# How to Import W2 Data Using QuickBooks

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

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.
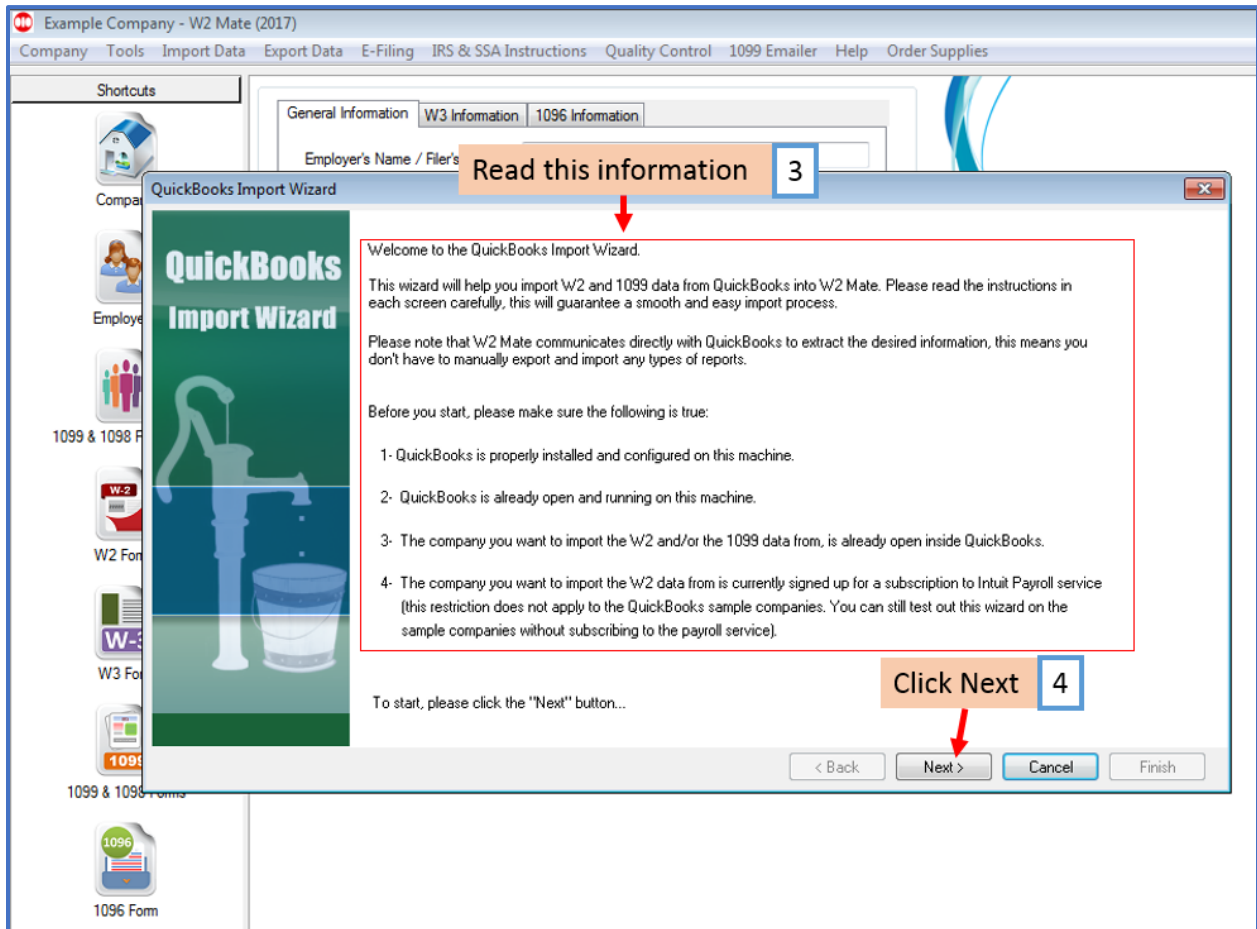
1. Click Import Data

