

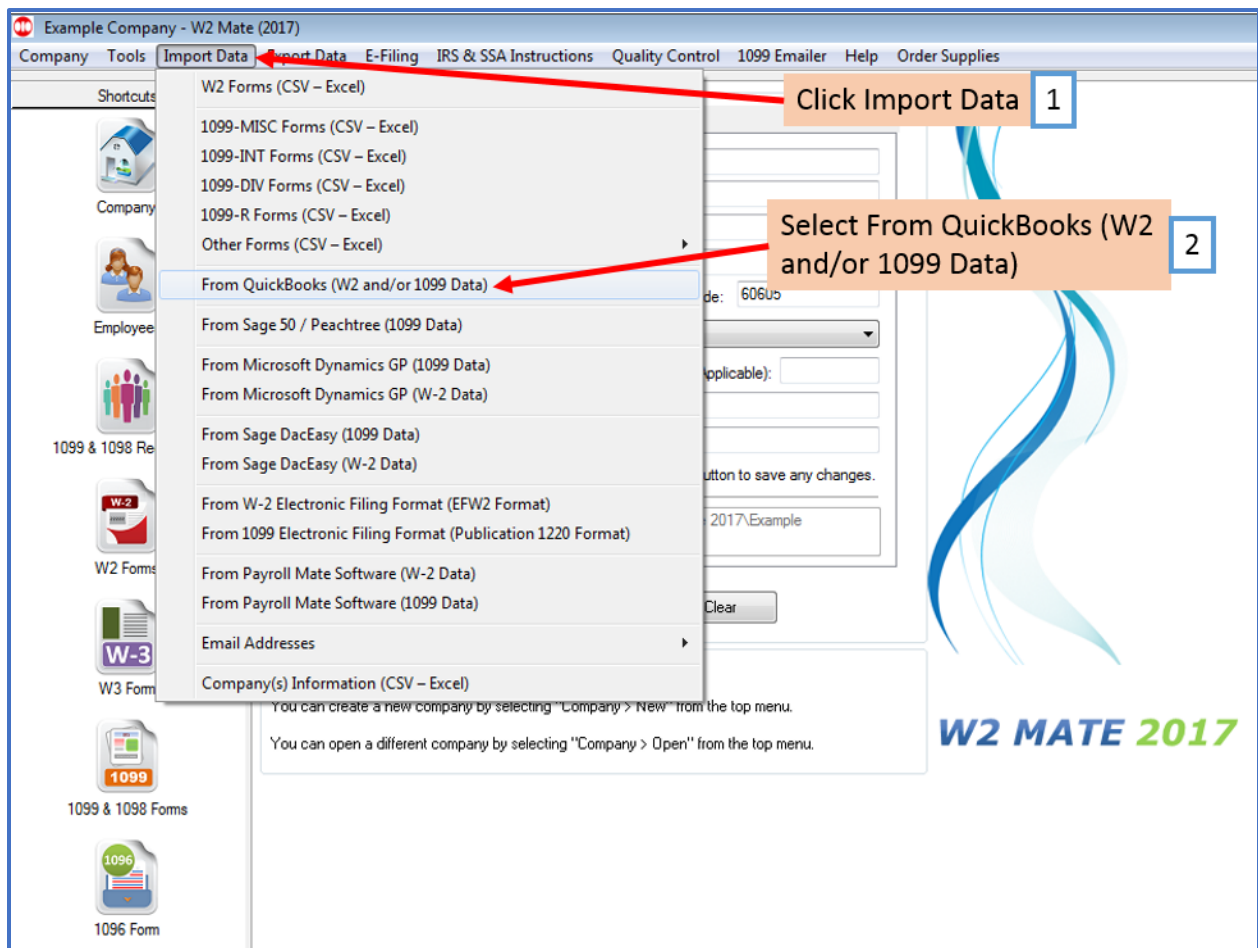
How to Import Other 1099 Data Using QuickBooks

Note: In order to use this feature you must purchase and enable W2 Mate Option #3 to import and W2 Mate Option #5 for additional 1099/1098 forms

Make sure you have the correct Company open inside W2 Mate

Note: You can import into one company at a time. If you do not currently have this company created inside of W2 Mate you will need to create the company prior to importing the data. See How to Create a New Company tutorial.

