

QUICKBOOKS 1099 ELECTRONIC FILING

RealTaxTools.com

QuickBooks 1099 Electronic Filing Using W2 Mate Software

***This tutorial
demonstrates how to
use W2 Mate software
to file QuickBooks 1099
forms ELECTRONICALLY
through the
IRS FIRE SYSTEM.***

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Steps for E-Filing QuickBooks 1099 Forms

Step 1

Import 1099
data from
QuickBooks
and Map to
the desired
type of 1099
form

Step 2

Generate
1099
E-Filing
Submission

Step 3

Upload 1099-
E-File to IRS
FIRE System

Step 1 : Import 1099 data from Intuit QuickBooks

W2 Mate comes with an easy user wizard for importing and then mapping QuickBooks 1099 data

QuickBooks Import Wizard

Type of Data to Import and Tax Year

Please specify the type of data you would like to import: W2 Data 1099 Data

Please specify the tax year of the data you would like to import: 2012

1099 Import Options

Type of 1099 form you would like QuickBooks 1099 data be mapped to: Form 1099-INT - Interest Income

1099 box you would like the money amount be mapped to: 1099-INT Box

How to import 1099 data to different forms/boxes? Specify the 1099

Get amounts from 1099 Accounts Only. Uncheck in order to get amounts from other sources.

Email Options

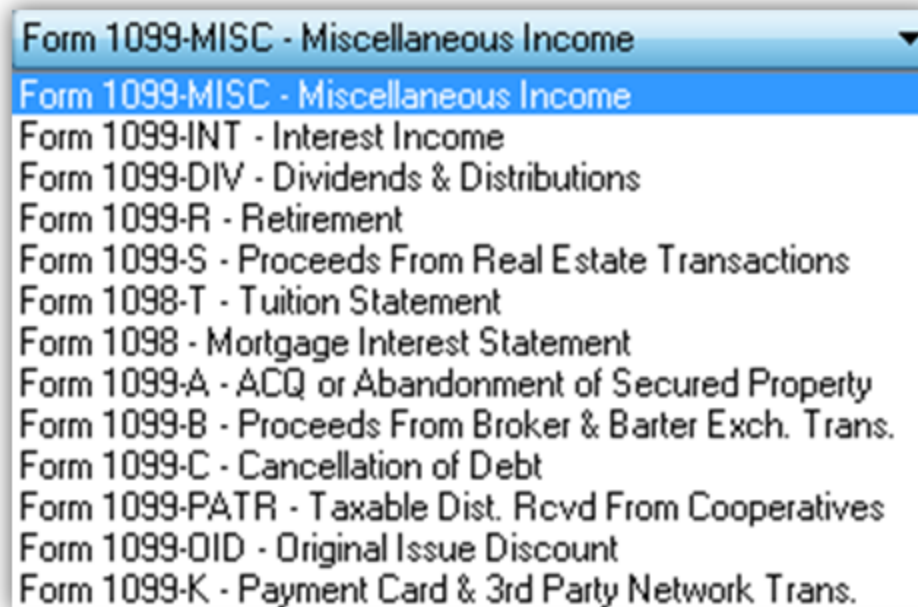
Import Email Address If email addresses for employees / vendors are not in the system, you can import email addresses and then send W2s & 1099s as PDFs.

Run in Debug Mode (only check this option if asked to do so by W2 Mate support team)

< Back Next > Cancel Finish

Step 1 : Import 1099 data from Intuit QuickBooks

W2 Mate can map 1099 data stored inside QuickBooks into any 1099 form including 1099-MISC, 1099-INT, 1099-DIV, 1099-R, 1099-S, 1098-T, 1098, 1099-A, 1099-B, 1099-C, 1099-K, 1099-PATR and 1099-OID.



Step 1 : Import 1099 data from Intuit QuickBooks

To import data from QuickBooks follow these steps:

- 1. From the top menu inside W2 Mate select “Import Data > From QuickBooks.**
- 2. The QuickBooks import wizard comes up with detailed instructions on how to proceed with the import process.**
- 3. Make sure to have QuickBooks running and the company you want to import from open.**
- 4. Click the Connect to QuickBooks button and W2 Mate will connect to QuickBooks.**

