

How to Import 1099 Data from Payroll Mate into W2 Mate

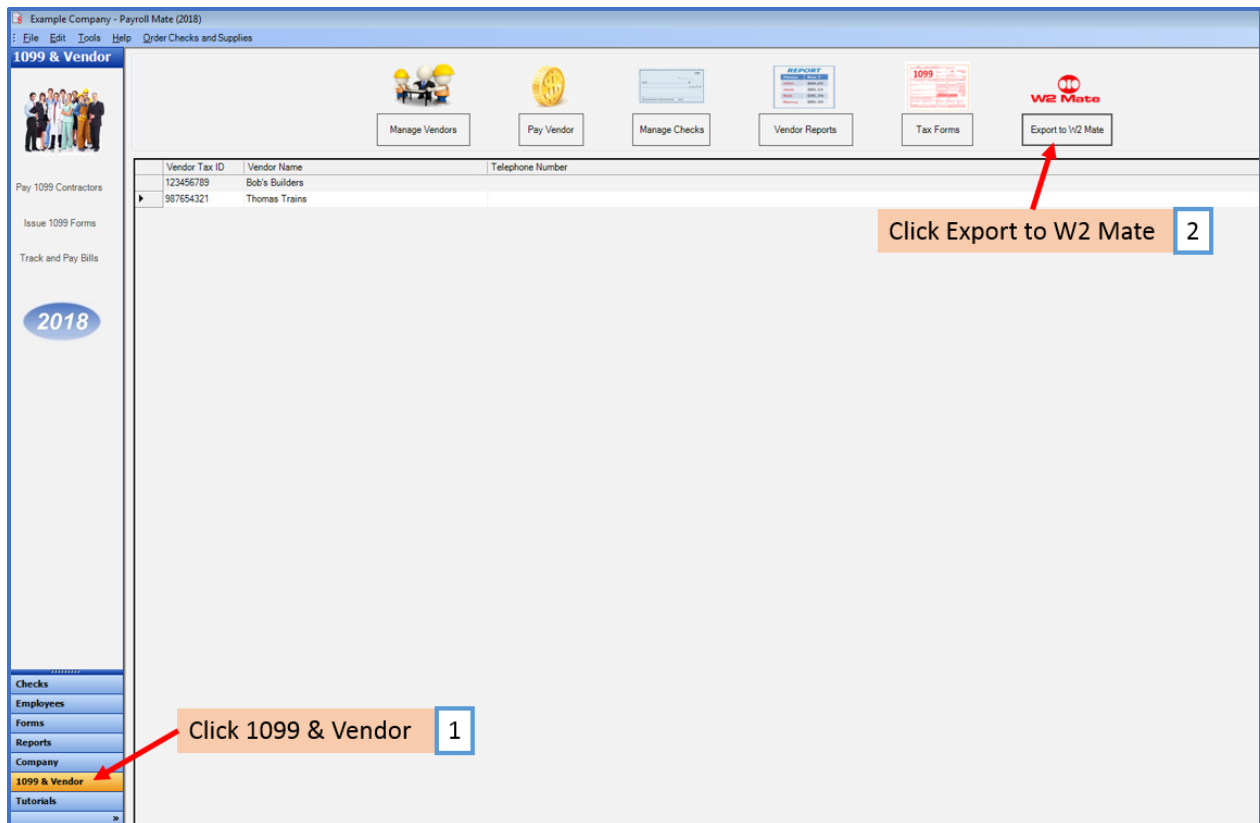
Note: This is a 2-part process. First you must export/save the file from Payroll Mate, second you will import the data into W2 Mate.

Open Payroll Mate:

Make sure you have the correct Company open inside Payroll Mate

Note: In order to use this feature you must purchase and enable Payroll Mate Option #6 1099 & Vendor Center

