

How to Send Batch Emails Using 1099 Emlaler

1099 Emlaler 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 Emlaler 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

The screenshot shows the W2 Mate software interface for the year 2017. The main window is titled "Example Company - W2 Mate (2017)". The menu bar includes: Company, Tools, Import Data, Export Data, E-Filing, IRS & SSA Instructions, Quality Control, 1099 Emlaler, Help, and Order Supplies. On the left, there is a "Shortcuts" sidebar with icons for Company, Employees, 1099 & 1098 Recipients, W2 Forms, W3 Form, 1099 & 1098 Forms, and 1096 Form. The main area is titled "1099 Recipient" and "Form 1099-MISC". It contains several input fields for Payer and Recipient information, including name, address, city, state, zip code, and federal ID numbers. There are also checkboxes for FATCA Filing REQ and 2nd TIN not. The right side of the form has 18 numbered sections for various types of income and withholdings, each with a numerical input field. At the top right of the form area, there are buttons for "Print", "Create PDF 1099's", and "Related Tasks". A callout box labeled "2" with an arrow points to the "Create PDF 1099's" button. Another callout box labeled "1" with an arrow points to the "1099 & 1098 Forms" icon in the sidebar.

For W2 Forms

1. Select W2 Forms
2. Click Create PDF W2's

The screenshot displays the W2 Mate (2017) software interface. On the left sidebar, under 'Shortcuts', the 'W2 Forms' icon is highlighted with a red arrow and a callout box labeled 'Click W2 Forms 1'. The main window shows a form for 'Employee' and 'W2' data. The 'W2' section includes fields for wages, taxes, and benefits. A red arrow points to the 'Create PDF W2's' button, which is highlighted with a callout box labeled 'Click Create PDF W2's 2'. The form contains the following data:

Field	Value
a Employee's social security number	111-22-3333
b Employer identification number	
c Employer's name, address, and ZIP code	Example Company 123 Main Chicago IL 60605
d Control number	
e Employee's first name, initial, Last name, Suff.	Samuel S Sample
f Employee's address and ZIP code	456 Test Chicago IL 60605
1 Wages, tips, other compensation	0.00
2 Federal income tax withheld	0.00
3 Social security wages	0.00
4 Social security tax withheld	0.00
5 Medicare wages and tips	0.00
6 Medicare tax withheld	0.00
7 Social security tips	0.00
8 Allocated tips	0.00
9 Nonqualified plans	0.00
10 Dependent care benefits	0.00
11 Nonqualified plans	0.00
12a Code	0.00
12b Code	0.00
12c Code	0.00
12d Code	0.00
13 Statutory employee	<input type="checkbox"/>
13 Retirement plan	<input type="checkbox"/>
13 3rd-party sick pay	<input type="checkbox"/>
14 Other	
15 State Employer's state ID number	IL
16 State wages, tips, etc.	0.00
17 State income tax	0.00
18 Local wages, tips, etc.	0.00
19 Local income tax	0.00
20 Locality name	
Local Tax Type	Other

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 Emler options Box
7. Click Create PDF W2's (or 1099's)

