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
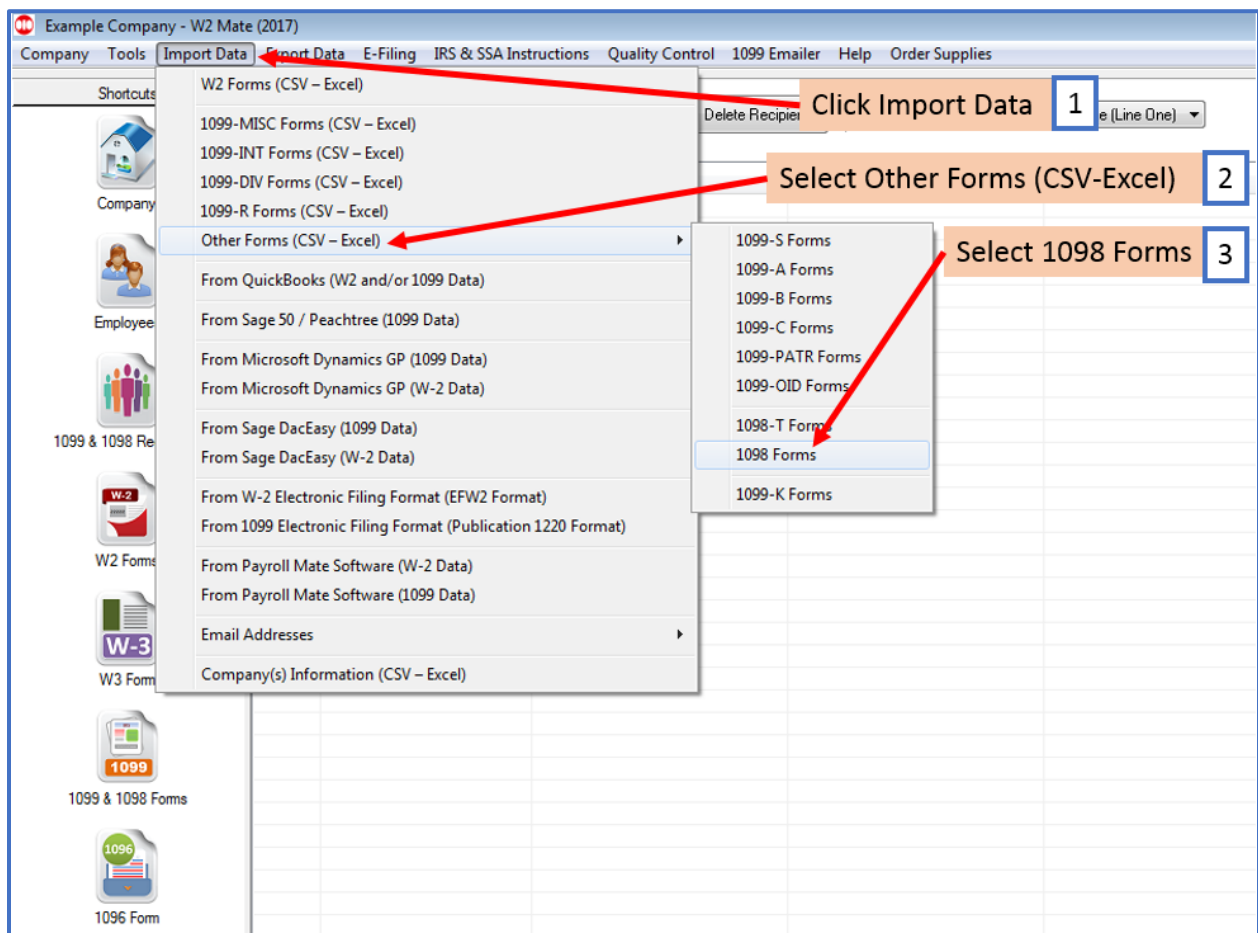
Make sure you have the correct Company open inside W2 Mate

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