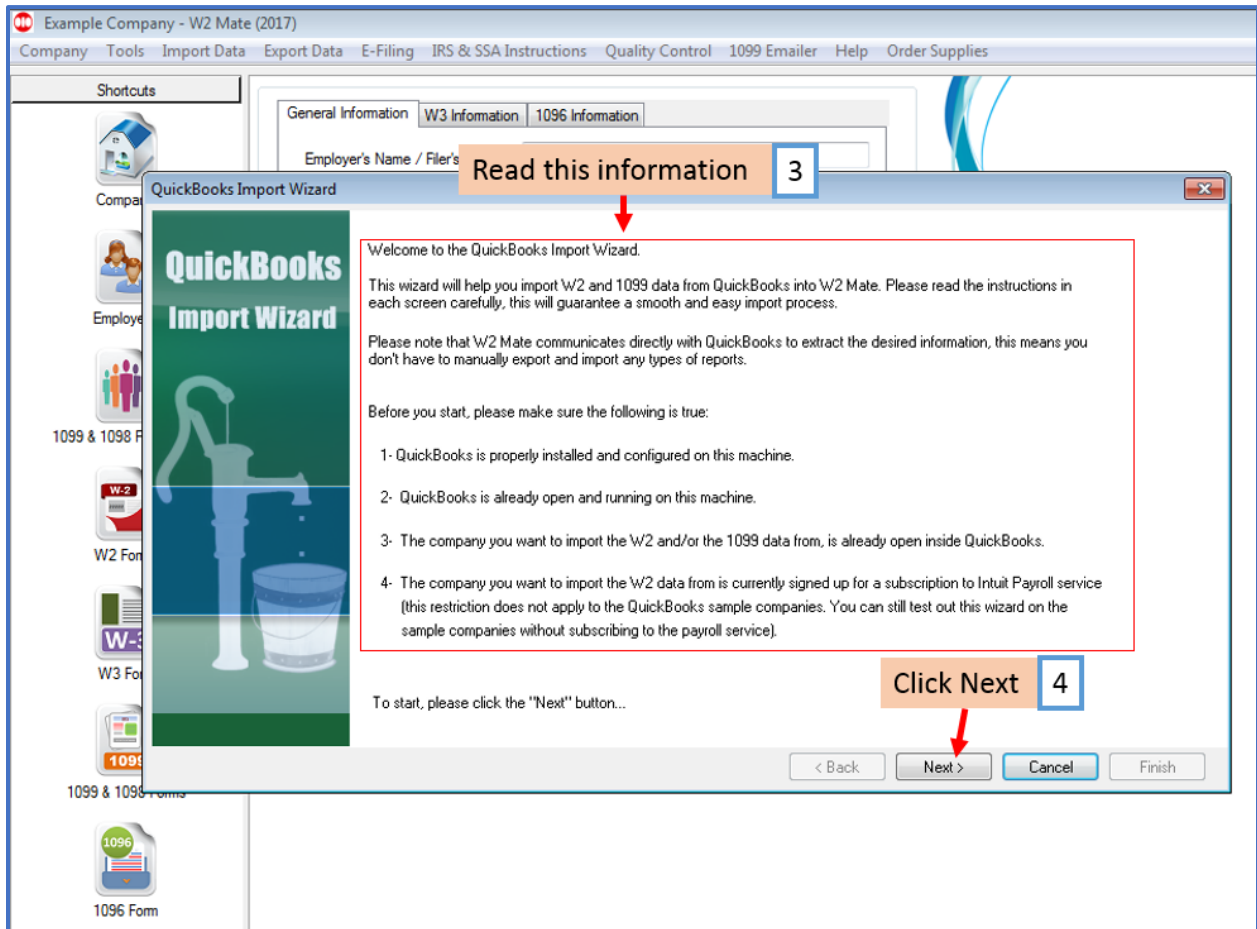
1. Click Import Data
2. Select From QuickBooks (W2 and/or 1099 Data)



Note: Follow the wizard screens by Reading and Clicking “NEXT”

3. Read carefully and understand that you will need to have QuickBooks open and actively running on your computer in order to import the data

4. Click Next



5. Click Connect to QuickBooks

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

Employer's Name / Filer's Name: Example Company

QuickBooks Import Wizard Click Connect to QuickBooks 5

Connecting to QuickBooks

W2 Mate will first need to connect (log in) to QuickBooks before it can read any W2 or 1099 information.

- 1- Click on the "Connect to QuickBooks" button shown to the right: **Connect to QuickBooks**
- 2- Now you should see a dialog inside QuickBooks asking you if you want to authorize W2 Mate to access the company information. The figure below shows the options you need to select inside this dialog.

Do you want to allow this application to read and modify this company file?

- No
- Yes, prompt each time
- Yes, whenever this QuickBooks company file is open
- Yes, always; allow access even if QuickBooks is not running

(1) Select this option

(2) Check this Checkbox

Allow this application to access personal data such as Social Security Numbers and customer credit card information. [Tell me more](#)

(3) Click Here

Continue... Cancel Help

- 3- Once you hit the "Continue" button on the first dialog, you should see a second dialog asking you to confirm granting access for W2 Mate. Please click on the "Done" button.

