

# How to Import 1099-R Data in W2 Mate

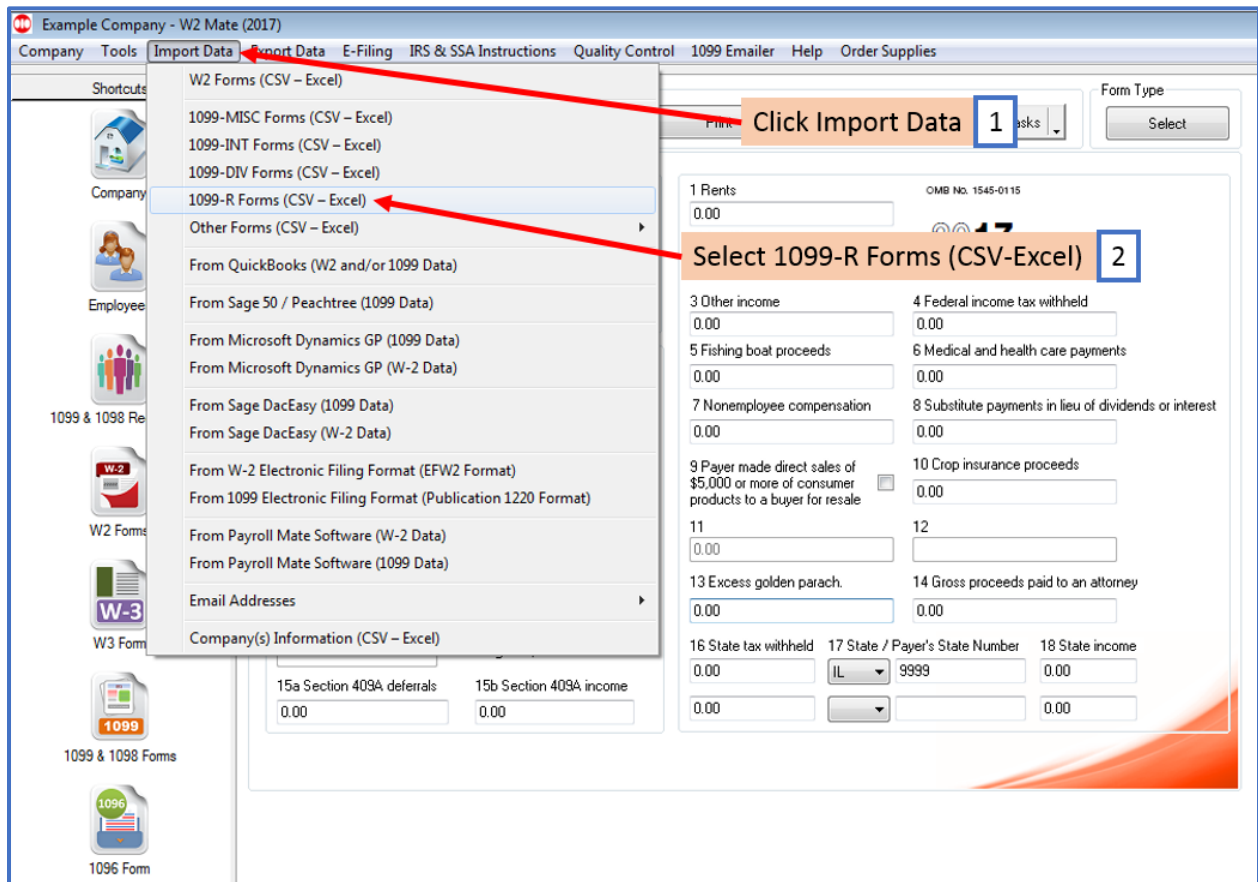
Note: In order to use this feature you must purchase and enable W2 Mate Option #3 to import

Make sure you have the correct Company open inside W2 Mate

1. Click Import Data

2. Click 1099-R 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



This will open the Import 1099-R 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

New 1099 / 1098 Recipient Modify Recipient Delete Recipient Sort Recipients By: Recipient's Name (Line One)

Identification Number Name (Line One) Detailed Import Help 3 Number

Import 1099-R 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 the last row of the file.

(2) Step Two: Set Input Text or CSV File

File: Y:\Ang Data Preview 4a a.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 Address 1	Recipient's Address 2
Header	Recipient's Identification number	Recipient's Name (Line One)	Recipient's Name (Line Two)	Recipient's Address 1	Recipient's Address 2
1	524-96-7422	John Doe		65 Rose Rd.	