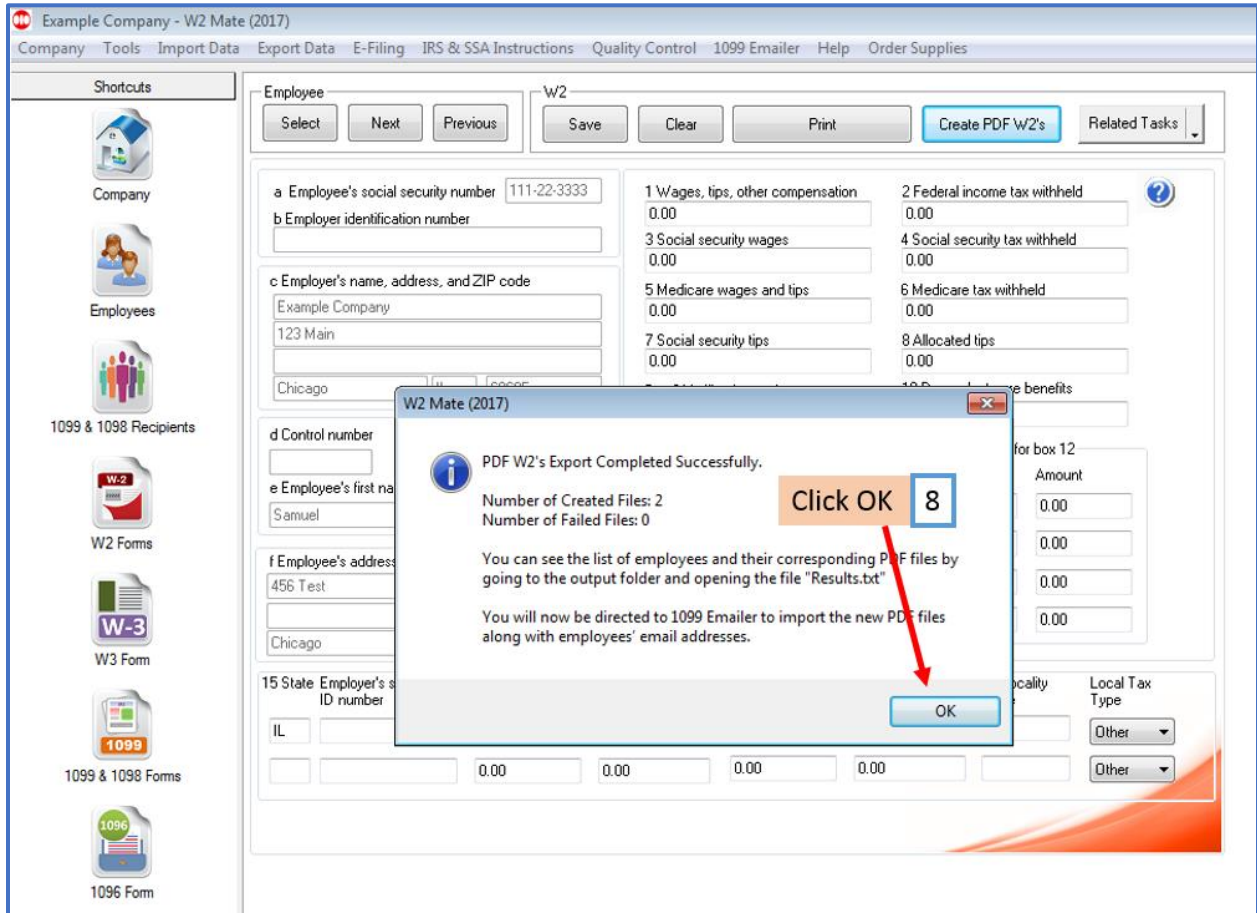
The screenshot shows the 'Create PDF W2's' dialog box in W2 Mate. The interface includes a menu bar, a sidebar with shortcuts, and a main workspace. The workspace is divided into several sections: 'Employee' information, 'Create PDF W2's' instructions, 'Step 1: Select Output Folder Name', 'Step 2: Set Password Options', 'Step 3: Select Employees', and '1099 Emler Options'. A table lists two employees: Samuel and Sally. The 'Create PDF W2's' button is highlighted with a red arrow and a callout box labeled '7'. Other callout boxes point to the 'Browse...' button (3), the password options (4), the employee selection checkboxes (5), and the 'Import generated PDF files...' checkbox (6).

