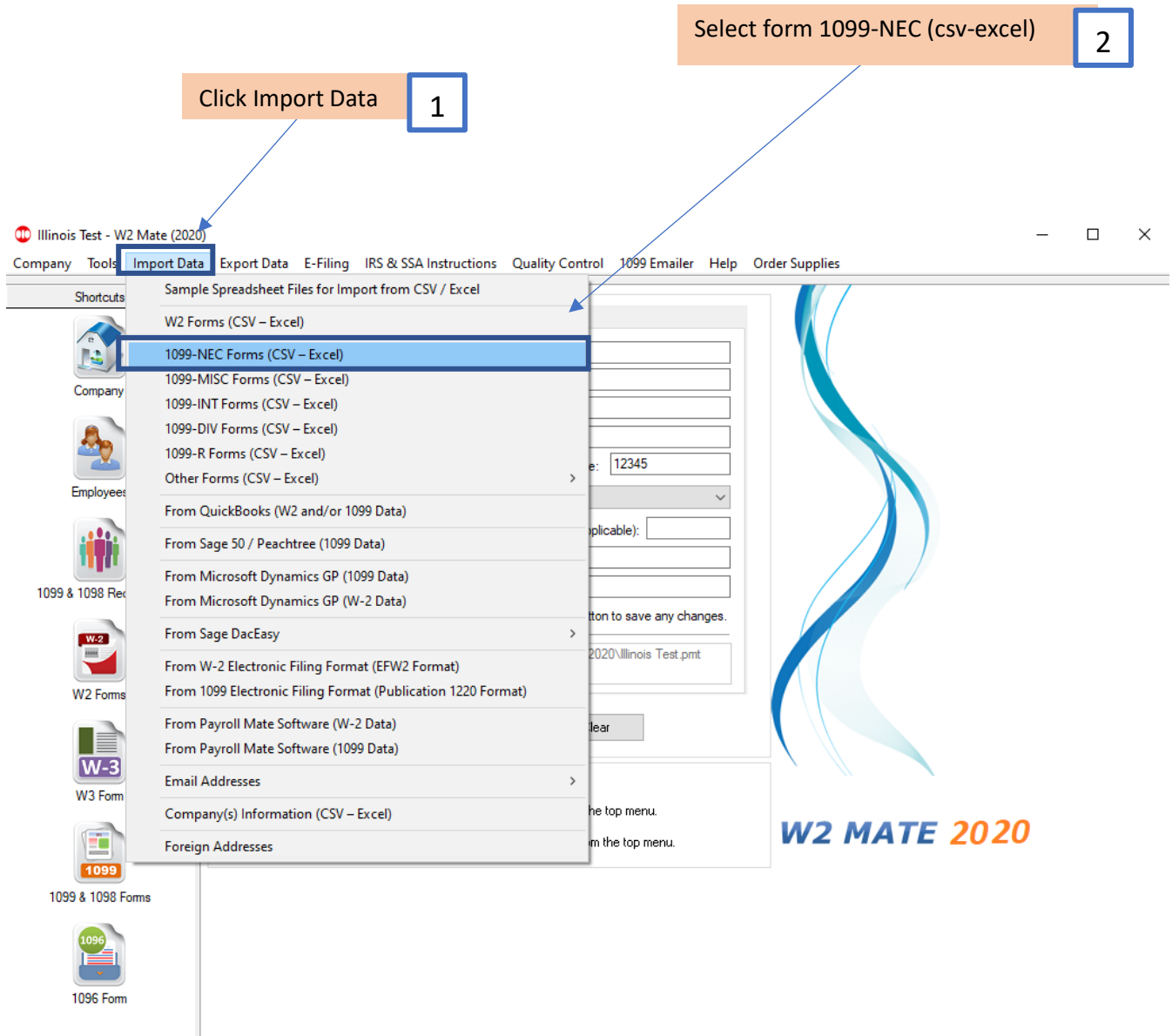


# How to Import 1099-NEC Data in W2 Mate from CSV

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

1. Click Import Data

2. Click 1099-Nec Forms (CSV – Excel) If you need help converting your Excel to a CSV please see “Creating a CSV from an Excel Spreadsheet” at the bottom of this tutorial



This will open the Import 1099-NEC Forms wizard

3. To get detailed help with the import process, click on the Data Import Help button

Note: CSV files typically use a comma separator. Leave the separator options to default unless otherwise specified.

