How to Send Batch Emails Using 1099 Emailer

1099 Emailer is a bulk email sending utility that allows users to automatically batch send volumes of 1099, W2 and 1098 recipient forms in PDF format via email

Note: In order to use this feature you must purchase and enable W2 Mate Option #6 to create the recipient PDF's as well as the 1099 Emailer option for the same year of W2 Mate

Make sure you have the correct Company open inside W2 Mate

For 1099/1098 Forms

1. Select 1099 & 1098 Forms

2. Click Create PDF 1099's

For W2 Forms

1. Select W2 Forms

2. Click Create PDF W2's

Note: The following steps are the same for either 1099's or W2's. The slides will show examples for W2's but follow these same steps for 1099's.

3. Click Browse to select Output location

5. Set a password on these PDF's if desired

5. Choose all the recipients/employees that you want to create PDF's for

6. Check 1099 Emailer options Box
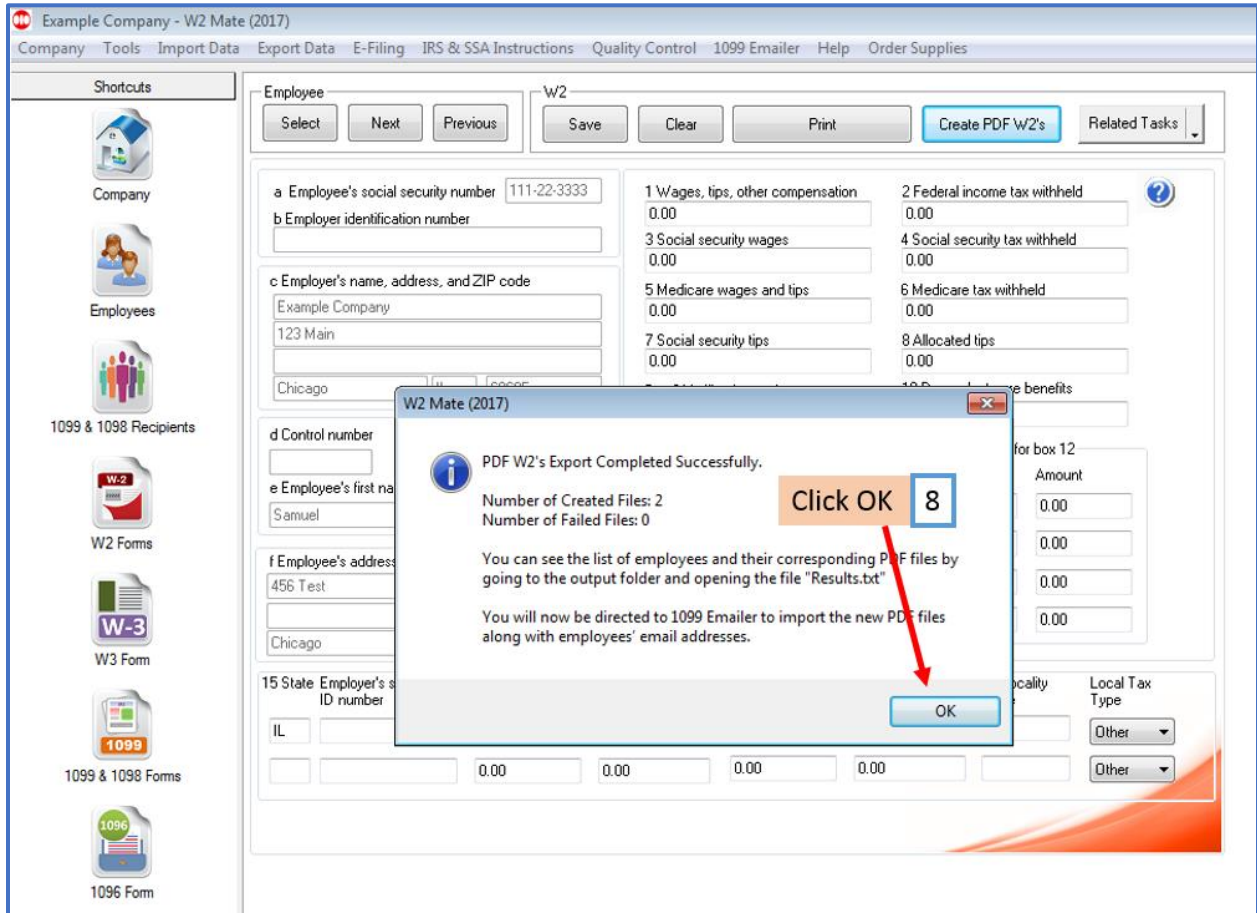
7. Click Create PDF W2's (or 1099's)

If you receive an error(s), correct the errors listed and generate the PDF files again