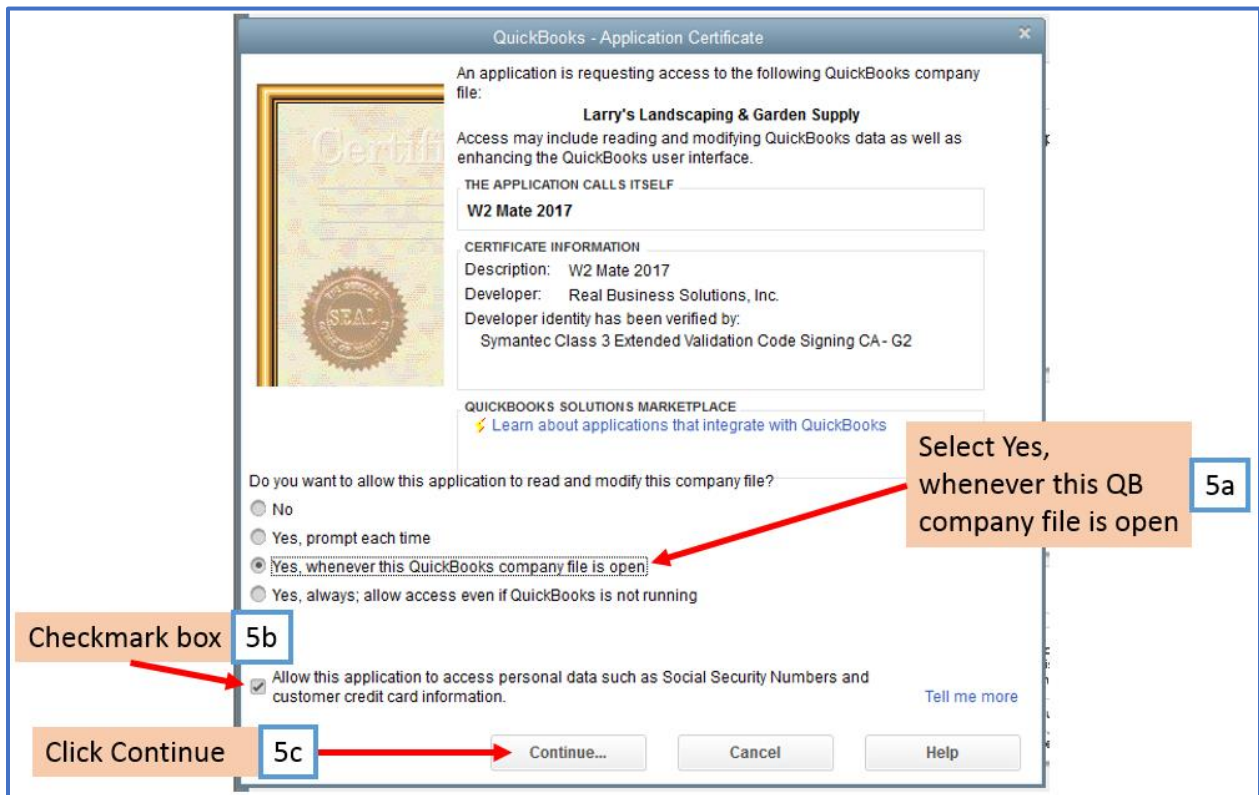
< Back Next > Cancel Finish

You should now see a dialog inside QuickBooks asking if you want to authorize W2 Mate to access the company information.

