

HOW TO EXPORT 1099 DATA FROM PAYROLL MATE AND IMPORT TO W2 MATE

Question

PLEASE REFER TO THE STEPS BELOW:

Answer

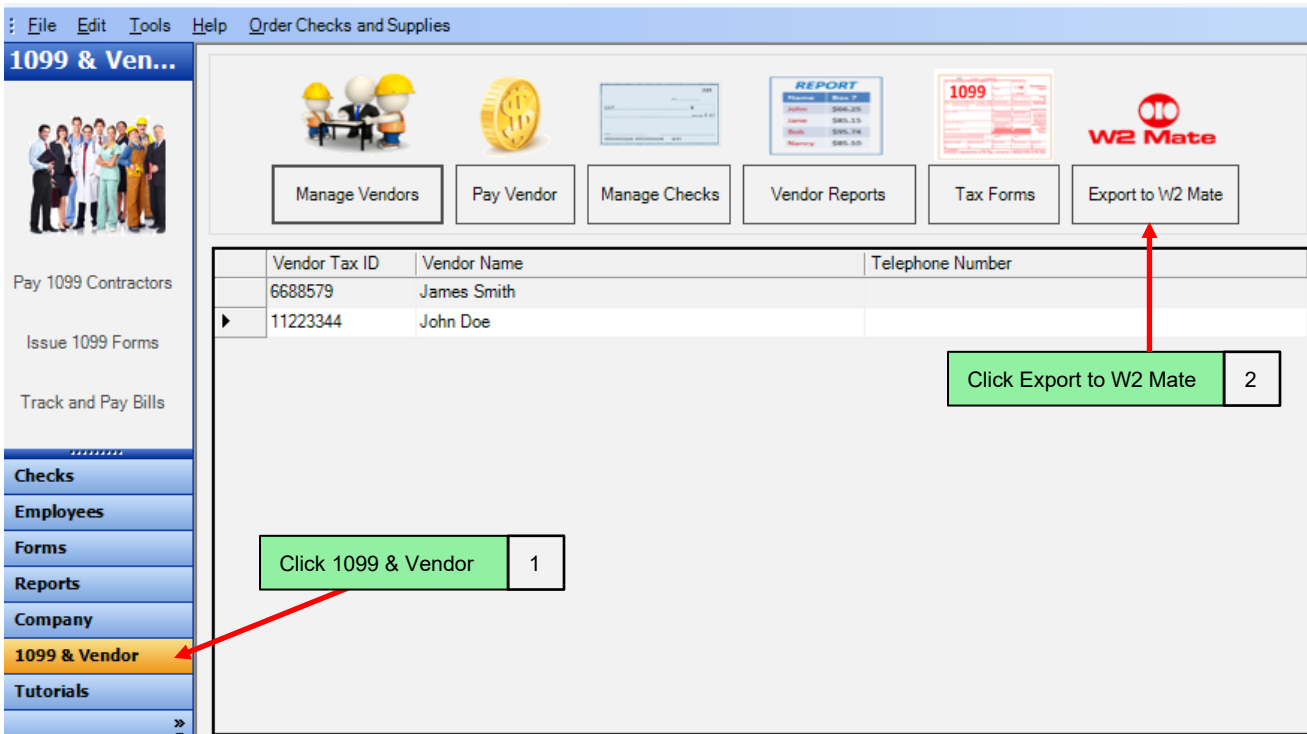
In order to use this feature, you will need to purchase and enable **Payroll Mate Option #6 (Vendor & 1099 Center)**, in addition to the purchase of Payroll Mate Software PC Download.

Note: This is a 2-part process. First you must export/save the file from Payroll Mate, second you will import the data into W2 Mate.

Part 1 (Export/Save the file from Payroll Mate)

