How to Import 1098 Data in W2 Mate

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

Make sure you have the correct Company open inside W2 Mate

- 1. Click Import Data
- 2. Select Other Forms (CSV Excel)
- 3. Select 1098 Forms

If you need help converting your Excel to a CSV please see "Creating a CSV from an Excel Spreadsheet" at the bottom of this tutorial

D Example Company - W2 Mate (2017)								
Company Tools	Import Data Front Data E-Filing IRS & SSA Instructions Quality Co	ontrol 1099 Emailer Help Order Supplies						
Shortcuts	W2 Forms (CSV – Excel)	Oligh June and Data 1						
	1099-MISC Forms (CSV – Excel)	Delete Recipier Click Import Data 1 e (Line One) -						
	1099-INT Forms (CSV – Excel)		_					
	1099-DIV Forms (CSV – Excel)	Select Other Forms (CSV-Excel)	2					
Company	1099-R Forms (CSV – Excel)							
	Other Forms (CSV – Excel)	Select 1098 Forms						
	From QuickBooks (W2 and/or 1099 Data)	1099-A Forms	3					
Employee	From Sage 50 / Peachtree (1099 Data)	1099-C Forms	-					
	From Microsoft Dynamics GP (1099 Data)	1099-PATR Forms						
	From Microsoft Dynamics GP (W-2 Data)	1099-OID Forms						
1 TR								
1099 & 1098 Re	From Sage DacEasy (1099 Data)	1098-T Form						
	From Sage DacEasy (W-2 Data)	1098 Forms						
W-2	From W-2 Electronic Filing Format (EFW2 Format)	1099-K Forms						
	From 1099 Electronic Filing Format (Publication 1220 Format)							
W2 Forms	From Payroll Mate Software (W-2 Data)							
	From Payroll Mate Software (1099 Data)							
	Email Addresses	>						
W-3								
W3 Form	Company(s) Information (CSV – Excel)							
1099								
1099 & 1098 F	oms		-					
1096								
1000 5								
1096 Form								

This will open the Import 1098 Forms wizard

4. To get detailed help with the import process, click on the Data Import Help button

Note: CSV files typically use a comma separator. Leave the separator options to default unless otherwise specified.

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

a. Once you select the input file you should see a preview for the contents of the file

Note: The first row is expected to include header information and NOT data. The header should contain names corresponding to the fields (columns) in the file and should contain the same number of fields (columns) as the records in the rest of the CSV file.

Example Company - W2 Mate (2017) Company Tools Import Data Export Data E-Filing IRS & SSA Instructions Quality Control 1099 Emailer Help Order Supplies								
Shortcuts	General Information W3 Information 1096 Information Employer's Name / Filer's Name: Example Company Import 1098 Forms							
Company	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 corresponde to the fields (columns) .							
1099 & 1098 Recipients (1) Step One: Set Separator Options Last Row Number to Read from File 1099 & 1098 Recipients (2) Step Two: Set Input Text or CSV File Click Browse to Select CSV data file								
W2 Forms	File: Y: \Ang Data Preview 5a .csv 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.							
W-3 W3 Form	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							
1099 & 1098 Forms	Header PAYER'S/BORROWER'S social security # PAYER'S/BORROWER'S name (line one) PAYER'S/BORROWER'S name (line two) PAYER'S/BORR 1 524-96-7422 John Doe 65 Rose Rd. 65 Rose Rd.							
1096 Form	< III > Import Close							

6. Map your fields

When mapping your columns, click the word "Unused" for each column and select the correct column description to use for mapping the data

a. Map data by LEFT clicking the mouse on each column and select the correct column data

Example Company - W2 Ma						
Company Tools Import Dat	a Export Data E-Filing IRS & SSA Instructions Quality Control 1099 Emailer Help Order Supplies					
Shortcuts	General Information W3 Information 1096 Information Employer's Name / Filer's Name: Example Company					
Company	Import 1098 Forms					
Employees	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					
(iii i)	(1) Step One: Set Separator Options Fields are separated by: Comma , Text Delimiter: Double * Only use if you do not want to read all rows form the input file					
1099 & 1098 Recipients	(2) Step Two: Set Input Text or CSV File					
W2 Forms	File: Y:\Angela\W2 MATE\CSV examples\1098-Data.csv Browse Allow Duplicate Recipient IDs (3) Step Three: Set Fields (Columns) Map each column 6 Define each field by clicking on the column headers. The default for each field is "Unused", Inich means the field will be ignored during the import process.					
To use the same field mapping you used before dick: Use Previous Field Mapping To clear previous mapping click: C						
W3 Form	Unused PAYEP'S/BORDOM/EP'S name (Line One) PAYEP'S/BORDOM/EP'S name (Line Two) PAYEP'S/BORDOM/EP'S nam					
	Header PAYER'S/BORROWER'S soda Recipient information PAYER'S/BORROWER'S name (Line One) 1 524-96-7422 Reported Amounts PAYER'S/BORROWER'S name (Line One) Unused PAYER'S/BORROWER'S name (Line Two) PAYER'S/BORROWER'S name (Line Two)					
1099	PAYER'S/BORROWER'S City					
1099 & 1098 Forms	Left click each "Unused" 6a PAYER'S/BORROWER'S State PAYER'S/BORROWER'S Zip Code Account Number					
1096 Form	Import Close					
1036 Pom						

