

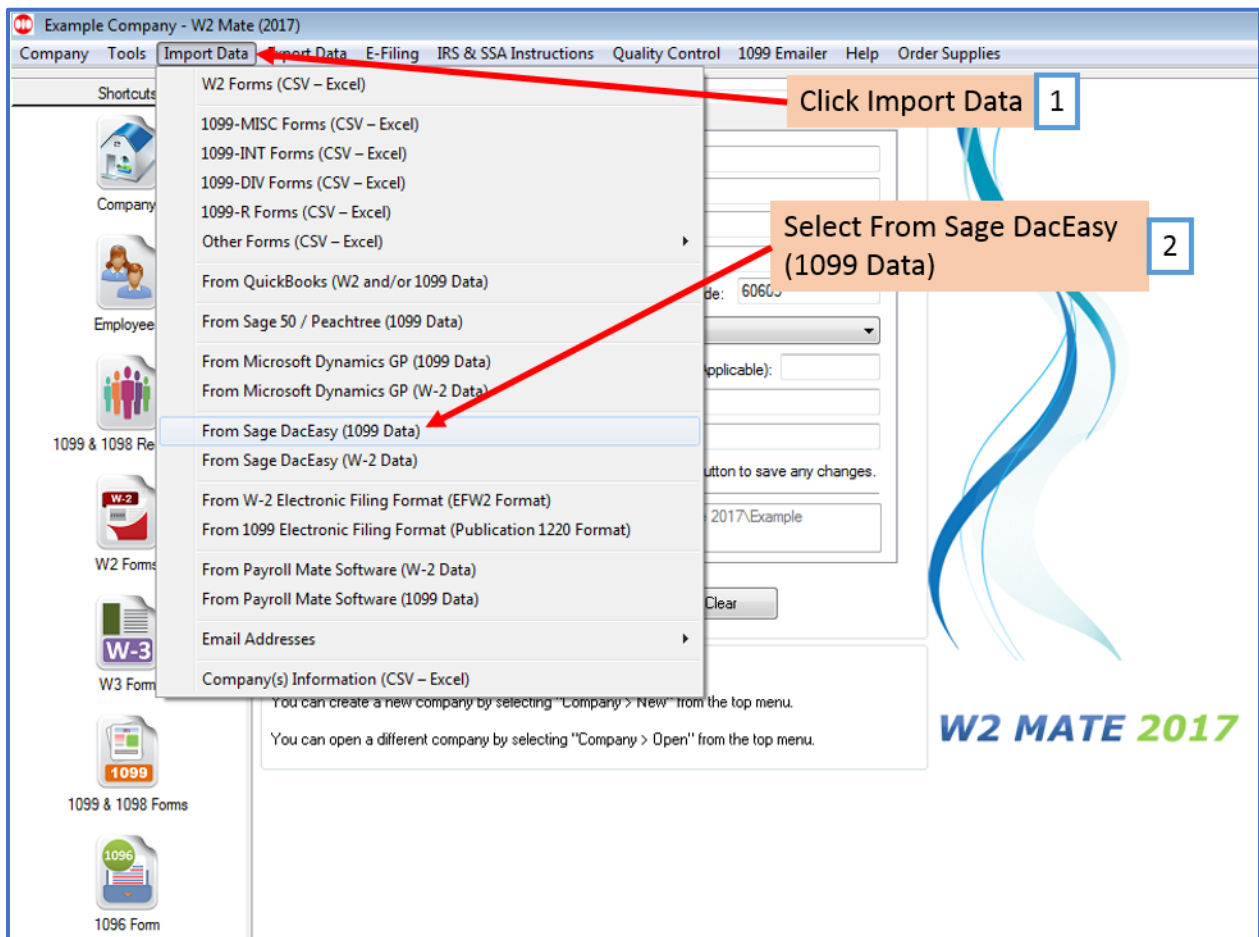
# How to Import 1099 Data Using Sage DacEasy

