How to Import Email Addresses in W2 Mate

Make sure you have the correct company open in W2 Mate

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

W2 Employee

- 1. Click Import Data
- 2. Select Email Addresses

3. Select Employees Email Addresses

Example Compa	mpany - W2 Mate (2017)						
Company Tools	ols Import Data Evont Data E-Filing IRS & SSA Instructions Quality Control 1099 Emailer Help Order Supplies	5					
Shortcuts	cuts W2 Forms (CSV – Excel)	1					
	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)	es 2					
Employee	yee From Sage 50 / Peachtree (1099 Data)						
	From Microsoft Dynamics GP (1099 Data) pplicable):						
	From Microsoft Dynamics GP (W-2 Data)						
1000 A 1000 D	From Sage DacEasy (1099 Data)						
1099 & 1098 Re	From Sage DacEasy (W-2 Data)	ail Addresses 2					
W-2	From W-2 Electronic Filing Format (FW2 Format)	all Addresses 5					
	From 1099 Electronic Filing Format (Publication 1220 Format)	2017 Example					
W2 Forms							
	From Payroll Mate Software (1000 Deta)						
W-3	-3 Email Addresses Email Addresses	Employees Email Addresses					
W3 Form	-om Company(s) Information (CSV – Excel) 1099 / 1098 Recipients Email Address	ies					
	You can create a new company by selecting "Lompany > New" from the top menu.	MATE 2017					
	You can open a different company by selecting "Company > Open" from the top menu.	MAIE 2017					
1099	99						
1099 & 1098 F	98 Forms						
1096 Form	Form						

4. Read the information regarding the import process carefully

5. Click Browse to select the CSV file

Example Company - W2 Mate	e (2017)								
Company Tools Import Data	a Export Data E-Filing IRS & SSA Instructions Quality Control 1099 Emailer Help Order Supplies								
Shortcuts	General Information Read Carefully 4								
Company	Import Employee Emails								
♣	see d is vialog in you wan to imput Email Addresses for multiple employees, having an email address for each employee (SV ePY Useful if you wish to send employee copies of forms W-2 electronically by email. One way to batch send W2s as an email is using "1099 Emailer" utility which is seamlessly integrated with W2 Mate. Import file format:								
Employees	1- W2 Mate expects the input file to be in CSV (comma separated value) format, which is the most common format used in order to transfer data between different types of applications.								
1099 & 1098 Recipients	 2- You can easily create a CSV file from inside a spreadsheet software like Excel, by clicking "Save As > CSV (Comma Delimited)". 3- W2 Mate expects at least 2 columns in the input file, one column for the email address and one column for the Employee Social Security Number. W2 Mate will auto detect these columns. Email address is assumed to be in the format aaa@bbb.com and the SSN in the format xxx-xx-xxxx. 								
	 4 - W2 Mate will use the employee SSN in order to tie the email address to an existing record already created inside W2 Mate. For example if W2 Mate already includes an employee named John Doe with an SSN of 123-45-6789 and the input file includes a row where the SSN is 123-45-6789 and email is JohnDoe@domainname.com then W2 Mate will update the record for John Doe to have an email address of JohnDoe@domainname.com. 5 - Records that exist inside the input file, but do not correspond to existing employees inside W2 Mate will be ignored. 								
W2 Forms	Click Browse 5								
W-3 W3 Form	Step 2: Specify input CSV file								
	Input CSV File Name: Browse								
1099 & 1098 Forms	Import								
1096 Form									

6. Click OK

😳 Example Company - W2 Mate (2017)	
Company Tools Import Data Export Data E-Filing IRS & SSA Instructions Quality Control 1099 Er	mailer Help Order Supplies
Shortcuts	
Import Employee Emails	E C
Step 1: Read Carefully	
Company Use this dialog if you wish to import Email Addresses for multiple employees. Having an ema send employee copies of forms W-2 electronically by email. One way to batch send W2s as integrated with W2 Mate.	ail address for each employee is very useful if you wish to an email is using "1099 Emailer" utility which is seamlessly
Import file format:	
 1- W2 Mate expects the input file to be in CSV (comma separated value) format, which is the between different types of applications. 	ne most common format used in order to transfer data
2- You can easily create a CSV file from inside a spreadsheet software like Excel, by dicking	g "Save As > CSV (Comma Delimite
3- W2 Mate expects at le W2 Mate will auto detect W2 Mate (2017)	Social Social Society Number. mat xxx-xx-xxxx.
1099 & 1098 Recipit 4- W2 Mate will use the et Mate already includes an email is JohnDoe@domain proceed with the import process.	he "Import" button to \$\$550 is 123-45-6789 and \$\$600 e@domainname.com.
5- Records that exist insid W2 Forms	ОК
Step 2: Specify input CSV file	
W3 Form Input CSV File Name: Y: \Angela\W2 MATE\IMPORT examples\Employee Email Addre	sses.csv Browse
1099	17
1099 & 1098 Fom Import Car	ncel
1096 Form	

