

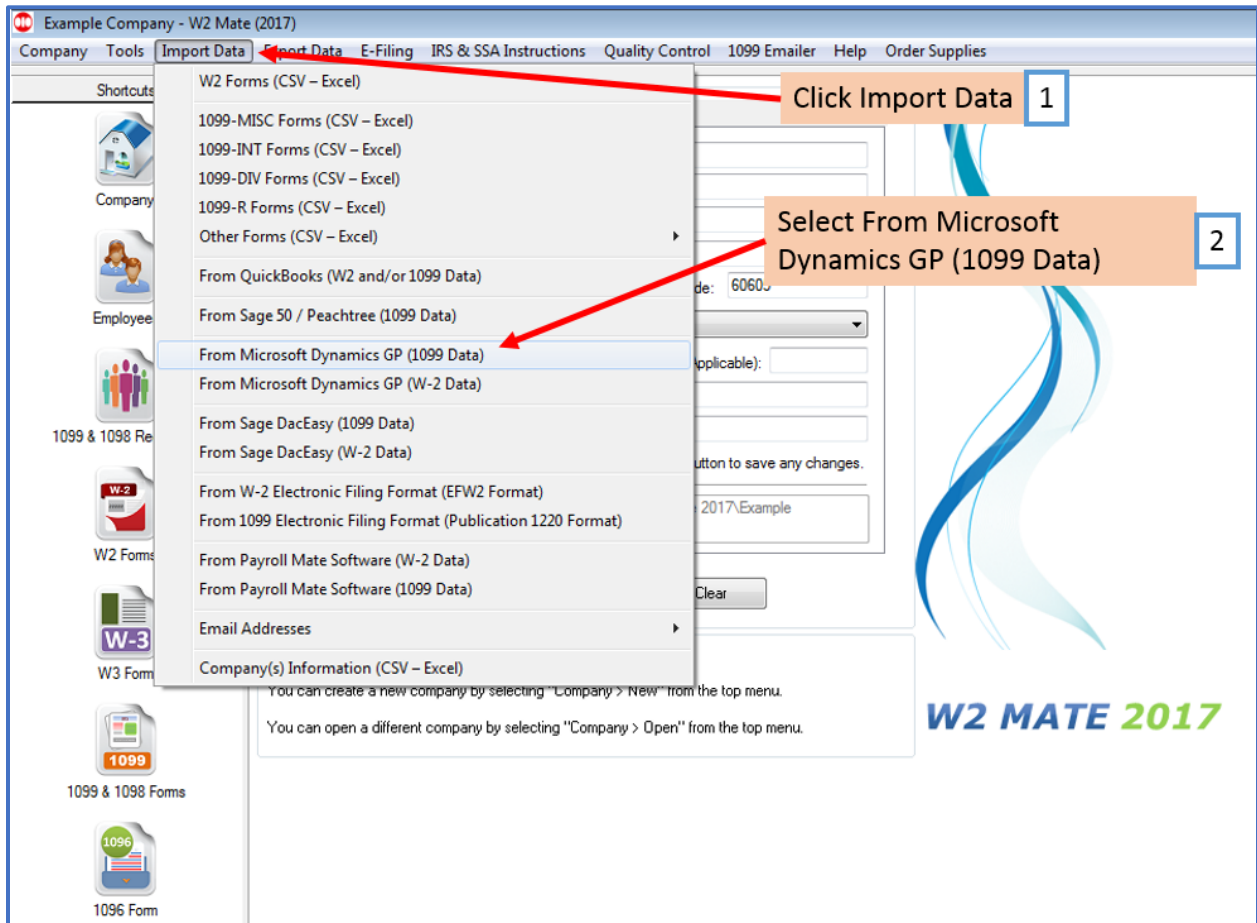
How to Import 1099 Data Using Microsoft Dynamics GP