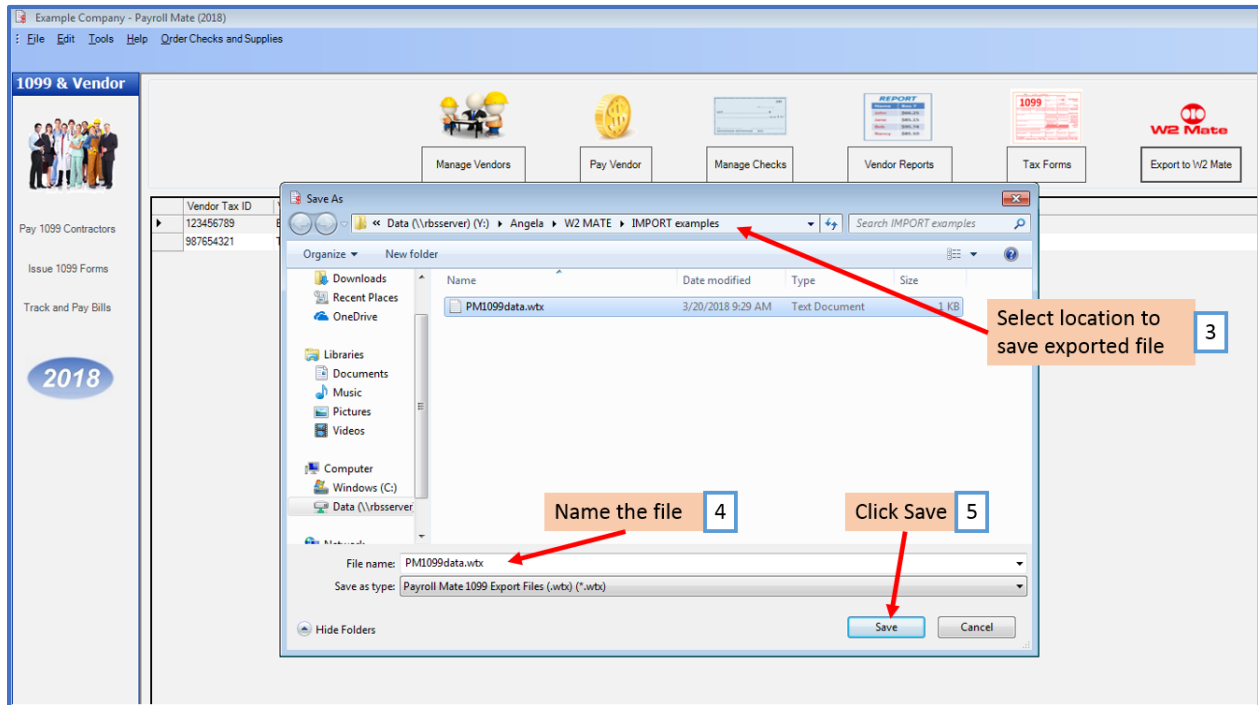
1. Click 1099 & Vendor
2. Click Export to W2 Mate