2. Select From QuickBooks (W2 and/or 1099 Data)
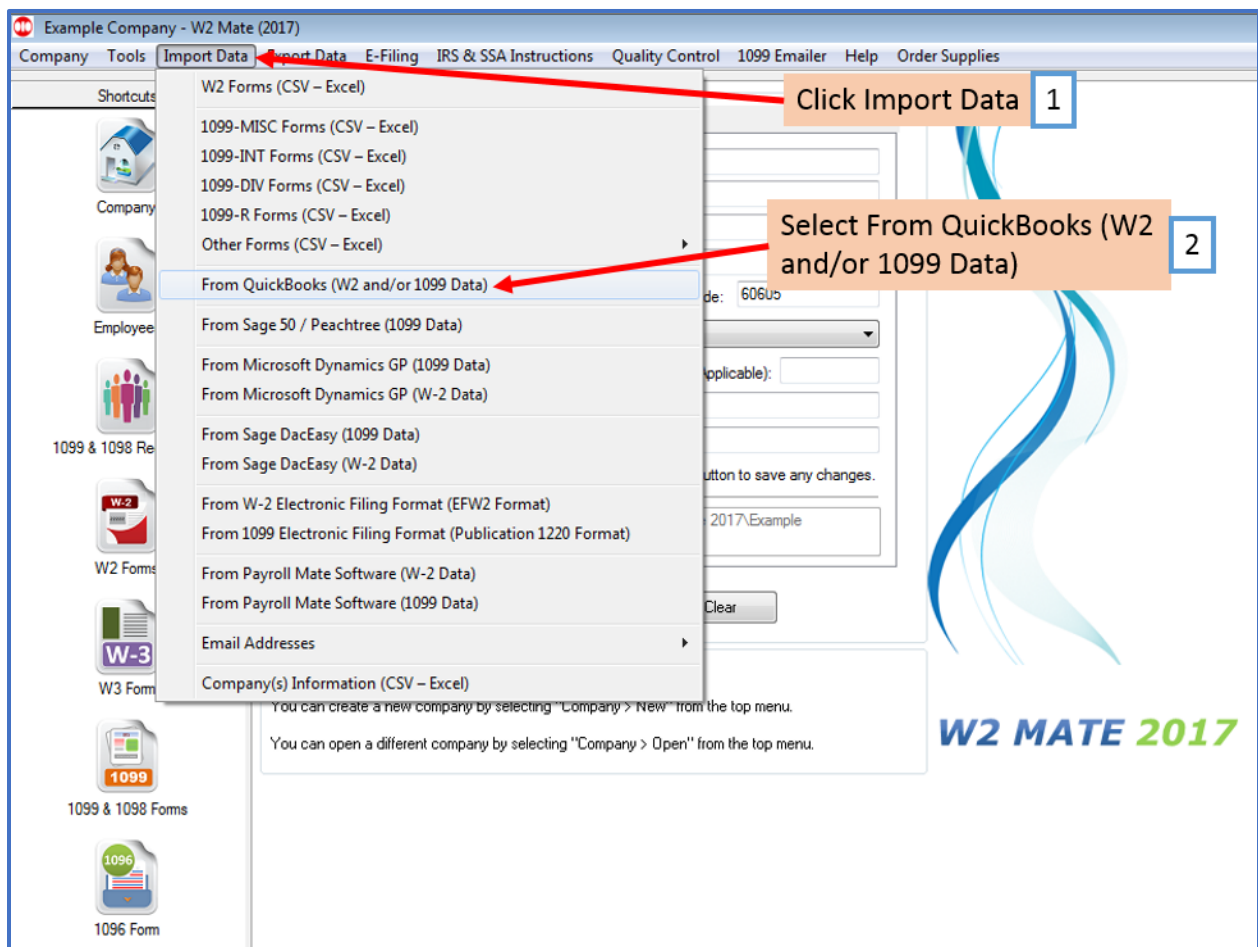
Note: Follow the wizard screens by Reading and Clicking "NEXT"

