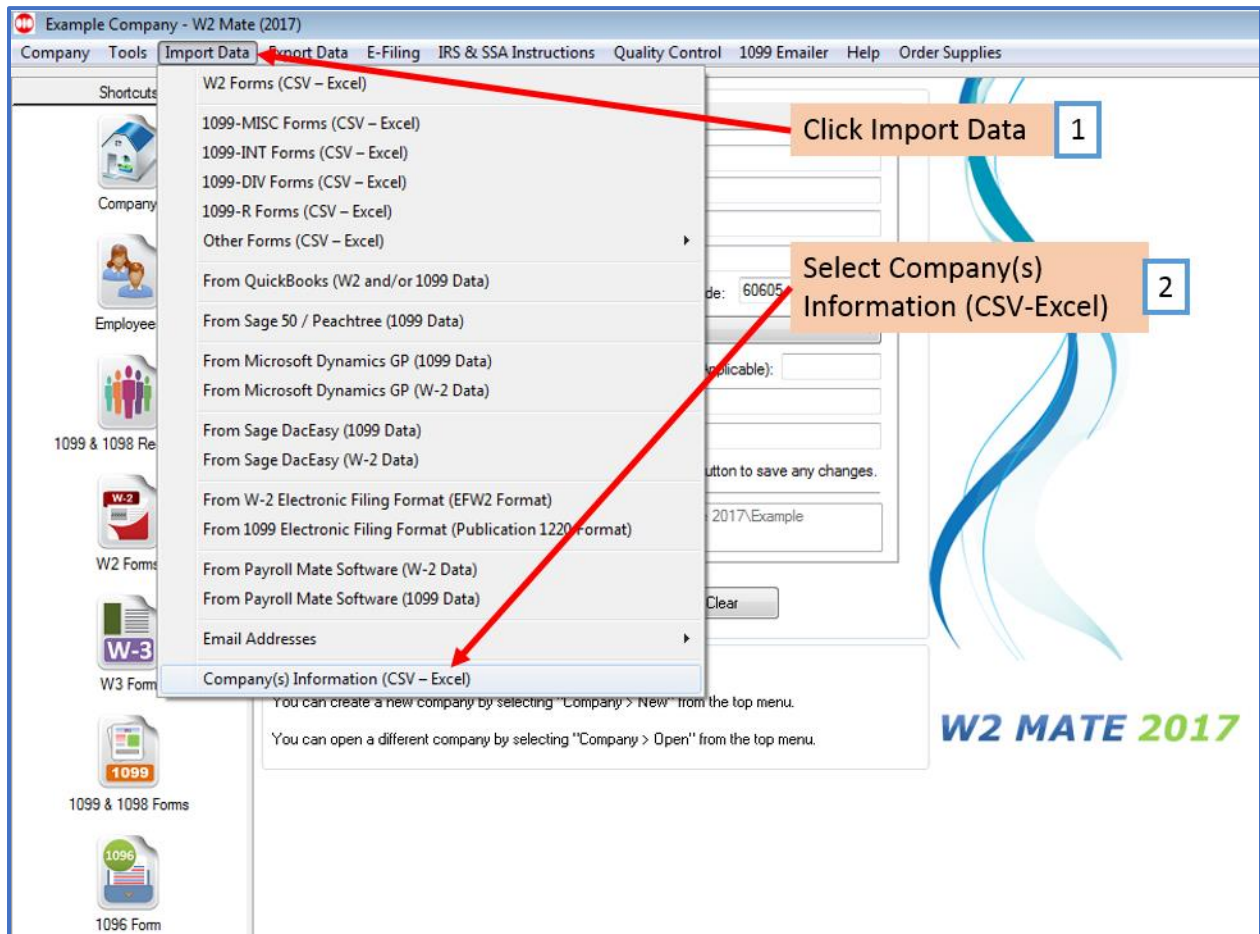


# How to Import Company Information in W2 Mate

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

1. Click Import Data
2. Click Company (CSV – Excel)



This will open the Import Company(s) Information wizard

3. To get detailed help with the import process, click on the Data Import Help button

Note: CSV files typically use a comma separator. Leave the separator options to default unless otherwise specified.