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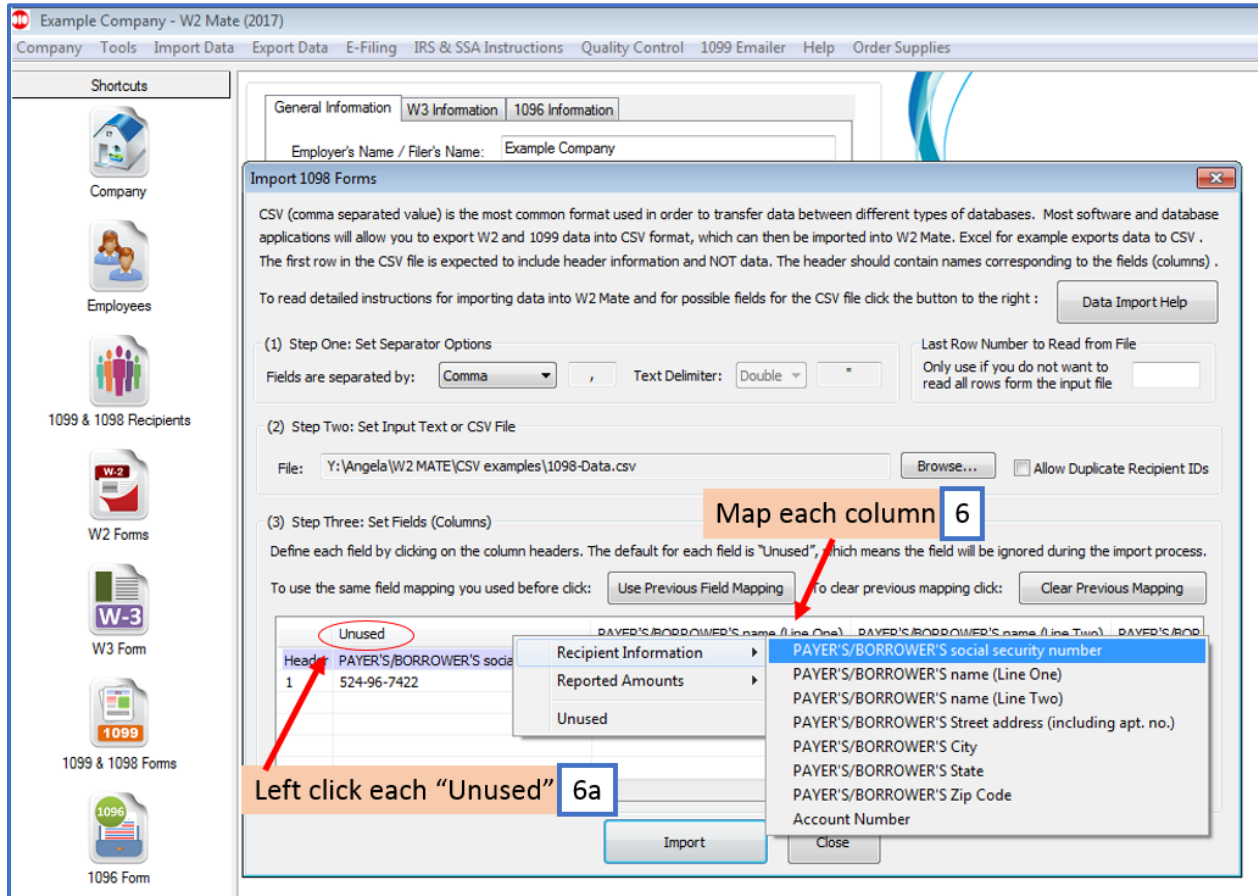   a. Once you select the input file you should see a preview for the contents of the file

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.