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

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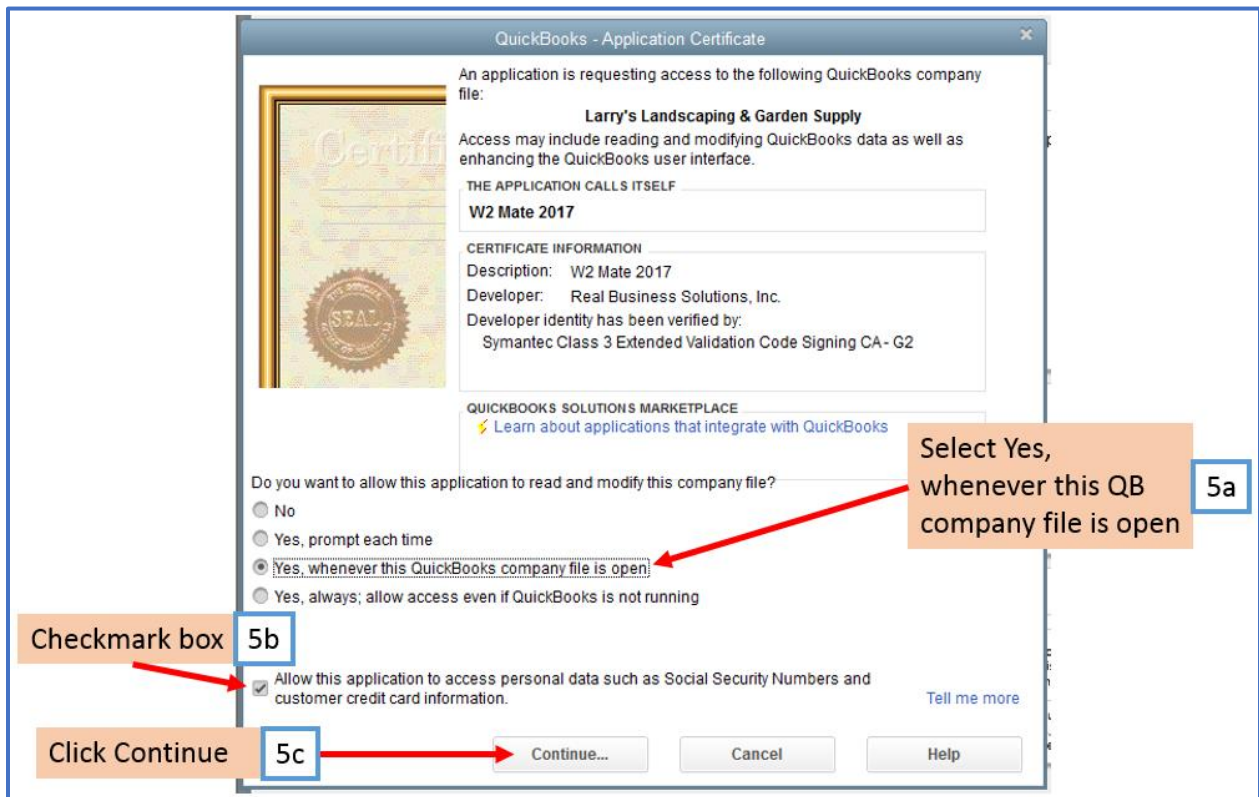
A second dialog will open in QuickBooks asking you to confirm granting access to W2 Mate