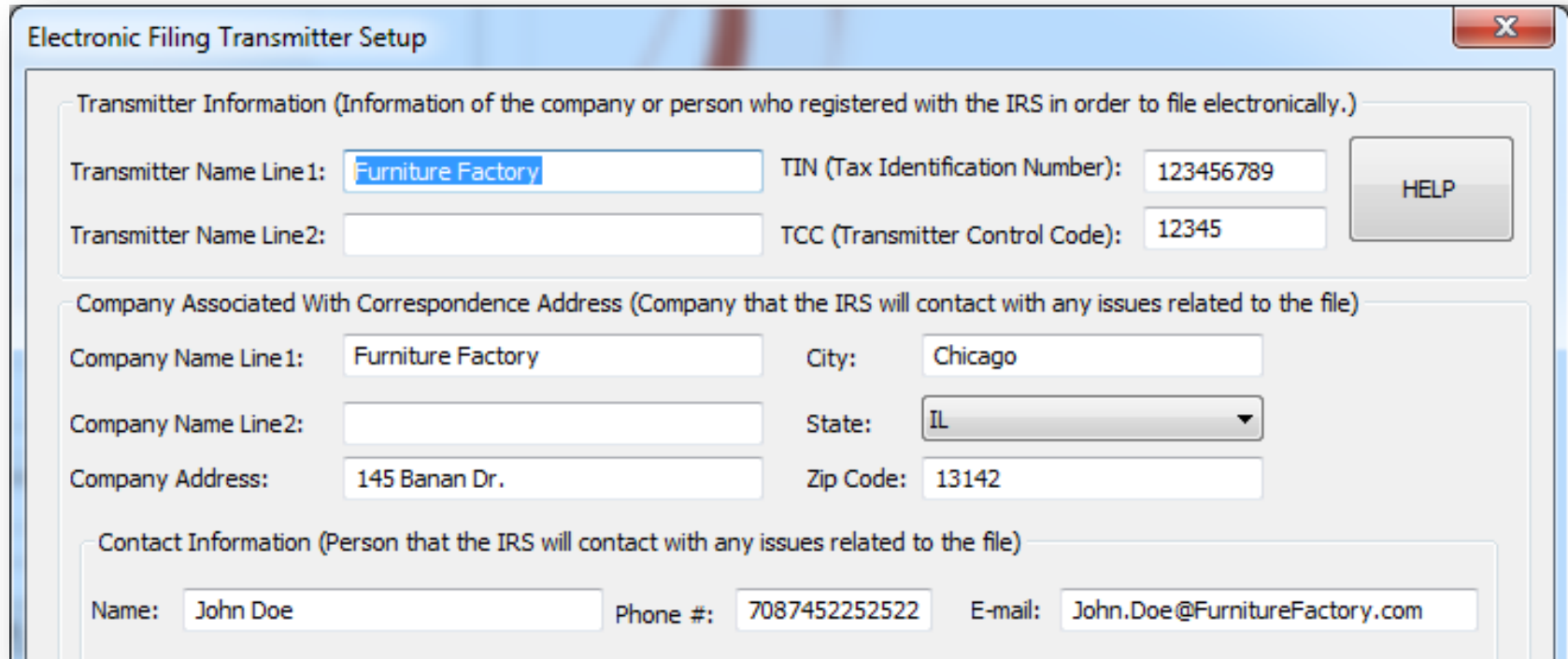
Step 1 : Import 1099 data from Intuit QuickBooks

To import data from QuickBooks follow these steps:

- 5. Specify 1099 as the type of data to import and then select the form you want to generate such as 1099-MISC, 1099-INT and so on.**
- 6. Click Next. Now W2 Mate will read the 1099 data from QuickBooks and show a spreadsheet with the forms imported.**
- 7. Review the 1099 forms and when you are ready, click Next and W2 Mate will complete the import process.**

Step 2 : Generate QuickBooks 1099 E-Filing Submission

With one click, W2 Mate can generate an IRS-compliant 1099 electronic filing submission that follows IRS Publication 1220.



The screenshot shows a software window titled "Electronic Filing Transmitter Setup" with a close button (X) in the top right corner. The window is divided into three sections:

- Transmitter Information (Information of the company or person who registered with the IRS in order to file electronically.)**
 - Transmitter Name Line1:
 - Transmitter Name Line2:
 - TIN (Tax Identification Number):
 - TCC (Transmitter Control Code):
 - A "HELP" button is located to the right of the TIN and TCC fields.
- Company Associated With Correspondence Address (Company that the IRS will contact with any issues related to the file)**
 - Company Name Line1:
 - Company Name Line2:
 - Company Address:
 - City:
 - State:
 - Zip Code:
- Contact Information (Person that the IRS will contact with any issues related to the file)**
 - Name:
 - Phone #:
 - E-mail:

Step 3 Upload 1099 E-File to IRS FIRE System

Uploading the 1099 electronic file to the IRS FIRE system is straightforward and takes only a few minutes.

- Go to <http://fire.irs.gov>. Click "Log On".
- Enter the User ID and Password. Click "Send Information Returns"
- Enter the TCC, TIN and Click "Submit"
- Click "Original File" and Click "Submit"
- Click "Browse" to locate the file and open it
- Click "Upload", when the upload completes, the screen will display a message.
- To verify, go to the "CHECK FILE STATUS" option on the Main Menu.



W2 Mate - Best Value in W2 1099 Software
We hope you will join our family of satisfied customers

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