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

The screenshot shows the 'Import 1099-R Forms' dialog box in W2 Mate. The dialog is in Step Three: Set Fields (Columns). A table shows columns with 'Unused' headers. A dropdown menu is open for the first 'Unused' cell, showing a list of field names like 'Recipient's Identification number' and 'Recipient's Name (Line One)'. Red arrows and callouts point to the 'Unused' cell and the dropdown menu.

Map each column 5

Left click each "Unused" 5a

Header	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	Account Number
1	524-96-7412	John Doe								

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

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Identification Number Name (Line One) Name (Line Two) Account Number

**Import 1099-R Forms**

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(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:\Angela\W2 MATE\CSV examples\1099-R-Data.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. 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	Recipient's Identification number	Recipient's Name (Line One)	Recipient's Name (Line Two)	Recipient's Address1	Recipient's Address2
1	524-96-7422	John Doe		65 Rose Rd.	

Click Import 6

Import Close

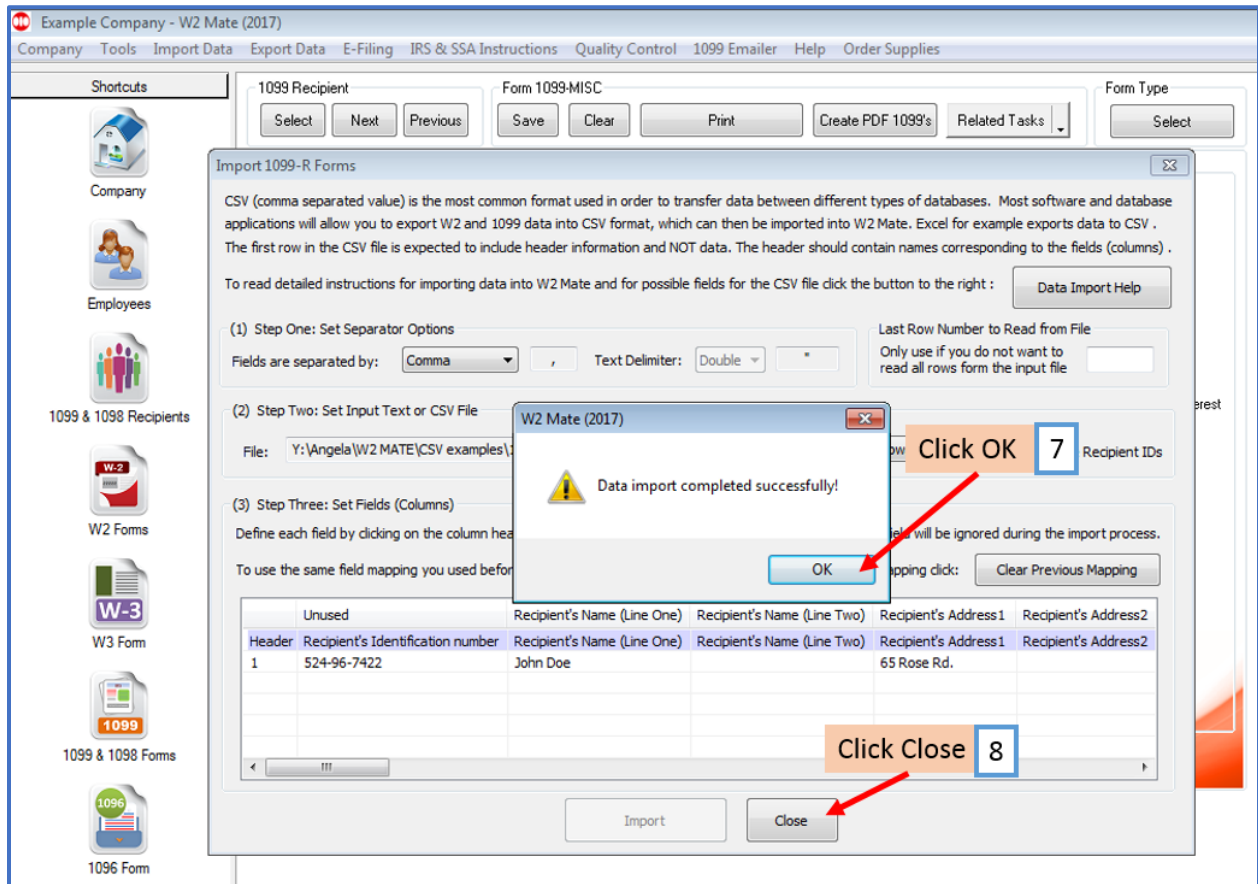
Note: The most common error during import is duplicate or incorrectly formatted 1099-R data. The import engine in W2 Mate uses a highly advanced detection system which can identify and report the most common import data errors BEFORE the data is imported.