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

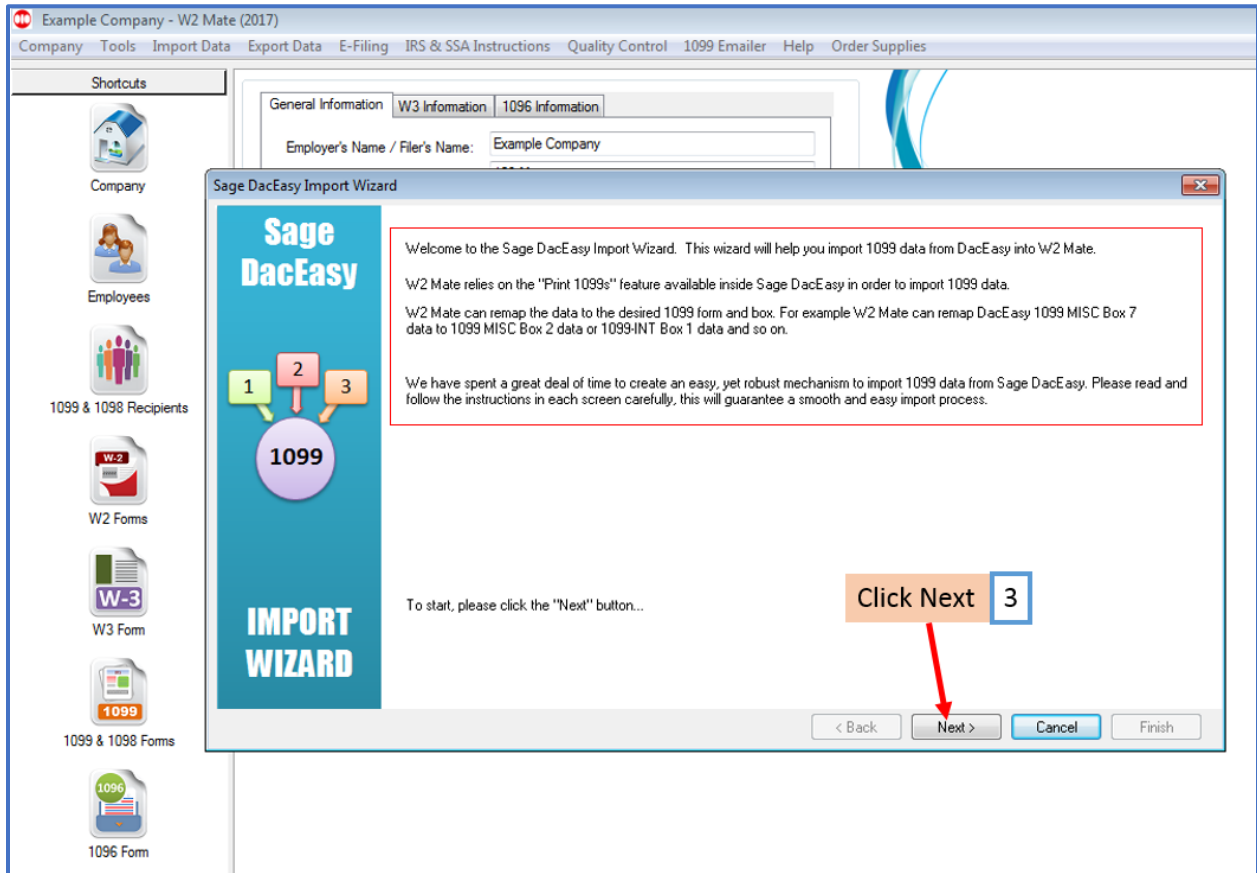
Make sure you have the correct Company open inside W2 Mate

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 Sage DacEasy (1099 Data)



### 3. Read the notice then Click Next



#### 4. Read Steps then Click Next

The screenshot shows the Sage W2 Mate (2017) software interface. In the background, the 'General Information' tab is active, showing 'Employer's Name / Filer's Name: Example Company'. Overlaid on this is the 'Sage DacEasy Import Wizard' dialog box. The dialog box has a blue header with 'Sage DacEasy' and 'IMPORT WIZARD' text. On the left side of the dialog, there is a vertical navigation bar with icons for '1099 & 1098 Recipients', 'W2 Forms', 'W-3 Form', '1099 & 1098 Forms', and '1096 Form'. The '1099' icon is highlighted. The main content area of the dialog box contains the following text:

Below are the main steps for importing 1099 data from Sage DacEasy into W2 Mate:

- (1) Make sure all fields under Company General Information tab inside W2 Mate are filled properly. The values for these fields must be exactly the same as they are entered in DacEasy.
- (2) Use the 1099s Report inside DacEasy to print 1099 statements to a file.
- (3) Load the file created in the previous step inside W2 Mate software.
- (4) W2 Mate will read the input file and display the 1099 data to be imported in a spreadsheet view.

Please click the "Next" button to go to the first step....

A red arrow points from a box containing the text 'Click Next' and the number '4' to the 'Next >' button in the dialog box's footer. The footer also contains '< Back', 'Cancel', and 'Finish' buttons.