Open Payroll Mate: Make sure you have the correct Company open inside Payroll

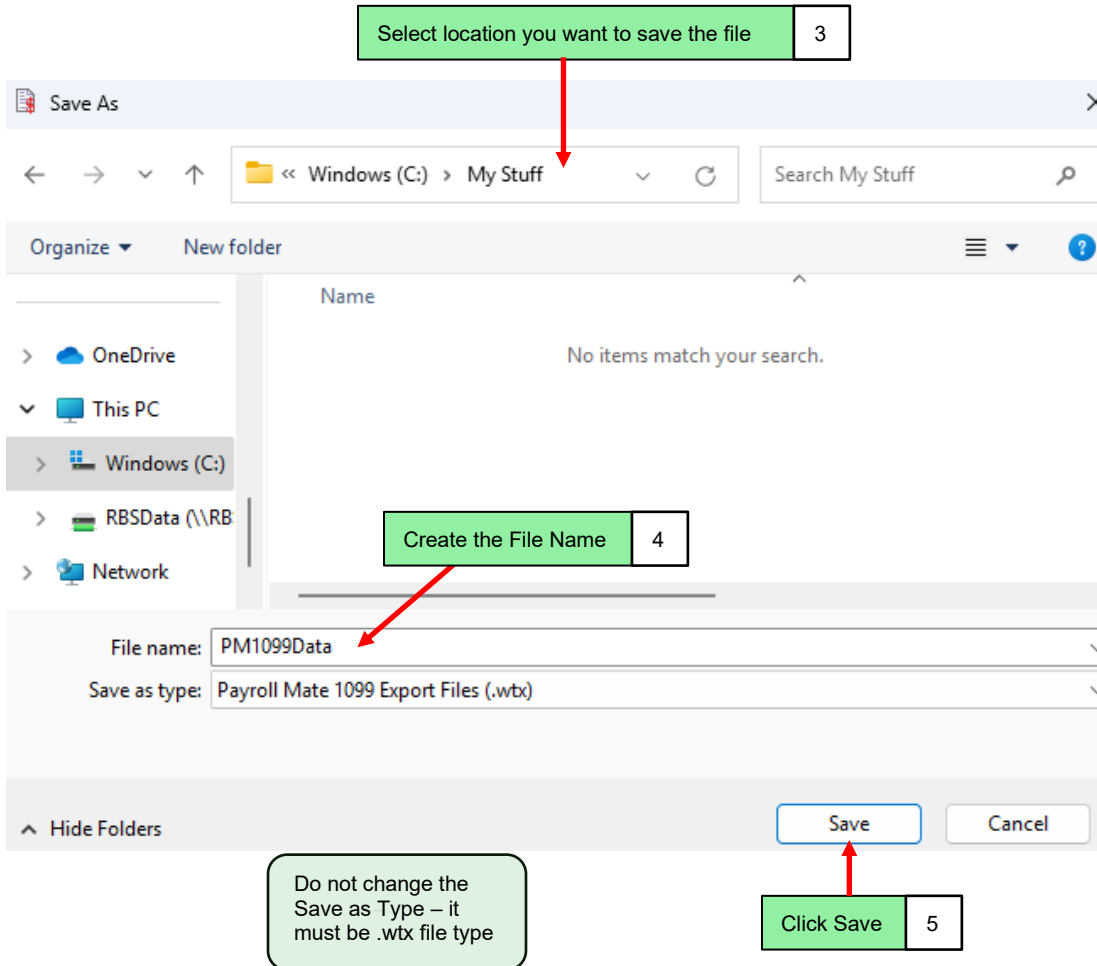
1. Click **1099 & Vendor**
2. Click **Export to W2 Mate**



The screenshot shows the Payroll Mate software interface. The menu bar includes File, Edit, Tools, Help, and Order Checks and Supplies. The main window title is '1099 & Ven...'. The interface features a sidebar with navigation options: Pay 1099 Contractors, Issue 1099 Forms, Track and Pay Bills, Checks, Employees, Forms, Reports, Company, 1099 & Vendor (highlighted), and Tutorials. The main area contains a toolbar with buttons for Manage Vendors, Pay Vendor, Manage Checks, Vendor Reports, Tax Forms, and Export to W2 Mate. Below the toolbar is a table with columns for Vendor Tax ID, Vendor Name, and Telephone Number. The table contains two rows: one for James Smith (Vendor Tax ID 6688579) and one for John Doe (Vendor Tax ID 11223344). A red arrow points from the 'Export to W2 Mate' button to a green callout box labeled 'Click Export to W2 Mate' with the number '2'. Another red arrow points from the '1099 & Vendor' menu item to a green callout box labeled 'Click 1099 & Vendor' with the number '1'.