Select	SSN #	First Name	Middle Name	Last Name
<input checked="" type="checkbox"/>	111-22-3333	Samuel	S	Sample
<input checked="" type="checkbox"/>	999-99-9999	Sally		Tester

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

8. Export completed message, Click OK

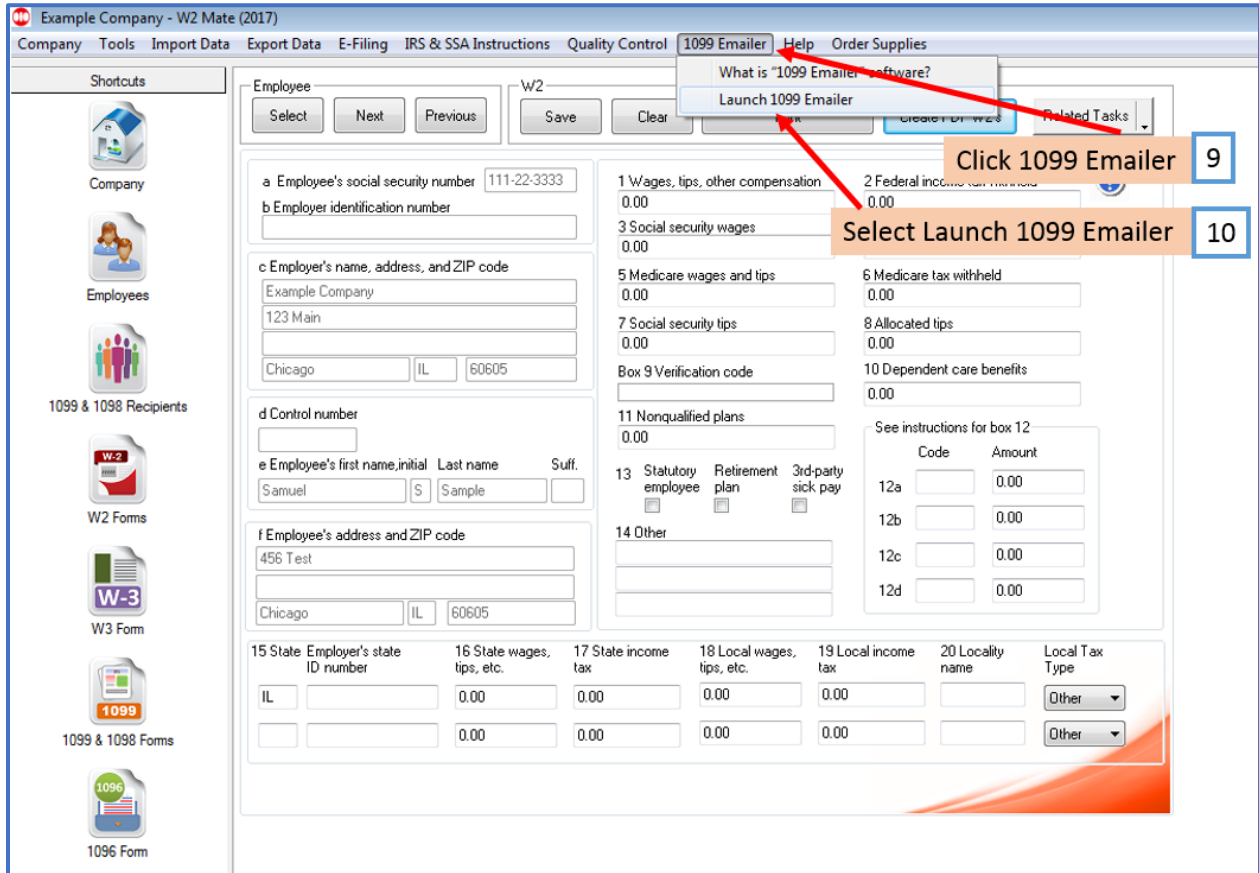
Note: The number of Created Files and Failed Files will show. You can see the list of created PDF files by going to the output folder and opening the file "Results.txt"



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

9. Click 1099 Emitter

10. Click Launch 1099 Emitter



11. Click Batch Send Emails

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

Example Company - W2 Mate (2017)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions Quality Control 1099 Emler Help Order Supplies