5. Read Step 1 directions then Click Next

The screenshot shows the Sage DacEasy Import Wizard window. The main window is titled "Example Company - W2 Mate (2017)" and has a menu bar with "Company", "Tools", "Import Data", "Export Data", "E-Filing", "IRS & SSA Instructions", "Quality Control", "1099 Emailer", "Help", and "Order Supplies". The wizard is currently on the "General Information" tab, which shows "Employer's Name / Filer's Name: Example Company".

The wizard window has a blue sidebar with the "Sage DacEasy" logo and "IMPORT WIZARD" text. It features a progress indicator with three numbered steps (1, 2, 3) and a large "1099" icon. The main content area displays the following text:

**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 Sage DacEasy (for the company you are importing data from).

Please note the following:

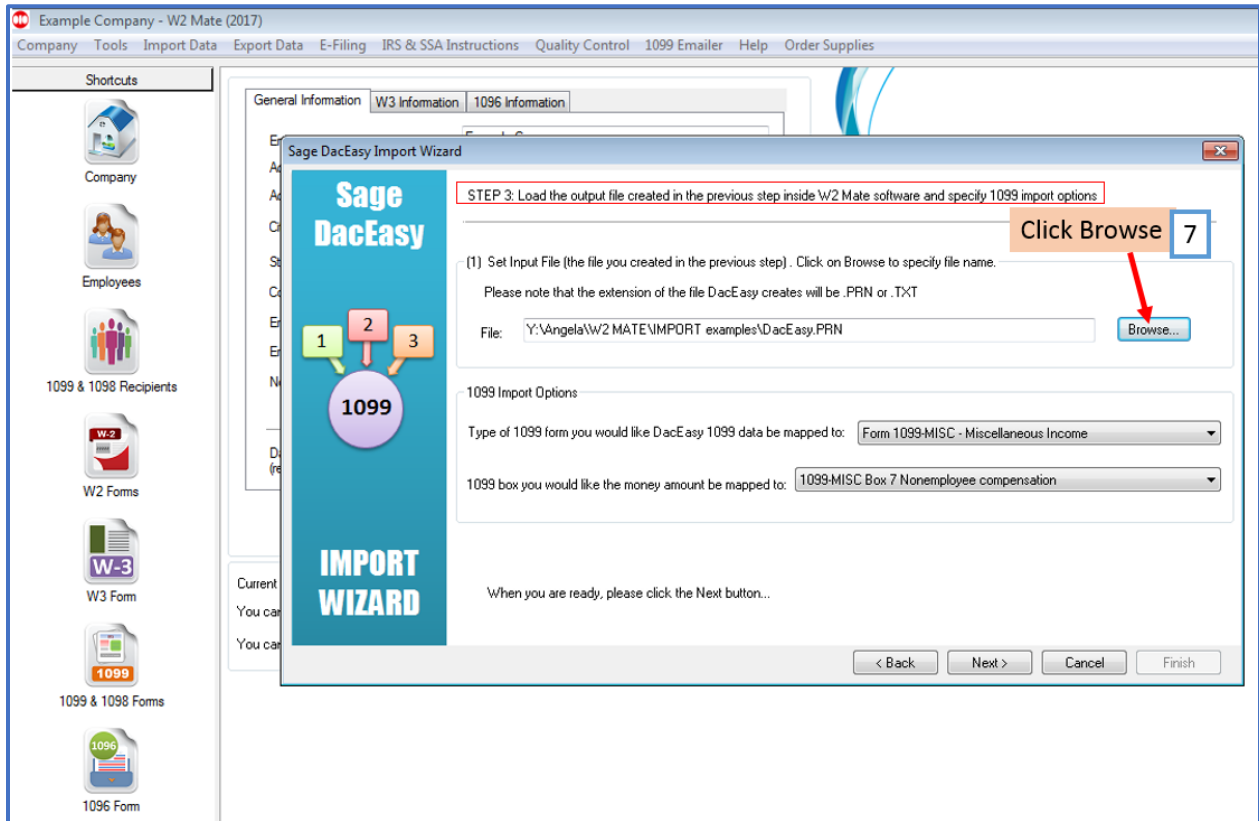
- You can create multiple companies inside W2 Mate (each company can correspond to an existing company inside Sage DacEasy).
- Employer Identification Number field is called Federal tax ID inside DacEasy.

At the bottom of the wizard window, there are four buttons: "< Back", "Next >", "Cancel", and "Finish". A red arrow points from a callout box labeled "Click Next 5" to the "Next >" button.