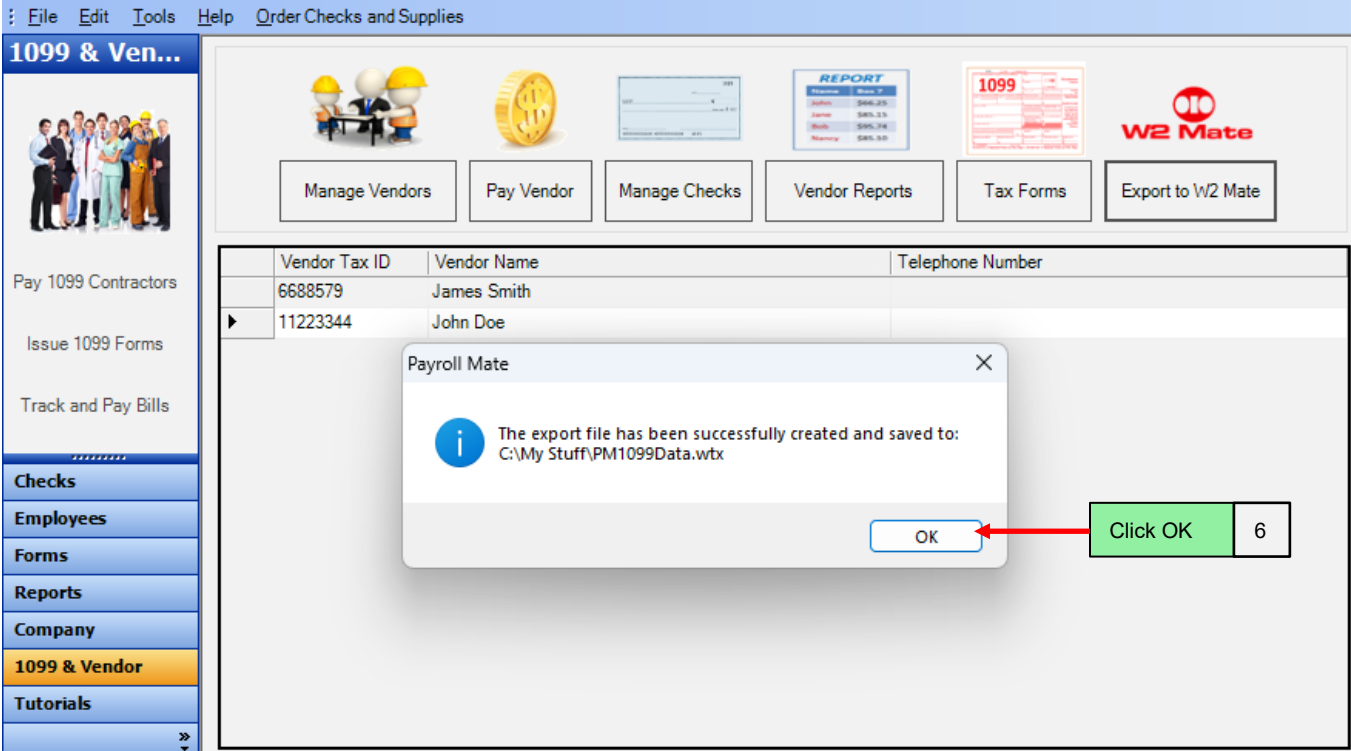
Vendor Tax ID	Vendor Name	Telephone Number
6688579	James Smith	
11223344	John Doe	

3. **Select the location** you want to save the file
4. **Create the File Name**
5. Click **Save**



A message dialog box will appear stating that the export file has been successfully created and saved to the location and file name you specified.

6. Click **OK**



The screenshot shows the Payroll Mate software interface. The main window has a menu bar with 'File', 'Edit', 'Tools', 'Help', and 'Order Checks and Supplies'. Below the menu bar is a navigation pane on the left with '1099 & Ven...' selected. The main area contains a toolbar with icons for 'Manage Vendors', 'Pay Vendor', 'Manage Checks', 'Vendor Reports', 'Tax Forms', and 'Export to W2 Mate'. Below the toolbar is a table with columns 'Vendor Tax ID', 'Vendor Name', and 'Telephone Number'. The table contains two rows: one for James Smith (Tax ID 6688579) and one for John Doe (Tax ID 11223344). A message dialog box titled 'Payroll Mate' is open in the center, displaying an information icon and the text: 'The export file has been successfully created and saved to: C:\My Stuff\PM1099Data.wtx'. An 'OK' button is visible in the dialog box. A red arrow points from a green box labeled 'Click OK' to the 'OK' button in the dialog box. A small box with the number '6' is also present next to the 'Click OK' label.

Vendor Tax ID	Vendor Name	Telephone Number
6688579	James Smith	
11223344	John Doe	

