

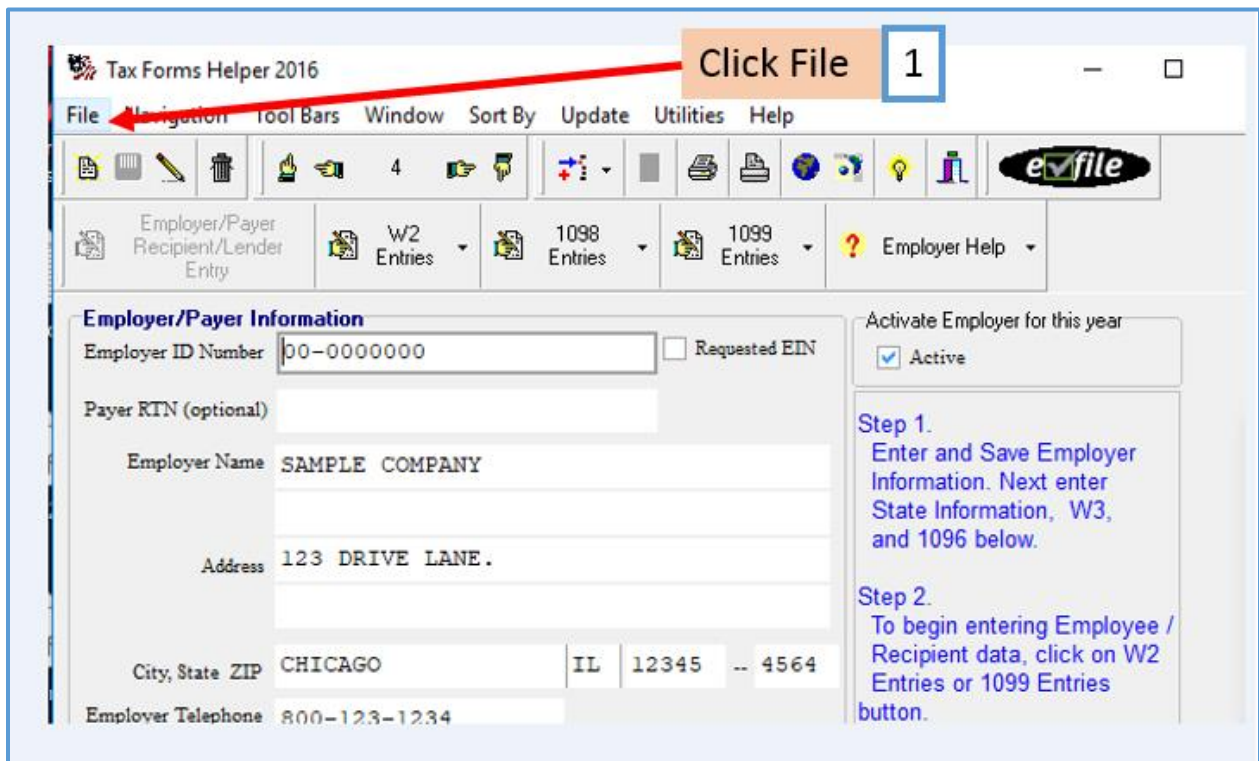
# How to Import 1099-MISC Data from Adams Tax Forms Helper

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 Adams Tax Forms Helper to a CSV (Comma Separated Value) spreadsheet file and then import inside W2 Mate

