How to Import 1099-MISC Data in W2 Mate from CSV

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. Click 1099-MISC Forms (CSV Excel)

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

Example Compare	ny - W2 Mate (2017)	
Company Tools	Import Data Amont Data E-Filing IRS & SSA Instructions Quality	Control 1099 Emailer Help Order Supplies
Shortcuts	W2 Forms (CSV – Excel)	
	1099-MISC Forms (CSV – Excel)	Click Import Data 1
T-2	1099-INT Forms (CSV – Excel)	
	1099-DIV Forms (CSV – Excel)	
Company	1099-R Forms (CSV – Excel)	
	Other Forms (CSV – Excel)	Select 1099-MISC Forms
2	From QuickBooks (W2 and/or 1099 Data)	de: 60605 (CSV-Excel)
Employee	From Sage 50 / Peachtree (1099 Data)	
	From Microsoft Dynamics GP (1099 Data)	oplicable):
	From Microsoft Dynamics GP (W-2 Data)	upincaure).
1099 & 1098 Re	From Sage DacEasy (1099 Data)	
	From Sage DacEasy (W-2 Data)	utton to save any changes.
W-2	From W-2 Electronic Filing Format (EFW2 Format)	
	From 1099 Electronic Filing Format (Publication 1220 Format)	2017\Example
W2 Forms	From Payroll Mate Software (W-2 Data)	
	From Payroll Mate Software (1099 Data)	Clear
W-3	Email Addresses	•
W3 Form	Company(s) Information (CSV – Excel)	
1099	You can create a new company by selecting "Company > New You can open a different company by selecting "Company > D	1A/2 MATE 2017
1099 & 1098 Fo	oms	
1096 Form		

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 Ma Company Tools Import Date	i <mark>te (2017)</mark> ta Export Data E-Filing IRS & SSA Insi	ructions Quality Control 1	099 Emailer Heln Order	Supplies	
Shortcuts	General Information W3 Information	1096 Information			
Company	Employer of Hame / Filer of Hame:	Example Company 123 Main	Detaile	ed Import H	elp 3
Employees	Import 1099-MISC Forms CSV (comma separated value) is the most or applications will allow you to export W2 and The first row in the CSV file is expected to in To read detailed instructions for importing d	1099 data into CSV format, which include header information and NO	n can then be imported into W. T data. The header should cor	2 Mate. Excel for examp ntain names correspond	le exports data to CSV .
1099 & 1098 Recipients	(1) Step One: Set Separator Options Fields are separated by: Comma (2) Step Two: Set Input Text or CSV File	, Text Delimiter: Cli	Double	Last Row Number to R Only use if you do not read all rows form the elect CSV da	tead from File t want to input file
W2 Forms	File: Y: W Data Previev (3) Step Three: Set Fields (C lumns) Define each field by clicking on the column				w Duplicate Recipient IDs
W-3 W3 Form	To use the same field mapping you used b	efore click: Use Previous Field	Mapping To clear previous	s mapping dick:	ear Previous Mapping
(1099	Recipient's Identification numb Header ID # 1 864411123	er Recipient's Name (Line One) Name (line one) John Doe	Recipient's Name (Line Two) Name (line two)	Recipient's Address 1 Address 1 65 Roes Rd.	Recipient's Address2 Address2 Suite 100
1099 & 1098 Forms	<				Þ
1096 Form		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

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
8	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
Company	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).
2	To read detailed instructions for importing data into W2 Mate and for possible fields for the CSV file dick the button to the right : Data Import Help
Employees	(1) Step One: Set Separator Options Last Row Number to Read from File
	Fields are separated by: Comma Text Delimiter: Double read all rows form the input file
utu	(2) Step Two: Set Input Text or CSV File
1099 & 1098 Recipients	File: Y:\Angela\W2 MATE\CSV examples\1099-MISC-Data.csv Browse Allow Duplicate Recipient IDs
	(3) Step Three: Set Fields (Columns) 5 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.
W2 Forms	To use the same field mapping you used before click: Use Previous Field Mapping To dear previous mapping click: Clear Previous Mapping
	Unused Recipient's Name (Line Con) Bacipiont's Name Line Two) Bacipiont's Address 1 Bacipiont's Address 2
W-3	Header ID # Name (line one) Recipient Information Recipient's Identification number Recipient's Name (Line One)
W3 Form	1 864411123 John Doe Reported Amounts Recipient's Name (Line One) Recipient's Name (Line Two)
	Unused Recipient's Address1
	Recipient's Address2 Recipient's City
1099 1099 & 1098 Forms	< III Recipient's State
	Recipient's Zip Code
1096	Left click each "Unused" 5a Import Close Email Address Account Number
1096 Form	