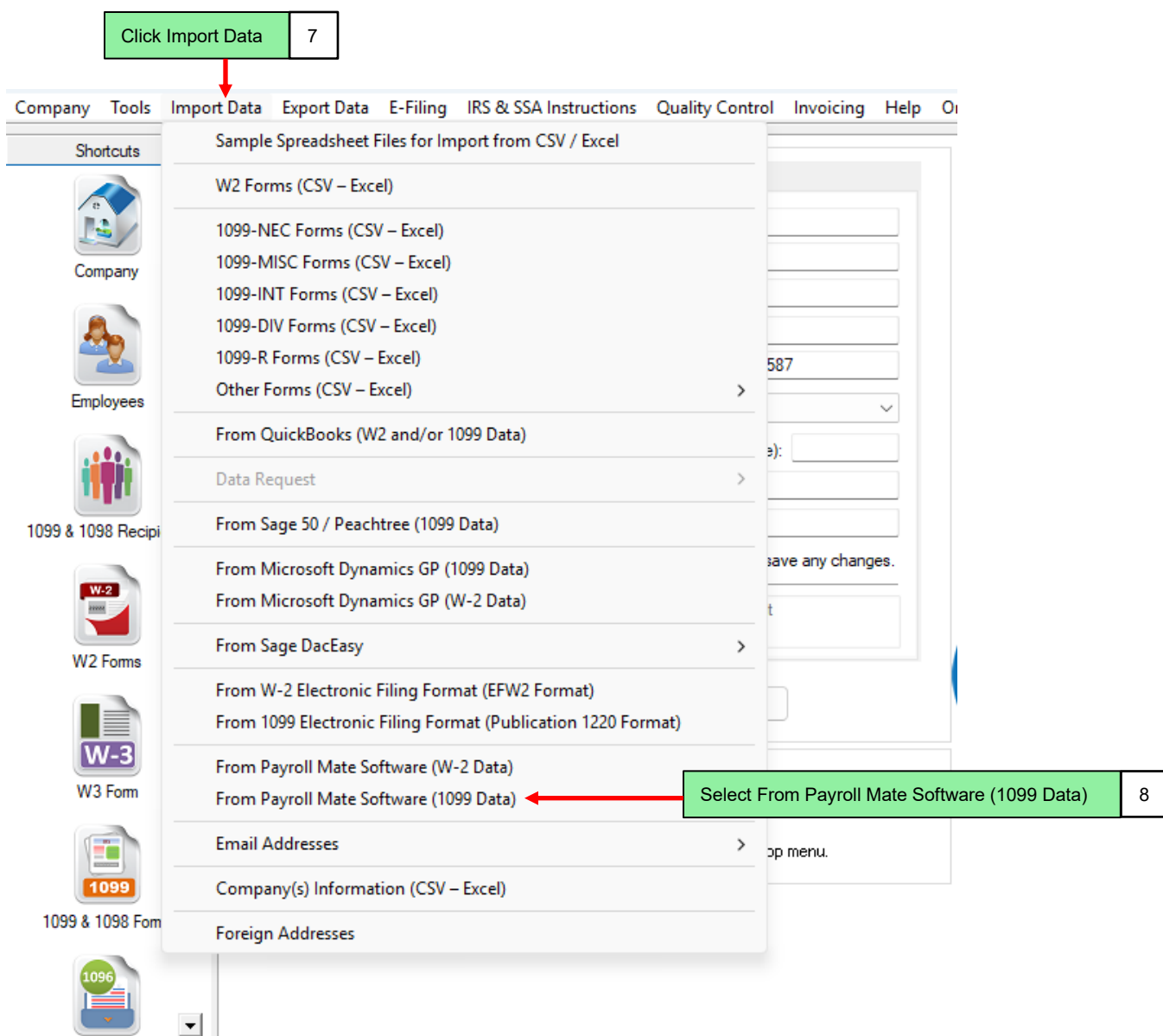
Part 2 (Import the data into W2 Mate)

Open W2 Mate: Make sure you have the correct Company open inside W2 Mate.

If you do not currently have this company created inside of W2 Mate you will need to create the company prior to importing the Payroll Mate 1099 data.

7. Click **Import Data**

8. Select **From Payroll Mate Software (1099 Data)**



The screenshot shows the W2 Mate software interface. The 'Import Data' menu is open, displaying various options for importing data. A green box labeled 'Click Import Data' with the number '7' points to the 'Import Data' menu item. Another green box labeled 'Select From Payroll Mate Software (1099 Data)' with the number '8' points to the 'From Payroll Mate Software (1099 Data)' option in the dropdown menu.

Company Tools **Import Data** Export Data E-Filing IRS & SSA Instructions Quality Control Invoicing Help O

Shortcuts

- Sample Spreadsheet Files for Import from CSV / Excel
- W2 Forms (CSV – Excel)
- 1099-NEC Forms (CSV – Excel)
- 1099-MISC Forms (CSV – Excel)
- 1099-INT Forms (CSV – Excel)
- 1099-DIV Forms (CSV – Excel)
- 1099-R Forms (CSV – Excel)
- Other Forms (CSV – Excel) >
- From QuickBooks (W2 and/or 1099 Data)
- Data Request >
- From Sage 50 / Peachtree (1099 Data)
- From Microsoft Dynamics GP (1099 Data)
- From Microsoft Dynamics GP (W-2 Data)
- From Sage DacEasy >
- From W-2 Electronic Filing Format (EFW2 Format)
- From 1099 Electronic Filing Format (Publication 1220 Format)
- From Payroll Mate Software (W-2 Data)
- From Payroll Mate Software (1099 Data) ←
- Email Addresses >
- Company(s) Information (CSV – Excel)
- Foreign Addresses