5d. Click Done
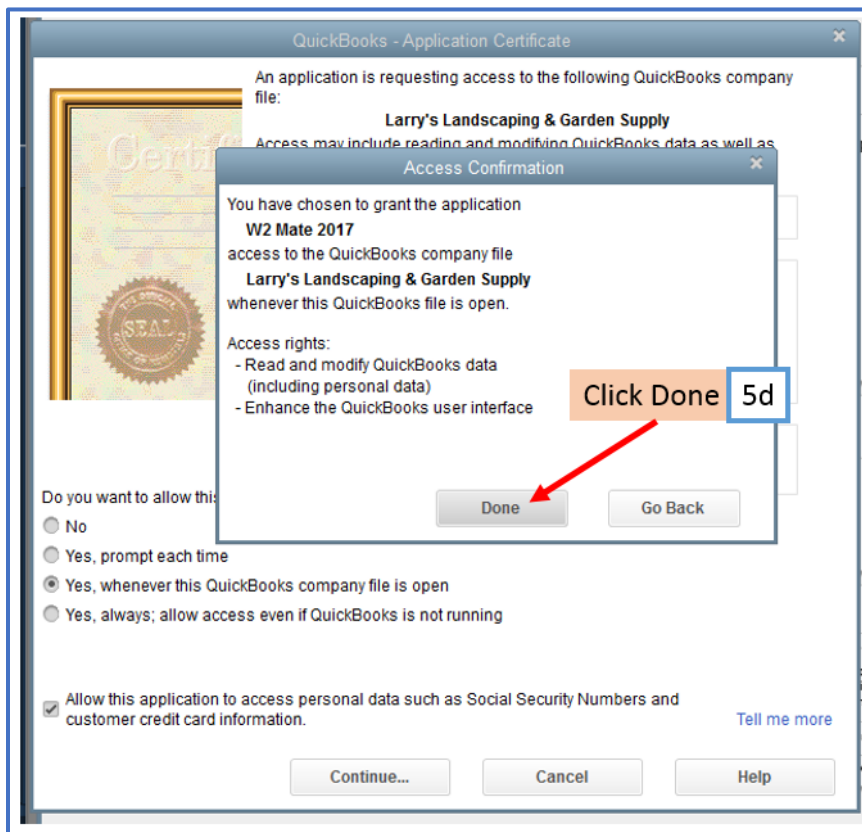
6. Click OK

6a. Click Next
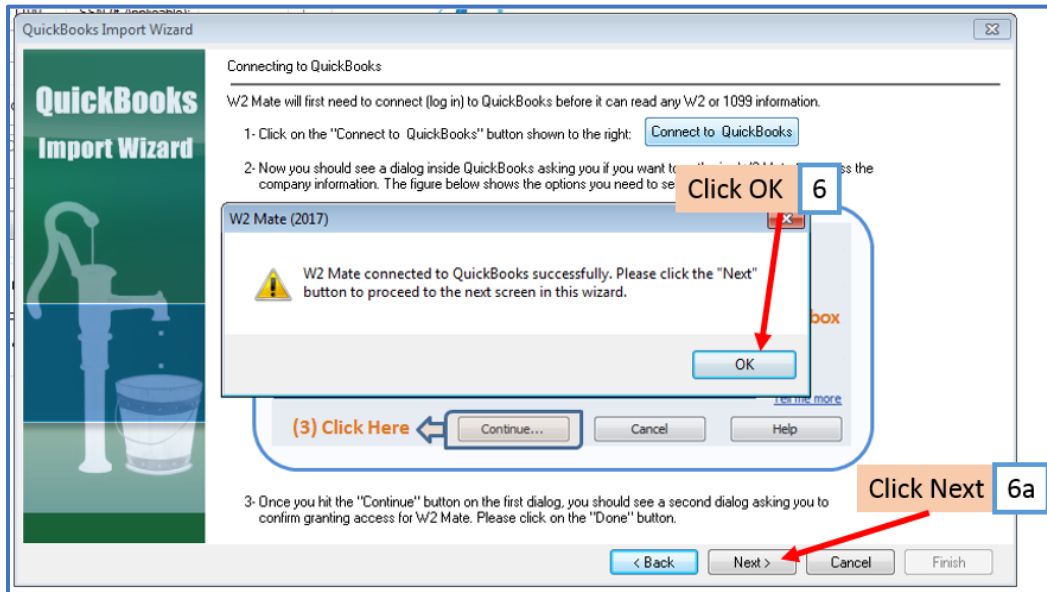
7. Select W2 Data

8. Checkmark to import email addresses

9. Click Next
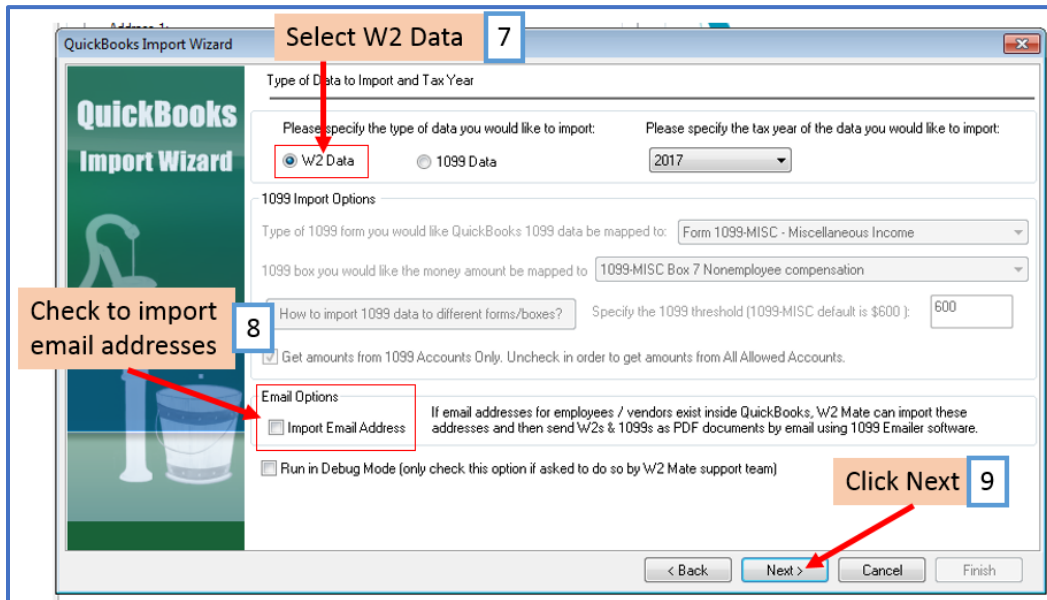