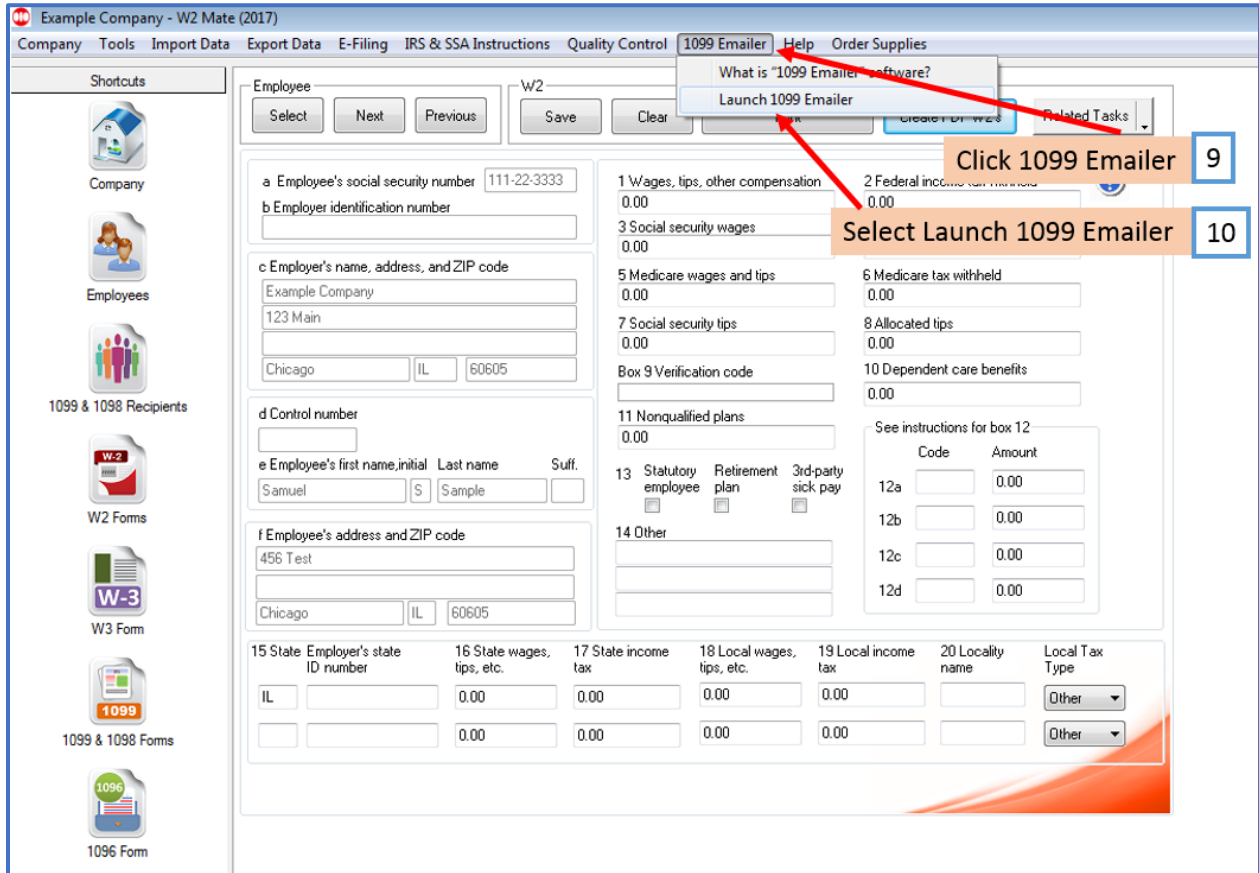8. Export completed message, Click OK

Note: The number of Created Files and Failed Files will show. You can see the list of created PDF files by going to the output folder and opening the file "Results.txt"

If there are no errors, the 1099 Emailer will auto launch. Skip to step 11

9. Click 1099 Emailer

10. Click Launch 1099 Emailer

11. Click Batch Send Emails

Note: If this is your first time using the 1099 Emailer, a box that will appear to set up the emailer settings