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-R Import wizard



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

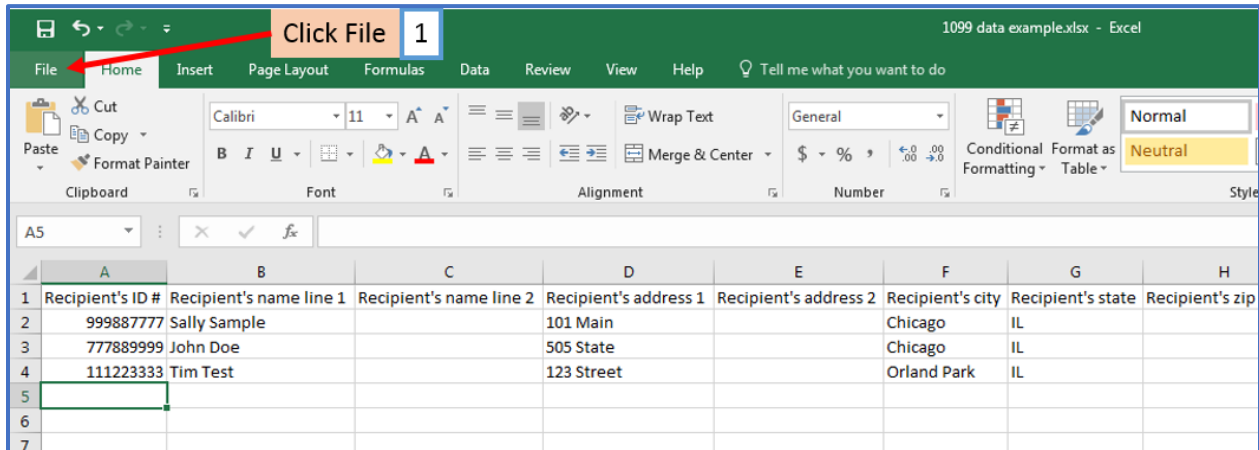


# Creating a CSV (Comma Separated Value) from an Excel Spreadsheet