10. Read and review the QuickBooks items and the W2 Box the data will be imported to

11. Click Assign W2 Box to change the W2 box used for import (as needed)
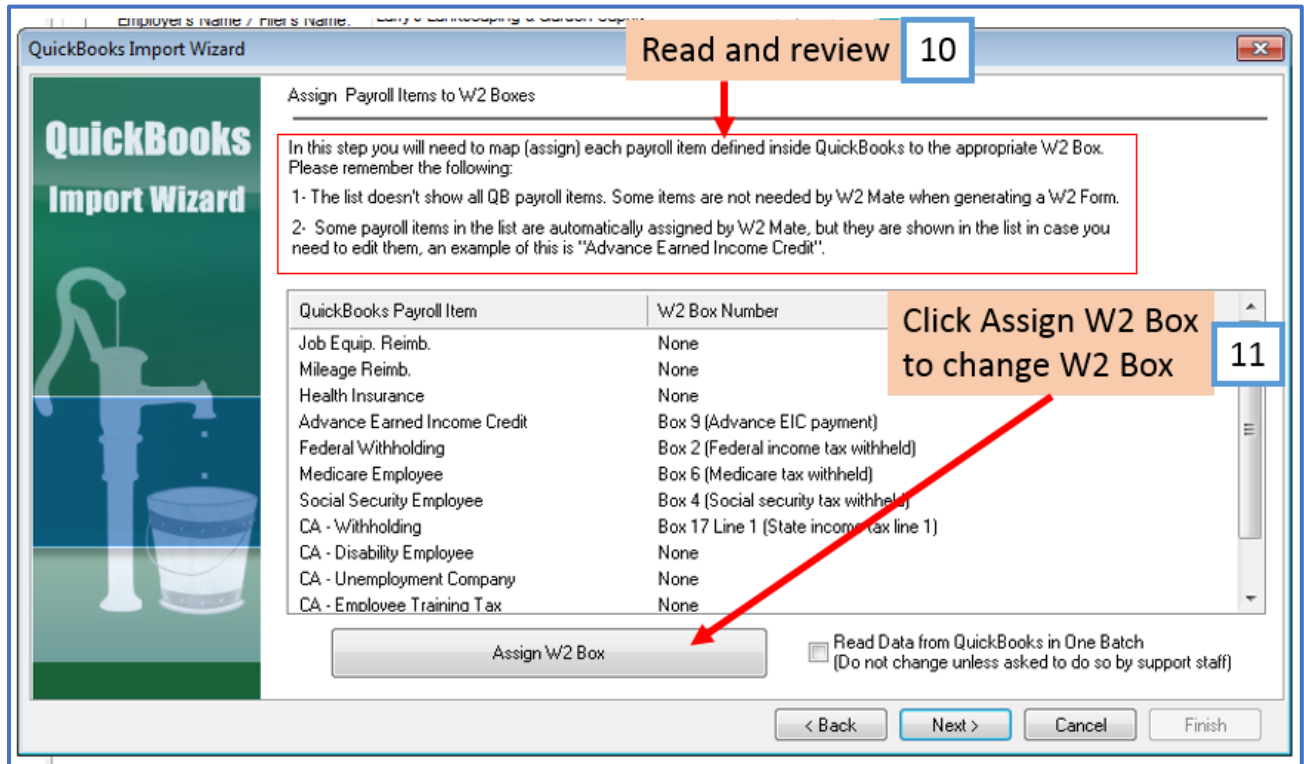
11a. Complete each part for the specific W2 Box