6. Read Step 2 directions then Click Next

The screenshot shows the Sage DacEasy Import Wizard interface. The main window has a sidebar with shortcuts for Company, Employees, 1099 & 1098 Recipients, W2 Forms, W3 Form, 1099, 1099 & 1098 Forms, and 1096 Form. The main area displays the 'Sage DacEasy Import Wizard' dialog box. The wizard is titled 'STEP 2: Use the 1099s Report inside DacEasy to print 1099 statements to a file.' and includes three numbered instructions: (1) Open the 1099s dialog box inside Sage DacEasy (Select Payables from the Reports menu, and then select 1099s.) (2) Once you've entered and/or reviewed all fields click the "OK" button to access the Report Layout dialog box. (3) In the "Report Layout- 1099s" window that comes up follow the steps in the figure below. The figure below is a screenshot of the 'Report Layout - 1099s' dialog box with four numbered callouts: 1. Select Export for the Target option (pointing to the 'Export' radio button). 2. Specify a file name and location. This file you will need to feed into W2 Mate in the next step (pointing to the 'Path and file name' field). 3. Select Report for the File format option (pointing to the 'Report' radio button). 4. Click OK to create the file with the 1099 data (pointing to the 'OK' button). The wizard also has a 'Click Next 6' callout pointing to the 'Next >' button. The background shows the 'General Information' tab with 'Employer's Name / Filer's Name: Example Company'.

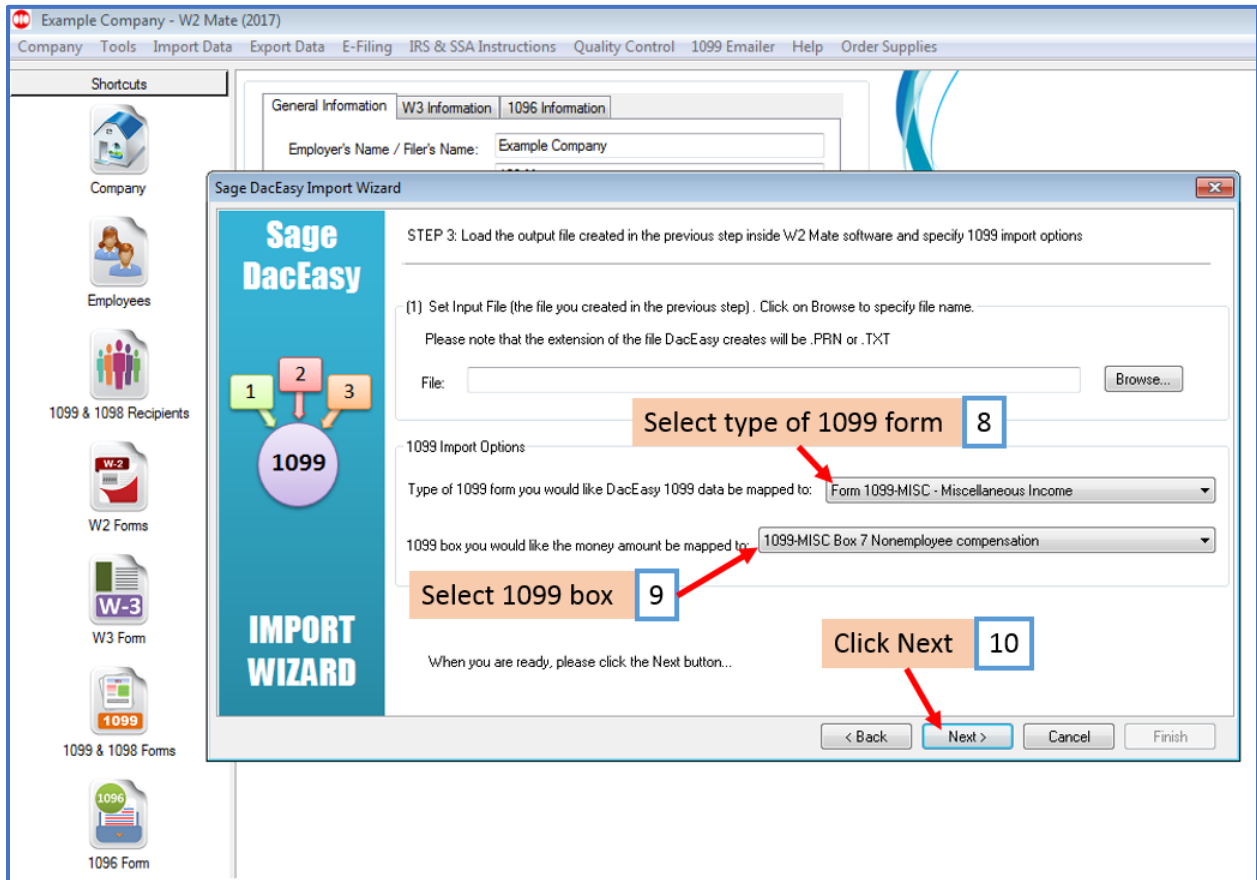
## 7. Read Step 3 directions then Click Browse



8. Select type of 1099 form data being imported

9. Select the 1099 box to map the monetary amount into

10. Click Next



If the data does not have errors you can proceed to Step 16

11. Any row with errors will not be imported

Note: Any cell with an error will have a small red arrow in the top right corner, place your mouse pointer on this arrow to view a detail of the error for that cell. You can correct the errors on this review page by clicking in the cell and editing the data.