Shortcuts

Employee W2

Select Next Previous Save Clear Print Create PDF W2's Related Tasks

a Employee's social security number 111-22-3333 1 Wages, tips, other compensation 2 Federal income tax withheld
0.00 0.00

b Employer identification number

1099 Emler 2017

File Recipients View Help

Add Edit Delete Preview Attachments Batch Send Emails Find Import Reports Settings

1099	Recipient Name	Company Name	Recipient Email	Recipient Tax ID	First Attachment (tax form)	Email Send Result
	Samuel S Sample	Example Company	sam.sample@hotmail.c...	111-22-3333	C:\Users\RBS\Desktop\P...	Unsent
	Sally Tester	Example Company	sally.teste@hotmail.com	999-99-9999	C:\Users\RBS\Desktop\P...	Unsent

Output

10:05:40 AM Loading recipients
10:05:40 AM Loaded 2 recipients
10:05:40 AM Emails sent: 4

1099 Emler

CAP NUM SCRL

Click Batch Send Emails 11

The employees/recipients are listed here

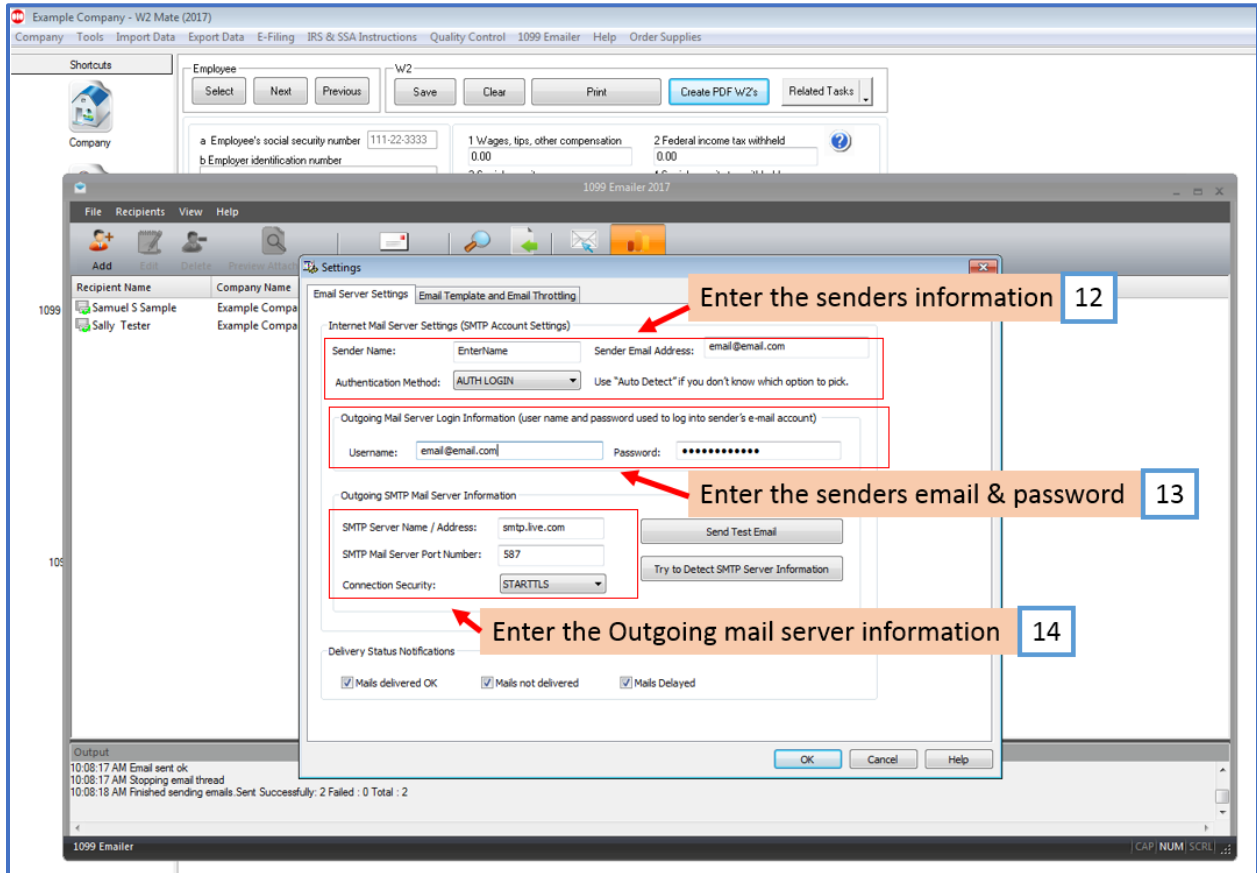
You can find additional information by clicking Help>About 1099 Emler