11b. Click OK

Complete information as needed   11a

QuickBooks Payroll Item Definition

Please fill the information below for the "CA - Withholding" payroll item.

Part 1: Please specify the W2 Box in which the amount of this payroll item is reported.

W2 Box: Box 17 Line 1 (State income tax line 1)

☐ This payroll item increases taxable wages in W2 Box 1.
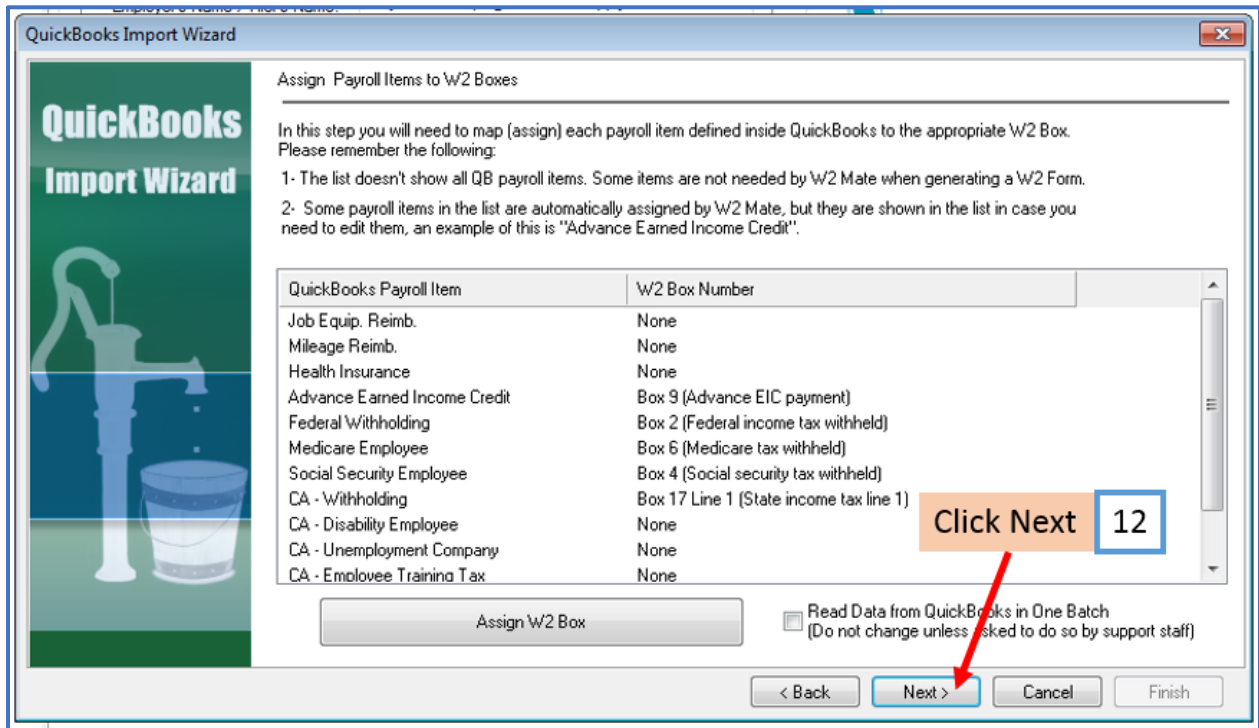
If this payroll item doesn't affect any W2 boxes, then leave the selection as "None".

