How to Import 1099-PATR 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 1099-PATR

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 Compa	iny - W2 Mate (2017)							
Company Tools	Import Data Export Data E-Filing IRS & SSA Instructions Quality Co	ontrol 1099 Emailer Help Ord	ler Supplies					
Shortcuts	W2 Forms (CSV – Excel)	Click Imp	ort Data 1					
	1099-MISC Forms (CSV – Excel)							
No.	1099-INT Forms (CSV – Excel)	Select Other Forms (CSV-Excel) 2						
Community of the second	1099-DIV Forms (CSV – Excel)							
Company	1099-R Forms (CSV – Excel)							
	Other Forms (CSV – Excel)	1099-S Forms	Select 1099-PATR					
2	From QuickBooks (W2 and/or 1099 Data)	1099-A Forms 1099-B Forms	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						
1099 & 1098 Re	From Sage DacEasy (1099 Data)	1098-T Forms						
1033 & 1038 He	From Sage DacEasy (W-2 Data)	1098 Forms						
W-2	From W-2 Electronic Filing Format (EFW2 Format) From 1099 Electronic Filing Format (Publication 1220 Format)	1099-K Forms						
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 1099 & 1098 F	You can create a new company by selecting "Company > New "r You can open a different company by selecting "Company > Ope		W2 MATE 2017					
1096 Form	1							

This will open the Import 1099-PATR 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.

Shortcuts		General Information 14/2 L C					
1	Import 1099-				Detaile	ed Import He	elp 4 🚺
12/		separated value) is the most com					
Company		will allow you to export W2 and 10 in the CSV file is expected to inclu				Second	
		iled instructions for importing data					Data Import Help
	(1) = 1						
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	Fields are s	eparated by: Comma	• , Tex	t Delimiter: Clic	ck Browse to	Select CSV (data file
	(2) Stop Tu	vo: Set Input Total Court	_				_
	(2) Step 11	and a second s	Case of the second s				
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099 & 1098 Recipien			view 5a	5V	Br	owse 🕅 Allow D	uplicate Recipient ID
099 & 1098 Recipien	File: Y	:\Angela\W2	<mark>riew</mark> 5a	īv	Br	owse 🔲 Allow D	uplicate Recipient ID
099 & 1098 Recipien	File: Y	Data Prev		sv for each field is "Ur			
	File: Y (3) Step Th Define ead	: Vangela W2 Tree: Set Fields (Columns) h field by clicking on the column he	eaders. The default		nused", which means the	field will be ignored durin	g the import process
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	File: Y (3) Step Th Define ead	: Vangela W2 Tree: Set Fields (Columns) h field by clicking on the column he	eaders. The default		nused", which means the g To dear previous m	field will be ignored durin	g the import process
	File: Y (3) Step Th Define ead To use the Header	Columns) h field by clicking on the colur n he same field mapping you used befind Unused RECIPIENT'S Tax identification #	eaders. The default ore dick: Use Pr Unused RECIPIENT'S nam	evious Field Mappin Unus	nused", which means the g To dear previous m	field will be ignored durin apping dick: Clear I Unused RECIPIENT'S Address	g the import process Previous Mapping Unused RECIPIENT'S City
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W2 Forms W3 Form W3 Form	File: Y (3) Step Th Define eac To use the Header 1	Columns) h field by clicking on the column he same field mapping you use performed Unused RECIPIENT'S Tax identification # 524-96-7422	eaders. The default ore dick: Use Pr Unused RECIPIENT'S nam	evious Field Mappin Unus	nused", which means the g To dear previous m sed	field will be ignored durin apping dick: Clear I Unused RECIPIENT'S Address	g the import process Previous Mapping Unused RECIPIENT'S City

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

Shortcuts			11/
~	Import 1099-PATR Forms		
Company	CSV (comma separated value) is the most common format used in order to trans applications will allow you to export W2 and 1099 data into CSV format, which co The first row in the CSV file is expected to include header information and NOT do	an then be imported into W2 Mate. B	excel for example exports data to CSV .
20	To read detailed instructions for importing data into W2 Mate and for possible fie		
Employees	(1) Step One: Set Separator Options Fields are separated by: Comma , Text Delimiter:	Only u	w Number to Read from File se if you do not want to I rows form the input file
1099 & 1098 Recipie	(2) Step Two: Set Input Text or CSV File File: Y:\Angela\W2 MATE\CSV examples\1099-PATR-Data.csv	Browse	Allow Duplicate Recipient IDs
W2 Forms	 (3) Step Three: Set Fields (Columns) Define each field by clicking on the column headers. The default for each field To use the same field mapping you used before click: Use Previous Field Mapping 		vill be ignored during the import process.
	Unused RECIPIENT'S name (Line One	Recipient Information	RECIPIENT'S Tax Identification #
W-3	Header RECHENT'S Tax identification # RECIPIENT'S name (line one) 1 524-96 7422 John Doe	Reported Amounts	RECIPIENT'S name (Line One) RECIPIENT'S name (Line Two)
W3 Form	Left click each "Unused" 6a	Unused	RECIPIENT'S Street address (including apt. no RECIPIENT'S City RECIPIENT'S State RECIPIENT'S Zip Code Account Number
1099 & 1098 Forms			

