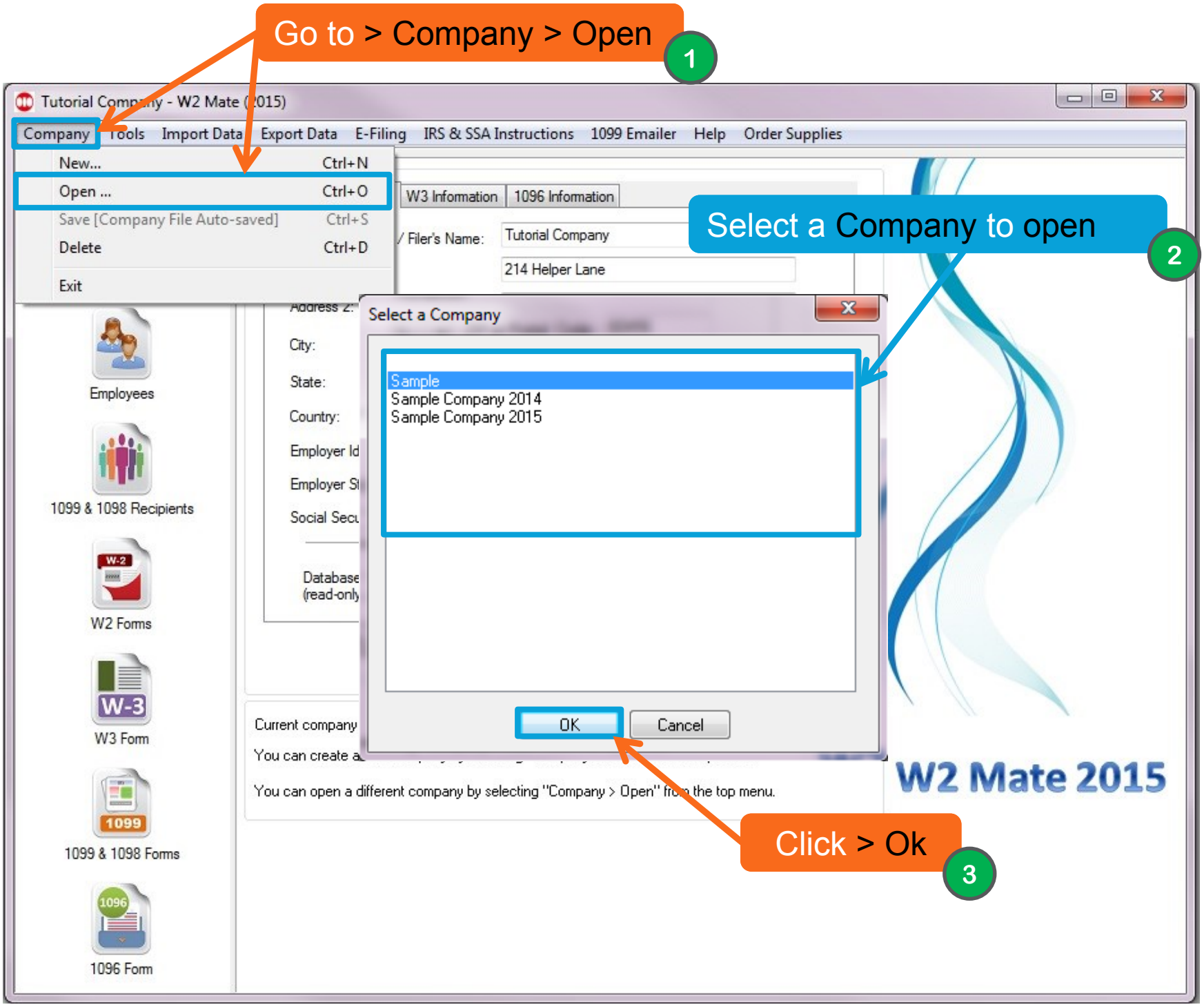
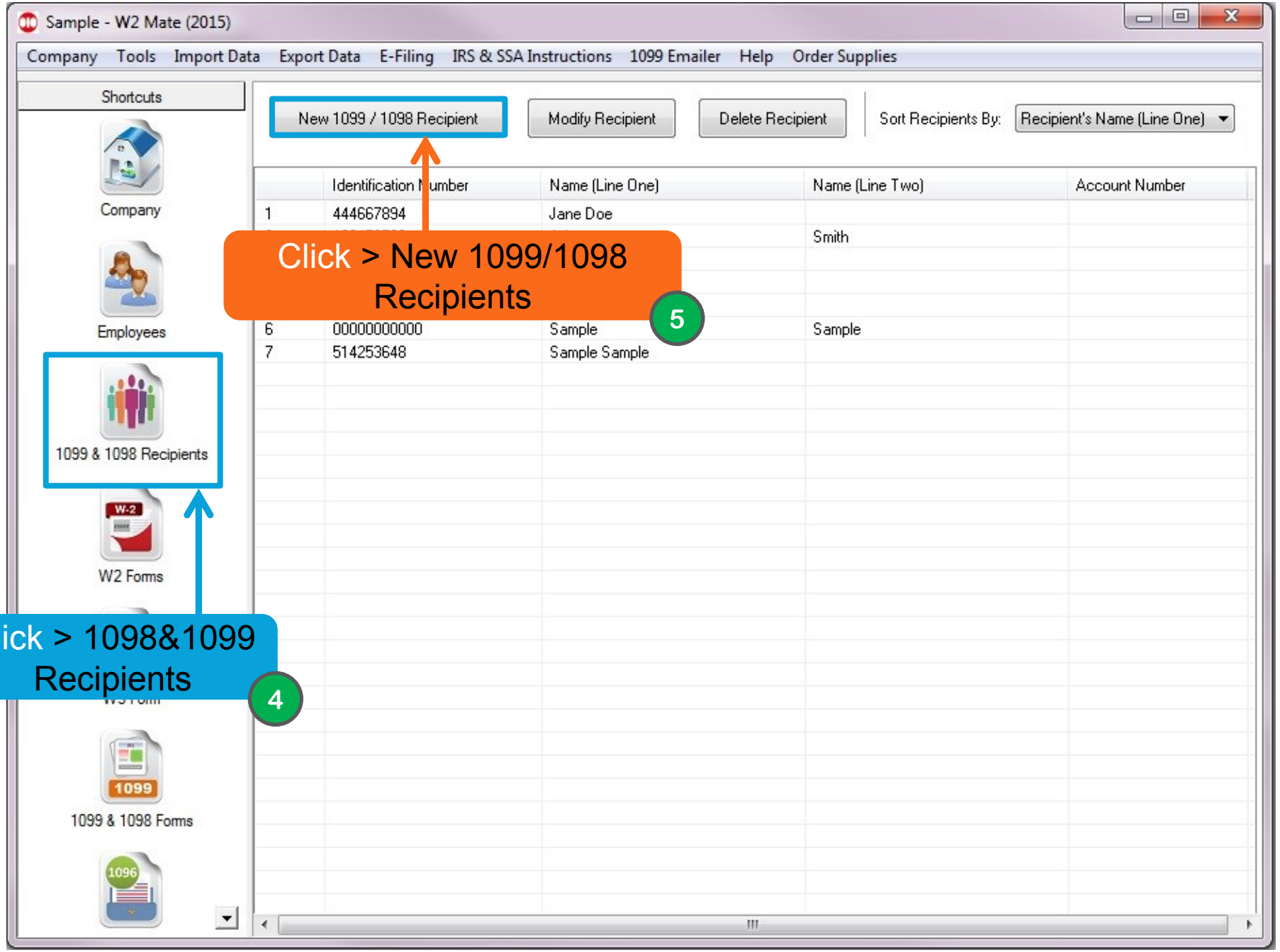