4. Click Browse to select the correct CSV data file to import

a. Once you select the input file you should see a preview for the contents of the file

Note: The first row is expected to include header information and NOT data. The header should contain names corresponding to the fields (columns) in the file and should contain the same number of fields (columns) as the records in the rest of the CSV file.

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**Data Preview** 4a

Import 1099-NEC Forms

CSV (comma separated value) is the most common format used in order to transfer data between different types of databases. Most software and database applications will allow you to export W2 and 1099 data into CSV format, which can then be imported into W2 Mate. Excel for example exports data to CSV. The first row in the CSV file should contain names corresponding to the fields (columns) in the file and should contain the same number of fields (columns) as the records in the rest of the CSV file.

To read detailed instructions for importing data into W2 Mate and for possible fields for the CSV file, click the button to the right: **Data Import Help**

(1) Step One: Set Separator Options

Fields are separated by: Comma , Text Delimiter: Double " " Last Row Number to Read from File: Only use if you do not want to read all rows from the input file

(2) Step Two: Set Input Text or CSV File

File: C:\Users\RBS\Desktop\1099-NEC-Data.csv **Browse...**  Allow Duplicate Recipient IDs

Define each field by clicking on the column headers. The default for each field is "Unused", which means the field will be ignored during the import process.

To use the same field mapping you used before click: **Use Previous Field Mapping** To clear previous mapping click: **Clear Previous Mapping**

Header	ID #	Name (line one)	Name (line two)	Address1	Address2	City	State	Zip Code	Email	Ac
1	241-74-7411	John Doe		65 Roes Rd.	Suite 100	Julie	SC	52121	John.Doe@JaneDoe.com	54

Import Close

5. Map your fields, when mapping your columns, click the word “Unused” for each column and select the correct column description to use for mapping the data
  - a. Map data by LEFT clicking the mouse on each column and select the correct column data

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To read detailed instructions for importing data into W2 Mate and for possible fields for the CSV file click the button to the right :

(1) Step One: Set Separator Options

Fields are separated by:  , Text Delimiter:  \*

Last Row Number to Read from File  
Only use if you do not want to read all rows from the input file

(2) Step Two: Set Input Text or CSV File

File:    Duplicate Recipient IDs

(3) Step Three: Set Fields (Columns)

Define each field by clicking on the column headers. The default for each field is "Unused", which means the field will be ignored during the import process.

To use the same field mapping you used before click:  To clear previous mapping click:

Header	ID #	Name (line one)	Name (line two)
1	241-7-7411	John Doe	

Unused Unused Unused

Recipient Information >

Reported Amounts >

Unused

Recipient's Identification number

Recipient's Name (Line One)

Recipient's Name (Line Two)