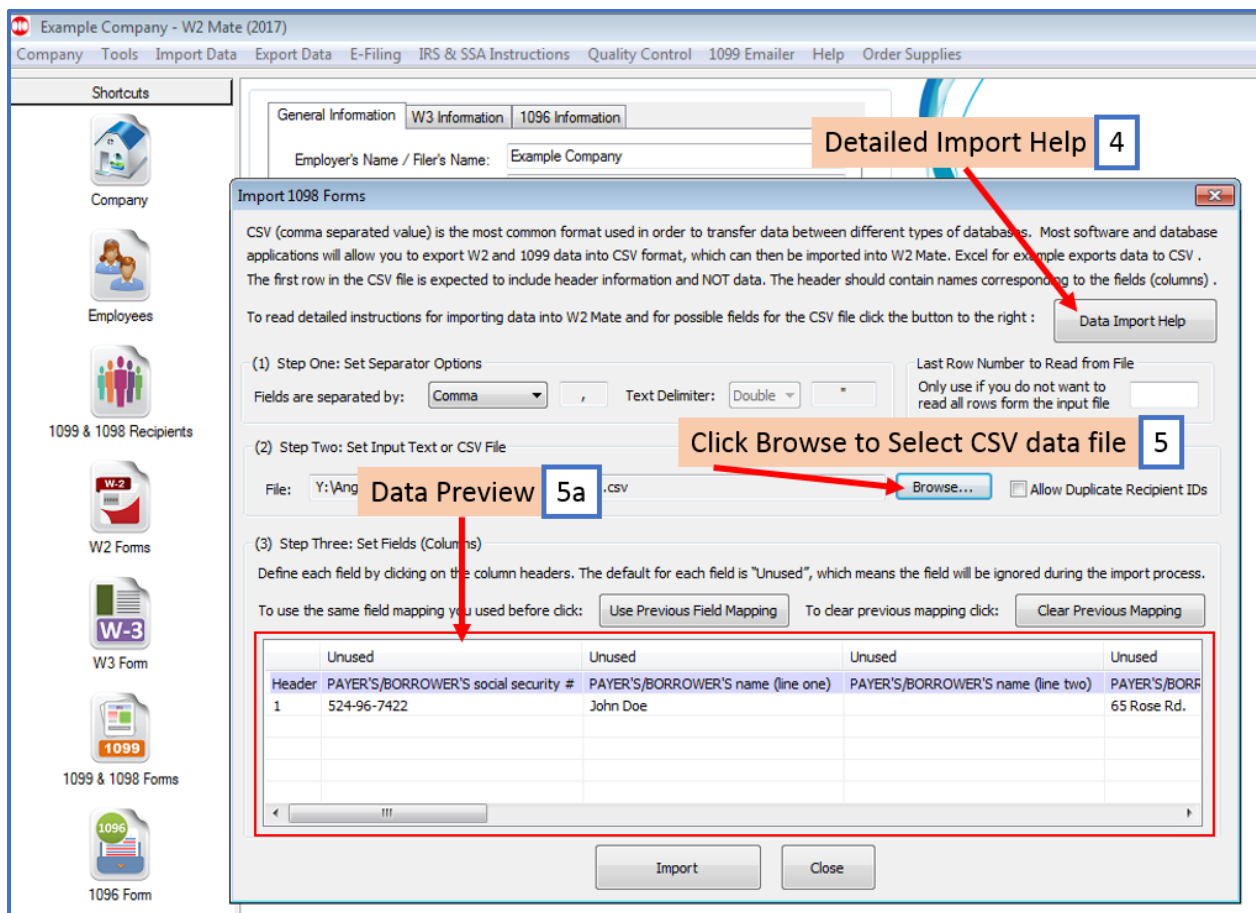
6. Map your fields
When mapping your columns, click the word "Unused" for each column and select the correct column description to use for mapping the data
    a. Map data by LEFT clicking the mouse on each column and select the correct column data

