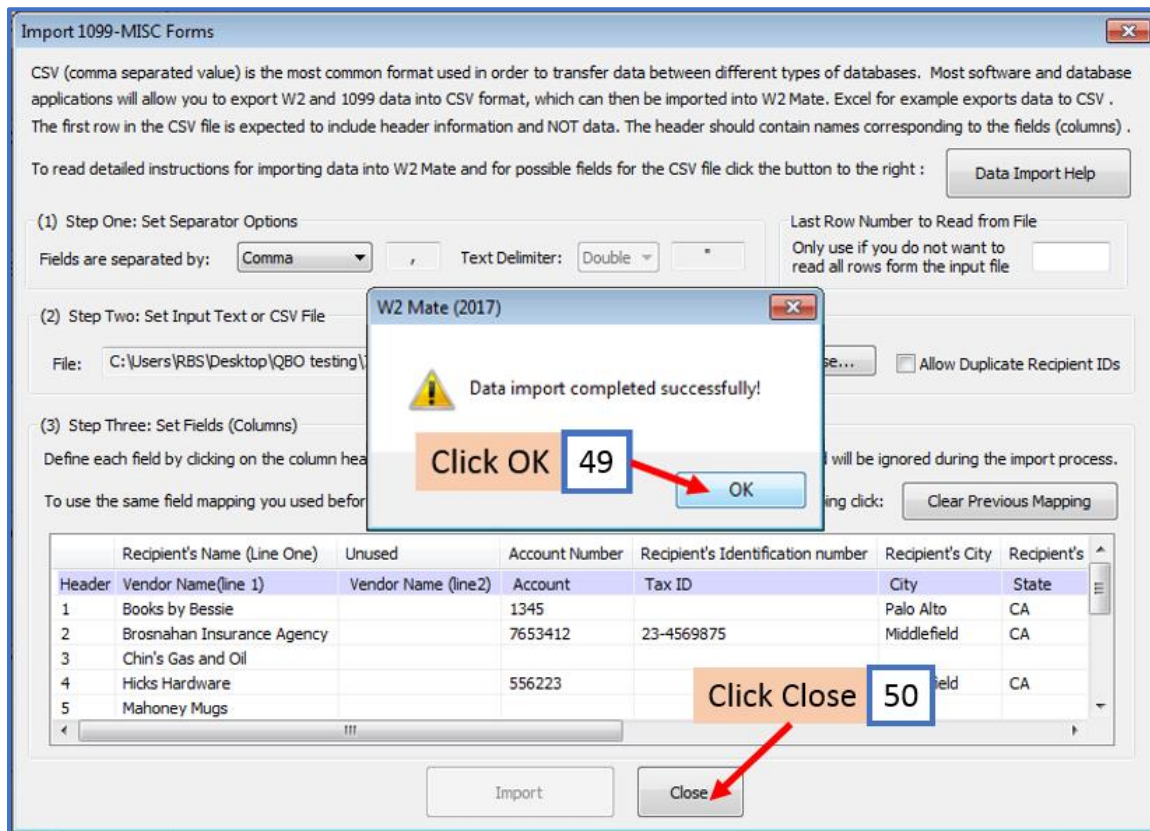
Note: The most common error during import is duplicate or incorrectly formatted 1099 data. The import engine in W2 Mate uses a highly advanced detection system which can identify and report the most common import data errors BEFORE the data is imported.

If you receive any errors in regards to the data in the CSV file, you will need to open the CSV file, make the needed corrections, resave the CSV file, then import the corrected file into W2 Mate.

Corrections cannot be made on the panel above, this is a mapping utility only not an editor.

49. Click OK when you receive the Data Import completed successfully message

50. Click Close to exit the 1099 Import wizard



Your recipients and their 1099 data are now inside W2 Mate