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

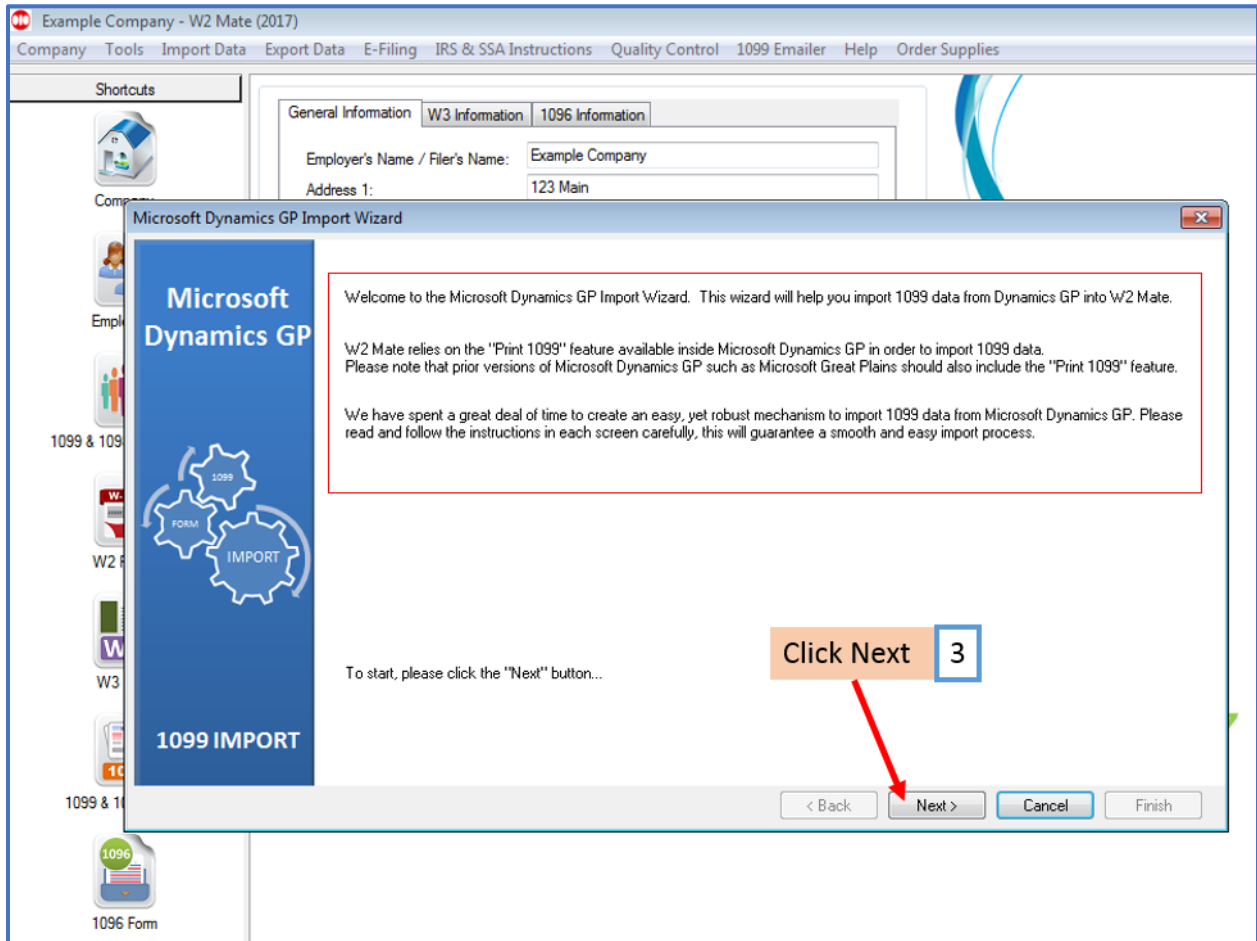
Make sure you have the correct Company open inside W2 Mate

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.