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

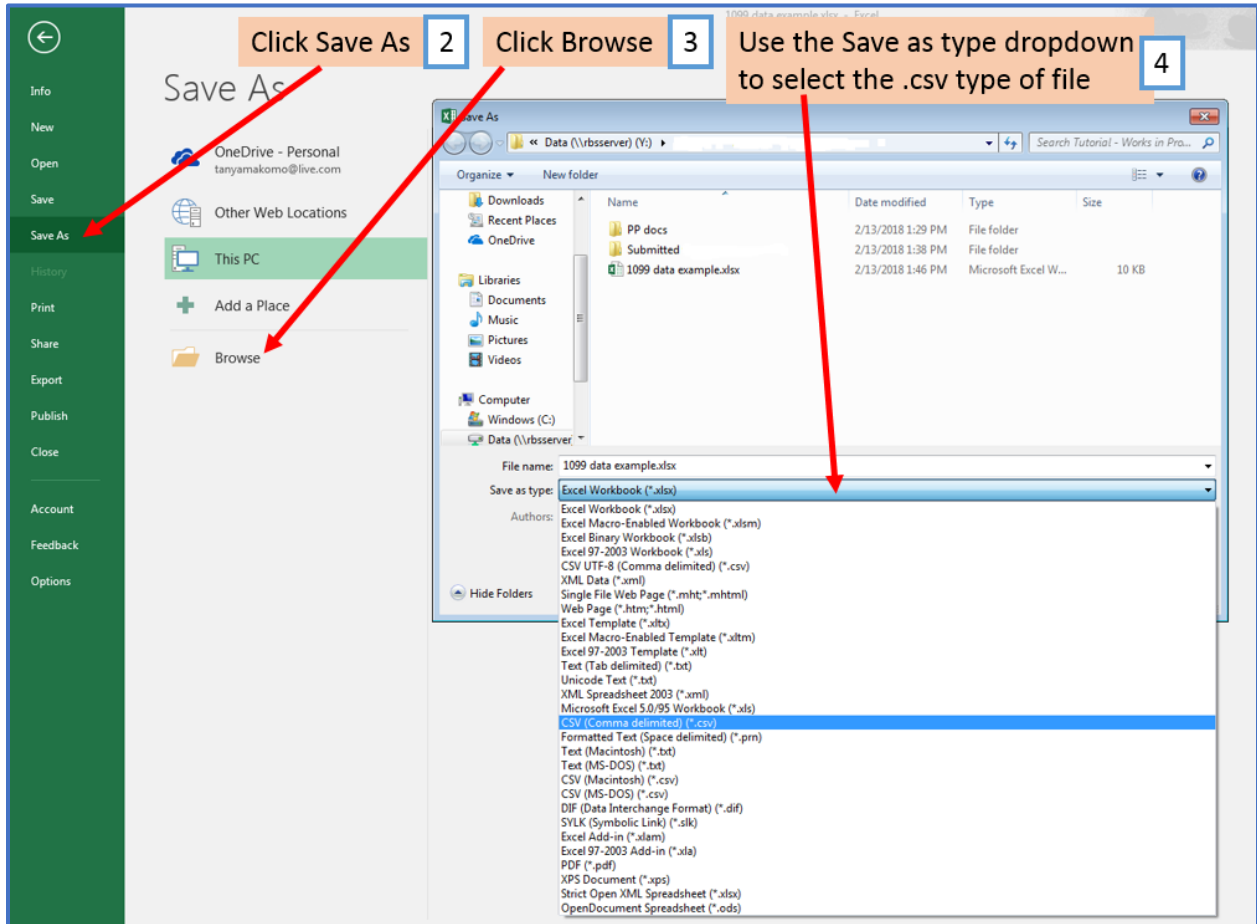


2. Click Save As

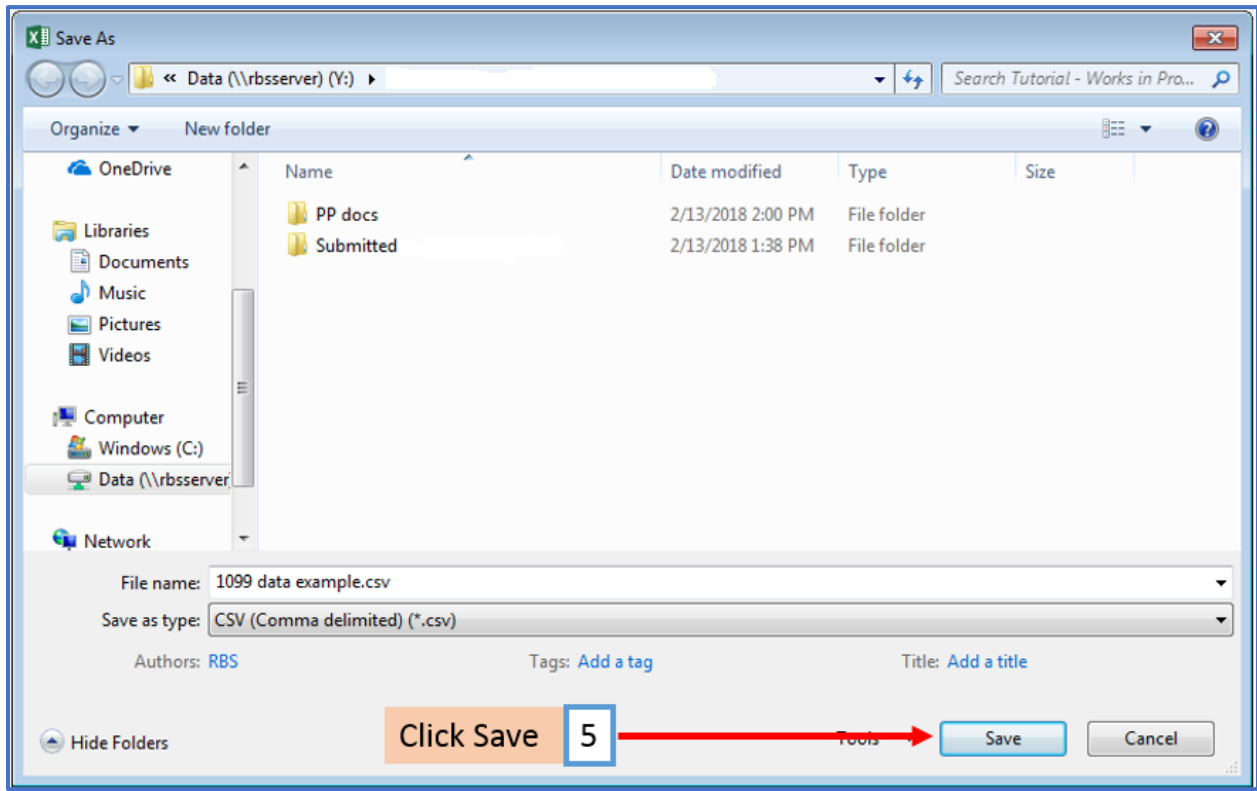
3. Click Browse to select location to save file

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