5a. Select Yes, whenever this QuickBooks company file is open

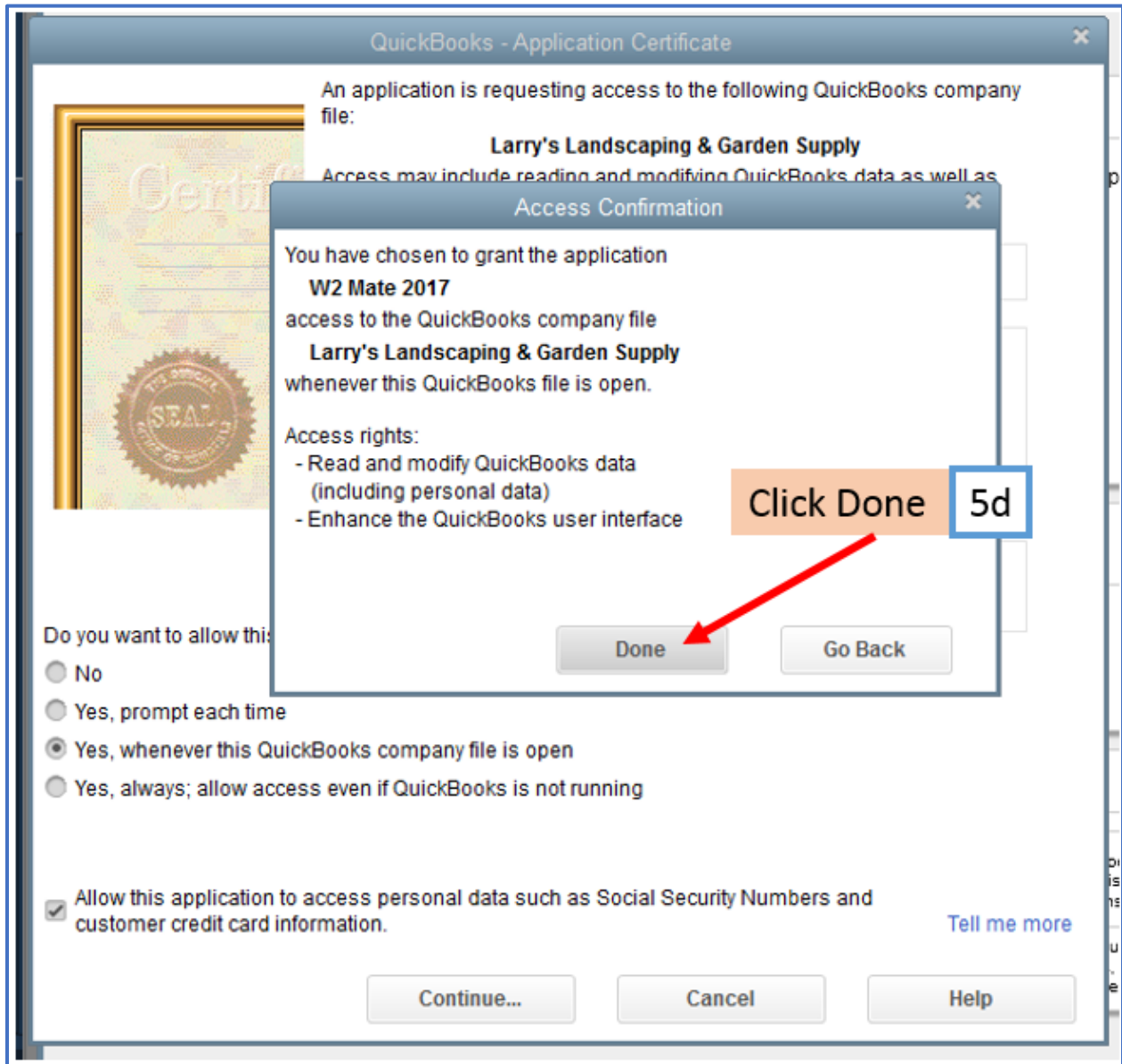
5b. Checkmark box Allow this application to access personal data such as Social Security Numbers and customer credit card information

5c. Click Continue



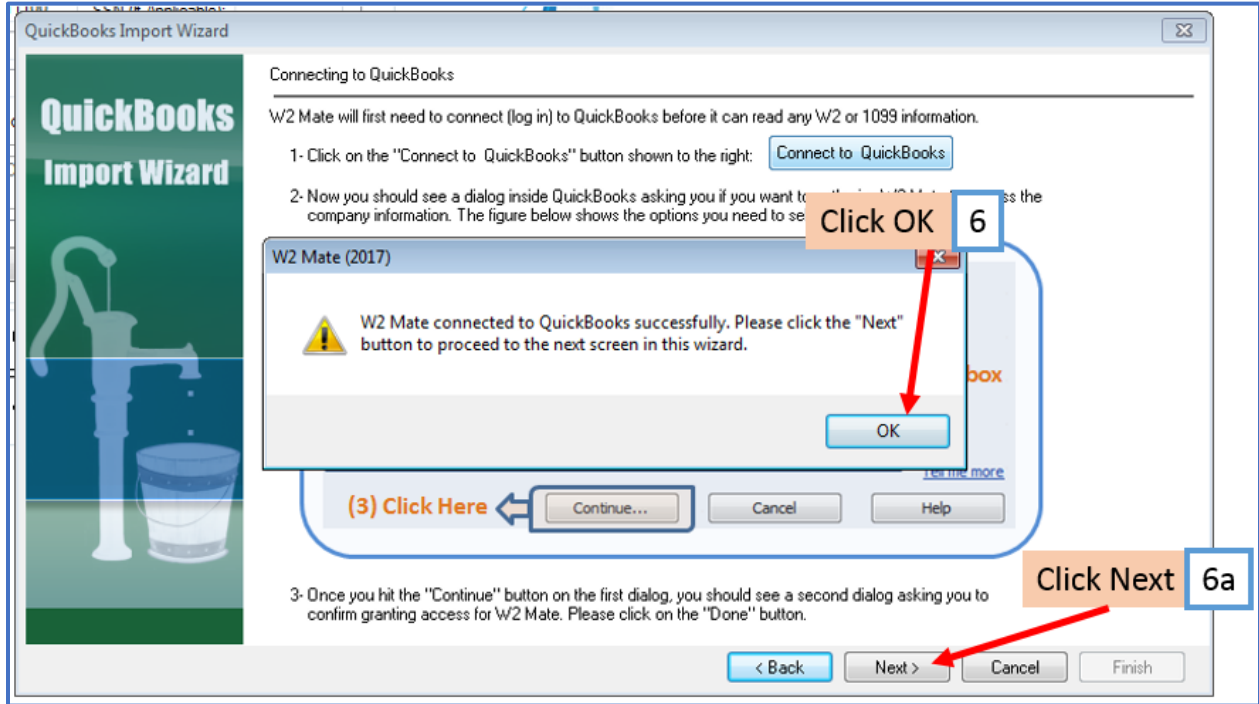
A second dialog will open in QuickBooks asking you to confirm granting access to W2 Mate