Company

Employees

1099 & 1098 Recipi

W2 Forms

W3 Form

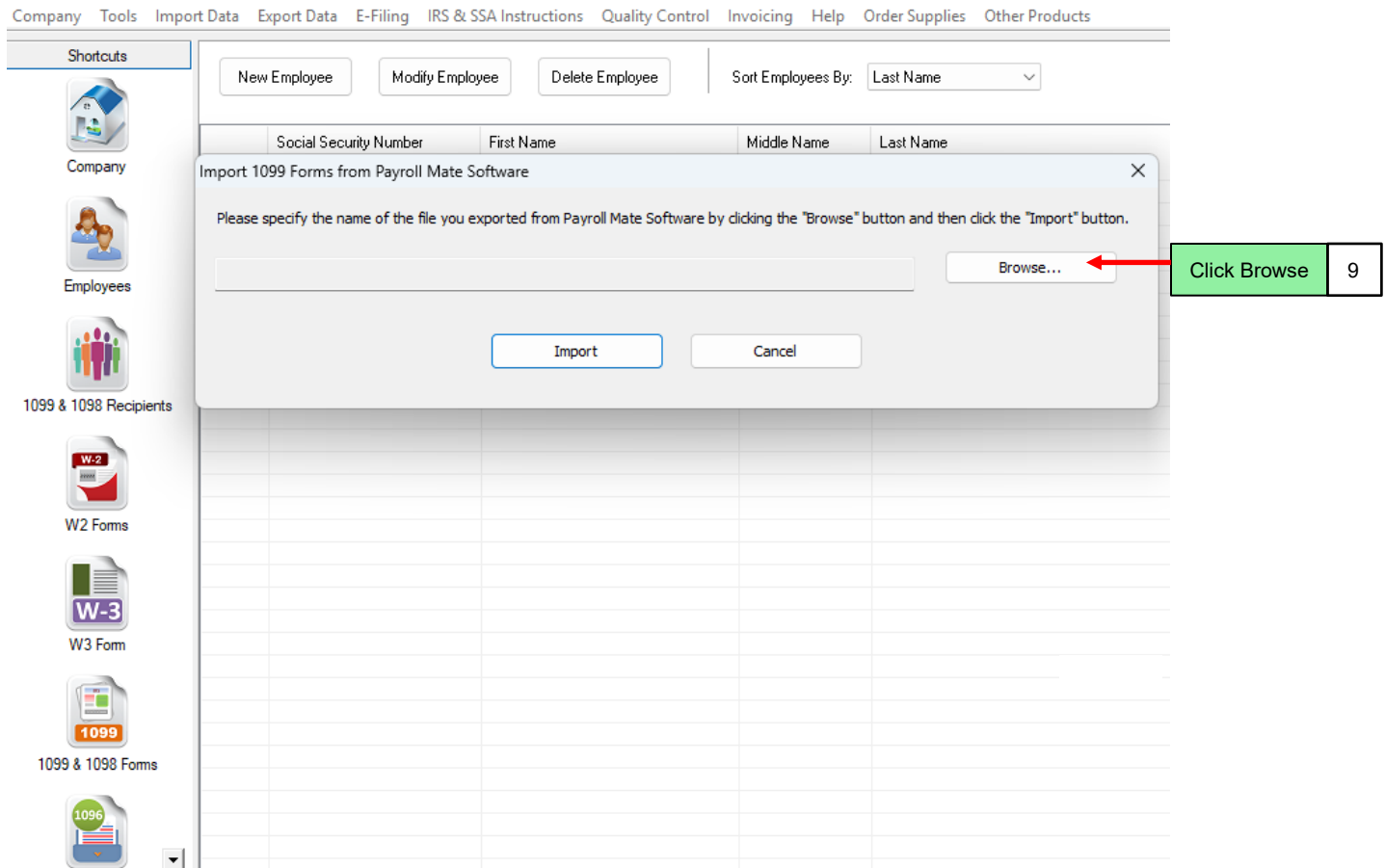
1099 & 1098 Fom

1096

Save any changes.

op menu.