Click Batch Send Emails   11

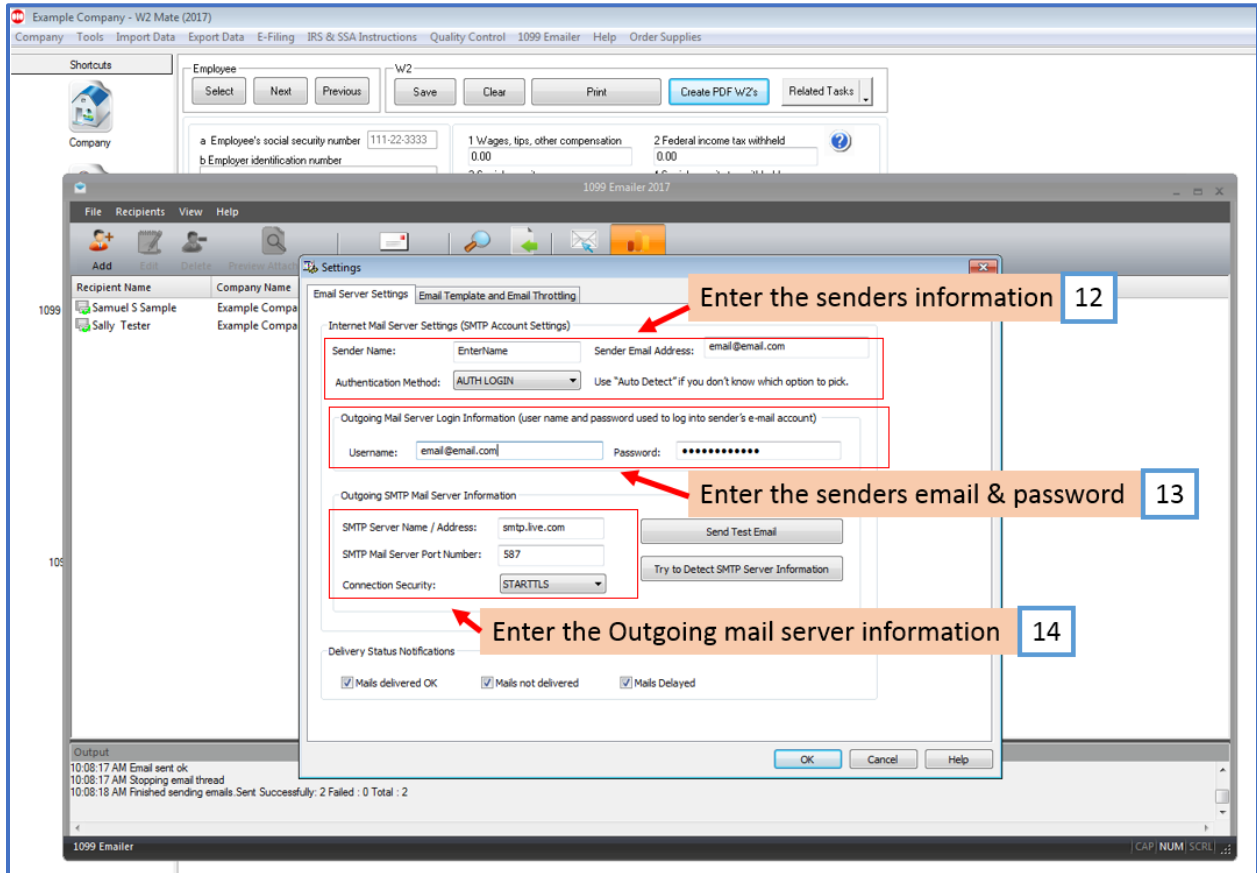The employees/recipients are listed here

You can find additional information by clicking Help>About 1099 Emailer

Email Server Settings Tab