5d. Click Done



6. Click Next

6a. Click Next



7. Select 1099 Data

8. Select Tax Year

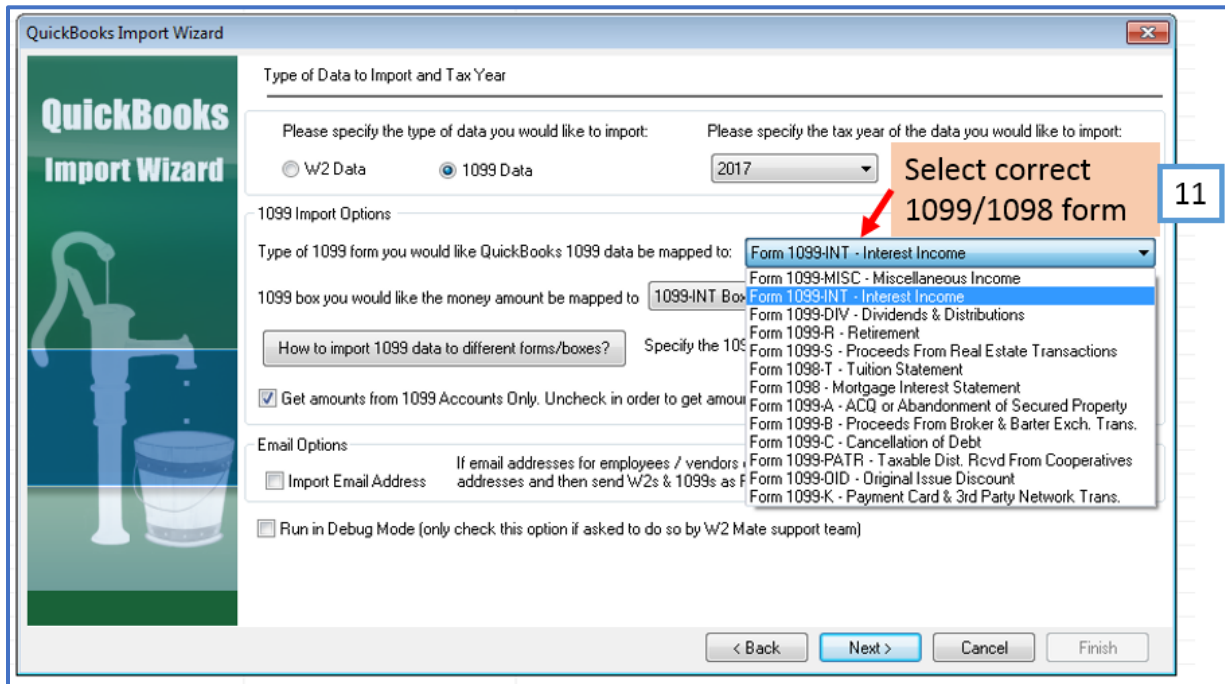
9. Check to Get amounts from 1099 Accounts Only