Do not check this box unless you absolutely know what you are doing. Use in rare cases like Group-term life insurance & SCorp Pd Med Premium.

Part 2: If the payroll item affects Box 12, then please select the appropriate code.

Box 12 Code: [   ]   [IRS Instructions for Box 12]

Part 3: If the payroll item affects Box 14, then please enter Box 14 Description.

Box 14 Description: [   ]   Example: Use CA-SDI for California State Disability Insurance

Part 4: If the payroll item affects Box 13, then please check the appropriate check box.

☐ Statutory Employee   ☐ Retirement Plan   ☐ 3-rd Party Sick Pay

Part 5: If the payroll item affects Box 17, then please specify the Employer's State and State ID number.

Employer's State: CA ▼   Employer's State ID Number: [   ]

Part 6: If the payroll item affects Box 19, then please specify the Locality name.

Locality Name: [   ]

Click OK 11b → [OK]   [Cancel]

12. Click Next

13. Click Yes to continue or No to go back and edit W2 Boxes
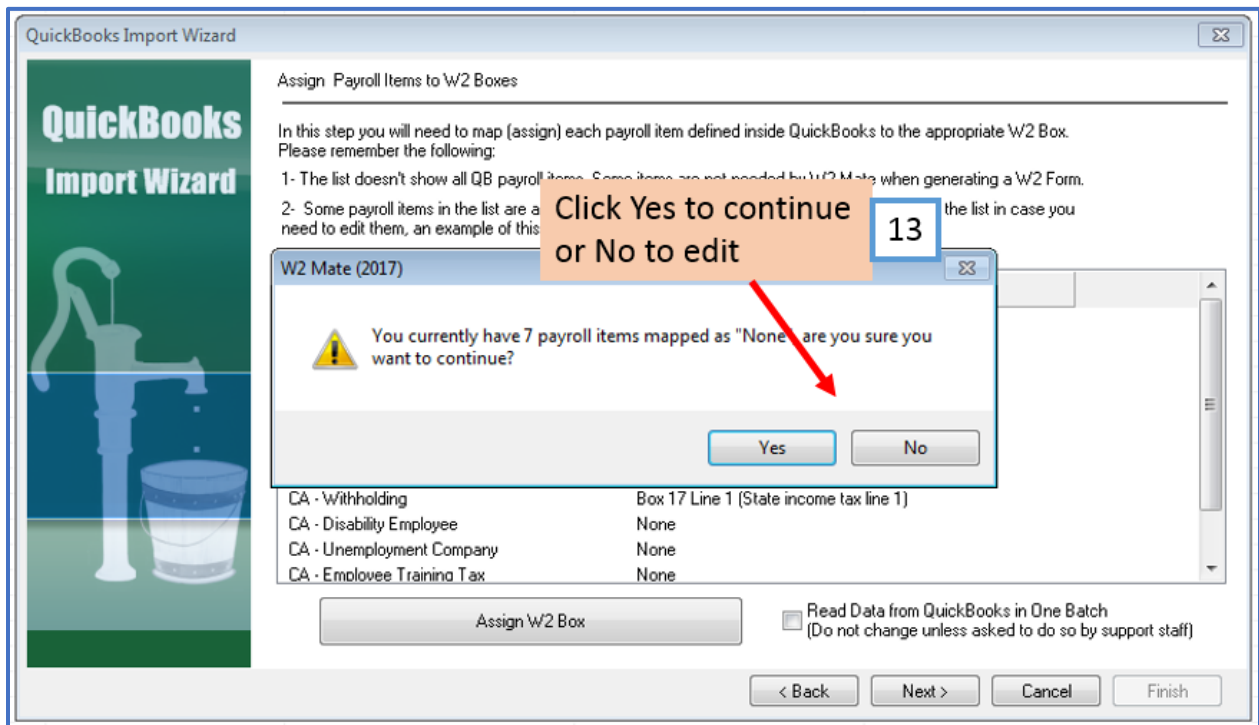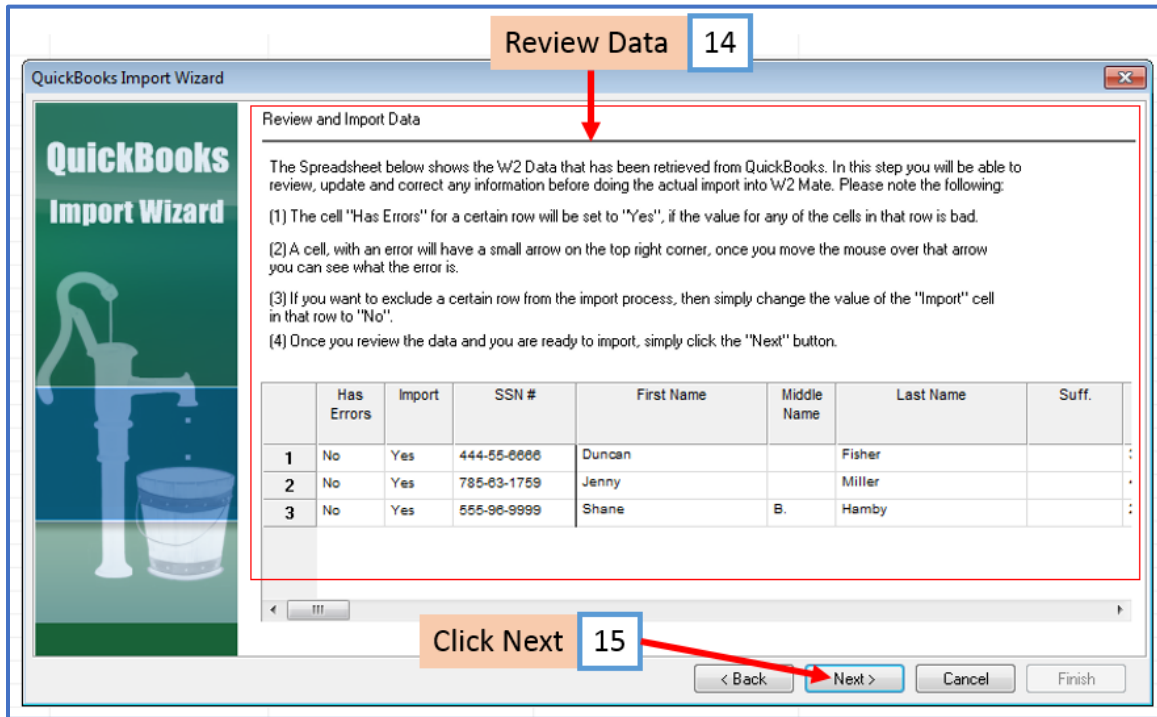
14. Review Import Data – Make updates as needed on this page

15. Click Next

Review Data 14

QuickBooks Import Wizard

QuickBooks Import Wizard

Review and Import Data

The Spreadsheet below shows the W2 Data that has been retrieved from QuickBooks. In this step you will be able to review, update and correct any information before doing the actual import into W2 Mate. Please note the following:

(1) The cell "Has Errors" for a certain row will be set to "Yes", if the value for any of the cells in that row is bad.

(2) A cell, with an error will have a small arrow on the top right corner, once you move the mouse over that arrow you can see what the error is.

(3) If you want to exclude a certain row from the import process, then simply change the value of the "Import" cell in that row to "No".

(4) Once you review the data and you are ready to import, simply click the "Next" button.

	Has Errors	Import	SSN #	First Name	Middle Name	Last Name	Suff.
1	No	Yes	444-55-6666	Duncan		Fisher	:
2	No	Yes	785-63-1759	Jenny		Miller	.
3	No	Yes	555-96-9999	Shane	B.	Hamby	:

Click Next 15

< Back   Next >   Cancel   Finish

16. Click Finish

QuickBooks Import Wizard

QuickBooks Import Wizard

Congratulations, the import process completed successfully . Please click the "Finish" button to end this wizard.

Click Finish 16

< Back   Next >   Cancel   Finish