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

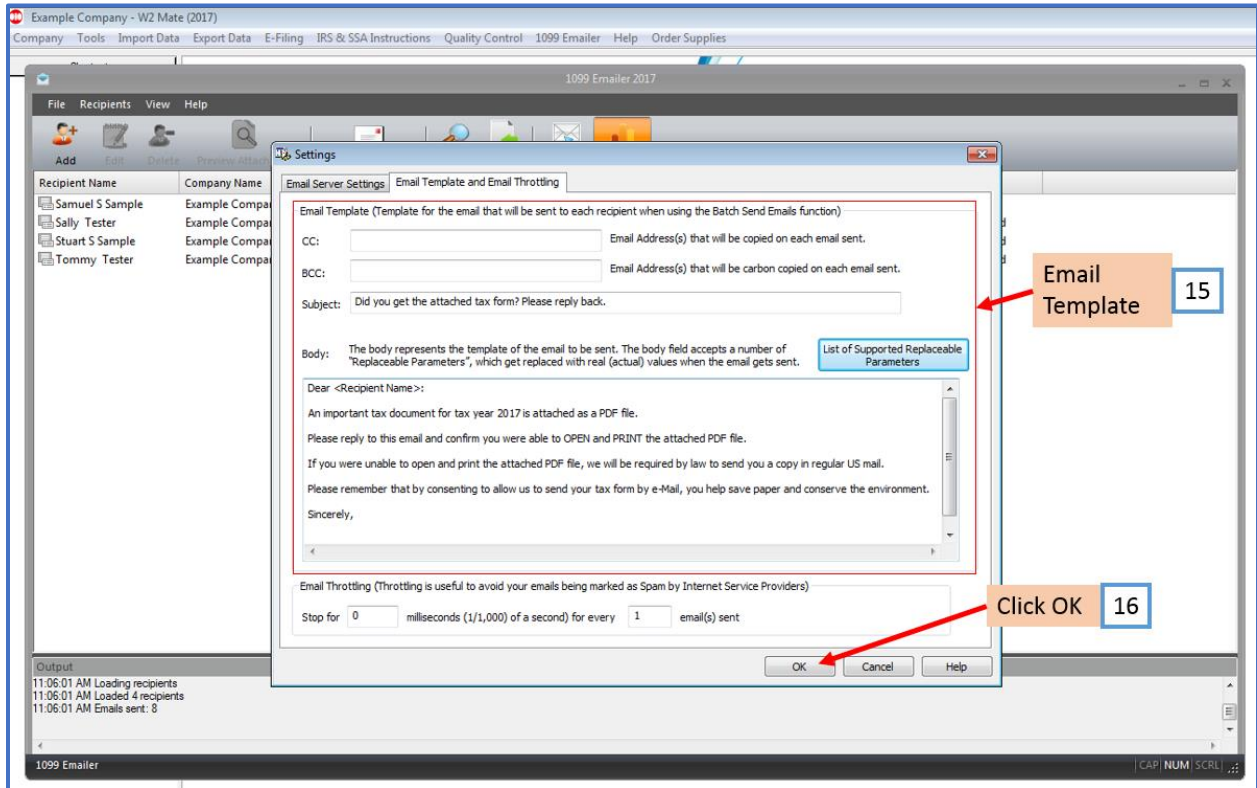


Email Template and Email Throttling Tab