Note: Leave unchecked to get amounts from All Allowed Accounts

10. Checkmark to Import email addresses

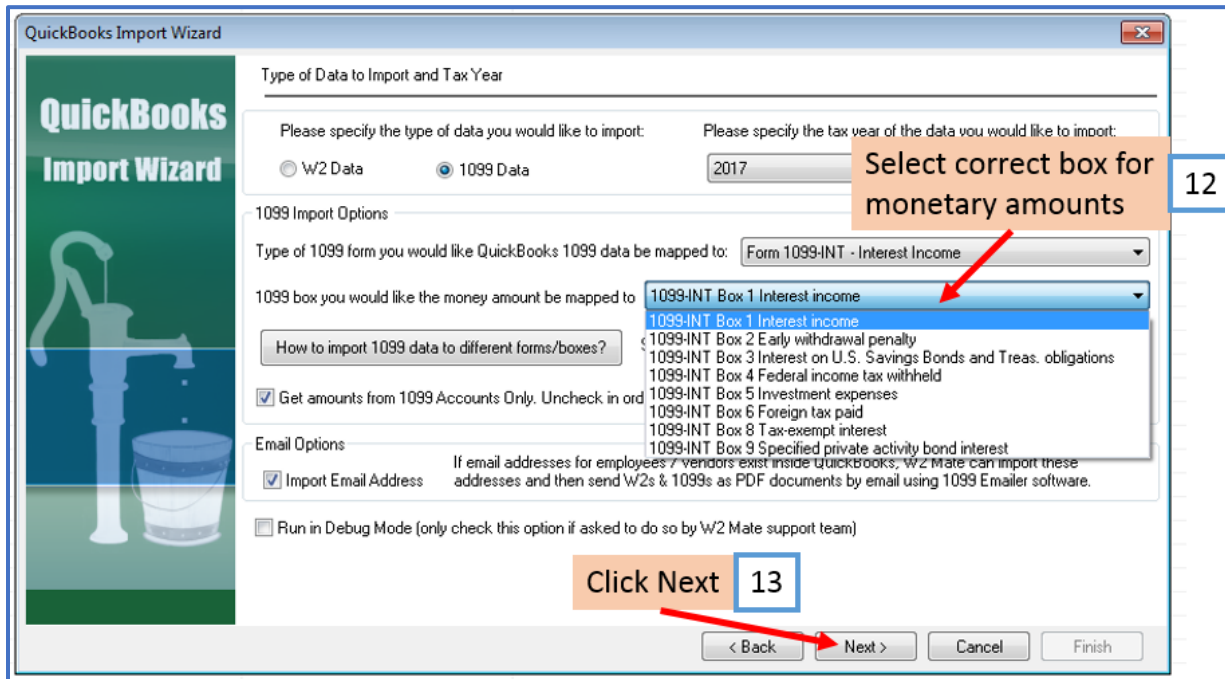
The image shows a screenshot of the 'QuickBooks Import Wizard' dialog box. The window title is 'QuickBooks Import Wizard'. The main content area is titled 'Type of Data to Import and Tax Year'. It contains two sections: 'Please specify the type of data you would like to import:' and 'Please specify the tax year of the data you would like to import:'. The first section has two radio buttons: 'W2 Data' (unchecked) and '1099 Data' (checked). The second section has a dropdown menu showing '2017'. Below these are '1099 Import Options' with two dropdown menus: 'Type of 1099 form you would like QuickBooks 1099 data be mapped to:' (set to 'Form 1099-INT - Interest Income') and '1099 box you would like the money amount be mapped to:' (set to '1099-INT Box 1 Interest income'). There is a text input field for 'Specify the 1099 threshold (1099-MISC default is \$600):' with the value '600'. A checkbox labeled 'Get amounts from 1099 Accounts Only. Uncheck in order to get amounts from All Allowed Accounts.' is checked. Below this is an 'Email Options' section with a checkbox 'Import Email Address' checked and a note: 'If email addresses for employees / vendors exist inside QuickBooks, W2 Mate can import these addresses and then send W2s & 1099s as PDF documents by email using 1099 Emailer software.' There is also an unchecked checkbox for 'Run in Debug Mode (only check this option if asked to do so by W2 Mate support team)'. At the bottom are buttons for '< Back', 'Next >', 'Cancel', and 'Finish'. Four numbered callouts (7, 8, 9, 10) with arrows point to the '1099 Data' radio button, the '2017' dropdown, the 'Get amounts from 1099 Accounts Only' checkbox, and the 'Import Email Address' checkbox, respectively.