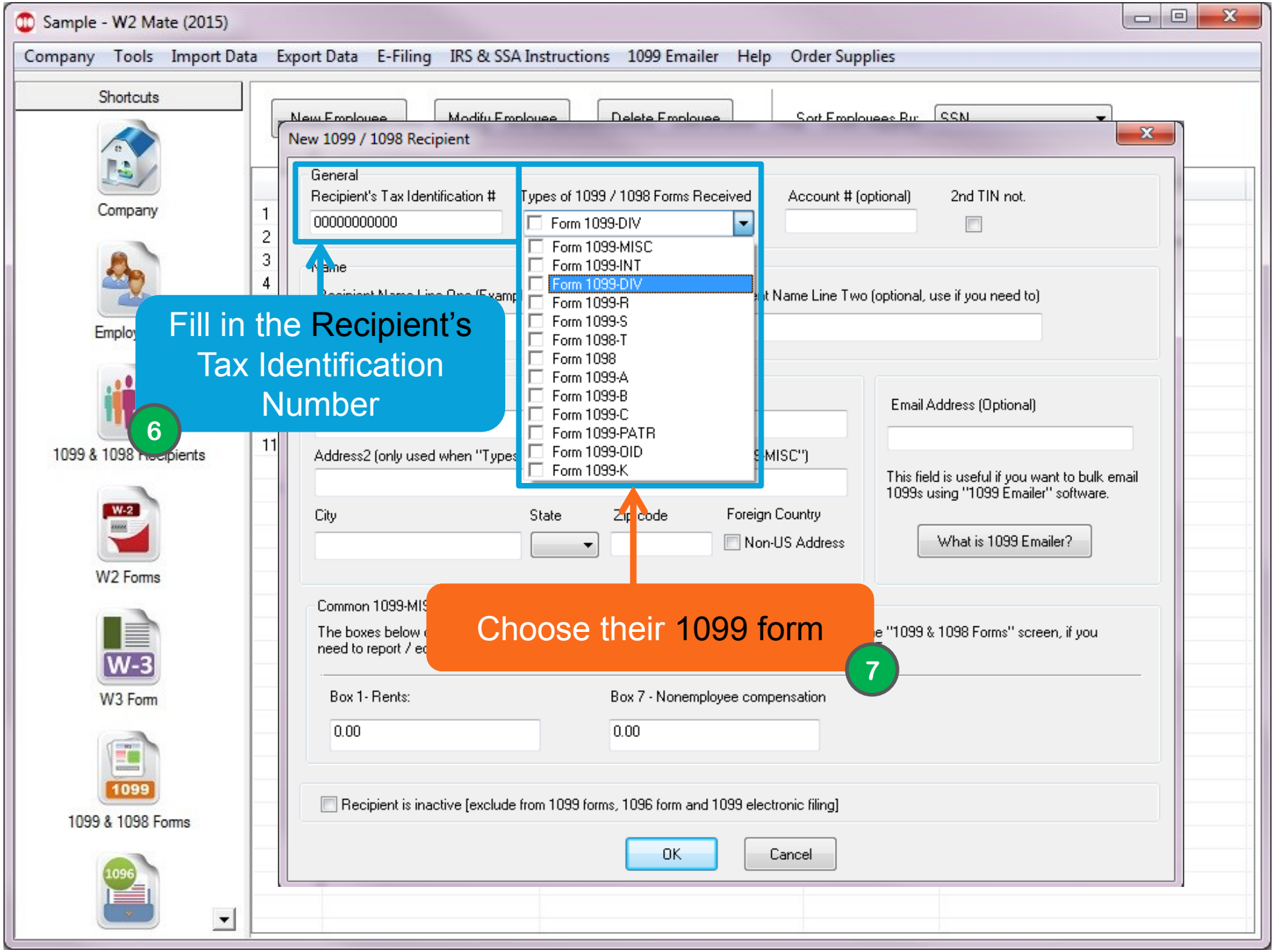