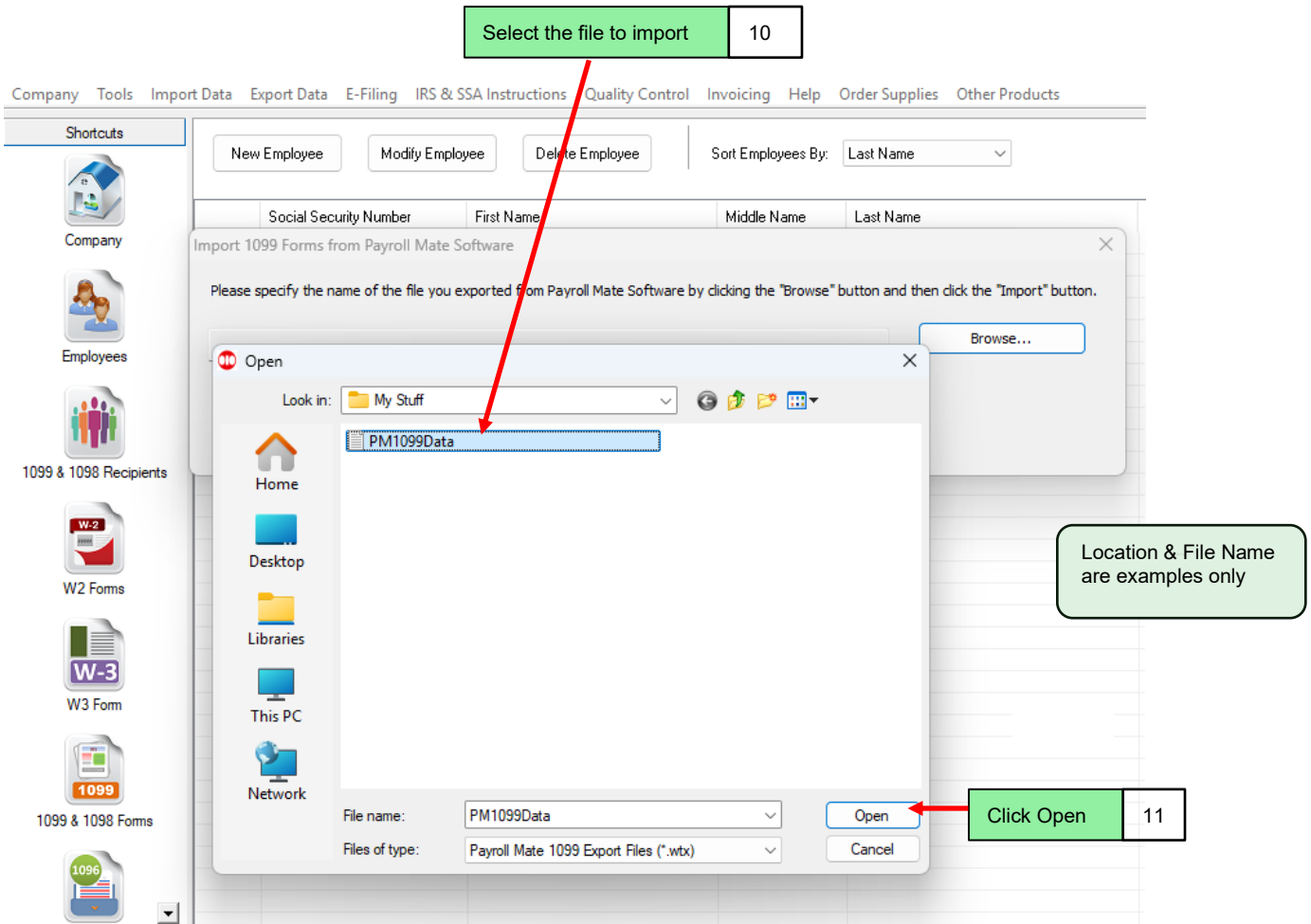
9. Click **Browse** to find the file you created through Payroll Mate



The screenshot shows the Payroll Mate software interface. At the top, there is a menu bar with options: Company, Tools, Import Data, Export Data, E-Filing, IRS & SSA Instructions, Quality Control, Invoicing, Help, Order Supplies, and Other Products. Below the menu bar, there are buttons for 'New Employee', 'Modify Employee', and 'Delete Employee', along with a 'Sort Employees By:' dropdown menu set to 'Last Name'. A table with columns for 'Social Security Number', 'First Name', 'Middle Name', and 'Last Name' is visible. A dialog box titled 'Import 1099 Forms from Payroll Mate Software' is open, containing the text: 'Please specify the name of the file you exported from Payroll Mate Software by clicking the "Browse" button and then click the "Import" button.' The dialog box has a 'Browse...' button, an 'Import' button, and a 'Cancel' button. A red arrow points to the 'Browse...' button, and a callout box with a green background and white text says 'Click Browse' and '9'. On the left side of the interface, there is a sidebar with icons for 'Company', 'Employees', '1099 & 1098 Recipients', 'W2 Forms', 'W3 Form', and '1099 & 1098 Forms'.