11. Select correct 1099/1098 form from drop-down list



12. Select correct box for monetary amounts from drop-down menu

13. Click Next

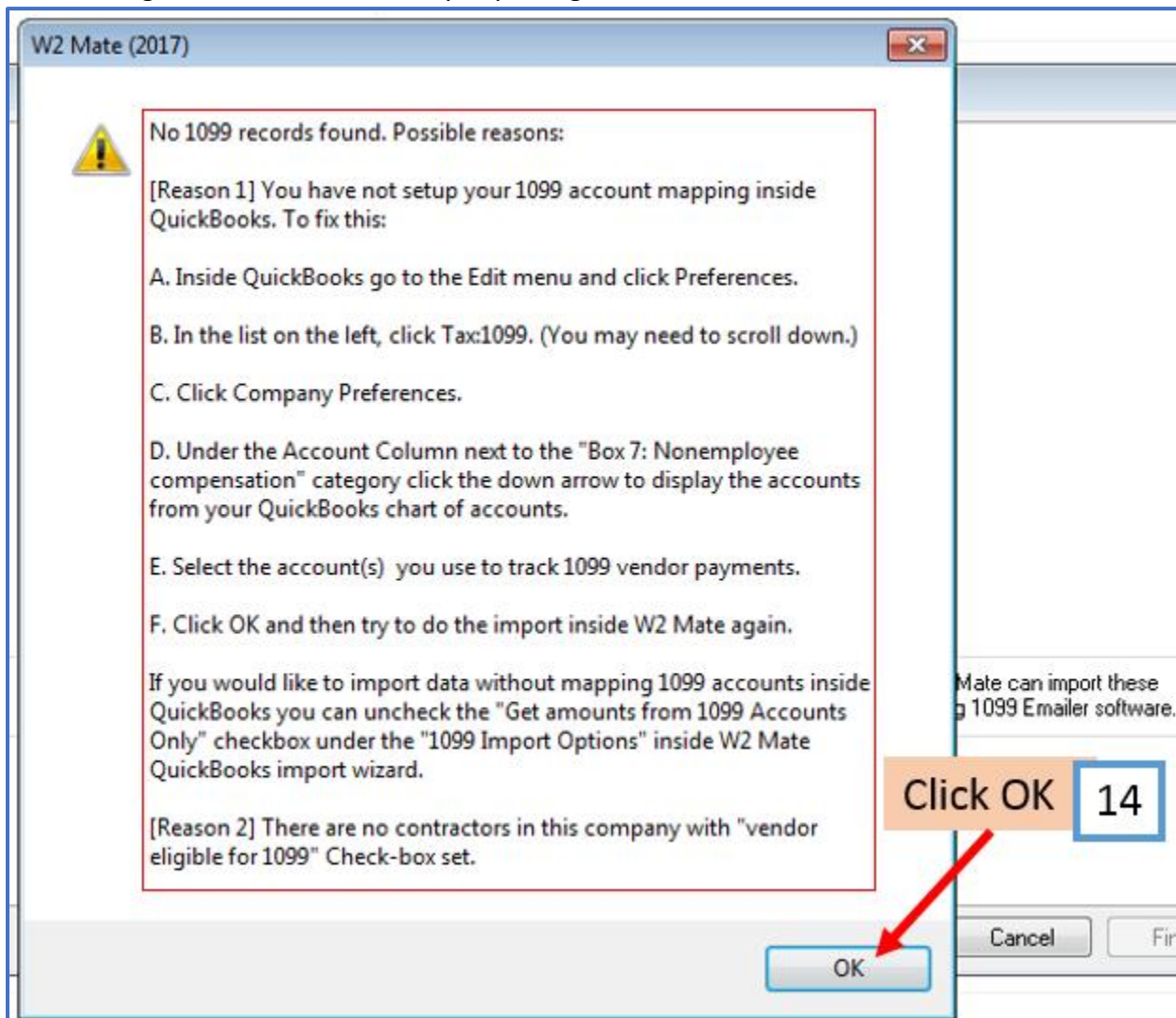


Read notice if no 1099 records are found

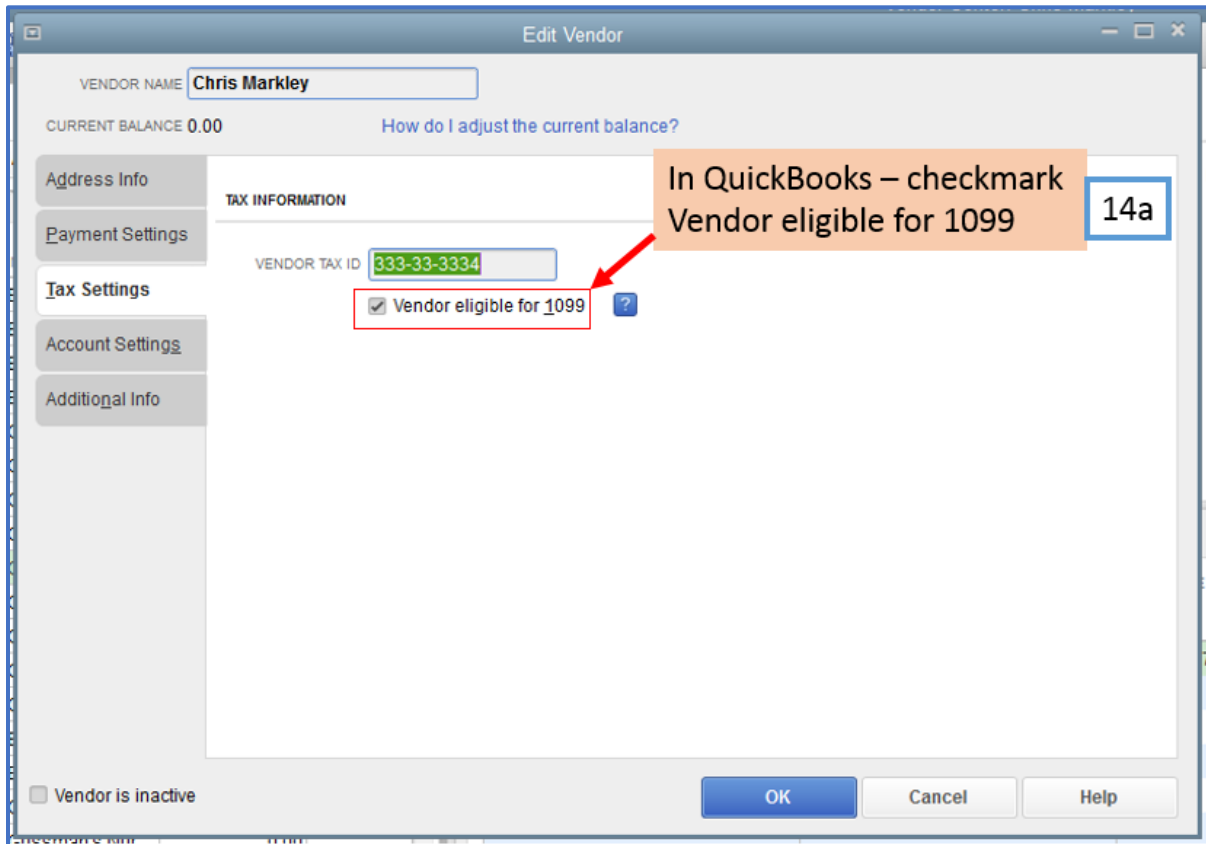
Note: If you get this message, make changes in QuickBooks and try import again. If you do not receive this message, continue to step 15