12. Enter the email information you wish to send the PDF's from

13. Enter the senders email and password

14. Fill out the proper information depending on your email service
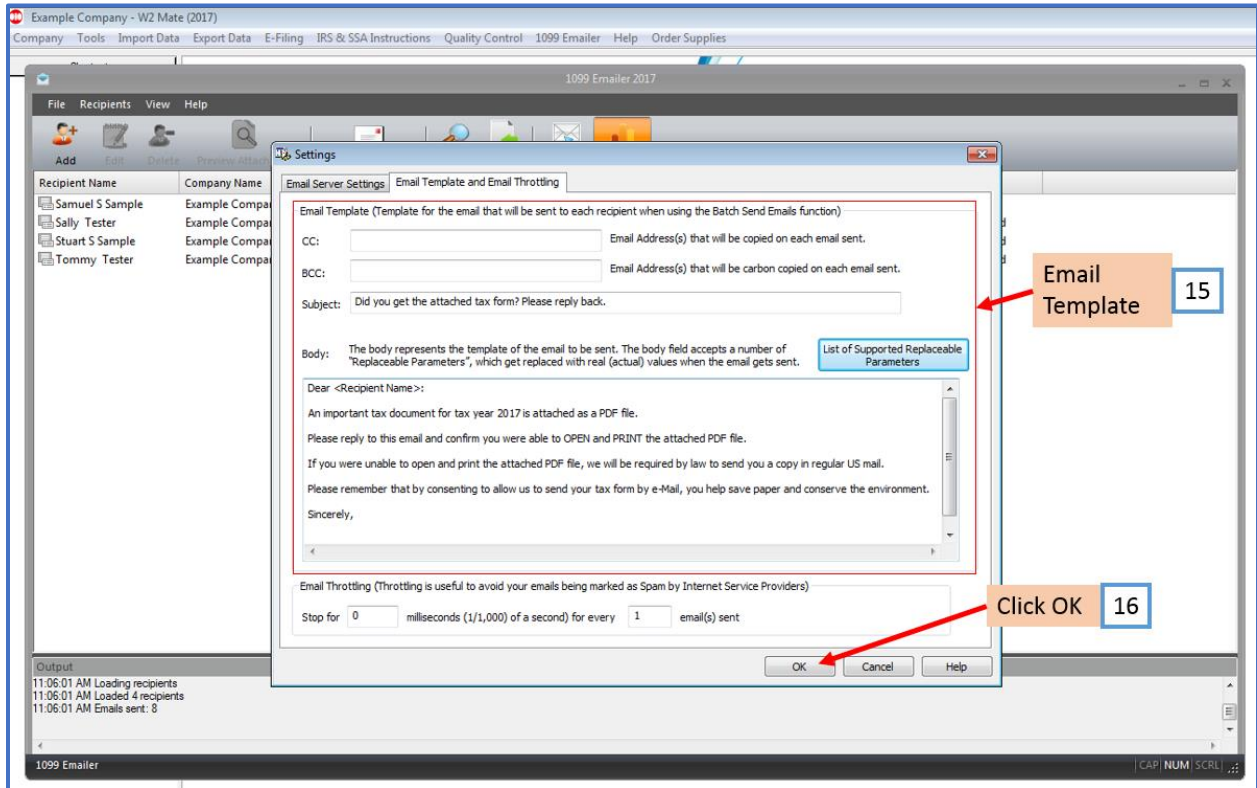
Email Template and Email Throttling Tab