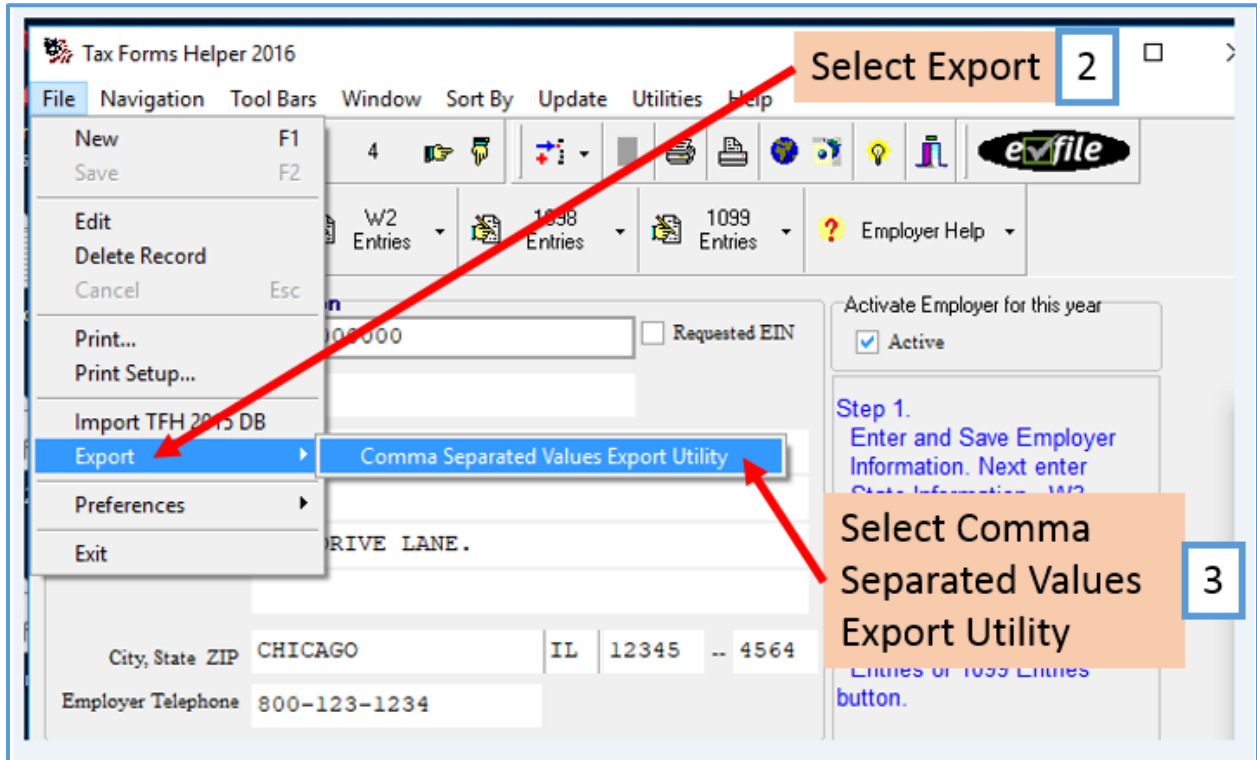
## To export your data from Tax Forms Helper:

1. Click on "File" from the top menu



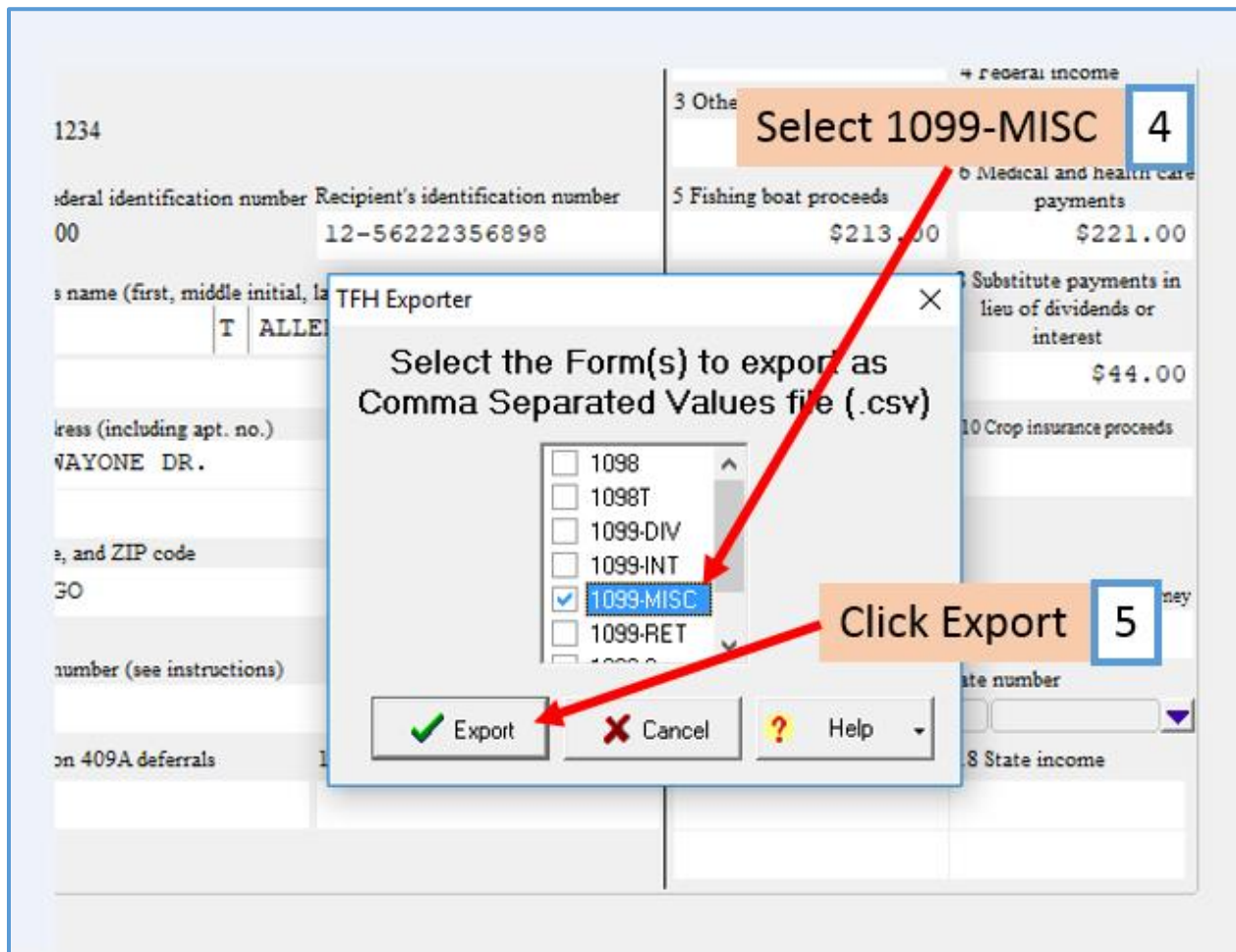
2. Select Export

3. Select Comma Separated Values Export Utility



4. TFH Exporter will open. Select 1099-MISC

5. Click Export

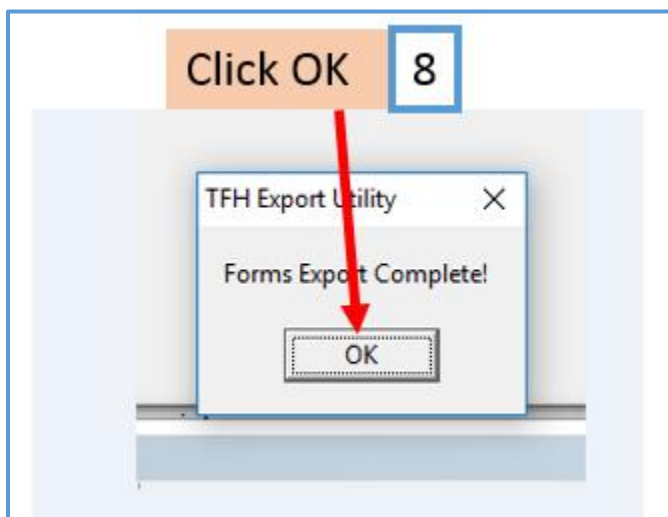


6. Select location to save exported file