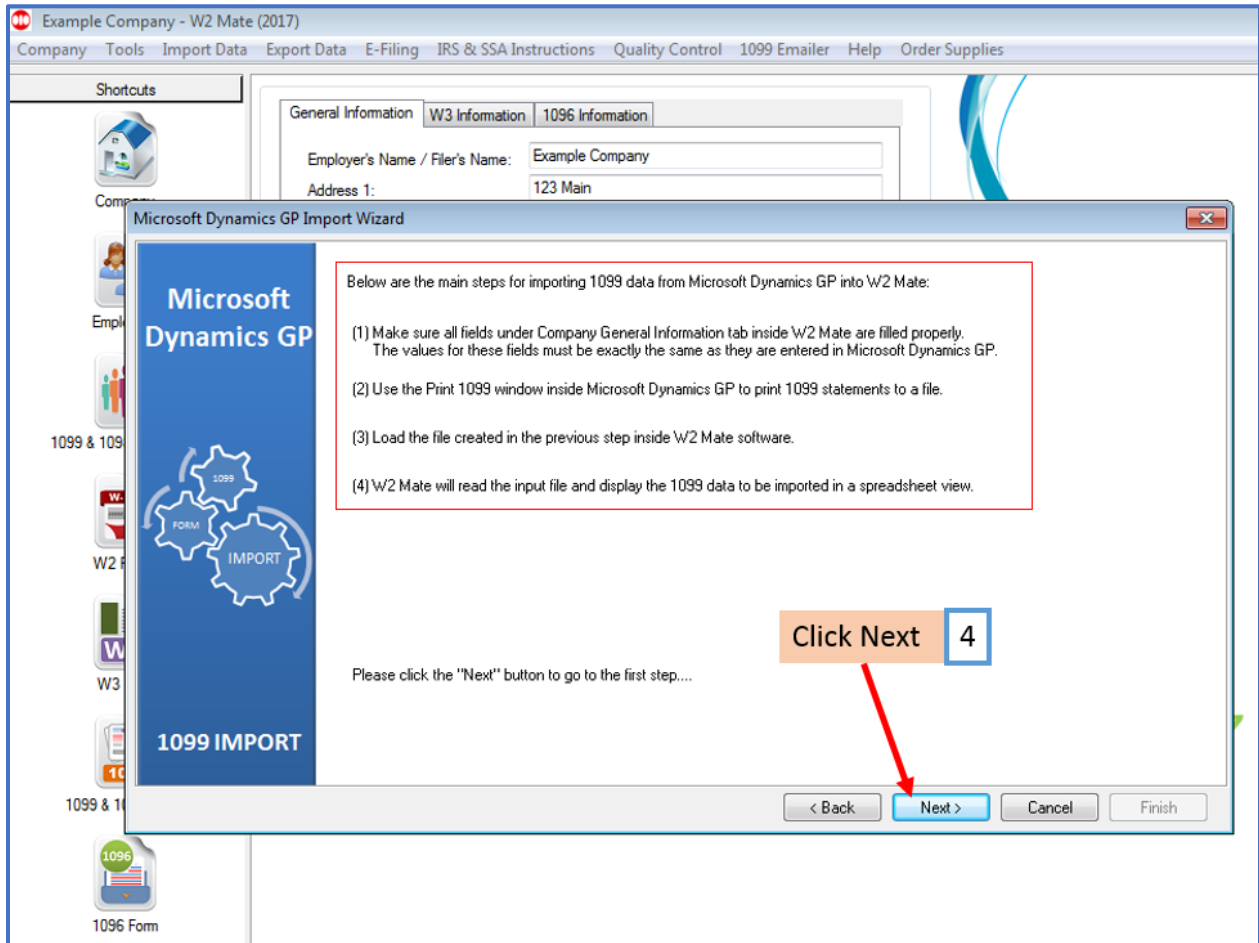
1. Click Import Data
2. Select From Microsoft Dynamics GP (1099 Data)



3. Read message then Click Next



4. Read steps then Click Next



5. Read steps then Click Next

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

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

Address 1: 123 Main

Microsoft Dynamics GP Import Wizard

Microsoft Dynamics GP

1099 IMPORT

STEP 1: Make sure all fields under Company General Information tab inside W2 Mate are filled properly.

It's very important to fill out the following fields under Company General Information tab inside W2 Mate before you proceed with the import process:

Employer Name, Address 1, Address 2 (if applicable), City, State, Zip code and Employer Identification Number.