4. Click Browse to select the correct CSV data file to import

a. Once you select the input file you should see a preview for the contents of the file

Note: The first row is expected to include header information and NOT data. The header should contain names corresponding to the fields (columns) in the file and should contain the same number of fields (columns) as the records in the rest of the CSV file.

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 Detailed Import Help 3

Import Company(s) Information

CSV (comma separated value) is the most common format used in order to transfer data between different types of databases. Most software and database applications will allow you to export W2 and 1099 data into CSV format, which can then be imported into W2 Mate. Excel for example exports data to CSV. The first row in the CSV file is expected to include header information and NOT data. The header should contain names corresponding to the fields (columns).

To read detailed instructions for importing data into W2 Mate and for possible fields for the CSV file click the button to the right: Data Import Help

(1) Step One: Set Separator Options

Fields are separated by: Comma , Text Delimiter: Double " Last Row Number to Read from File: Only use if you do not want to read all rows from the input file

(2) Step Two: Set Input Text or CSV File

File: Y: \Company-Data.csv Browse... Click Browse to Select CSV data file 4

Data Preview 4a

(3) Step Three: Set Field Mapping (Columns)

Define each field by clicking on the column headers. The default for each field is "Unused", which means the field will be ignored during the import process.

To use the same field mapping you used before click: Use Previous Field Mapping To clear previous mapping click: Clear Previous Mapping

Unused	Employer Identification Number	Employer's Address Line 1	Employer's Address Line 2	Employer's City	Employer's State	
Header	Employer's Name	Employer Identification Number	Employer's Address Line 1	Employer's Address Line 2	Employer's City	Employer's State
1	Dan and Associates, Inc.	12-3456789	1458 Happy Town	Suite 400	NiceTown	IL

Import Close

## 5. Map your fields

When mapping your columns, click the word “Unused” for each column and select the correct column description to use for mapping the data

a. Map data by LEFT clicking the mouse on each column and select the correct column data

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**Import Company(s) Information**

CSV (comma separated value) is the most common format used in order to transfer data between different types of databases. Most software and database applications will allow you to export W2 and 1099 data into CSV format, which can then be imported into W2 Mate. Excel for example exports data to CSV . The first row in the CSV file is expected to include header information and NOT data. The header should contain names corresponding to the fields (columns) .

To read detailed instructions for importing data into W2 Mate and for possible fields for the CSV file click the button to the right :

(1) Step One: Set Separator Options

Fields are separated by:  , Text Delimiter:  \*

Last Row Number to Read from File  
Only use if you do not want to read all rows from the input file

(2) Step Two: Set Input Text or CSV File

File: Y:\Angela\W2 MATE\IMPORT examples\Company-Data.csv

**Map each column 5**

(3) Step Three: Set Fields (Columns)