7. Click Import

Example Company - W	2 Mate (2017)										
Company Tools Impor	t Data Export Data E-Filing IRS & SSA Instructions Quality Control 1099 Emailer Help Order Supplies										
Shortcuts											
	Import Employee Emails										
Step 1: Read Carefully											
Company	Company Use this dialog if you wish to import Email Addresses for multiple employees. Having an email address for each employee is very useful if you wish to send employee copies of forms W-2 electronically by email. One way to batch send W2s as an email is using "1099 Emailer" utility which is seamlessly integrated with W2 Mate.										
Import file format:											
Employees	1- W2 Mate expects the input file to be in CSV (comma separated value) format, which is the most common format used in order to transfer data between different types of applications.										
	2- You can easily create a CSV file from inside a spreadsheet software like Excel, by dicking "Save As > CSV (Comma Delimited)".										
(†† 1)	3- W2 Mate expects at least 2 columns in the input file, one column for the email address and one column for the Employee Social Security Number. W2 Mate will auto detect these columns. Email address is assumed to be in the format aaa@bbb.com and the SSN in the format xxx-xx-xxxx.										
1099 & 1098 Recipients	4- W2 Mate will use the employee SSN in order to tie the email address to an existing record already created inside W2 Mate. For example if W2 Mate already includes an employee named John Doe with an SSN of 123-45-6789 and the input file includes a row where the SSN is 123-45-6789 and email is JohnDoe@domainname.com.										
W2 Forms	5- Records that exist inside the input file, but do not correspond to existing employees inside W2 Mate will be ignored.										
	Step 2: Specify input CSV file										
W3 Form	Input CSV File Name: Y:\Angela\W2 MATE\IMPORT examples\Employee Email Addresses.csv Browse										
	Click Import 7										
1099											
1099 & 1098 Forms	Import Cancel										
1096											
1096 Form											



The employee email addresses that were imported into W2 Mate will be listed

9. Click Close

Example Company - W2 Mate	e (2017) Export Data E-Filing IRS & SSA Instructions Quality Control 1099 Emailer Help Order Supplies
Shortcuts Company	General Information W3 Information 1096 Information Employer's Name / Filer's Name: Example Company Address 1: 123 Main
Employees	W2 Mate
1099 & 1098 Recipients	Imported Employee Email addresses will be in list
W2 Forms	
W-3 W3 Form	Click Close 9
1099 & 1098 Forms	Copy onis message Print onis message Close
1096 Form	

1099/1098 Recipient

- 1. Click Import Data
- 2. Select Email Addresses
- 3. Select 1099/1098 Recipients Email Addresses

Example Compare	ny - W2 Mate (2017)	
Company Tools	Import Data Control Data E-Filing IRS & SSA Instructions Quality C	ontrol 1099 Emailer Help Order Supplies
Shortcuts	W2 Forms (CSV – Excel)	
	1099-MISC Forms (CSV – Excel)	Click Import Data 1
	1099-INT Forms (CSV – Excel)	
	1099-DIV Forms (CSV – Excel)	
Company	1099-R Forms (CSV – Excel)	
	Other Forms (CSV – Excel)	Colort Empil Addresses 2
	From QuickBooks (W2 and/or 1099 Data)	Belect Email Addresses 2
Employee	From Sage 50 / Peachtree (1099 Data)	
	From Microsoft Dynamics GP (1099 Data)	policable):
	From Microsoft Dynamics GP (W-2 Data)	Select 1099/1098 Recipients
1099 & 1098 Be	From Sage DacEasy (1099 Data)	Email Addresses 3
	From Sage DacEasy (W-2 Data)	utton to save any changes.
W-2	From W-2 Electronic Filing Format (FW2 Format)	
	From 1099 Electronic Filing Format (Publication 1220 Format)	2017/Example
W2 Forms	From Payroll Mate Software (W-2 Data)	
	From Payroll Mate Software (1099 Data)	Clear
	Email Addresses	Employees Et ail Addresses
VV-5	Company(s) Information (CSV – Eycel)	1099 / 1098 Recipients Email Addresses
VV 3 Form	You can create a new company by selecting "Lompany > New"	from the top menu.
	You can open a different company by selecting "Company > Ope	en" from the top menu. W2 MATE 2017
1099		
1099 & 1098 Fo	oms	
1096		
1096 Form		