3. Select location to save the file

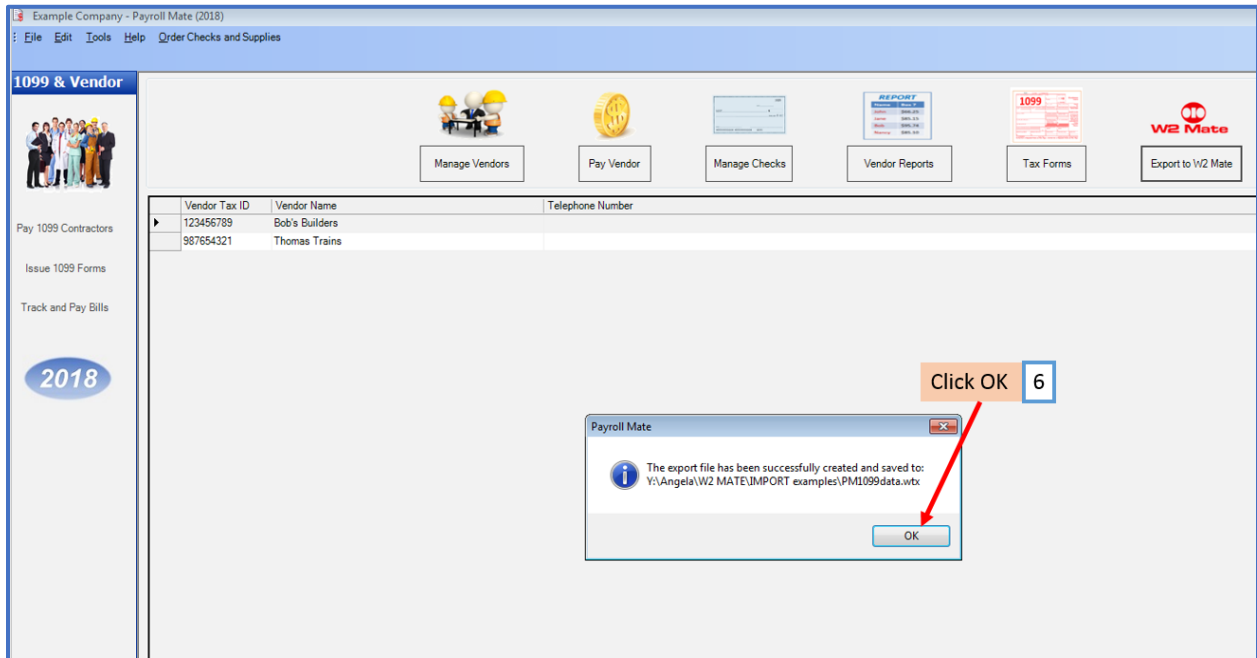
4. Create the File Name

5. Click Save



6. Click OK at the message the file was successfully created

Note: The location for the saved file shows here. You will need this location to import the data into W2 Mate.



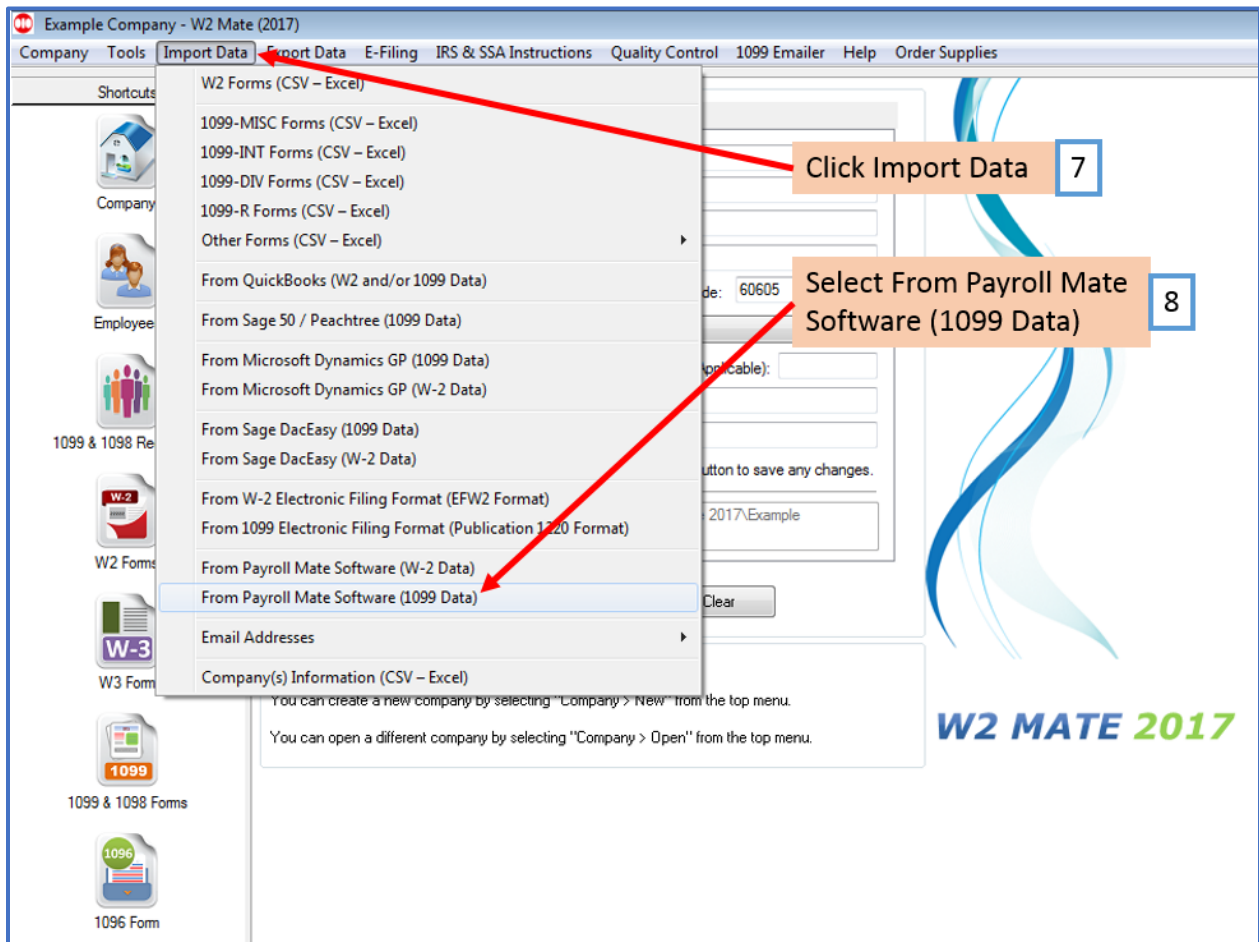
Open W2 Mate:

Note: Make sure you have the correct Company open inside W2 Mate.