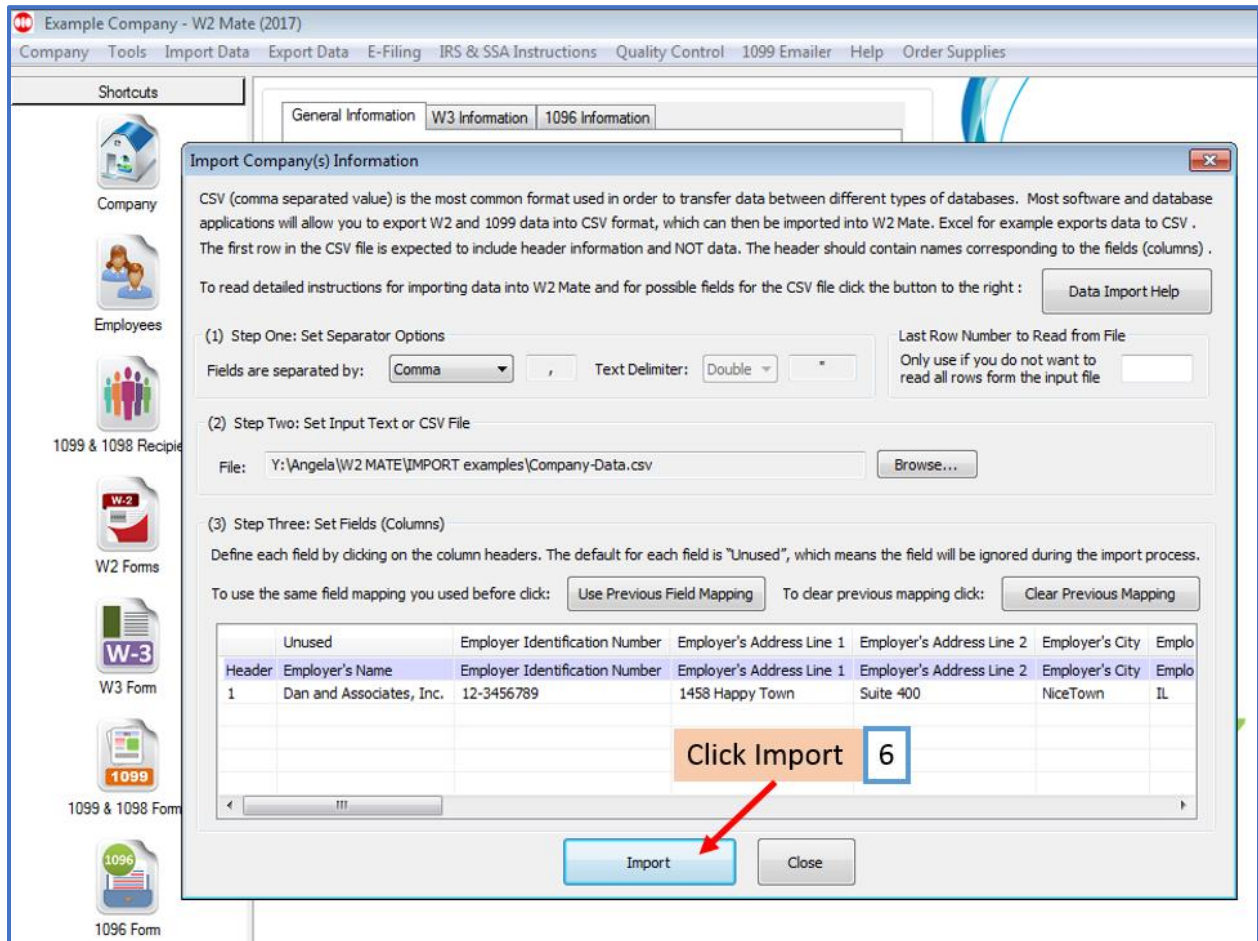
Define each field by clicking on the column headers. The default for each field is "Unused", which means the field will be ignored during the import process.

To use the same field mapping you used before click:  To clear previous mapping click:

Header	Unused	Emp	Employer's Name	Employer's City	Emplo
1	Dan and Associates, Inc.	12-3	Employer Identification Number	NiceTown	IL