The values for these fields must be EXACTLY the same as they are entered in Microsoft Dynamics GP (for the company you are importing data from).

Please note the following:

- You can create multiple companies inside W2 Mate (each company can correspond to an existing company inside Microsoft Dynamics GP).
- Employer Identification Number field is called Payer's Federal ID Number inside Microsoft Dynamics GP and you can enter it inside the Print 1099 window.

Click Next 5

< Back Next > Cancel Finish

6. Read steps then Click Next

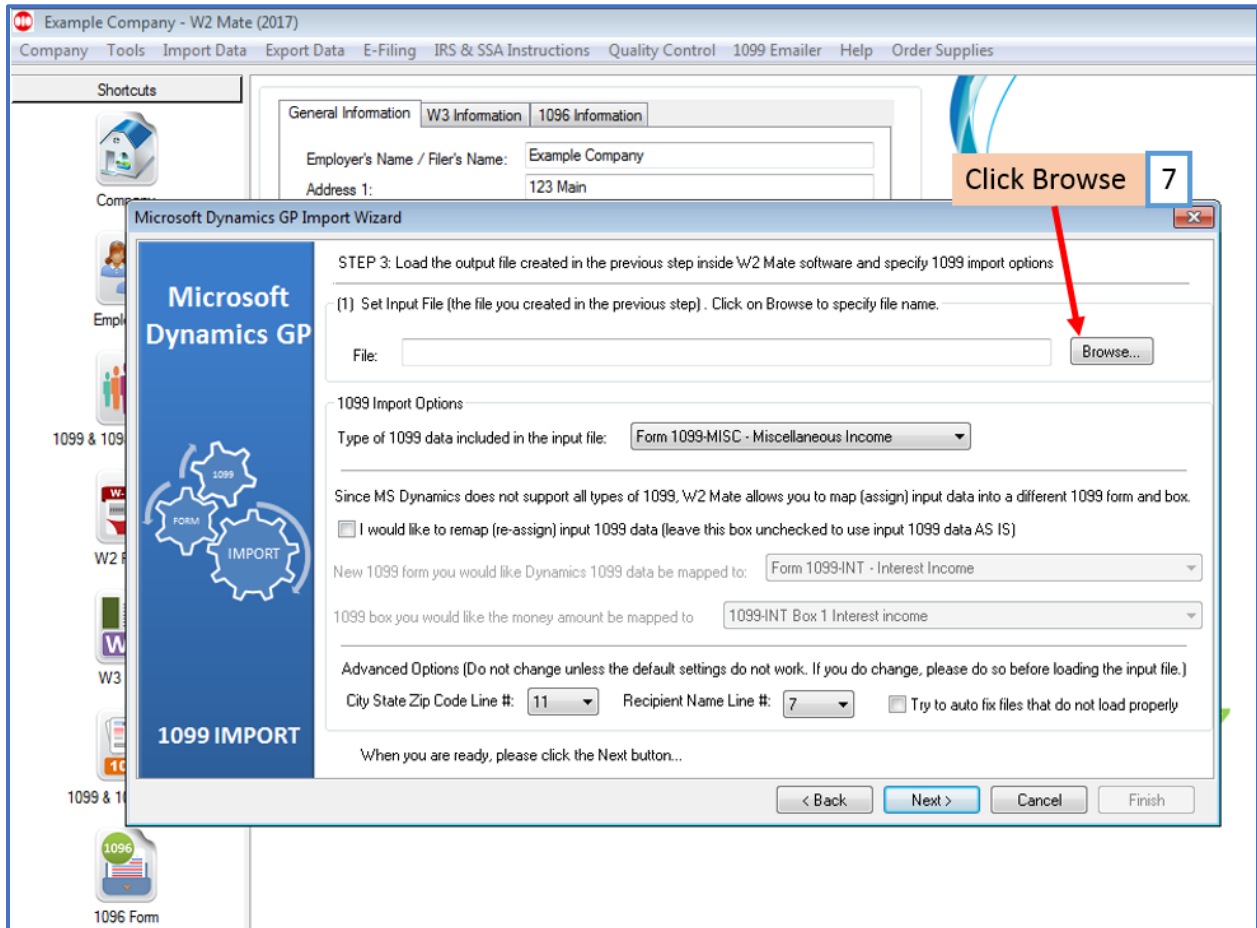
The screenshot shows the Microsoft Dynamics GP Import Wizard interface. The main window has a title bar 'Microsoft Dynamics GP Import Wizard' and a sidebar with 'Microsoft Dynamics GP' and '1099 IMPORT' logos. The main content area displays 'STEP 2: Use the Print 1099 window inside Microsoft Dynamics GP to print 1099 statements to a file.' followed by five numbered instructions:

- (1) Open the Print 1099 window inside Microsoft Dynamics GP. Microsoft Dynamics GP menu >> Tools >> Routines >> Purchasing >> Print 1099
- (2) Enter the payer's information, including the payer's Federal ID number. Make sure Form Type is "Continuous".
- (3) Once you've entered and/or reviewed all fields click the "Print" button. Important Note: If the window also shows a button named "Print Forms" then use that one instead of the "Print" button.
- (4) In the "Report Destination" window that comes up:
 - Select "File" as the "Destination"
 - Select "Text file" as the "File Format"
 - Use "File Name" field to specify file name.
 - Select the "Replace" option.
- (5) Click OK to create the output text file that includes the 1099 data. (this file you will need to feed into W2 Mate in the next step).

An inset dialog box titled 'Destination' is shown, with 'File' selected under 'Destination', 'File Name' set to 'C:\Temp\Export.txt', 'File Format' set to 'Text file', and 'Replace' selected under 'Append/Replace'.

At the bottom of the wizard, there are buttons for '< Back', 'Next >', 'Cancel', and 'Finish'. A red arrow points from a box containing the number '6' to the 'Next >' button. A text box with 'Click Next' is also present.

7. Click Browse to select file created in Microsoft Dynamics GP



8. Select type of 1099 data being imported

The screenshot shows the Microsoft Dynamics GP Import Wizard interface. The main window is titled "Microsoft Dynamics GP Import Wizard" and displays "STEP 3: Load the output file created in the previous step inside W2 Mate software and specify 1099 import options".

The wizard is divided into several sections:

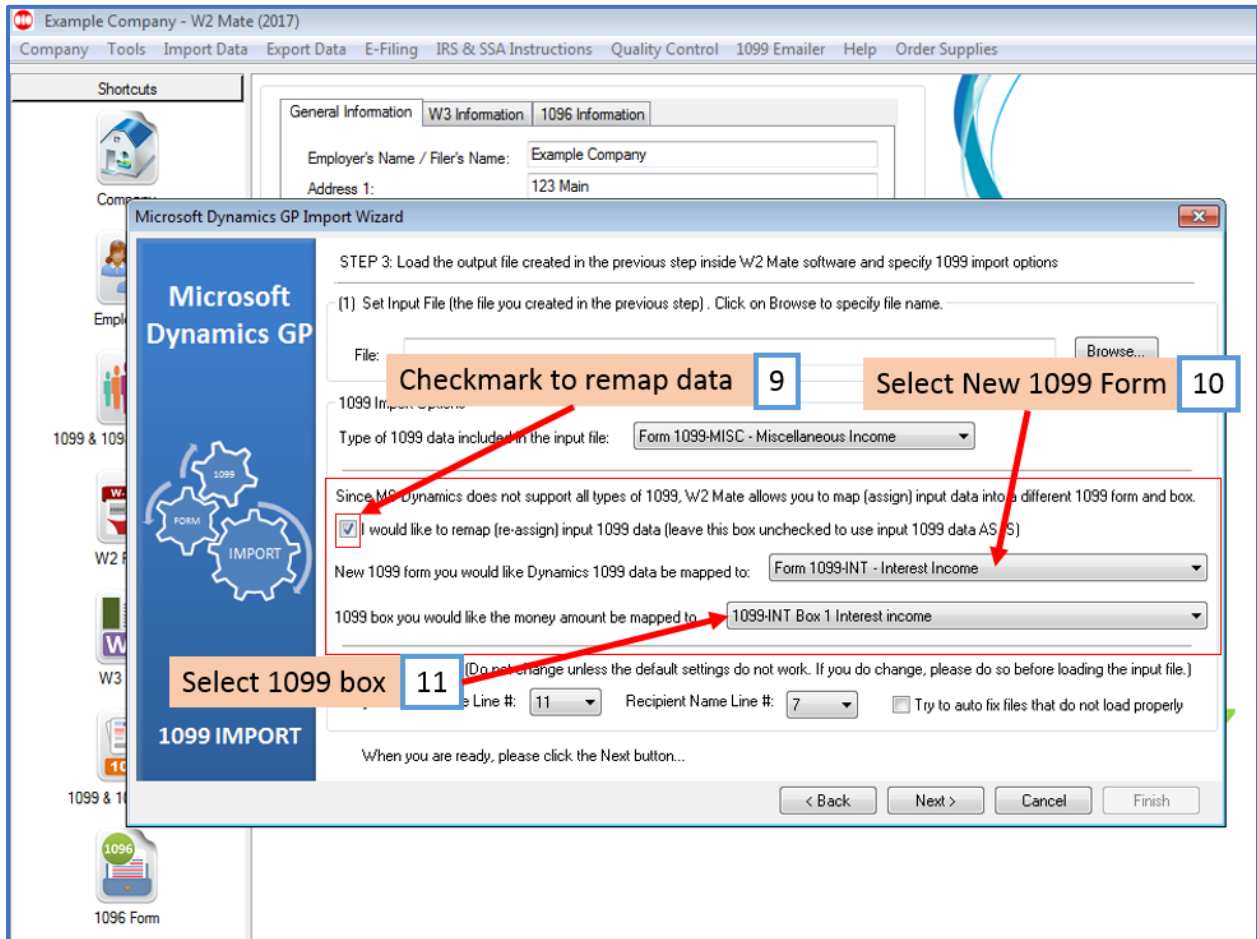
- General Information:** Shows "Employer's Name / Filer's Name: Example Company" and "Address 1: 123 Main".
- File Selection:** A "File:" field is present, with a "Browse..." button. A red box highlights the number "8" next to the field, with the text "Select 1099 Data type" written above it.
- 1099 Import Options:**
 - Type of 1099 data included in the input file:** A dropdown menu is open, showing options: "Form 1099-MISC - Miscellaneous Income" (highlighted), "Form 1099-MISC - Miscellaneous Income", "Form 1099-INT - Interest Income", and "Form 1099-DIV - Dividends and Distributions". A red arrow points to the first option.
 - Since MS Dynamics does not support all types:** A dropdown menu is set to "Form 1099-DIV - Dividends and Distributions".
 - Advanced Options:** Includes "City State Zip Code Line #:" (11), "Recipient Name Line #:" (7), and a checkbox for "Try to auto fix files that do not load properly".

The wizard includes navigation buttons: "< Back", "Next >", "Cancel", and "Finish".

9. Checkmark box to remap data as needed

10. Select new 1099 Form

11. Select box for 1099 monetary amounts



12. Review data

13. Click Next

Microsoft Dynamics GP Import Wizard

STEP 4: Review and Import Data

The Spreadsheet below shows the 1099 Data that has been extracted from the input file. In this step you will be able to review, update and correct any information before doing the actual import into W2 Mate. 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 "Next" button.

	Has Errors	Import	Recipient's Tax ID number	Recipient's Name (Line One)	Recipient's Name (Line Two)	Recipient's Address 1	Recipient's Address 2	Reci
1	No	Yes	235-78-7855	A Travel Company		123 Riley Street	AT-Address 1	Los A
2	No	Yes	169876654	Beaumont Construction		1234 East Crestview Drive		Chica
3	No	Yes	265-89-4533	Bergeron Communications Sol.		876 12 London Ave.		Mont 8G5

< Back Next > Cancel Finish

14. Click Finish