pany room important	a Export Data		ions Quality Control 103	semandi map orderst	- F F	
Shortcuts			16 Information			
Company	Import 1099	-MISC Forms				(
Employees	applications The first row	a separated value) is the most com will allow you to export W2 and 10 w in the CSV file is expected to inclu ailed instructions for importing data	199 data into CSV format, which ude header information and NO	n can then be imported into W2 T data. The header should cor	2 Mate. Excel for exam ntain names correspond	ple exports data to CSV
	(1) Step Or	ne: Set Separator Options	 , Text Delimiter: 		Last Row Number to I Only use if you do no read all rows form the	Read from File
1099 & 1098 Recipients	File: Y	wo: Set Input Text or CSV File f:\Angela\W2 MATE\CSV examples hree: Set Fields (Columns)				
W2 Forms	File: Y (3) Step Ti Define eac	Y:\Angela\W2 MATE\CSV examples	aders. The default for each fie		he field will be ignored o	
W2 Forms	File: Y (3) Step Ti Define eac	Y:\Angela\W2 MATE\CSV examples hree: Set Fields (Columns) ch field by dicking on the column he	eaders. The default for each fie		he field will be ignored of smapping click:	lear Previous Mapping
W2 Forms W2 Forms W3 Form	File: Y (3) Step Ti Define eac	r:\Angela\W2 MATE\CSV examples hree: Set Fields (Columns) ch field by dicking on the column he e same field mapping you used befor Recipient's Identification number	eaders. The default for each fie	Mapping To clear previous	he field will be ignored of smapping click:	during the import process lear Previous Mapping
W-3	File: Y (3) Step Ti Define eac To use the Header	f:\Angela\W2 MATE\CSV examples hree: Set Fields (Columns) ch field by dicking on the column he e same field mapping you used befor Recipient's Identification number ID #	eaders. The default for each fie ore dick: Use Previous Field Recipient's Name (Line One) Name (line one)	Mapping To dear previous Recipient's Name (Line Two) Name (line two)	he field will be ignored of smapping click: C Recipient's Address 1 Address 1	during the import process lear Previous Mapping Recipient's Address2 Address2 Suite 100

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

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

😳 Example Company - W2 Mat					
Company Tools Import Data	a Export Data E-Filing IRS & SSA Instruction	ons Quality Control 109	9 Emailer Help Order Su	ipplies	
Shortcuts		6 Information			X
Employees	CSV (comma separated value) is the most comm applications will allow you to export W2 and 105 The first row in the CSV file is expected to induc To read detailed instructions for importing data	99 data into CSV format, which de header information and NO	a can then be imported into W2 T data. The header should con	Mate. Excel for examp tain names correspond	ole exports data to CSV .
	(1) Step One: Set Separator Options Fields are separated by: Comma	, Text Delimiter:	Double 🔻	Last Row Number to F Only use if you do no read all rows form the	t want to e input file
1099 & 1098 Recipients	 (2) Step Two: Set Input Text or CSV File File: Y:\Angela\W2 MATE\CSV examples\ (3) Step Three: Set Fields (Columns) Define each field by clicking on the column here 	🛕 Data import c	ompleted successfully!	owse 🗖 Allo	w Duplicate Recipient IDs
W-3	To use the same field mapping you used befor		OK Recipient's Name (Line Two)	apping click: Cl	ear Previous Mapping
W3 Form	Recipient's Identification number Header ID #	Name (line one)	Name (line two)	Recipient's Address1 Address1	Recipient's Address2 Address2
1099	1 864411123	John Doe	(65 Roes Rd.	Suite 100
1099 & 1098 Forms			Click (Close 8	
1096 Form	<	Import	Close		

Your new recipients and their 1099-MISC 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	∃ 5 •∂-5	Click F	ile 1			1099 data	example.xlsx - Exce	I
Fi	le Home	Insert Page Layout	Formulas Data Re	wiew View Help	🔉 Tell me what you v	vant to do		
Pas	u K Cut ⊡ ⊡ Copy + te ≮ Format Pair					Cond Forma	£ 2 _	lormal leutral
	Clipboard	G Font	G.	Alignment	ra Numbe		2	Style
A5	· ·	$\times \checkmark f_x$						
	А	В	С	D	E	F	G	н
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)"

¢			the Save as type dropdown
Info	Save As	to se	elect the .csv type of file
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		XPS Document (*.xps) Strict Open XML Spreadsheet (*.xlsx) OpenDocument Spreadsheet (*.ods)	

5. Click Save

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) Hide Folders		Click Save	5		Toois	Save	Cance	.

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