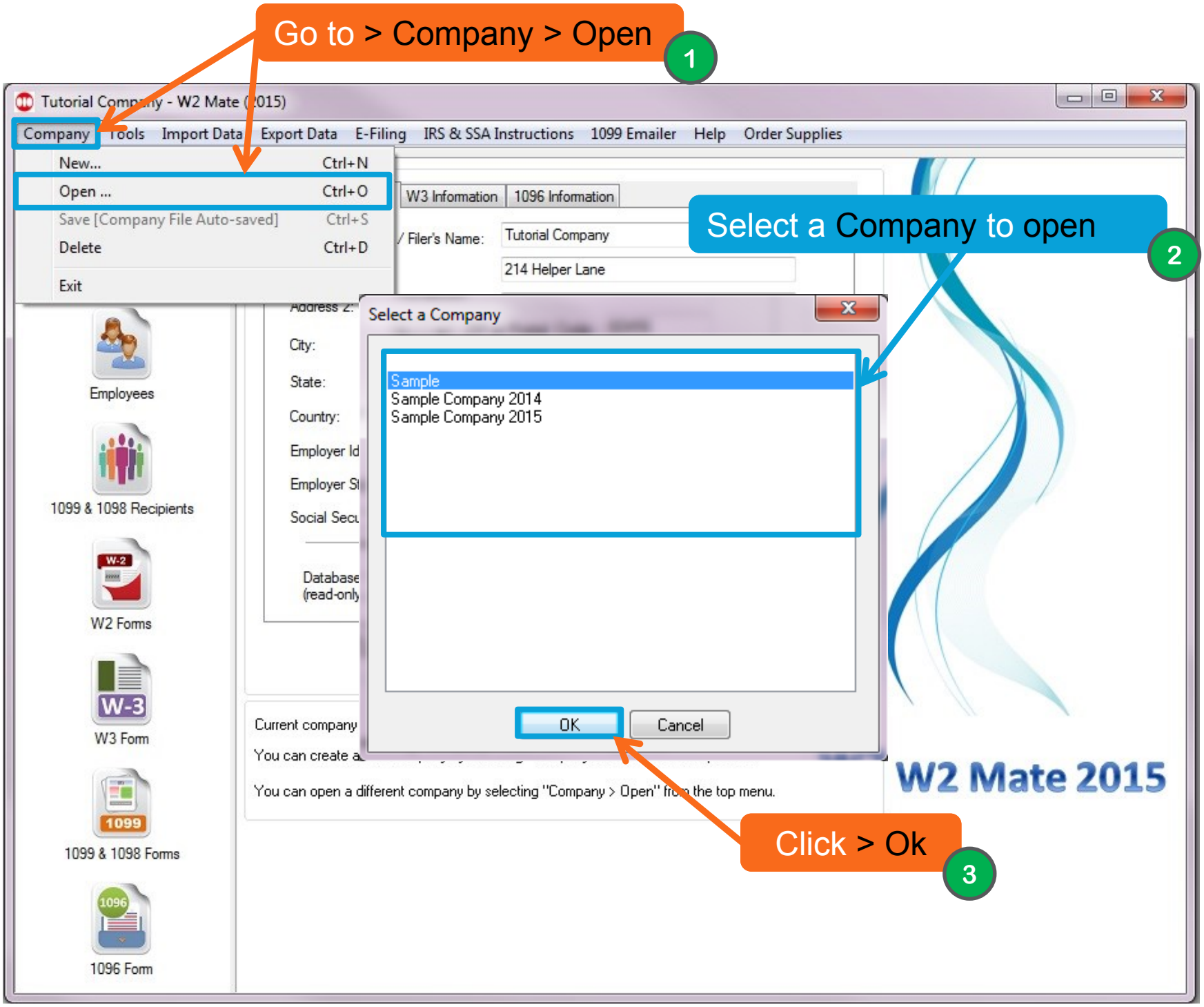
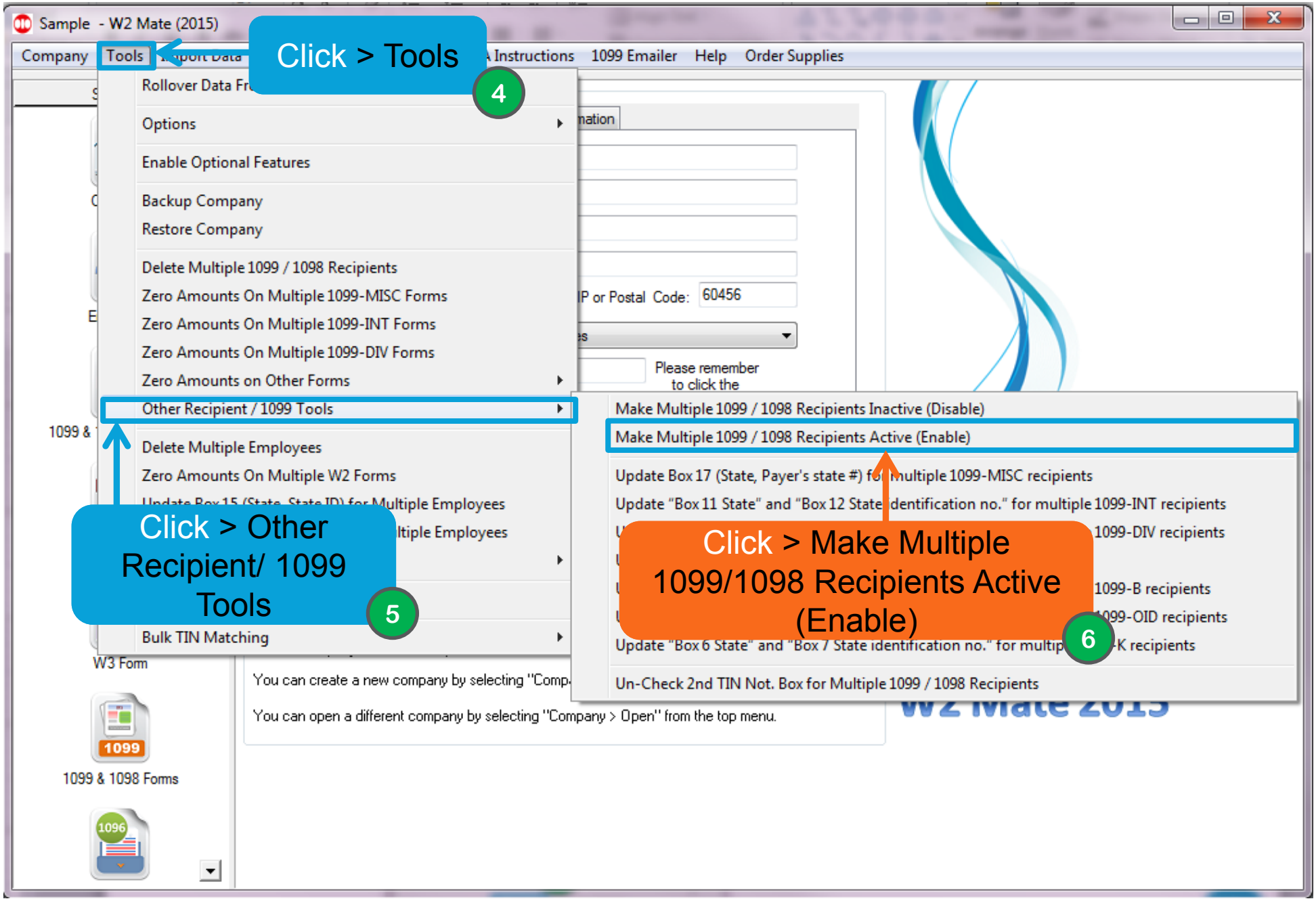
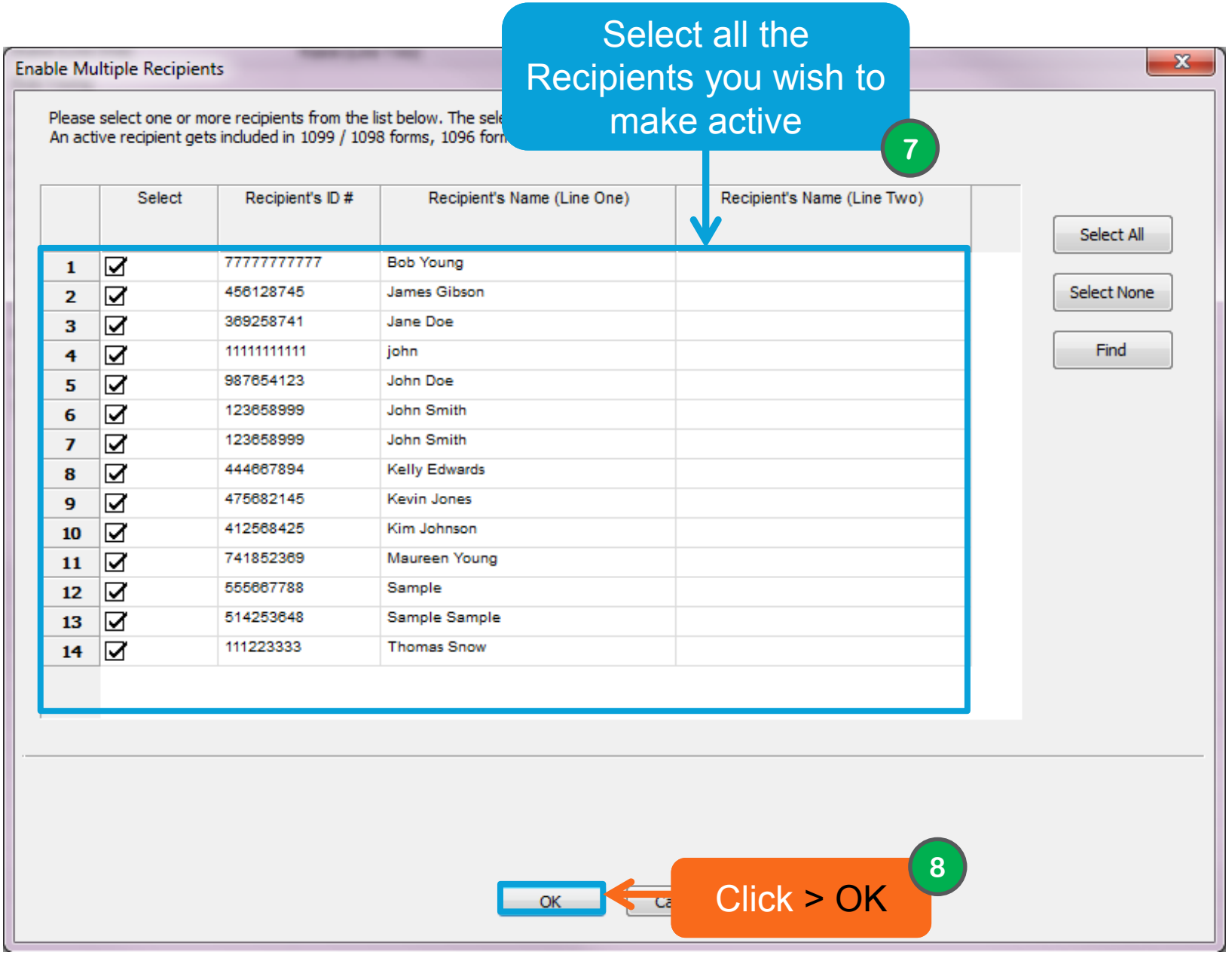
How to Make Multiple 1099/1098 Recipients Active in W2 Mate®