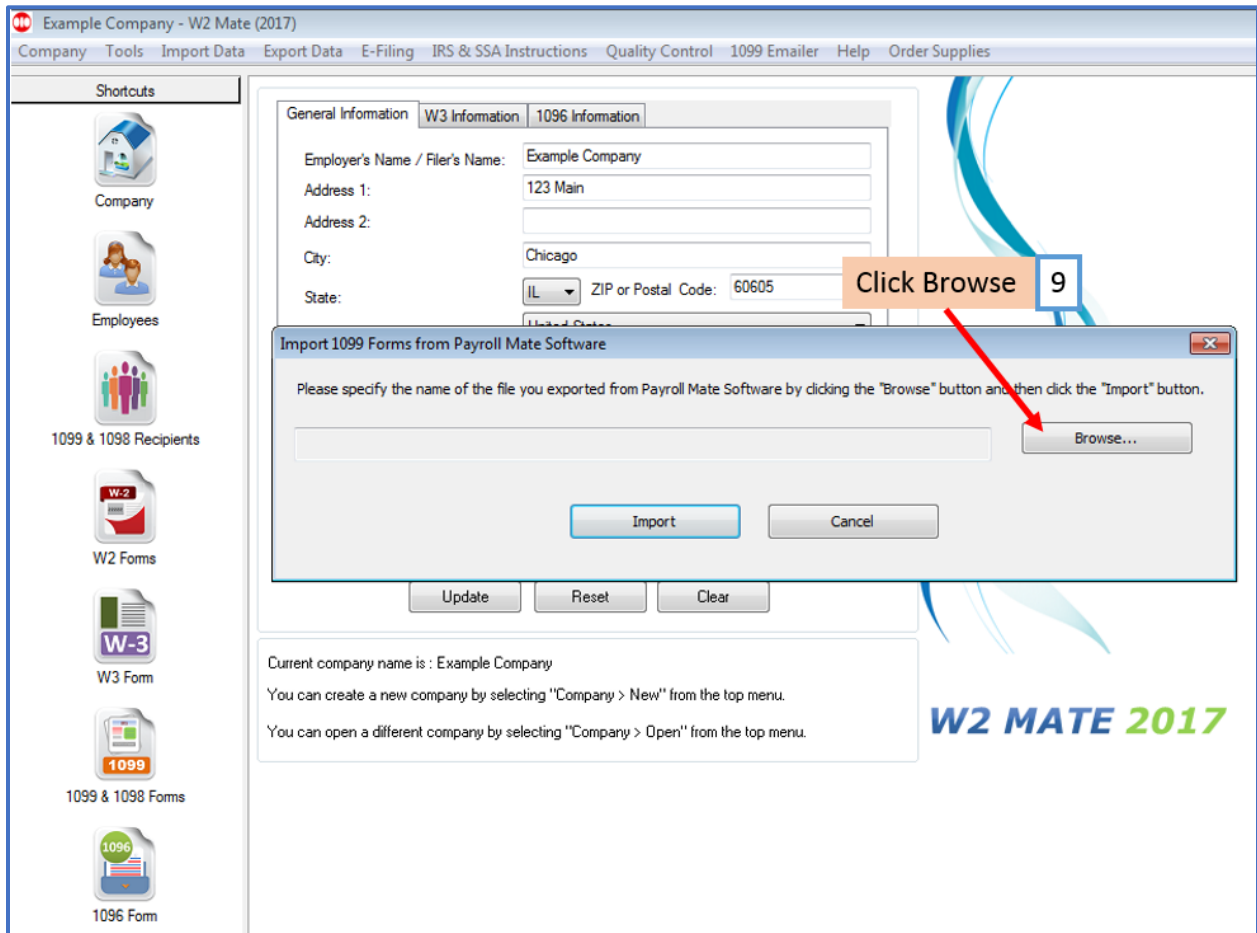
If you do not currently have this company created inside of W2 Mate you will need to create the company prior to importing the Payroll Mate 1099 data. See How to Create a New Company tutorial.