**Left click each "Unused" 5a**

## 6. When you have all the fields mapped, Click Import



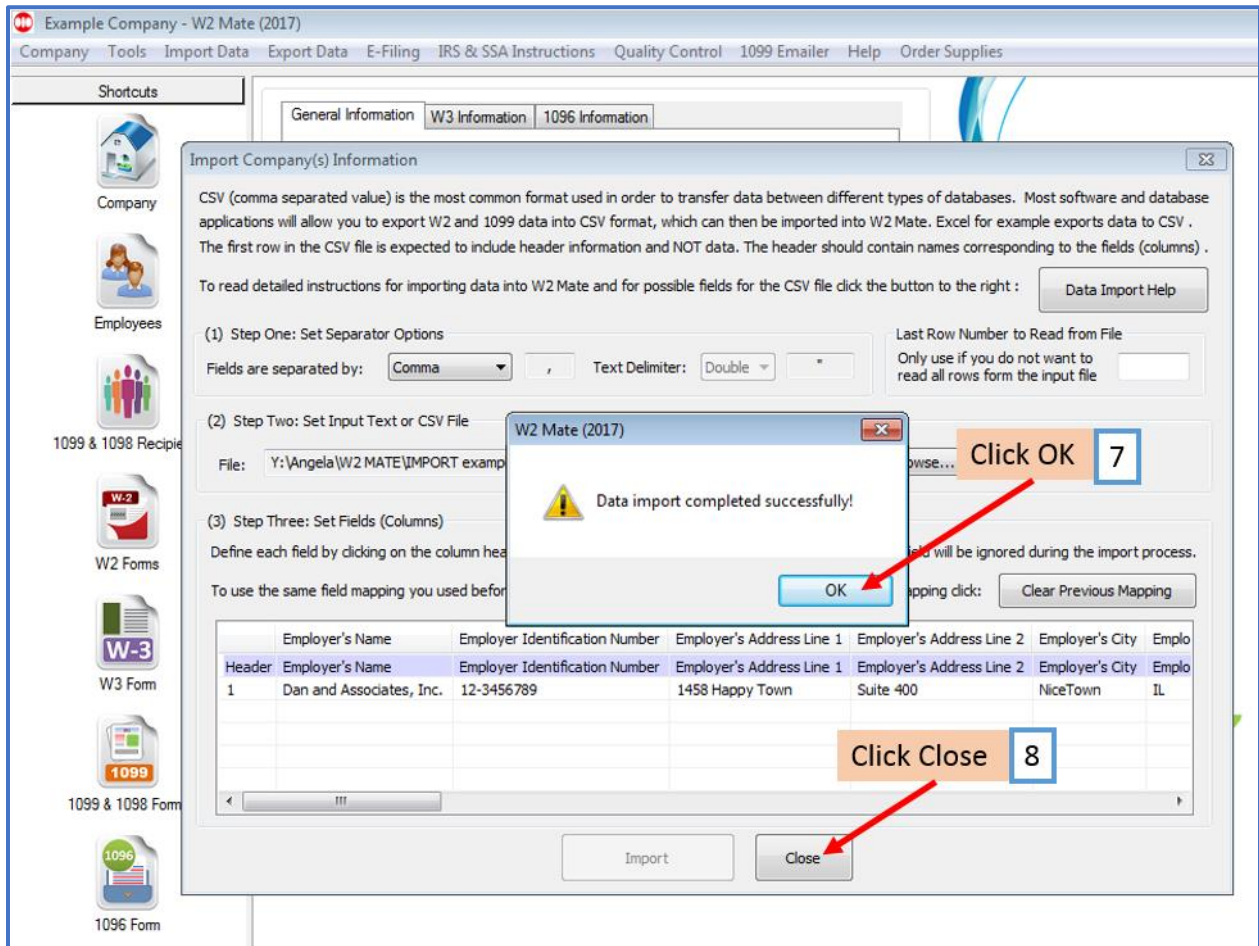
Note: The most common error during import is duplicate or incorrectly formatted data. The import engine in W2 Mate uses a highly advanced detection system which can identify and report the most common import data errors BEFORE the data is imported.

If you receive any errors in regards to the data in the CSV file, you will need to open the CSV file, make the needed corrections, resave the CSV file, then import the corrected file into W2 Mate. Corrections cannot be made on the panel above, this is a mapping utility only not an editor.



7. When you receive the Data Import completed successfully Click OK

8. Click Close to exit the Import wizard



Your Company data is now imported in W2 Mate