15. Email Template (CC, BCC, Subject, Body message)

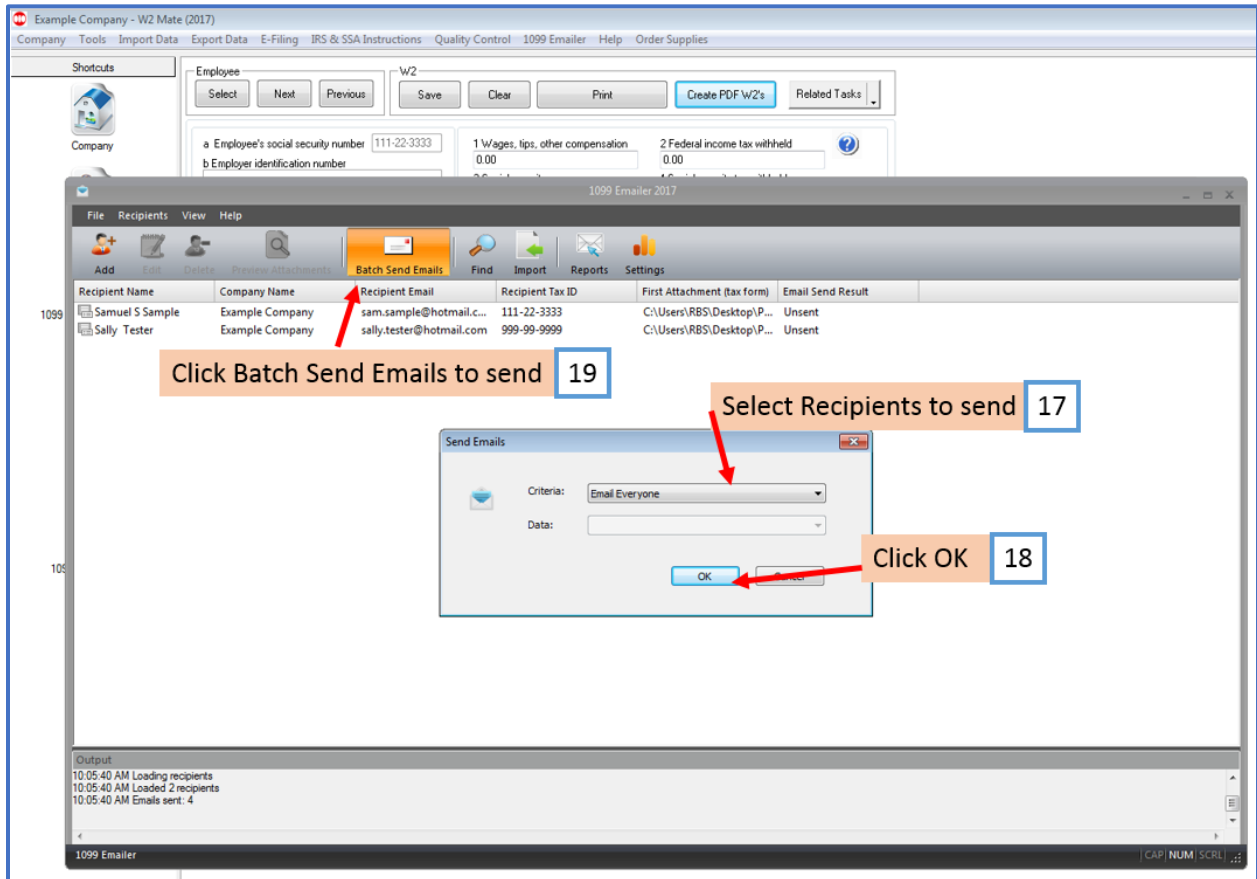Note: Email Throttling can be edited as needed

