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

🔒 Example Company - F	ayroll Mate (2018)								
<u>Eile E</u> dit <u>T</u> ools <u>H</u> e	Ip Order Checks and	Supplies							
1099 & Vendor						REPORT New Bas J Adv. Sec.25 Sec.35	1099	•	
			Manage Vendors	Pay Vendor	Manage Checks	Vendor Reports	Tax Forms	Expert to W2 Mate	
	Vendor Tax	D Vendor Name		Telephone Number				-	
Pay 1099 Contractors	123456789	Bob's Builders							
	987654321	Thomas Trains							_
Issue 1099 Forms							Click Expo	rt to W2 Mate	2
Track and Pay Bills									_
2018									
Checks									
Employees									
Forms Reports	Cli	ck 1099 & Ve	endor 1						
Company									
1099 & Vendor Tutorials									
*									

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)

Example Company	- W2 Mate (2017)
Company Tools In	nport Data Froort Data E-Filing IRS & SSA Instructions Quality Control 1099 Emailer Help Order Supplies
Shortcuts	W2 Forms (CSV – Excel) 1099-MISC Forms (CSV – Excel)
	1099-INT Forms (CSV – Excel)
	1099-DIV Forms (CSV – Excel)
Company	1099-R Forms (CSV – Excel)
	Other Forms (CSV – Excel)
2	From QuickBooks (W2 and/or 1099 Data) de: 60605 Select From Payroll Mate 8
Employee	From Sage 50 / Peachtree (1099 Data)
	From Microsoft Dynamics GP (1099 Data)
	From Microsoft Dynamics GP (W-2 Data)
	From Sage DacEasy (1099 Data)
1099 & 1098 Re	From Sage DacEasy (W-2 Data)
W-2	From W-2 Electronic Filing Format (EFW2 Format)
	From 1099 Electronic Filing Format (Publication 1220 Format)
W2 Forms	From Payroll Mate Software (W-2 Data)
	From Payroll Mate Software (1099 Data)
W-3	Email Addresses
W3 Form	Company(s) Information (CSV – Excel)
	You can create a new company by selecting "Company > New "from the top menu. You can create a new company by selecting "Company > New "from the top menu. W2 MATE 2017
	Tou can open a direrent company by selecting Company > Upen from the top menu.
1000 4 1000 5	
1099 & 1098 Fom	15
1996	
1096 Form	

Example Company - W2 Mate	e (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
₹	Address 2: City: Chicago State: IL V ZIP or Postal Code: 60605 Click Browse 9
Employees	
1099 & 1098 Recipients	Please specify the name of the file you exported from Payroll Mate Software by dicking the "Browse" button and then dick the "Import" button. Browse Import Cancel
W3 Form	Update Reset Clear Current company name is : Example Company You can create a new company by selecting "Company > New" from the top menu. W2 MATE 2017 You can open a different company by selecting "Company > Open" from the top menu. W2 MATE 2017
1099 & 1098 Forms	

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

10. Select the correct file to import

Shortcuts	General Informat	ion W3 Information	n 1096 Informati	on	Sala	ct File 10	1
	Employer's Na	me / Filer's Name	Example Compa	nv			
	Address 1: (<u></u>	<i>.</i>			
Company	Address 2:	Upen 🔱					
	Chr	Look in:	IMPORT ex	amples			
	City.	(Pa)	Name	. /	Date modified	Туре	
Employees	State:		PM1099da	ta.wtx	3/20/2018 9:29 AM	Text Docu	
Employees	Import 1099 Fo	Recent Places					8
	Dianas anasifi					and the second	
THE	Please specify	Desktop				port but	ton.
1099 & 1098 Recipients						••0	
		Librarier					
W-2		cioraries					
W2 Forms		Computer					
	1.2 ·····						
W/-3		Network	•	III		Þ	
W2 Form	Current company r		File name:	PM1099data.wtx	-	Open	
WS FOIL	You can create a r		Files of type:	Payroll Mate 1099 Export File	s (*.wtx) 🔻	Cancel	
	You can open a di	erent company by se	electing "Compan	y > Upen" from the top menu.		20.	1)
1099	d						
1099 & 1098 Forms							
1096							

Note: Selected file name will appear in the address bar

11. Click Import

Example Company - W2 Mate Company Tools Import Data	917) Export Data E-Filing IRS & SSA Instructions Quality Control 1099 Emailer Help Order Supplies					
Shortcuts Company	General Information W3 Information Employer's Name / Filer's Name: Example Company Address 1: 123 Main Address 2: City: City: Chicago State: IL V Por Postal Code:					
Employees 1099 & 1098 Recipients W2 Forms	Import 1099 Forms from Payroll Mate Software Please specify the name of the file you exported from Payroll Mate Software by clicking the "Browse" button and then click the "Import" button. Y:\Angela\W2 MATE\IMPORT examples\PM 1099data.wtx Browse Click Import 11					
W3 Form W3 Form 1099 & 1098 Forms 1096 Form	Update Reset Clear Current company name is : Example Company You can create a new company by selecting "Company > New" from the top menu. You can open a different company by selecting "Company > Open" from the top menu.					



12. At Import completed successfully Click OK