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

Note: Email Throttling can be edited as needed

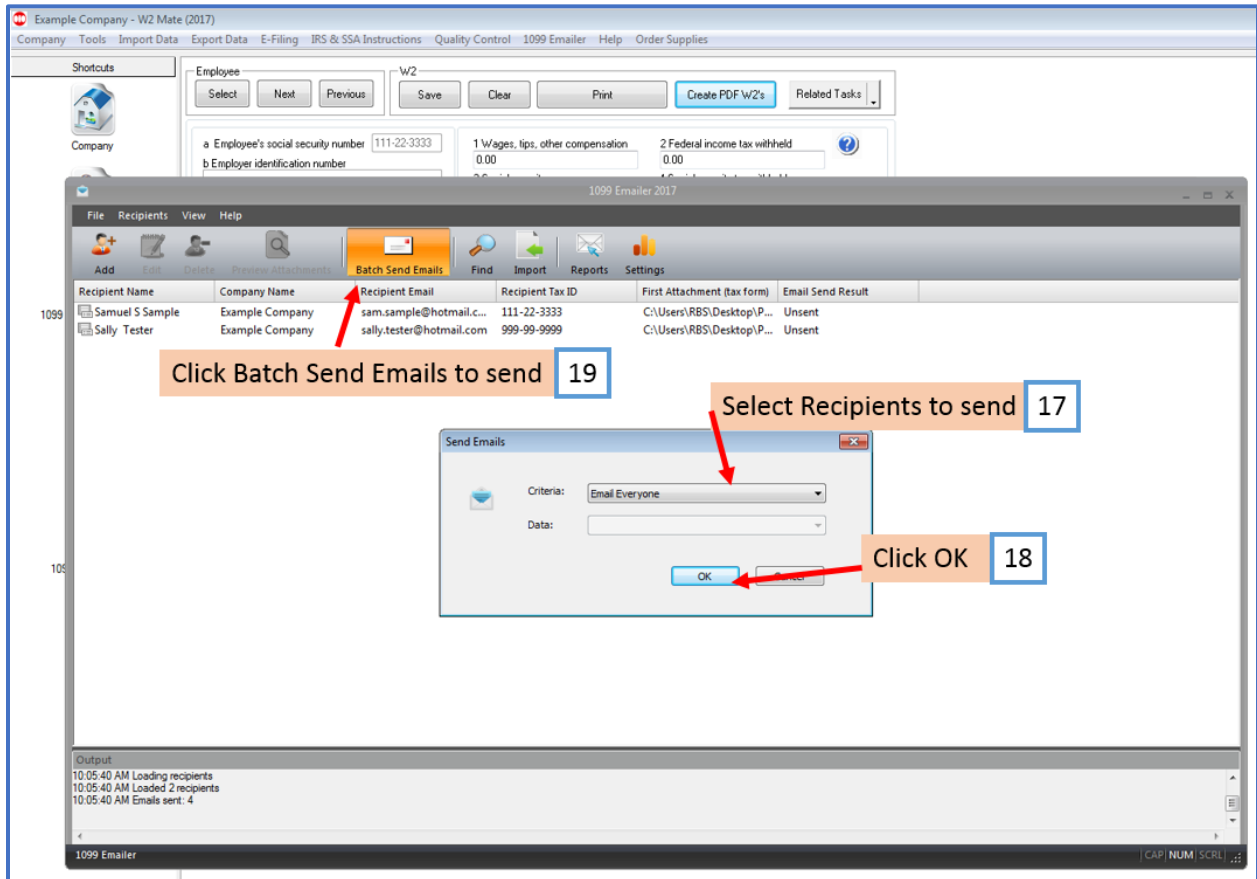
16. Click OK