7. Click Import Data

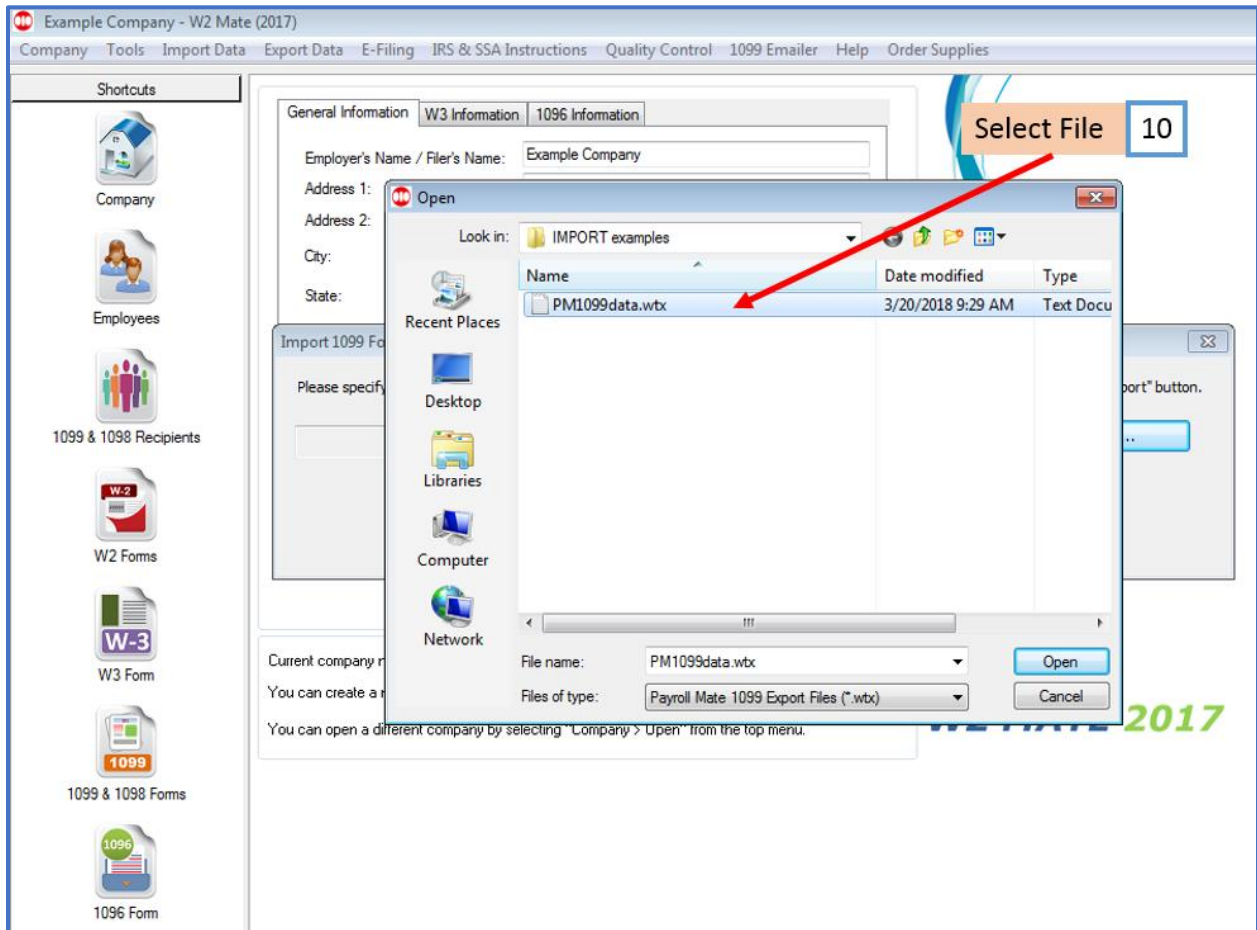
8. Select From Payroll Mate Software (1099 Data)