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
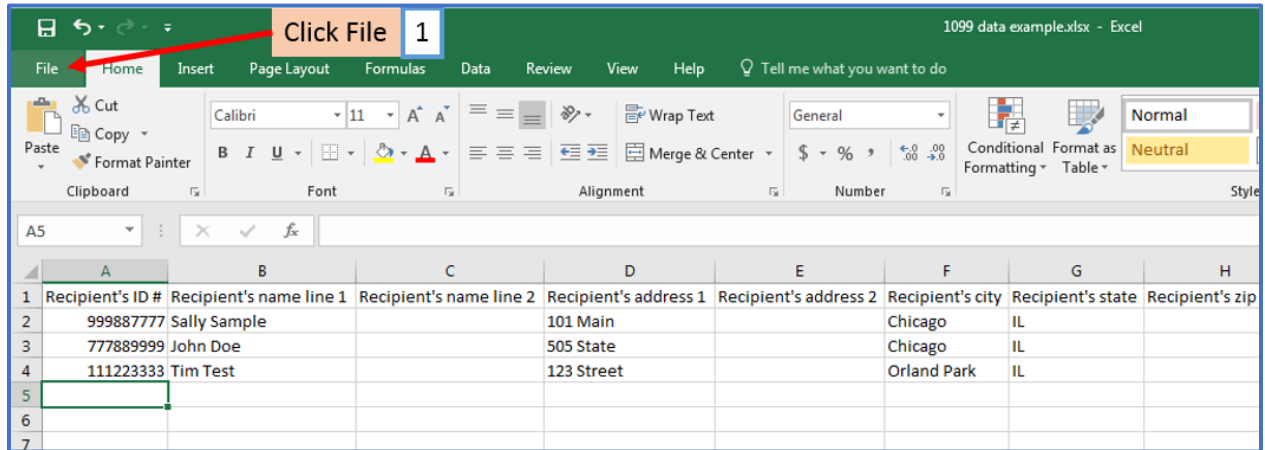
9. Click Close to exit the 1098 Import wizard
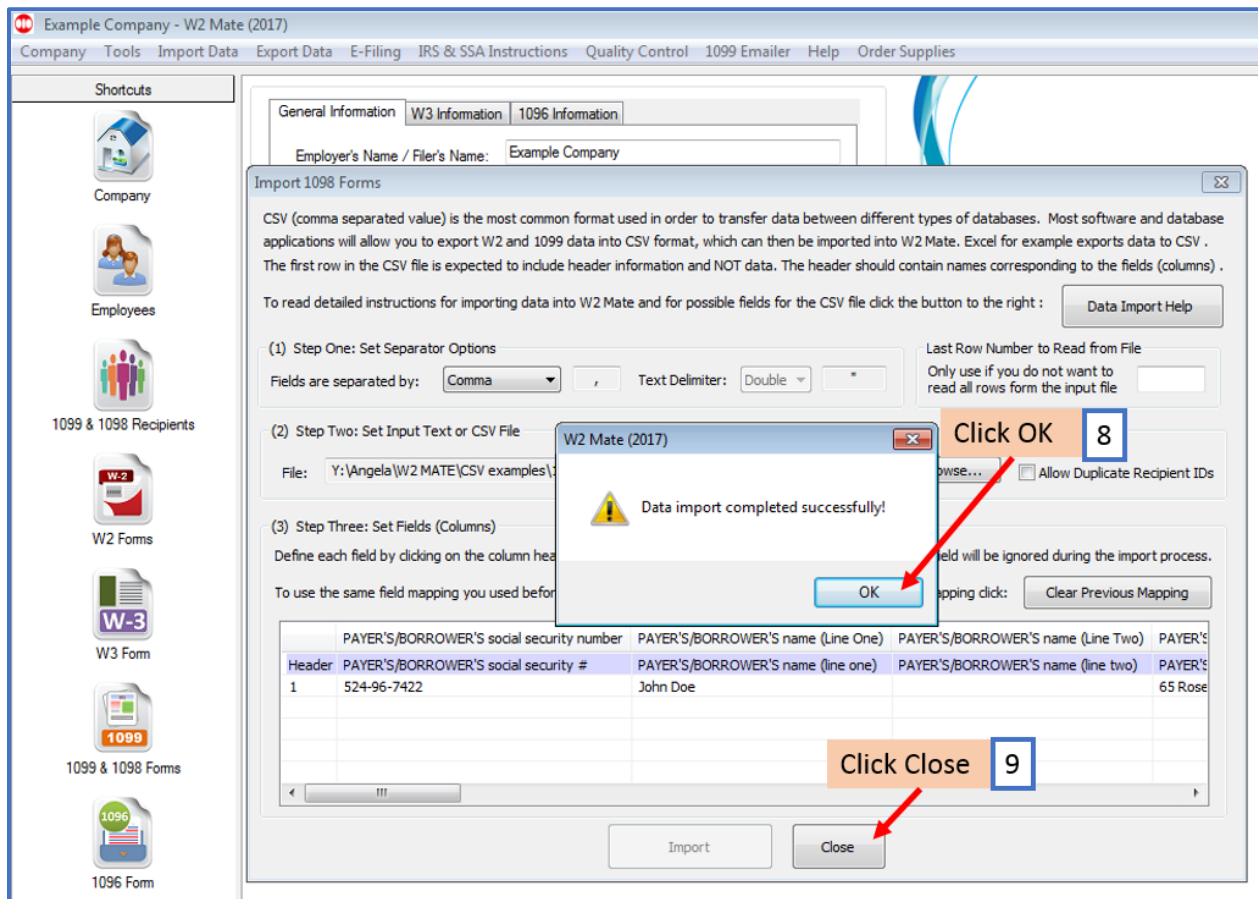
Your new recipients and their 1098 data are now saved in W2 Mate