7. Save file as a Comma Separated Values type file



8. Click OK

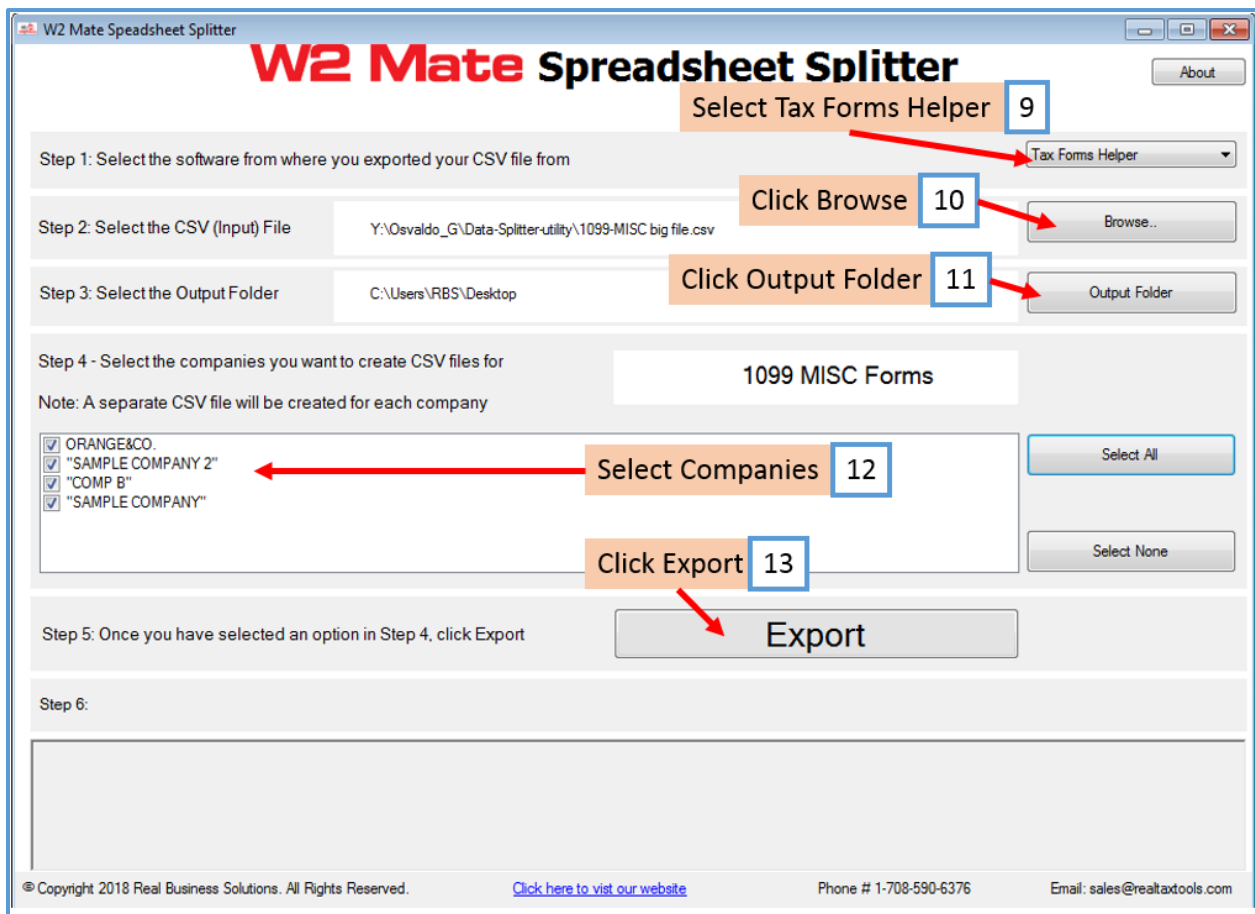


Tax Forms Helper combines all the companies into the same file. If you have multiple companies, you can download and use the W2 Mate Spreadsheet Splitter to separate each company into a new CSV file:

<http://www.1099tutorial.com/download/w2-mate-spreadsheet-splitter-1.html>

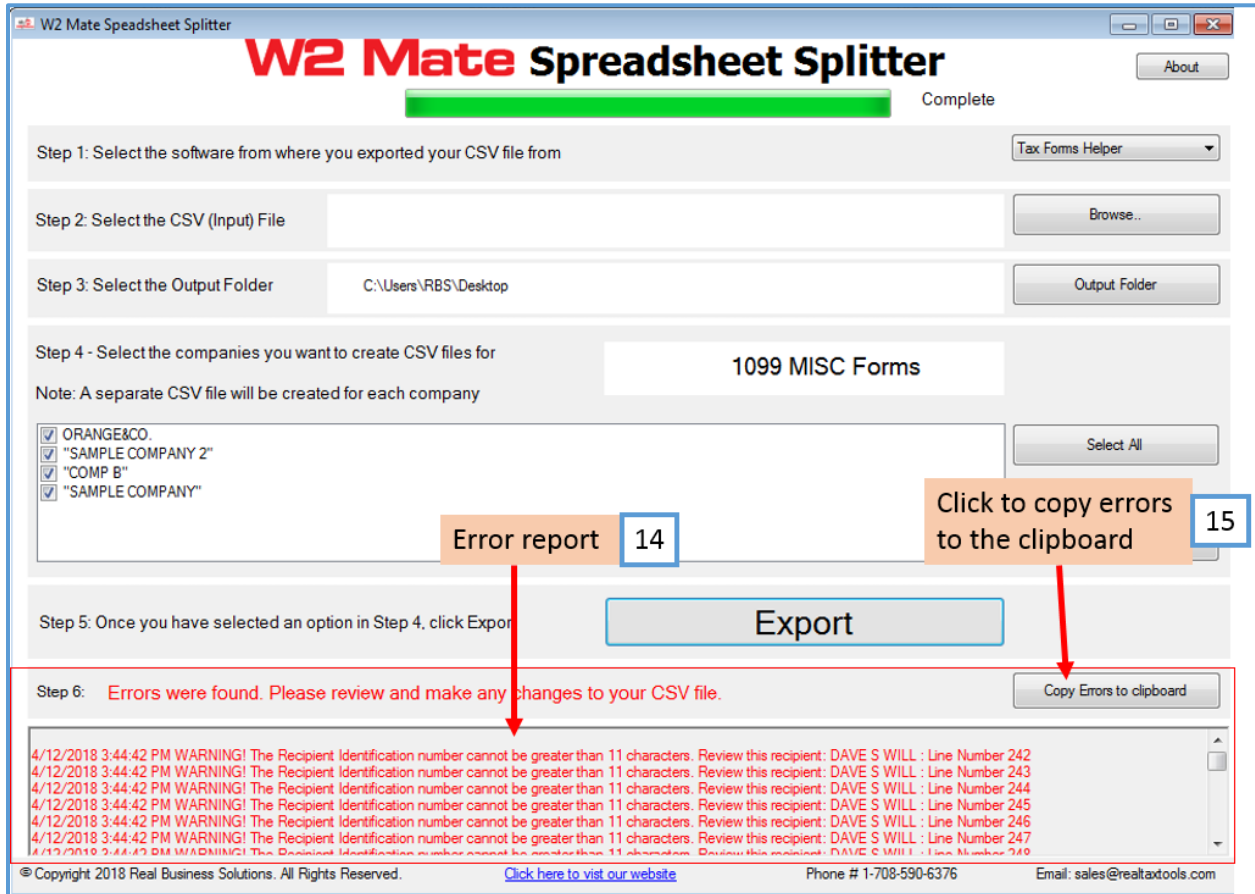
Once the W2 Mate Spreadsheet Splitter is open:

9. Select Tax Forms Helper from drop down menu
10. Click Browse to select the CSV file created from Tax Forms Helper
11. Click Output Folder to select the location to save the new CSV files
12. Select the companies
13. Click Export



