Step 1: Create a Multi PCode Import Map
- Login to the administrative portion of the Corporate Suite software.
- Select the correct tax year, filing entity, & form type from the upper left menu options
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- Select the "Import Forms" Option from the left-hand menu under "Preparing My Forms"
    -

- Select "Create/Manage/Print Import Maps", make sure the correct form type is selected from the menu, and then choose "Select" to view all import maps for the selected form type.
    -

- Select "Add" on the bottom left to create a new map. Select the File type of the import. In this example Excel will be used. The sample Import File can be downloaded at Sample Multi-PCode 1099-Misc

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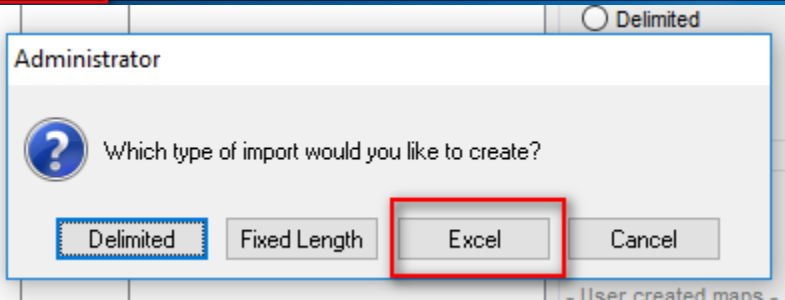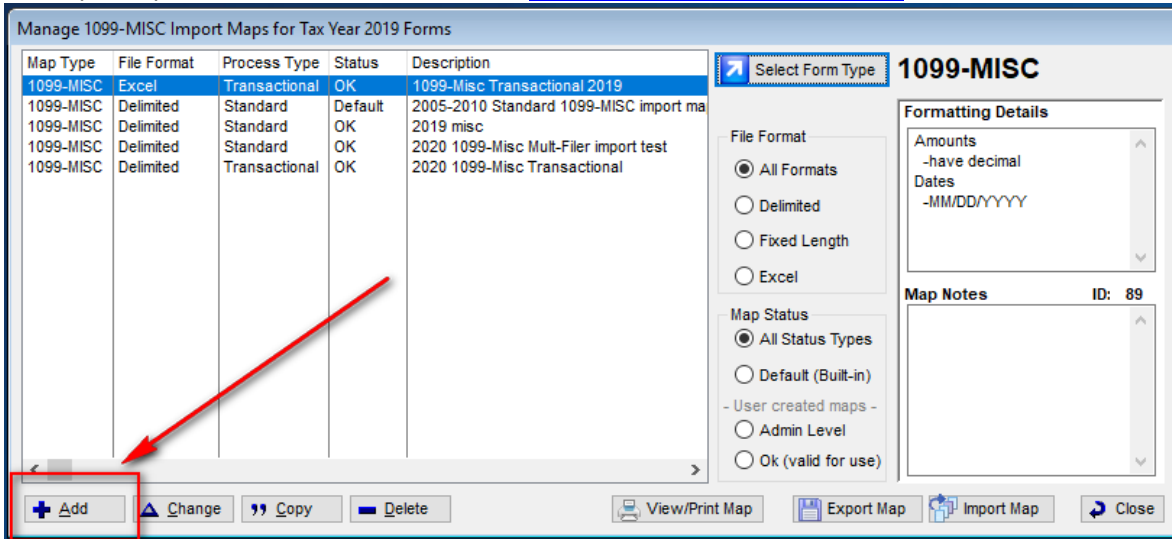
- Proceed through the Import wizard. For this example keep "Has a Header Row" to match our sample file which has a head row. Then select "Use a sample file to provide the column/header information" Then browse to where you saved the sample file.