17. Select the recipients and click Batch Send emails

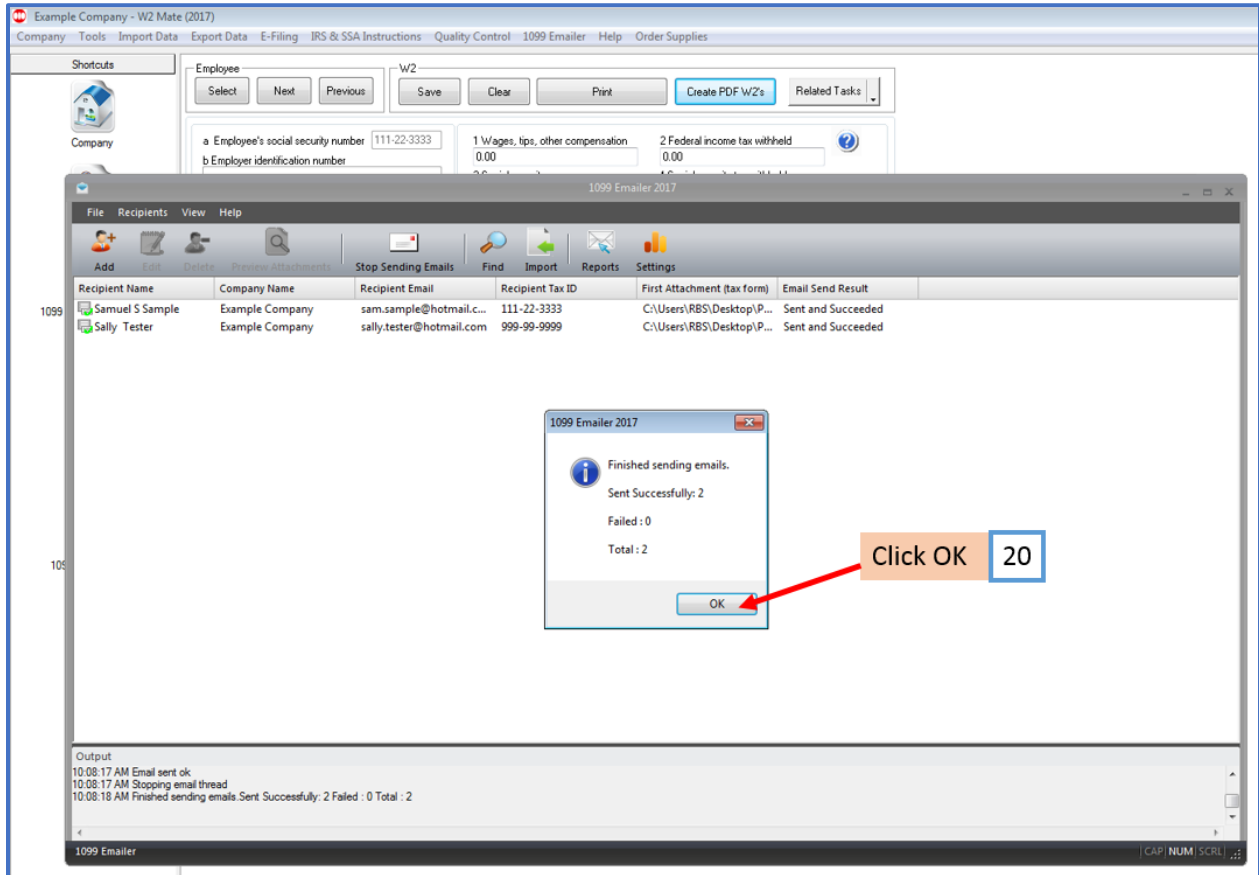
18. Click OK

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