4. Read the information regarding the import process carefully

5. Click Browse to select the CSV file

Example Company - W2 Mat	e (2017)							
Company Tools Import Data	Export Data E-Filing IRS & SSA Instructions Quality Control 1099 Emailer Help Order Supplies							
Shortcuts	General Information							
e	Import Employee Emails							
	Step 1: Read Carefully							
Company	Use this dialog if you wish to import Email Addresses for multiple 1099 Recipients. Having an email address for each recipient is very useful if you wish to send recipient copies of forms 1099 electronically by email. One way to batch send 1099s as an email is using "1099 Emailer" utility which is seamlessly integrated with W2 Mate. Import file format:							
Employees	1- W2 Mate expects the input file to be in CSV (comma separated value) format, which is the most common format used in order to transfer data between different types of applications.							
1099 & 1098 Recipients	2- You can easily create a CSV file from inside a spreadsheet software like Excel, by clicking "Save As > CSV (Comma Delimited)". 3- W2 Mate expects at least 2 columns in the input file, one column for the email address and one column for the 1099 Recipient Tax Identification Number . W2 Mate will auto detect these columns. Email address is assumed to be in the format aaa@bbb.com and the Tax Identification Number in the format xxx-xx-xxxx.							
W2 W2 Forms	- W2 Mate will use the 1099 Recipient Tax Identification Number in order to tie the email address to an existing record already created inside W2 Mate. For example if W2 Mate already includes an 1099 Recipient named John Doe with an Tax Identification Number of 123-45-6789 and the input file includes a row where the Tax Identification Number is 123-45-6789 and email is JohnDoe@domainname.com then W2 Mate will update the record for John Doe to have an email address of JohnDoe@domainname.com. 5- Records that exist inside the input file, but do not correspond to existing 1099 Recipients inside W2 Mate will be ignored.							
W-3 W3 Form	Step 2: Specify input CSV file Input CSV File Name: Browse Browse							
1099 & 1098 Forms	Import							
1096 Form								

6. Click OK



7. Click Import

💷 Exampl	le Compa	any - W2 Mate	(2017)											
Company	Tools	Import Data	Export Data	E-Filing	IRS & SSA Instru	ctions	Quality Cont	rol 1099 E	Emailer	Help Or	der Supplies			
	Shortcuts											/		
		Import Emp	oyee Emails										×	
	MA/	Step 1: Re	ad Carefully											
	Company	Use this dialog if you wish to import Email Addresses for multiple 1099 Recipients. Having an email address for each recipient is very useful if you wish to send recipient copies of forms 1099 electronically by email. One way to batch send 1099s as an email is using "1099 Emailer" utility which is seamlessly integrated with W2 Mate.												
	20	Import file format:												
	Employee	1- W2 Mat between d	e expects the inp lifferent types of	out file to applicatio	be in CSV (comma se ons.	parated \	value) format,	which is the	e most com	mon format	used in order t	to transfer data		
		2- You can	easily create a (CSV file fro	om inside a spreadsh	eet softw	vare like Excel	by clicking "	"Save As >	> CSV (Com	ma Delimited)".			
	iiii	3-W2Mat Number . the format	e expects at leas N2 Mate will auto xxx-xx-xxxx.	t 2 colum detect th	ns in the input file, o nese columns. Email	ne column address is	n for the email assumed to b	address and e in the form	d one colur mat aaa@b	mn for the 1 obb.com and	1099 Recipient d the Tax Ident	Tax Identificatio ification Number	n rin	
1099 8	8 1098 Re	4- W2 Mat	e will use the 109	99 Recipie	nt Tax Identification	Number i	in order to tie	the email add	dress to ar	n existing re	ecord already o	reated inside W	2	
	W-2	Mate. For example if W2 Mate already includes an 1098 Recipient named John Doe with an Tax Identification Number of 123-45-6789 and the input file includes a row where the Tax Identification Number is 123-45-6789 and email is JohnDoe@domainname.com then W2 Mate will update the record for John Doe to have an email address of JohnDoe@domainname.com.												
	W2 Forms			are input		copond to	coloring 105	recipiento	indice in 2		ignorear			
	W-3	Step 2: Spe	ecify input CSV fil	e										
	W3 Form	Input CS	V File Name:	Y:\Ange	la \W2 MATE \IMPOR	T example	es\Recipient E	mail Address	es.csv			Browse		
										Click	Import	7		
										CIICK	mport			11/
	1099													
109	9 & 1098 F					Import	t	Cance	el					
														I
	1096 Fom	ו												



The recipient email addresses that were imported into W2 Mate will be listed

9. Click Close