Recipient's Address1

Recipient's Address2

Recipient's City

Recipient's State

Recipient's Zip Code

Email Address

Account Number

Map each Column 5

Left click on Unused 5a

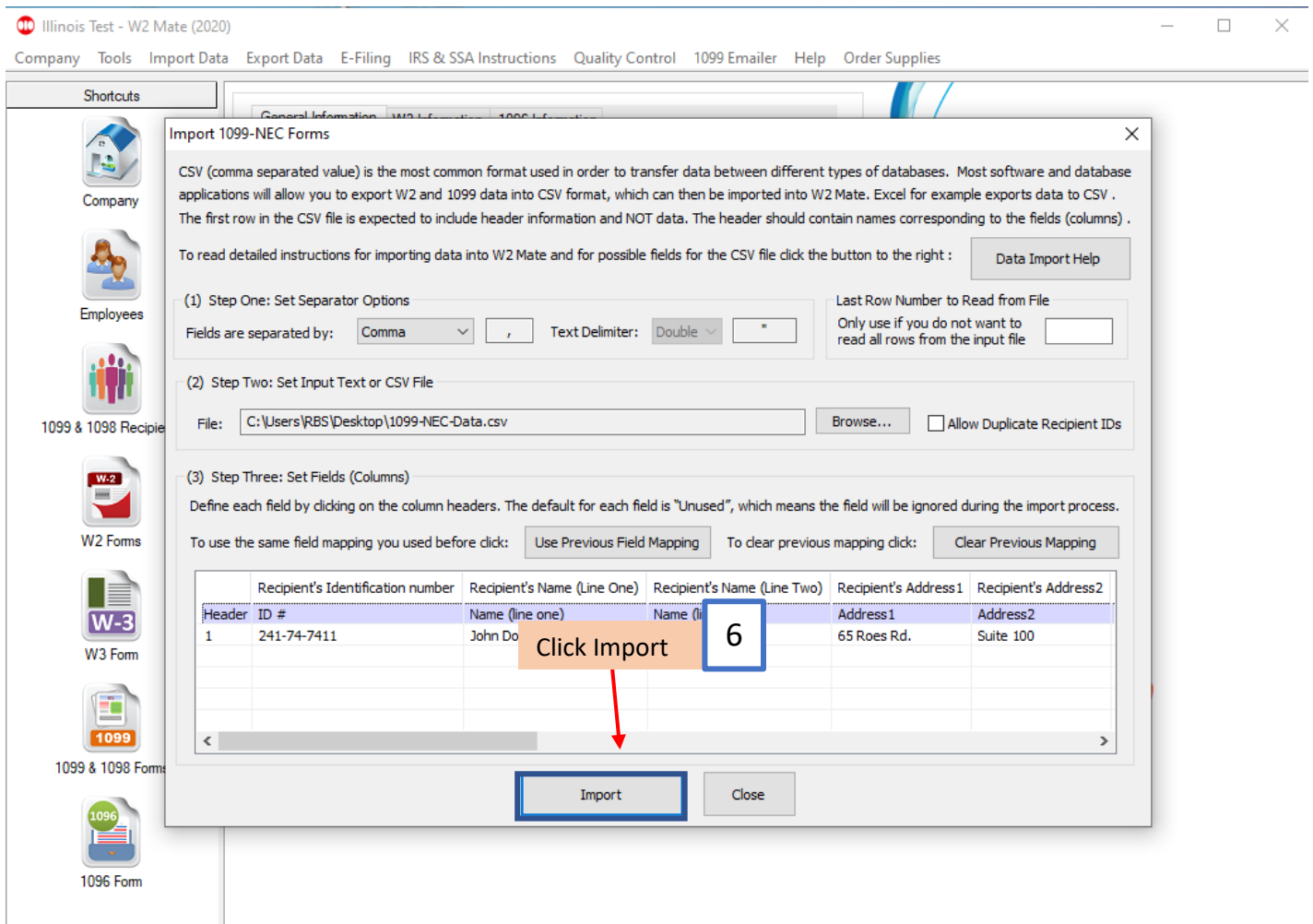
Import Close

6. When you have all the fields mapped, Click Import

Note: The most common error during import is duplicate or incorrectly formatted 1099 data. The import engine in W2 Mate uses a highly advanced detection system which can identify and report the most common import data errors BEFORE the data is imported.

If you receive any errors in regards to the data in the CSV file, you will need to open the CSV file, make the needed corrections, resave the CSV file, then import the corrected file into W2 Mate.

Corrections cannot be made on the panel above, this is a mapping utility only not an editor.



7. When you receive the Data Import completed successfully Click OK

8. Click Close to exit the 1099 Import wizard

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To read detailed instructions for importing data into W2 Mate and for possible fields for the CSV file click the button to the right :

(1) Step One: Set Separator Options

Fields are separated by:  Text Delimiter:   Last Row Number to Read from File

(2) Step Two: Set Input Text or CSV File

File:

(3) Step Three: Set Fields (Columns)

Define each field by clicking on the column header. The field will be ignored during the import process.

To use the same field mapping you used before  mapping click:

	Recipient's Identification number	Recipient's Name (Line One)	Recipient's Name (Line Two)	Recipient's Address1	Recipient's Address2
Header	ID #	Name (line one)	Name (line two)	Address1	Address2
1	241-74-7411	John Doe	Roes Rd.	Suite 100	