How to Create and Print 1099-DIV Forms in W2 Mate®

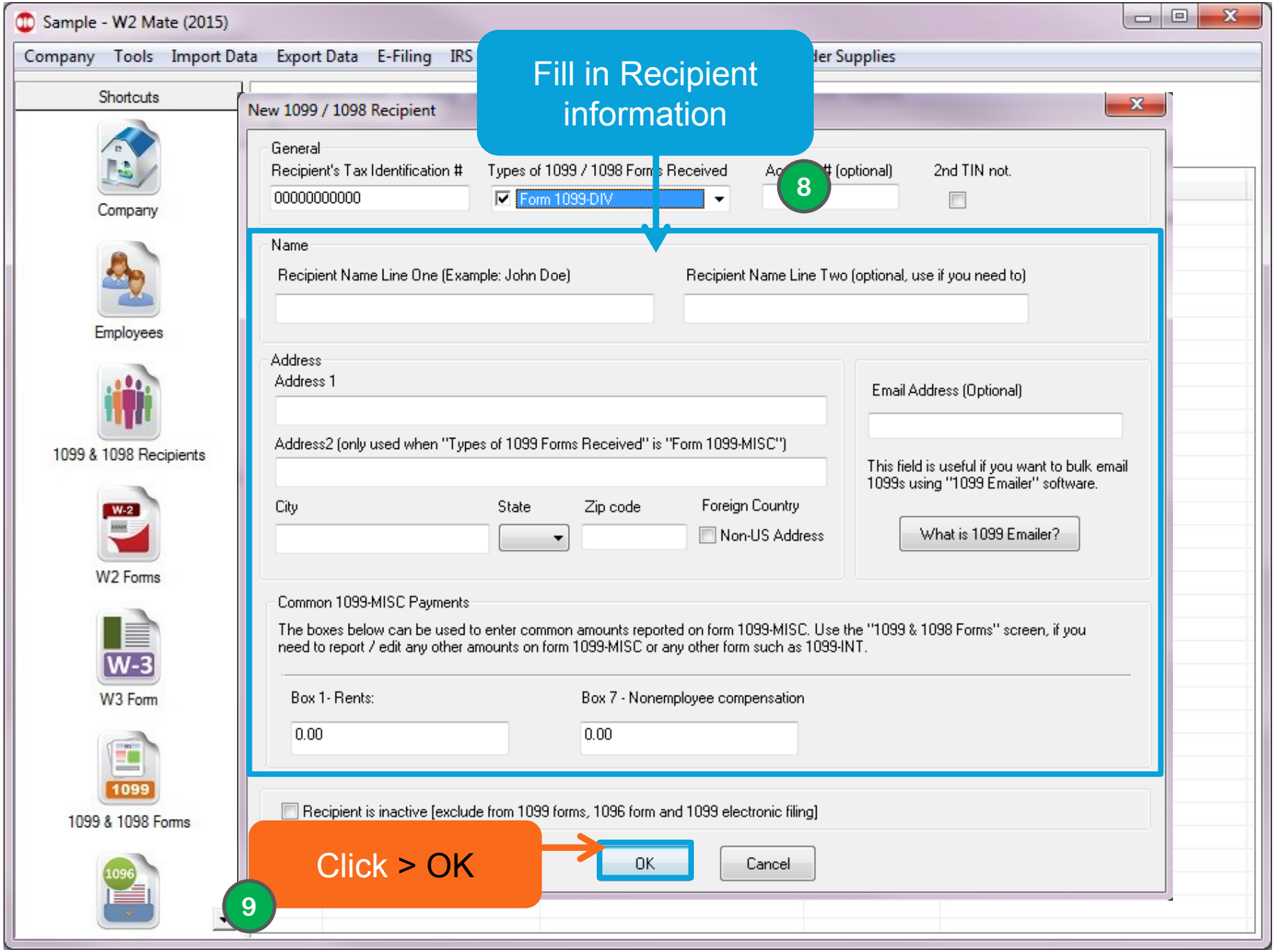
Start by Opening W2 Mate® Program