10. **Select the file** you created from your export in Payroll Mate **to import** in W2 Mate.
11. Click **Open**

Select the file to import 10



Company Tools Import Data Export Data E-Filing IRS & SSA Instructions Quality Control Invoicing Help Order Supplies Other Products

Shortcuts

New Employee Modify Employee Delete Employee Sort Employees By: Last Name

Social Security Number First Name Middle Name Last Name

Import 1099 Forms from Payroll Mate Software

Please specify the name of the file you exported from Payroll Mate Software by clicking the "Browse" button and then click the "Import" button.

Open

Look in: My Stuff

PM1099Data

Home Desktop Libraries This PC Network

File name: PM1099Data

Files of type: Payroll Mate 1099 Export Files (*.wtx)

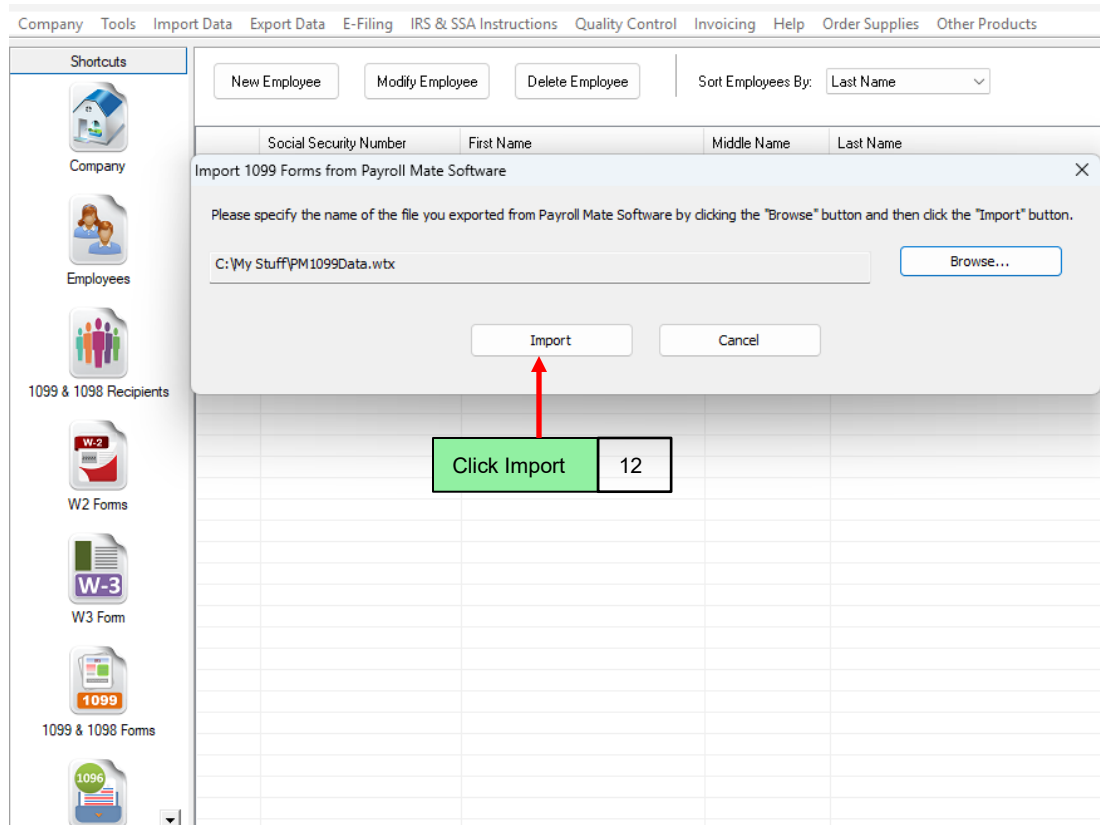
Open Cancel

Click Open 11

Location & File Name are examples only

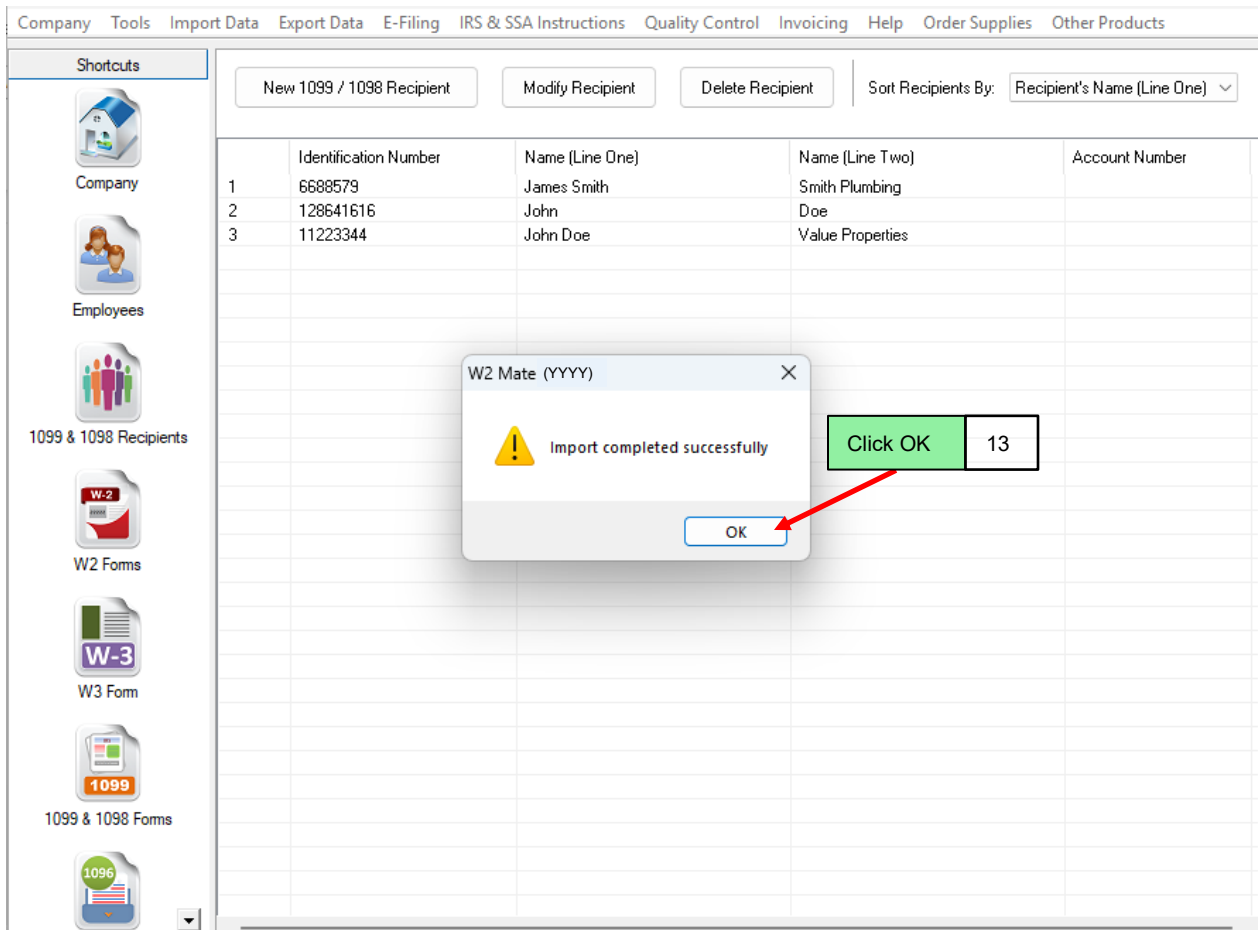
12. Click Import

Note: Selected file name will appear in the address bar



The screenshot shows the Payroll Mate software interface. The top menu bar includes: Company, Tools, Import Data, Export Data, E-Filing, IRS & SSA Instructions, Quality Control, Invoicing, Help, Order Supplies, and Other Products. The left sidebar has a 'Shortcuts' section with icons for Company, Employees, 1099 & 1098 Recipients, W2 Forms, W3 