

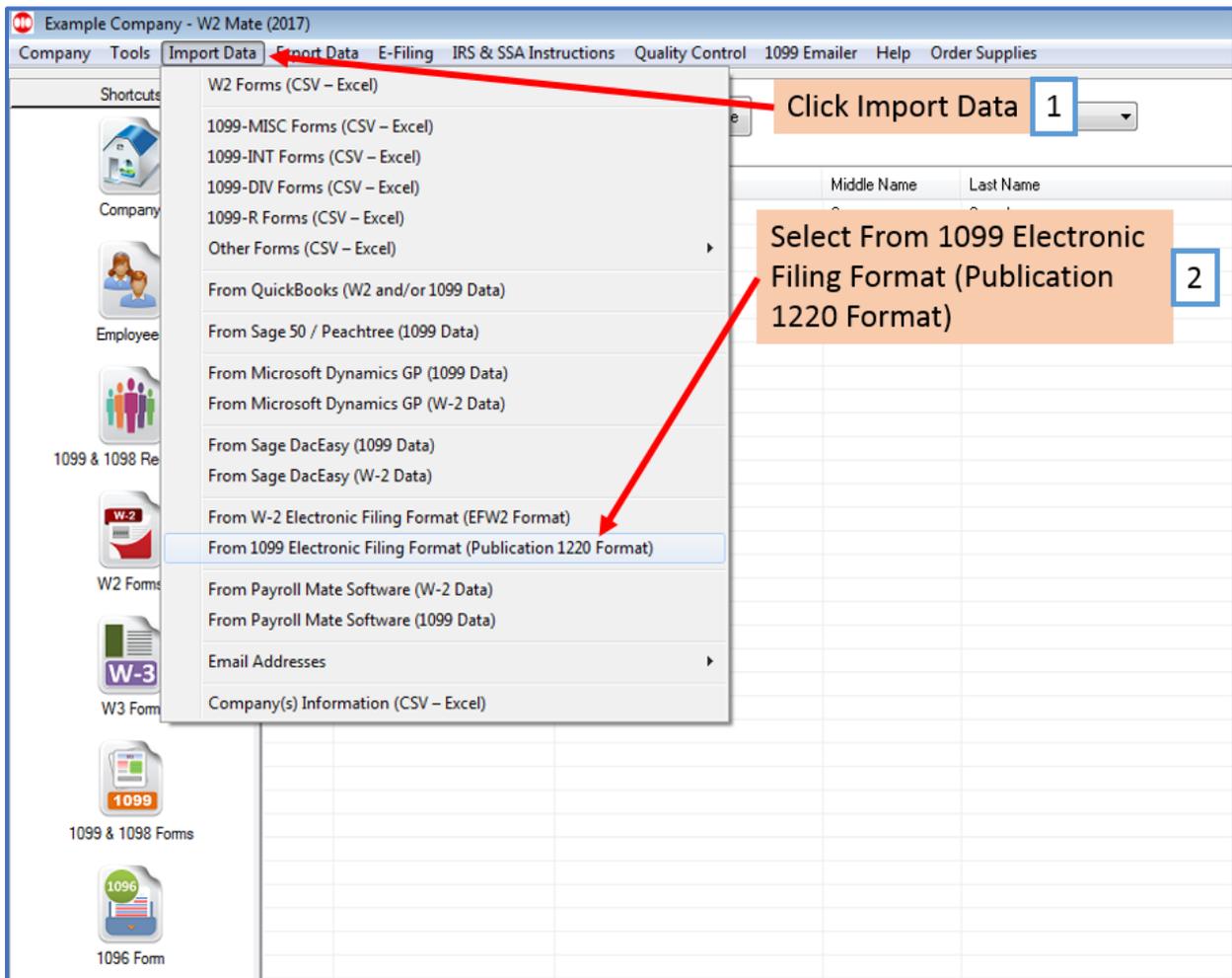
How to Import 1099 Data Using Electronic Filing Format (Publication 1220 Format)