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

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		-			E-Filing	IRS & SSA	Instructi	ons Quality Con	rol 1099	Emailer H	elp Ord	er Supplies			
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		Impor		PATR For											×
								at used in order to tr hto CSV format, whic							
	Company							r information and N							
	4	To re	ad deta	iled instru	ctions for in	nporting data	into W2	Mate and for possibl	fields for	the CSV file di	ck the butt	on to the rig	ght : Da	ta Import Help	
	Employees	(1)	Step Or	ne: Set Sep	parator Opt	tions							er to Read fro		
	Employees	Field	ls are s	eparated b	by: Con	nma	• •	Text Delimiter:	Double	-			do not want t frm the input f		
	i	(2)	Step Tv	vo: Set Inp	put Text or	CSV File									
1099 8	& 1098 Rec	ipien Fil	e: Y	: \Angela \V	V2 MATE\C	SV examples	1099-PA	TR-Data.csv			Bro	wse	Allow Dupli	cate Recipient	IDs
	W2 Forms	Def	ine ead	h field by o	-	-		ne default for each f Use Previous Fiel		ed", which me		-		ne import proce vious Mapping	_
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	W-3	н	eader	RECIPIEN	IT'S Tax ide	ntification #		ENT'S name (line one		IENT'S name (I			T'S Address		
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109	9 & 1098 Fo	oms									1				
	1096							Import		Close	J				
	1096 Form														

Note: The most common error during import is duplicate or incorrectly formatted 1099-PATR 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 1099-PATR Import wizard

Example Company - W	/2 Mate (2017) rt Data Export Data E-Filing IRS & SSA Instructions Quality Control 1099 Emailer Help Order Supplies
Shortcuts	
	Import 1099-PATR 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 .
4	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
Employees	(1) Step One: Set Separator Options Last Row Number to Read from File Fields are separated by: Comma , Text Delimiter: Double * Only use if you do not want to read all rows form the input file
(†)	(2) Step Two: Set Input Text or CSV File W2 Mate (2017) File: Y:\Angela\W2 MATE\CSV examples\1
1099 & 1098 Recipien	(3) Step Three: Set Fields (Columns)
W2 Forms	Define each field by dicking on the column heat and the ignored during the import process. To use the same field mapping you used befor OK Upping click: Clear Previous Mapping
	RECIPIENT'S Tax Identification # RECIPIENT'S name (Line One) RECIPIENT'S name (Line Two) RECIPIENT'S Street address (including ap Header RECIPIENT'S Tax identification # RECIPIENT'S name (line one) RECIPIENT'S name (line two) RECIPIENT'S Address
W-3 W3 Form	1 524-96-7422 John Doe 65 Rose Rd.
	Click Close 9
1099 & 1098 Forms	
1996	Import
1096 Form	

Your new recipients and their 1099-PATR 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

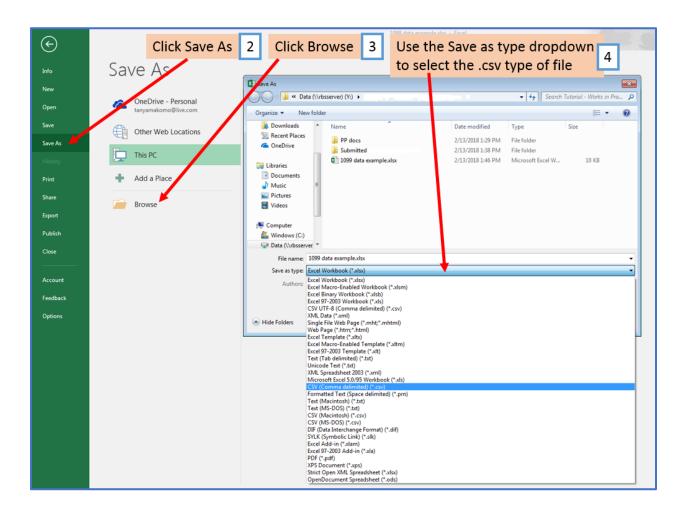
Open the correct 1099/1098 Data Excel File

1. Click File from the top menu bar

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F	ile Home	Insert Page Layout	Formulas Data R	eview View Help	🔉 Tell me what you v	vant to do		
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AS	; • ·	× ✓ fx						
	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)"



5. Click Save

X Save As								— ×
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This is the file you will choose when importing your data into W2 Mate