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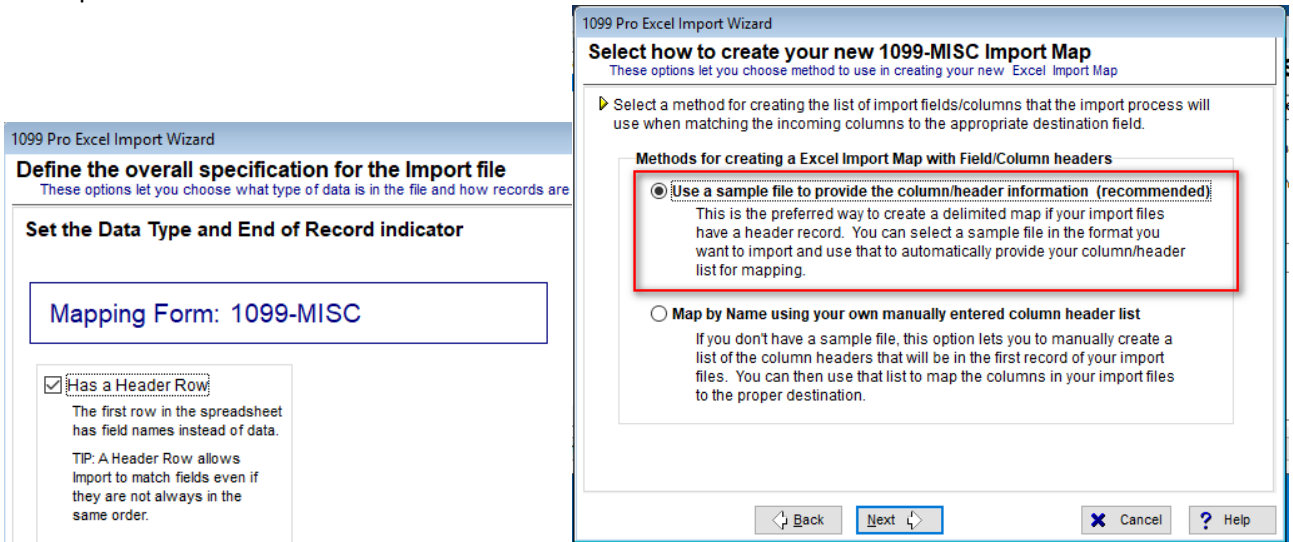
- At the mapping section, selecting "Map by Name" will automatically map the names in the sample file because the name will be matching. Alternatively you can drag over your own column header from the left box to the right box on top the field you would like to map your column header. The important head for this map to be Multi-PCode is the "Filer Payer Code" field.
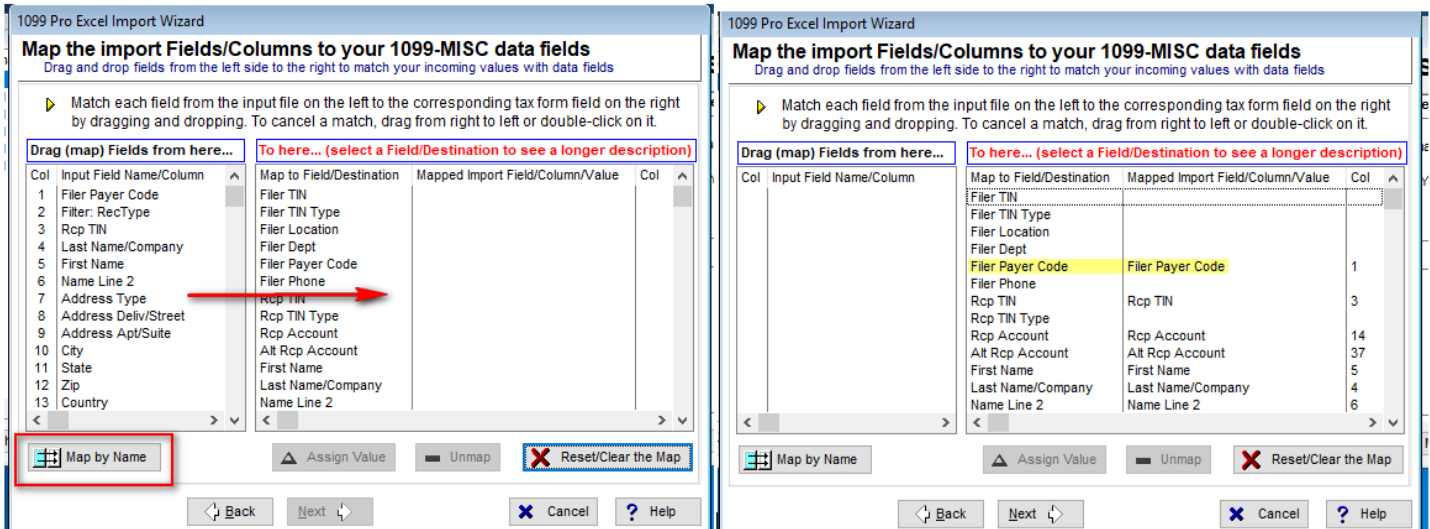
- Click "Next" to specify the Record Filter Value. Please enter the Value under the column "Filter: RecType". Any rows in the import file that does not have the value you define on this screen will be excluded from the import.
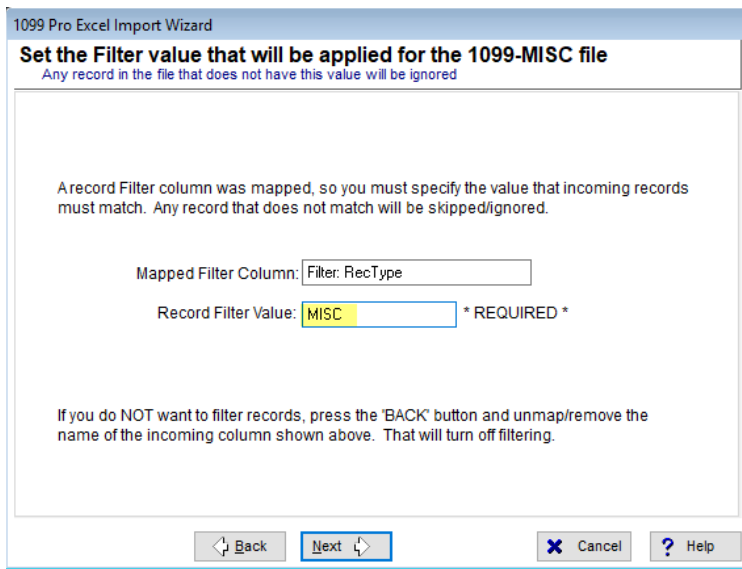
- Please specify your preferred formatting and recipient matching criteria. When specifying a name for the map, please name it appropriately to reflect this Multi-PCode import map.