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

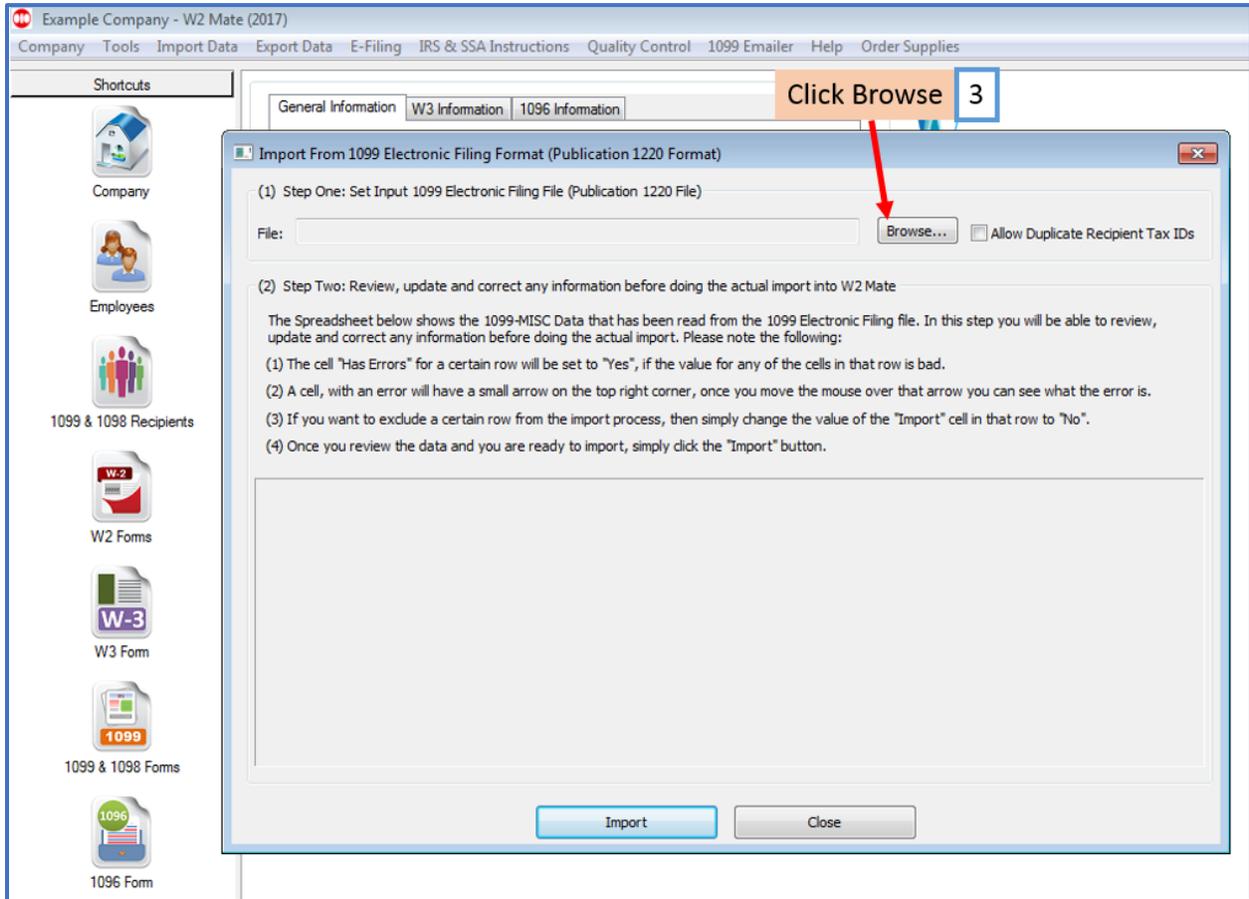
Note: If you do not currently have this company created inside of W2 Mate you will need to create the company prior to importing the 1099 data. See How to Create a New Company tutorial.

1. Click Import Data
2. Select From 1099 Electronic Filing Format (Publication 1220 Format)



3. Click Browse to find the Publication 1220 file

Note: Checkmark Allow Duplicate Recipient Tax IDs if needed



4. Review Data

5. Click Import

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 Form
- 1099 & 1098 Forms
- 1096 Form

General Information W3 Information 1096 Information

Import From 1099 Electronic Filing Format (Publication 1220 Format)

(1) Step One: Set Input 1099 Electronic Filing File (Publication 1220 File)

File: Y:\Angela\W2 MATE\IMPORT examples\IRSTAX-1099-MISC-EXAMPLE-COMPANY Allow Duplicate Recipient Tax IDs

Review Data 4

(2) Step Two: Review, update and correct any information before doing the actual import into W2 Mate

The Spreadsheet below shows the 1099-MISC Data that has been read from the 1099 Electronic Filing file. In this step you will be able to review, update and correct any information before doing the actual import. Please note the following:

- (1) The cell "Has Errors" for a certain row will be set to "Yes", if the value for any of the cells in that row is bad.
- (2) A cell, with an error will have a small arrow on the top right corner, once you move the mouse over that arrow you can see what the error is.
- (3) If you want to exclude a certain row from the import process, then simply change the value of the "Import" cell in that row to "No".
- (4) Once you review the data and you are ready to import, simply click the "Import" button.

	Has Errors	Import	Recipient's Tax ID	Recipient's Name-Line 1	Recipient's Name-Line 2	Recipient's Address 1	Recipient's Address 2	Recipient's City
1	No	Yes	987654321	Form Recipient		123 Form		Chicago
2	No	Yes	777889999	Jane A Test		505 Main		Chicago
3	No	Yes	999887777	John Q Doe		101 Front		Chicago
4	No	Yes	123456789	New	Recipient	123 Main		Chicago

Click Import 5

6. Click OK

The screenshot shows the W2 Mate (2017) software interface. The main window has a menu bar with 'Company', 'Tools', 'Import Data', 'Export Data', 'E-Filing', 'IRS & SSA Instructions', 'Quality Control', '1099 Emailer', 'Help', and 'Order Supplies'. Below the menu bar are buttons for 'New 1099 / 1098 Recipient', 'Modify Recipient', and 'Delete Recipient', along with a 'Sort Recipients By:' dropdown menu set to 'Recipient's Name (Line One)'. A table displays recipient information:

	Identification Number	Name (Line One)	Name (Line Two)	Account Number
1	987654321	Form Recipient		
2	777889999	Jane A Test		
3	999887777	John Q Doe		
4	123456789	New	Recipient	

A dialog box titled 'W2 Mate (2017)' is open in the foreground, displaying a yellow warning icon and the text: 'Import Process Completed Successfully. You will now be directed to the Recipients screen'. An 'OK' button is visible at the bottom of the dialog box. A red arrow points from a callout box labeled 'Click OK' and the number '6' to the 'OK' button.