	General Information W3 Information 1096 Information					
Ma /	Employer's Name / Filer's Name: Example Company					
Company	Import 1098 Forms					
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inter	Fields are separated by: Comma , Text Delimiter: Double read all rows form the input file					
199 & 1098 Recipients	(2) Step Two: Set Input Text or CSV File					
W-2	File: Y:\Angela\W2 MATE\CSV examples\1098-Data.csv Browse Allow Duplicate Recipient II					
W2 Forms	(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 proces To use the same field mapping you used before click: Use Previous Field Mapping To dear previous mapping click: Clear Previous Mapping					
W-3	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					
	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 proces To use the same field mapping you used before click: Use Previous Field Mapping To dear previous mapping click: Clear Previous Mapping					

7. When you have all the fields mapped, Click Import

Note: The most common error during import is duplicate or incorrectly formatted 1098 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.

- 8. When you receive the Data Import completed successfully Click OK
- 9. Click Close to exit the 1098 Import wizard

💭 Example Company - W2 Mate (2017)						
Company Tools Import Data	Export Data E-Filing IRS & SSA Instructions Quality Control 1099 Emailer Help Order Supplies					
Shortcuts	General Information W3 Information 1096 Information Employer's Name / Filer's Name: Example Company					
Company	Import 1098 Forms					
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1099 & 1098 Recipients	(2) Step Two: Set Input Text or CSV File W2 Mate (2017)					
W2 Foms	File: Y:\Angela\W2 MATE\CSV examples\: (3) Step Three: Set Fields (Columns)					
W-3	Define each field by dicking on the column heater and the import process. To use the same field mapping you used befor OK Clear Previous Mapping					
W3 Form	PAYER'S/BORROWER'S social security number PAYER'S/BORROWER'S name (Line One) PAYER'S/BORROWER'S name (Line Two) PAYER'S Header PAYER'S/BORROWER'S social security # PAYER'S/BORROWER'S name (line one) PAYER'S/BORROWER'S name (line two) PAYER'S					
1099	1 524-96-7422 John Doe 65 Rose					
1099 & 1098 Forms	Click Close 9					
1096 Form	Import Close					

Your new recipients and their 1098 data are now saved in W2 Mate

Creating a CSV (Comma Separated Value) from an Excel Spreadsheet

Note: In order to import your recipient 1099/1098 data into W2 Mate, the data must be in a CSV format

Open the correct 1099/1098 Data Excel File

1. Click File from the top menu bar

E	Click File 1									
File Home Insert Page Layout Formulas Data Review View Help Q Tell me what you want to do										
Pas	te ≪ Format Pair		$ \begin{array}{c} \mathbf{A}^{*} \mathbf{A}^{*} \\ \mathbf{A}^{*} \mathbf{A}^{*} \end{array} \equiv \equiv \equiv = $			Cond Forma	£ 2 _	lormal leutral		
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1	Recipient's ID #	Recipient's name line 1	Recipient's name line 2	Recipient's address 1	Recipient's address 2	Recipient's city	Recipient's state	Recipient's zip		
2	999887777	Sally Sample		101 Main		Chicago	IL			
3	777889999	John Doe		505 State		Chicago	IL			
4	111223333	Tim Test		123 Street		Orland Park	IL			
5										
6										
7										

- 2. Click Save As
- 3. Click Browse to select location to save file
- 4. Use the drop down to select the correct "Save as type" for the file

Note: There may be several different CSV formats to choose from For W2 Mate, the correct format type is "CSV (Comma delimited) (*.csv)"

¢	Click Save As		the Save as type dropdown 4
Info	Save As	to s	elect the .csv type of file
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Options		Excel 97-2003 Workbook (*.xls) CSV UTF-8 (Comma delimited) (*.csv) XML Data (*.xml)	
options		Hide Folders Single File Web Page (*.mht;*.mhtml) Web Page (*.htm;*.html)	
		Excel Template (*.xltx) Excel Macro-Enabled Template (*.xltm) Excel 97-2003 Template (*.xlt)	
		Text (Tab delinited) (*.bt) Unicode Text (*.bt)	
		XML Spreadsheet 2003 (*.xml) Microsoft Excel 5.0/95 Workbook (*.xls)	
		CSV (Comma delimited) (*.csv) Formatted Text (Space delimited) (*.prn) Text (Macintosh) (*.bt)	
		Text (Macintosh) (".sxt) Text (MS-DOS) (*.bxt) CSV (Macintosh) (*.csv)	
		CSV (MS-DOS) (*.csv) DIF (Data Interchange Format) (*.dif)	
		SYLK (Symbolic Link) (*.slk) Excel Add-in (*.xlam)	
		Excel 97-2003 Add-in (* xla) PDF (* .pdf) XPS Document (* .xps)	
		XP'S Document ("xps) Strict Open XML Spreadsheet ("xlsx) OpenDocument Spreadsheet (".ods)	

5. Click Save

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This is the file you will choose when importing your data into W2 Mate