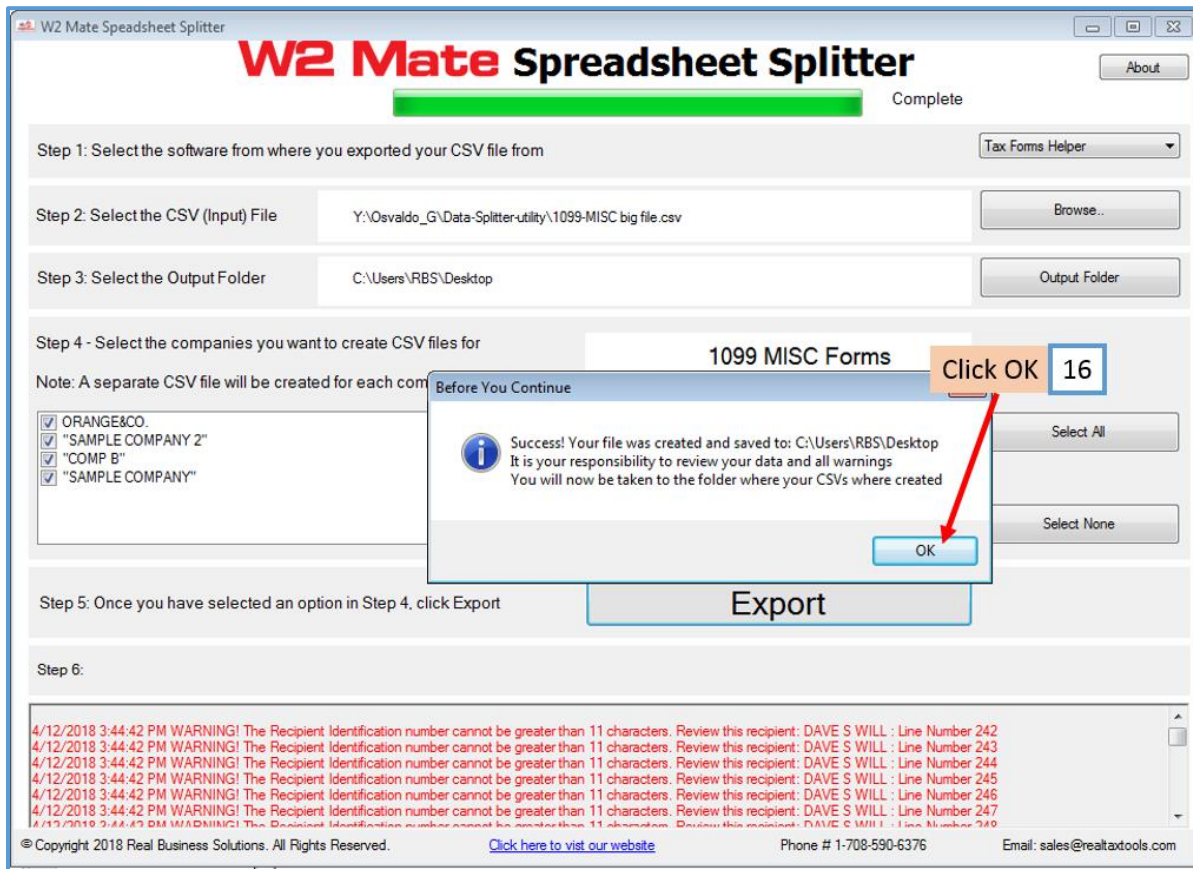
14. If there are errors in the CSV file, they will be listed here

15. Click Copy Errors to clipboard (if desired) then paste to a word document and print out to assist you with correcting any errors found