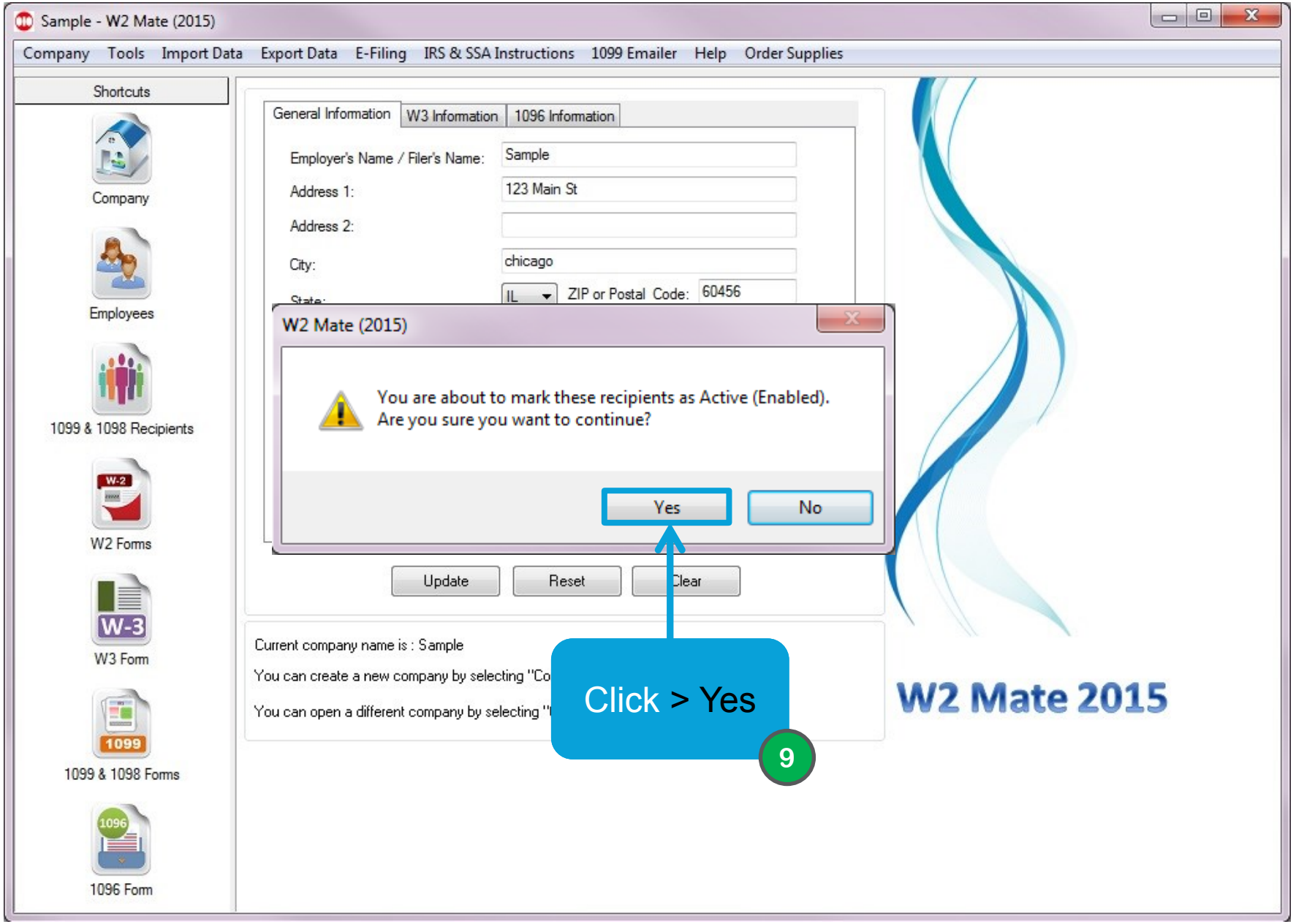
Start by Opening W2 Mate® Program

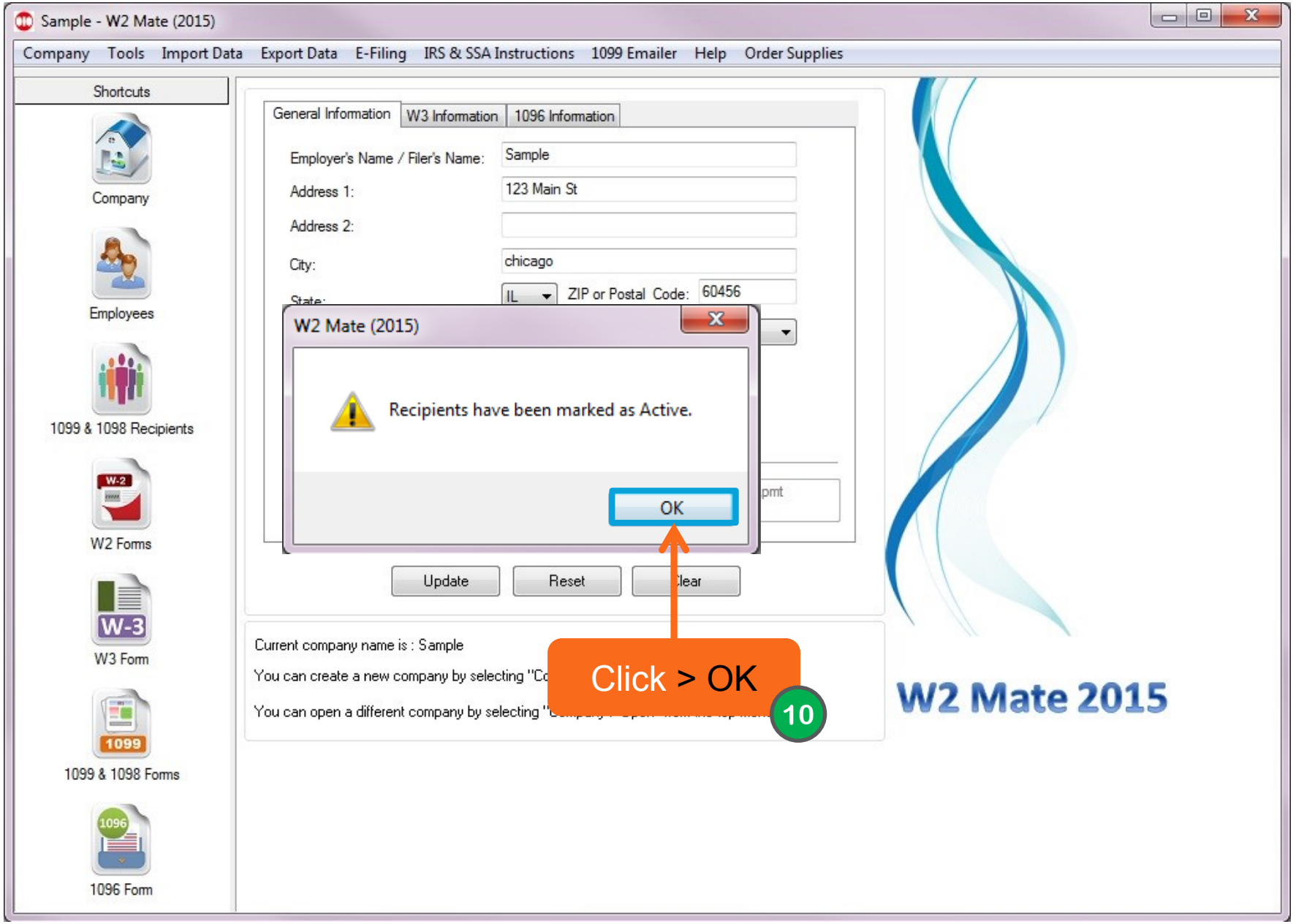
www.W2Mate.com


Go to > Company > Open
1
Tutorial Company - W2 Mate (2015)
Company
Tools
Import Data
Export Data
E-Filing
IRS & SSA Instructions
1099 Emailer
Help
Order Supplies
New... Ctrl+N
Open ... Ctrl+O
Save [Company File Auto-saved] Ctrl+S
Delete Ctrl+D
Exit
W3 Information
1096 Information
Filer's Name:
Tutorial Company
214 Helper Lane
Select a Company to open
2
Select a Company
Sample
Sample Company 2014
Sample Company 2015
OK
Cancel
City:
State:
Country:
Employer Id
Employer St
Social Secu
Database
(read-only
Current company
You can create a
You can open a different company by selecting "Company > Open" from the top menu.