16. Click OK

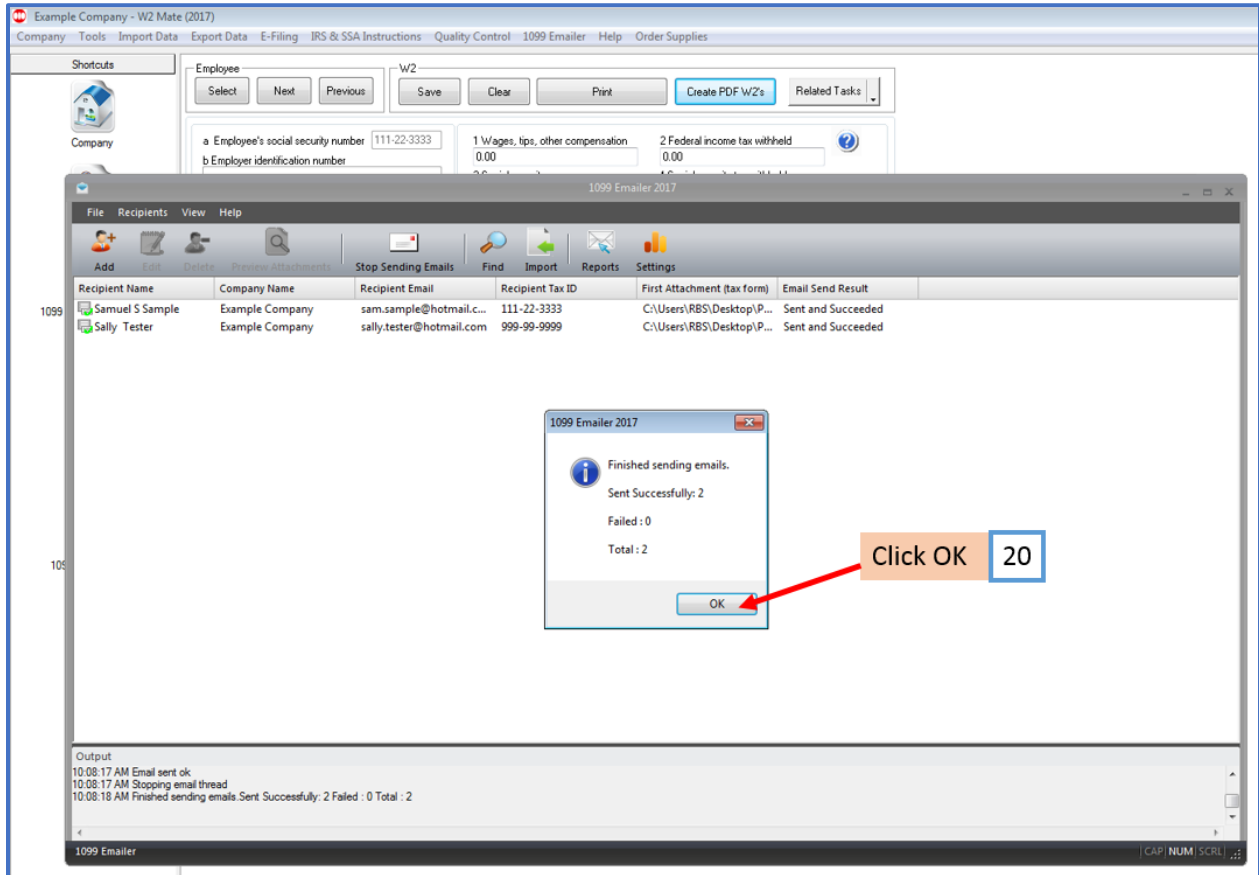17. Select the recipients and click Batch Send emails

18. Click OK

19. Click Batch Send Emails to send

20. Click OK

Note: The number of Successfully Sent, Failed and Total emails will show here

If you want to view the attachment that was emailed to a recipient:

21. Select Recipient

22. Click Preview Attachment