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
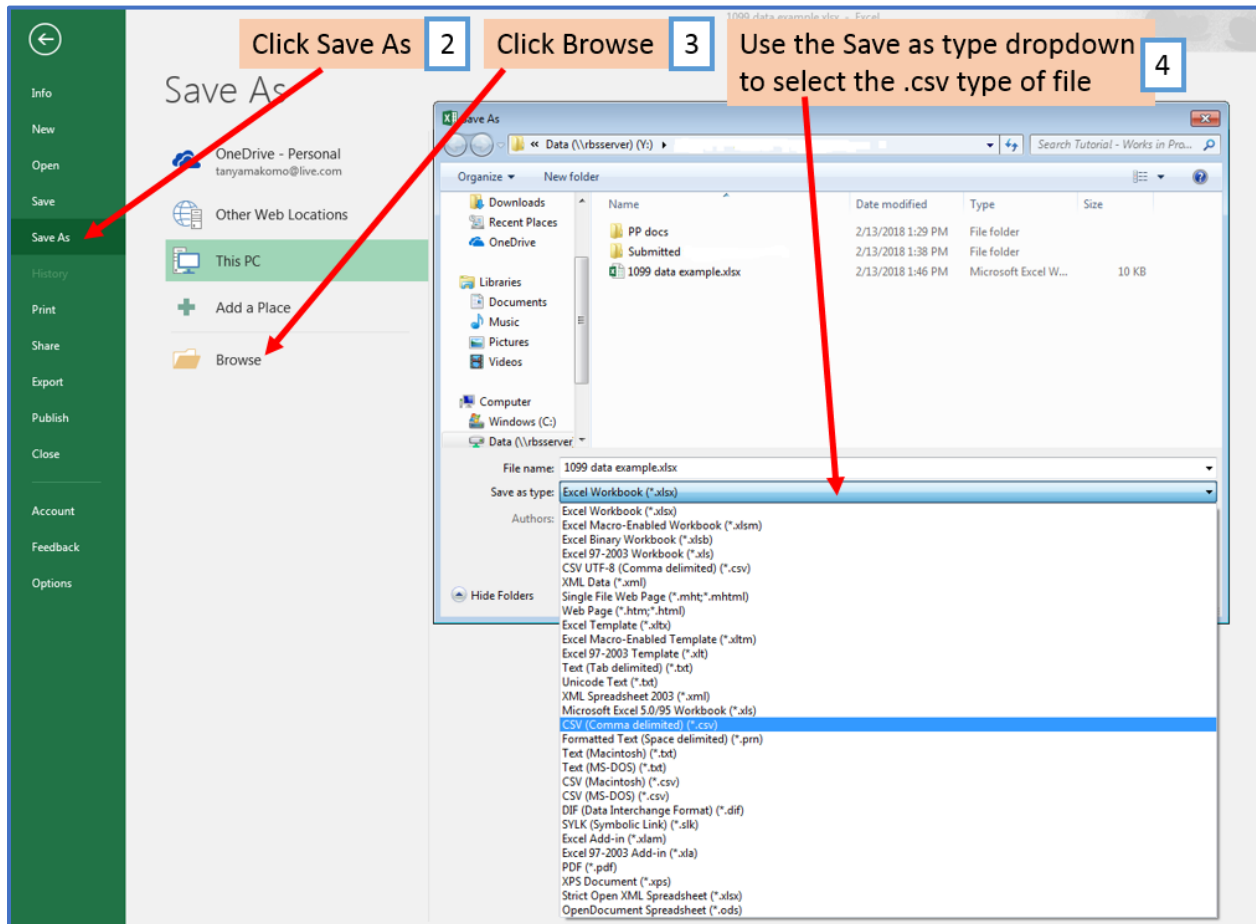
1. Click File from the top menu bar

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)"

5. Click Save

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