16. Click OK

Note: This will open the folder location where the new CSV files were saved



17. There should now be a CSV file for each company

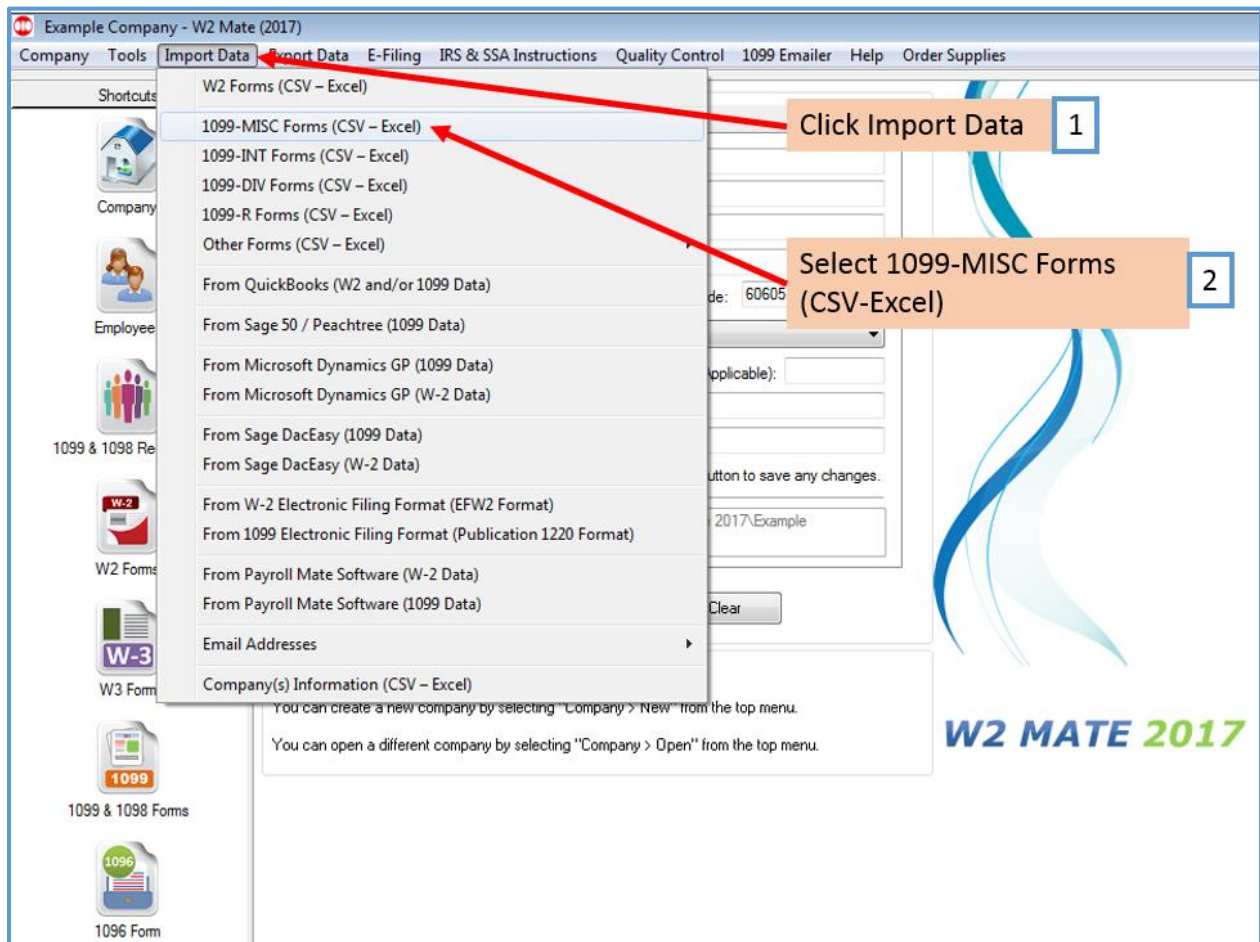


Now you are ready to import your 1099-MISC data into W2 Mate one company at a time.

### To import your data into W2 Mate:

Make sure you have the correct Company open inside W2 Mate

1. Click Import Data
2. Click 1099-MISC Forms (CSV – Excel)



This will open the Import 1099-MISC Forms wizard

3. 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

4. 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

Company

Employees

1099 & 1098 Recipients

W2 Forms

W-3

W3 Form

1099 & 1098 Forms

1096 Form

General Information W3 Information 1096 Information

Employer's Name / Filer's Name: Example Company

Address 1: 123 Main

Detailed Import Help 3

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: Comma , Text Delimiter: Double \*

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: Y:\A Data Preview 4a.csv

Browse... Allow Duplicate Recipient IDs

Click Browse to Select CSV data file 4

(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 Identification number | Recipient's Name (Line One) | Recipient's Name (Line Two) | Recipient's Address1 | Recipient's Address2 |
|--------|-----------------------------------|-----------------------------|-----------------------------|----------------------|----------------------|
| Header | ID #                              | Name (line one)             | Name (line two)             | Address1             | Address2             |
| 1      | 864411123                         | John Doe                    |                             | 65 Roes Rd.          | Suite 100            |
|        |                                   |                             |                             |                      |                      |
|        |                                   |                             |                             |                      |                      |

Import Close

## 5. 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

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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

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| Header | ID #      | Name (line one) | Recipient's Name (Line Two) | Recipient's Address1 | Recipient's Address2 |
|--------|-----------|-----------------|-----------------------------|----------------------|----------------------|
| 1      | 864411123 | John Doe        |                             |                      |                      |

Map each column 5

Left click each "Unused" 5a

- Recipient Information
- Reported Amounts
- Unused
- Recipient's Identification number
- ✓ Recipient's Name (Line One)
- Recipient's Name (Line Two)
- Recipient's Address1
- Recipient's Address2
- Recipient's City
- Recipient's State
- Recipient's Zip Code
- Email Address
- Account Number

Import Close

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

Example Company - W2 Mate (2017)