Form, 1099, and 1096. The main area shows a table with columns: Social Security Number, First Name, Middle Name, and Last Name. A dialog box titled 'Import 1099 Forms from Payroll Mate Software' is open, displaying the file path 'C:\My Stuff\PM1099Data.wtx' and buttons for 'Browse...', 'Import', and 'Cancel'. A red arrow points to the 'Import' button. A green box with the text 'Click Import' and the number '12' is overlaid on the table below the dialog box.

13. A dialog box will appear “Import completed successfully”, click **OK**



Company Tools Import Data Export Data E-Filing IRS & SSA Instructions Quality Control Invoicing Help Order Supplies Other Products

Shortcuts

New 1099 / 1098 Recipient Modify Recipient Delete Recipient Sort Recipients By: Recipient's Name (Line One) ▾

	Identification Number	Name (Line One)	Name (Line Two)	Account Number
1	6688579	James Smith	Smith Plumbing	
2	128641616	John	Doe	
3	11223344	John Doe	Value Properties	

W2 Mate (YYYY) X

! Import completed successfully

Click OK 13

OK

Company

Employees

1099 & 1098 Recipients

W2 Forms

W3 Form

1099 & 1098 Forms

1096

Your 1099 imported data will now appear inside W2 Mate under 1099 & 1098 Recipients and 1099 & 1098 Forms

Congratulations! You have successfully exported 1099 data from Payroll Mate and have imported it into W2 Mate.