14. Click OK

Make changes in QuickBooks and try import again

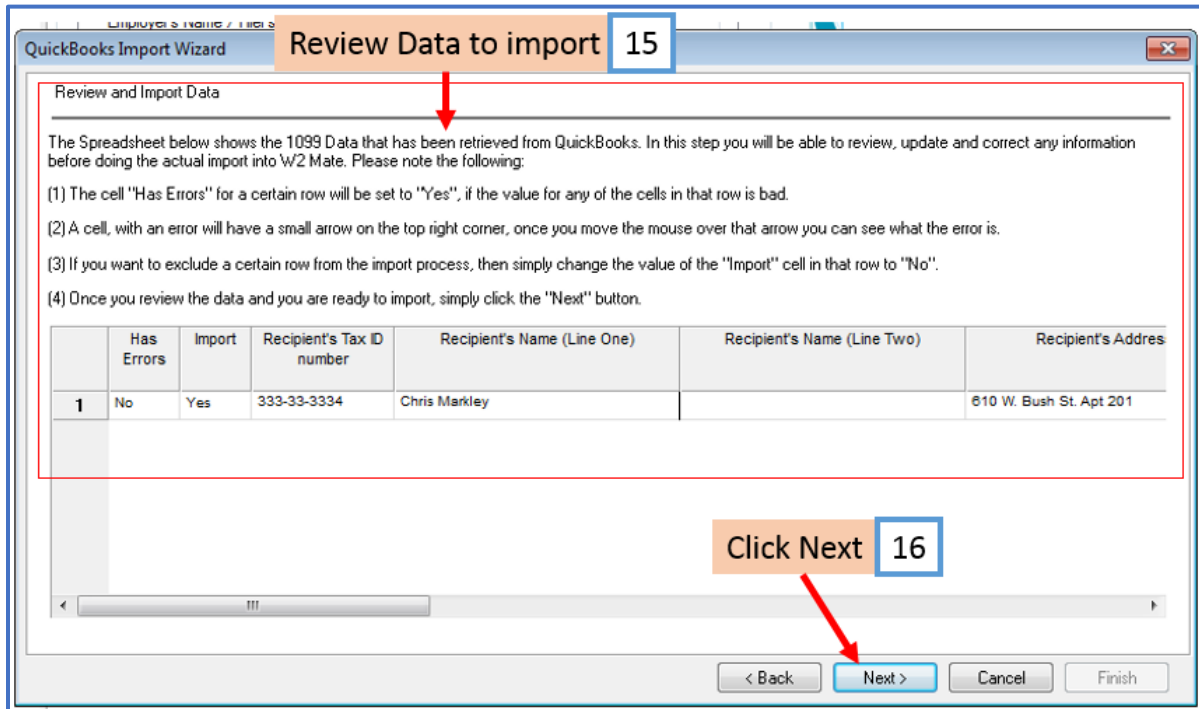


14a. In QuickBooks – make sure to checkmark Vendor eligible for 1099



15. Review Data to import

16. Click Next



17. Click Finish