  - 1099 Pro Excel Import Wizard

    Specify a Name and Usage Notes for the 1099-MISC Import map
    This information is displayed on the Import map browse to help your users

    Enter or update the map name and usage information
    ▷ The title and description will be displayed for users when they need to select an Import map to use.

    Map description or title: | Mult-PCode Import 1099-Misc

    Map Usage Notes:
    (Optional but recommended)

    [Back] [Next]   [✖ Cancel] [? Help]

- When you get to the "Specify the type of import" you can select from the 3 options. Please note what you select MUST be consistent to the import file and PCode aggregation settings. For this example we will select "Standard". All rows in the import file must import into Filers that are not configured for aggregation imports.

  1099 Pro Excel Import Wizard

  Specify the type of Import
  These options let you specify whether new information will update existing forms or replace them

  Processing Options for Tax Form Imports

  ○ **Standard**
  All Tax Forms are added as individual records, independent of all other forms and regardless of whether other forms may exist in the system for the same recipient.

  ○ **Transactional (aggregation must be enabled)**
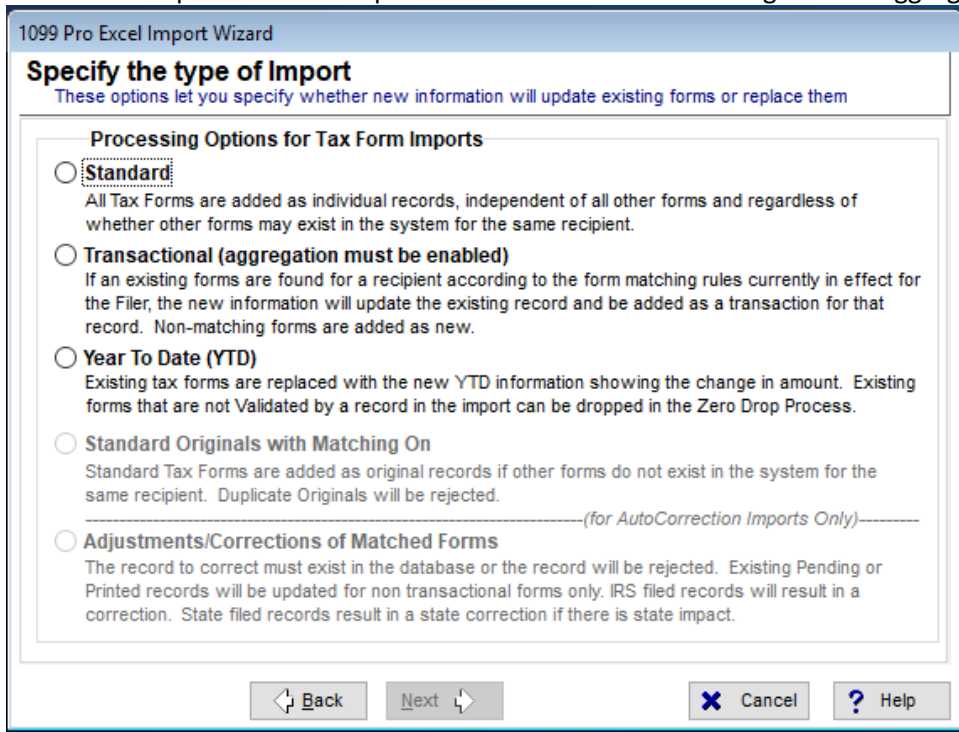 If an existing forms are found for a recipient according to the form matching rules currently in effect for the Filer, the new information will update the existing record and be added as a transaction for that record. Non-matching forms are added as new.

  ○ **Year To Date (YTD)**
  Existing tax forms are replaced with the new YTD information showing the change in amount. Existing forms that are not Validated by a record in the import can be dropped in the Zero Drop Process.

  ○ **Standard Originals with Matching On**
  Standard Tax Forms are added as original records if other forms do not exist in the system for the same recipient. Duplicate Originals will be rejected.
  --(for AutoCorrection Imports Only)---------

  ○ **Adjustments/Corrections of Matched Forms**
  The record to correct must exist in the database or the record will be rejected. Existing Pending or Printed records will be updated for non transactional forms only. IRS filed records will result in a correction. State filed records result in a state correction if there is state impact.

  [Back] [Next]   [✖ Cancel] [? Help]

- Final step will give a summary of your map criteria. Click "Finish" to save and you will now see this map available to use for an import.