Employees
1099 & 1098 Recipients
W2 Forms
W3 Form
1099 & 1098 Forms
1096 Form
W2 Mate 2015
Click > Ok
3


Sample - W2 Mate (2015)
Company
Tools
Instructions
1099 Emailer
Help
Order Supplies
Click > Tools
4
Rollover Data Fr
Options
Enable Optional Features
Backup Company
Restore Company
Delete Multiple 1099 / 1098 Recipients
Zero Amounts On Multiple 1099-MISC Forms
Zero Amounts On Multiple 1099-INT Forms
Zero Amounts On Multiple 1099-DIV Forms
Zero Amounts on Other Forms
Other Recipient / 1099 Tools
Delete Multiple Employees
Zero Amounts On Multiple W2 Forms
Bulk TIN Matching
Make Multiple 1099 / 1098 Recipients Inactive (Disable)
Make Multiple 1099 / 1098 Recipients Active (Enable)
Update Box 17 (State, Payer's state #) fo multiple 1099-MISC recipients
Update "Box 11 State" and "Box 12 State identification no." for multiple 1099-INT recipients
1099-DIV recipients
1099-B recipients
1099-OID recipients
Update "Box 6 State" and "Box 7 State identification no." for multip -K recipients
Un-Check 2nd TIN Not. Box for Multiple 1099 / 1098 Recipients
Click > Other Recipient/ 1099 Tools
5
Click > Make Multiple 1099/1098 Recipients Active (Enable)
6
P or Postal Code: 60456
Please remember to click the
You can create a new company by selecting "Comp
You can open a different company by selecting "Company > Open" from the top menu.
W3 Form
1099 & 1098 Forms


Select all the Recipients you wish to make active
7
Enable Multiple Recipients
Please select one or more recipients from the list below. The sele
An active recipient gets included in 1099 / 1098 forms, 1096 forr
Select
Recipient's ID #
Recipient's Name (Line One)
Recipient's Name (Line Two)
1 77777777777 Bob Young
2 456128745 James Gibson
3 369258741 Jane Doe
4 11111111111 john
5 987654123 John Doe
6 123658999 John Smith
7 123658999 John Smith
8 444667894 Kelly Edwards
9 475682145 Kevin Jones
10 412568425 Kim Johnson
11 741852369 Maureen Young
12 555667788 Sample
13 514253648 Sample Sample
14 111223333 Thomas Snow
Select All
Select None
Find
OK
8
Click > OK


Sample - W2 Mate (2015)
Company
Tools
Import Data
Export Data
E-Filing
IRS & SSA Instructions
1099 Emailer
Help
Order Supplies
Shortcuts
Company
Employees
1099 & 1098 Recipients
W2 Forms
W3 Form
1099 & 1098 Forms
1096 Form
General Information
W3 Information
1096 Information
Employer's Name / Filer's Name:
Sample
Address 1:
123 Main St
Address 2:
City:
chicago
State:
IL
ZIP or Postal Code:
60456
W2 Mate (2015)
You are about to mark these recipients as Active (Enabled).
Are you sure you want to continue?
Yes
No
Update
Reset
Clear
Current company name is : Sample
You can create a new company by selecting "Co
You can open a different company by selecting "
Click > Yes
9
W2 Mate 2015


Sample - W2 Mate (2015)
Company
Tools
Import Data
Export Data
E-Filing
IRS & SSA Instructions
1099 Emailer
Help
Order Supplies
Shortcuts
Company
Employees
1099 & 1098 Recipients
W2 Forms
W3 Form
1099 & 1098 Forms
1096 Form
General Information
W3 Information
1096 Information
Employer's Name / Filer's Name:
Sample
Address 1:
123 Main St
Address 2:
City:
chicago
State:
IL
ZIP or Postal Code:
60456
W2 Mate (2015)
Recipients have been marked as Active.
OK
Update
Reset
Clear
Current company name is : Sample
You can create a new company by selecting "Co
You can open a different company by selecting "
Click > OK
10
W2 Mate 2015

Congratulations. You know how to make multiple 1099/1098 recipients active!

www.W2Mate.com

1-800-507-1992