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Shortcuts

Company

Employees

1099 & 1098 Recipients

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W3 Form

1099 & 1098 Forms

1096 Form

General Information W3 Information 1096 Information

Employer's Name / Filer's Name: Example Company

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|        |                                   |                             |                             |                      |                      |
|        |                                   |                             |                             |                      |                      |
|        |                                   |                             |                             |                      |                      |

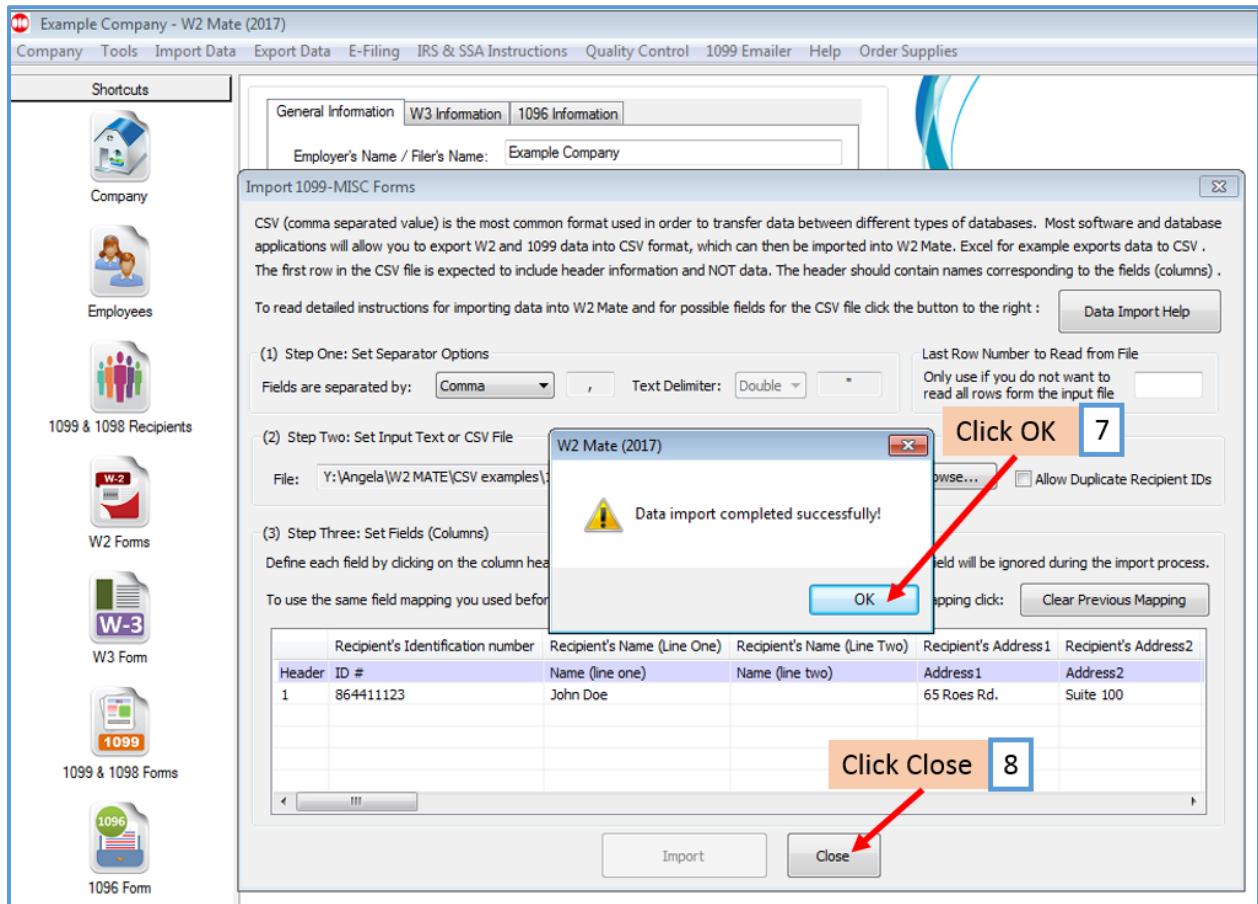
**Click Import** **6**

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.

7. When you receive the Data Import completed successfully Click OK

8. Click Close to exit the 1099 Import wizard



Your new recipients and their 1099-MISC data are now saved in W2 Mate