12. Click Next to continue with errors

The screenshot shows the 'STEP 4: Review and Import Data' window in W2 Mate. It contains a table of 1099 data with columns for 'Has Errors', 'Import', 'Recipient's Tax ID number', 'Recipient's Name (Line One)', 'Recipient's Name (Line Two)', 'Recipient's Address', 'Recipient's Address2', and 'Reci'. Row 1 has 'Has Errors' set to 'Yes' and 'Import' to 'No'. Row 2 has 'Has Errors' set to 'No' and 'Import' to 'Yes'. Row 3 has 'Has Errors' set to 'Yes' and 'Import' to 'No'. A red arrow points from a callout box to the 'Has Errors' cell in row 1. Another red arrow points from a callout box to the 'Next >' button at the bottom of the window.

Any row with errors will not be imported however you can click the fields below and correct as needed

11

If you Click Next you will get a message that the rows with errors will not import

12

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	Recipient's Address2	Reci
1	Yes	No		Casablanca Furniture		2500 N. Stemmons Fwy.		Austir
2	No	Yes	312-78-9344	Office Depot>XXXXXXXXXXXXXXXXXXXX		47500 Spring Creek	Office Depot Add 1	Austir
3	Yes	No		Dickson Furniture Industries		Route 7		Newa

< Back Next > Cancel Finish



13. Review the message you will see if you import a file with errors
14. Click Yes to continue with import of rows without errors only
15. Click No to go back and correct records

Message you will see if you attempt to import a file with errors **13**

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
- (3) If you want to exclude a cer
- (4) Once you review the data a

2 records will not be imported because they have errors. You can see all the rows with errors sorted at the top of the spreadsheet by clicking the "Has Errors" column header.

Are you sure you want to continue without importing these 2 records?

Click Yes to continue import without these records **14**

Click No to go back to review screen to correct records **15**

	Has Errors	Import	Rec ID
1	Yes	No	
2	No	Yes	312-
3	Yes	No	

16. When input file has no errors, Click Next to import all records

The screenshot shows the Sage DacEasy Import Wizard interface. At the top, there are tabs for 'General Information', 'W3 Information', and '1096 Information'. The 'General Information' tab is active, showing the following details:

- Employer's Name / Filer's Name: Furniture Factory
- Address 1: 17950 Paradise Road
- Address 2: Suite 800

The main window is titled 'Sage DacEasy Import Wizard' and is on 'STEP 4: Review and Import Data'. It contains the following instructions:

- (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.

Below the instructions is a table with the following data:

	Has Errors	Import	Recipient's Tax ID number	Recipient's Name (Line One)	Recipient's Name (Line Two)	Recipient's Address1	Recipient's Address2	Reci
1	No	Yes	222-33-4444	Casablanca Furniture		2500 N. Stemmons Frwy.		Austir
2	No	Yes	312-78-9344	Office Depot-XXXXXXXXXXXXXXXXXXXX		47500 Spring Creek	Office Depot Add 1	Austir
3	No	Yes	111-22-3333	Dickson Furniture Industries		Route 7		Newa

At the bottom of the wizard, there are four buttons: '< Back', 'Next >', 'Cancel', and 'Finish'. A red arrow points from the text 'If No errors, Click Next 16' to the 'Next >' button.

## 17. Click Finish

The screenshot shows the W2 Mate software interface. The main window displays the Sage DacEasy Import Wizard completion screen. The wizard title bar reads "Sage DacEasy Import Wizard". The main content area features the Sage DacEasy logo, a progress indicator with steps 1, 2, and 3, and a large "1099" in a purple circle. Below the logo, the text "IMPORT WIZARD" is displayed. The main message reads: "Congratulations, the import process completed successfully. Please click the 'Finish' button to end this wizard." A red arrow points from a callout box labeled "Click Finish 17" to the "Finish" button at the bottom right of the wizard window. The "Finish" button is highlighted with a blue box. The background window shows a table of recipients and a sidebar with shortcuts for various tax forms.

	Identification Number	Name (Line One)	Name (Line Two)	Account Number
1	222-33-4444	Casablanca Furniture		
2	111-22-3333	Dickson Furniture Industries		