9. Click Browse to find the file you created through Payroll Mate

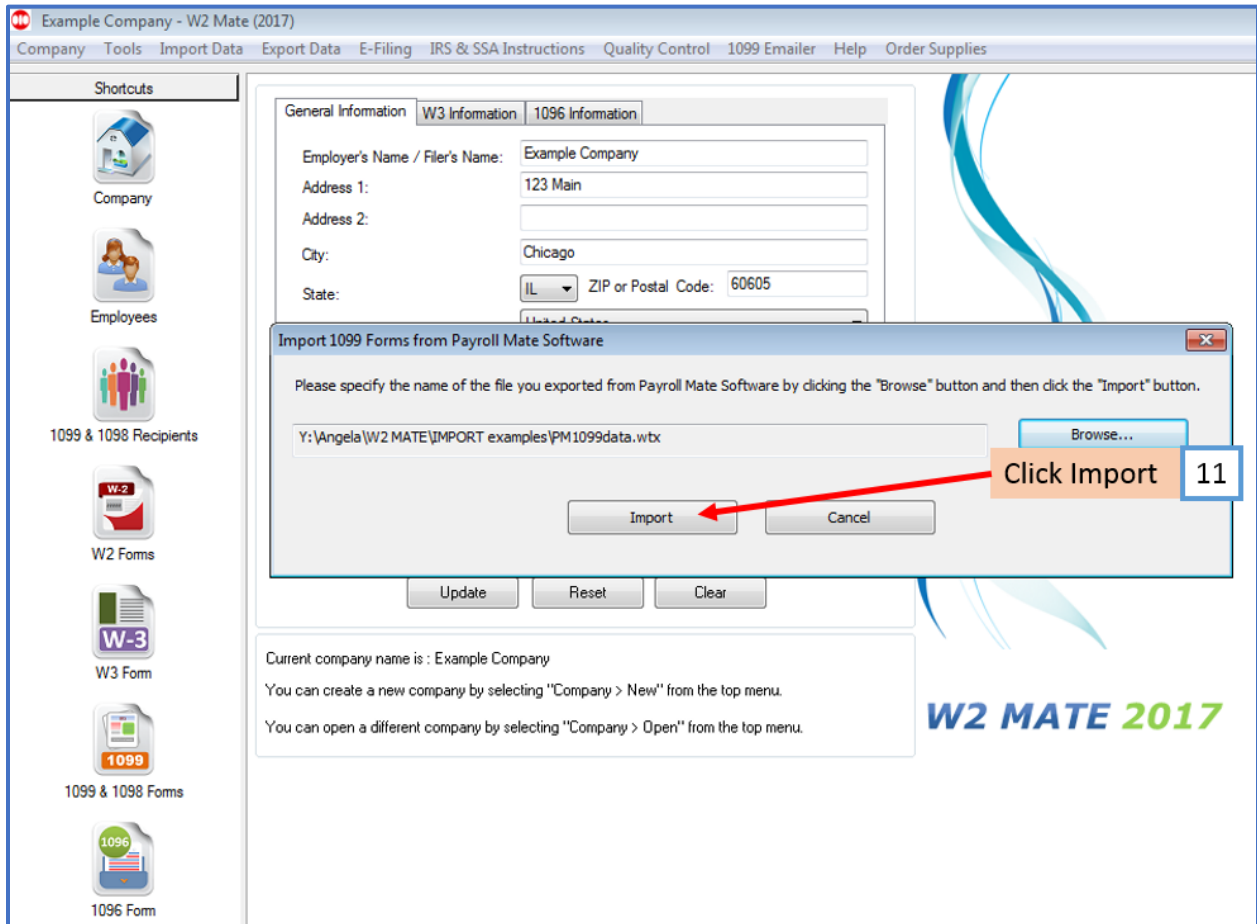


10. Select the correct file to import



Note: Selected file name will appear in the address bar

11. Click Import



12. At Import completed successfully Click OK

The screenshot displays the W2 Mate 2017 software interface. The main window is titled "Example Company - W2 Mate (2017)" and features a menu bar with options: Company, Tools, Import Data, Export Data, E-Filing, IRS & SSA Instructions, Quality Control, 1099 E-mailer, Help, and Order Supplies. On the left, a "Shortcuts" sidebar contains icons for Company, Employees, 1099 & 1098 Recipients, W2 Forms, W3 Form, 1099 & 1098 Forms, and 1096 Form. The central area is divided into tabs for "General Information", "W3 Information", and "1096 Information". The "General Information" tab is active, showing fields for Employer's Name / Filer's Name (Example Company), Address 1 (123 Main), Address 2, City (Chicago), State (IL), ZIP or Postal Code (60605), and Country (United States). Below these are fields for Employer Identification Number (12-3456789) and SSN (if Applicable). A modal dialog box titled "W2 Mate (2017)" is overlaid on the form, displaying a yellow warning icon and the text "Import completed successfully". A red arrow points from a callout box labeled "Click OK" and the number "12" to the "OK" button in the dialog box. At the bottom of the main window, there is a text box with the following content: "Current company name is : Example Company", "You can create a new company by selecting 'Company > New' from the top menu.", and "You can open a different company by selecting 'Company > Open' from the top menu." The "W2 MATE 2017" logo is visible in the bottom right corner.