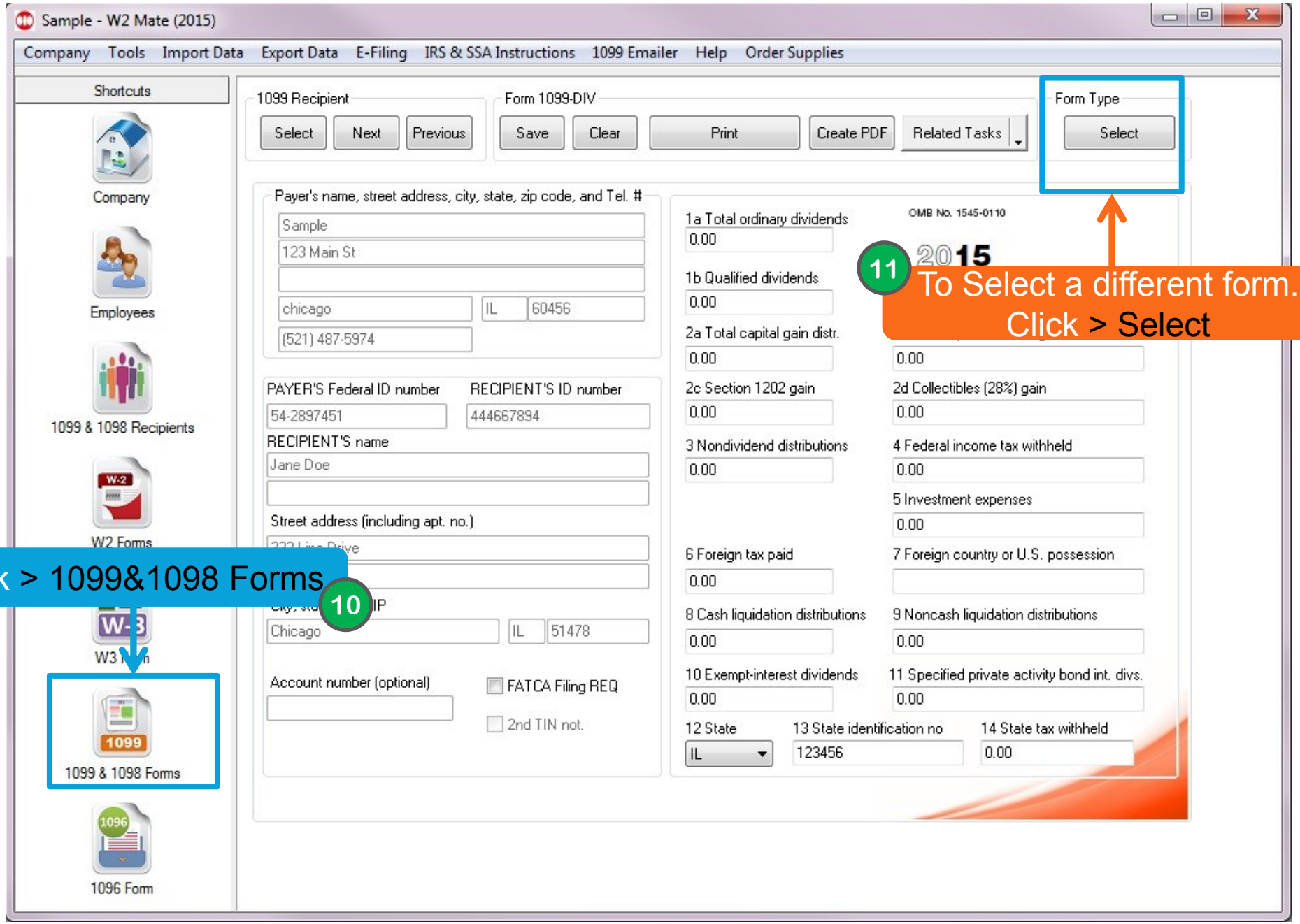
www.W2Mate.com

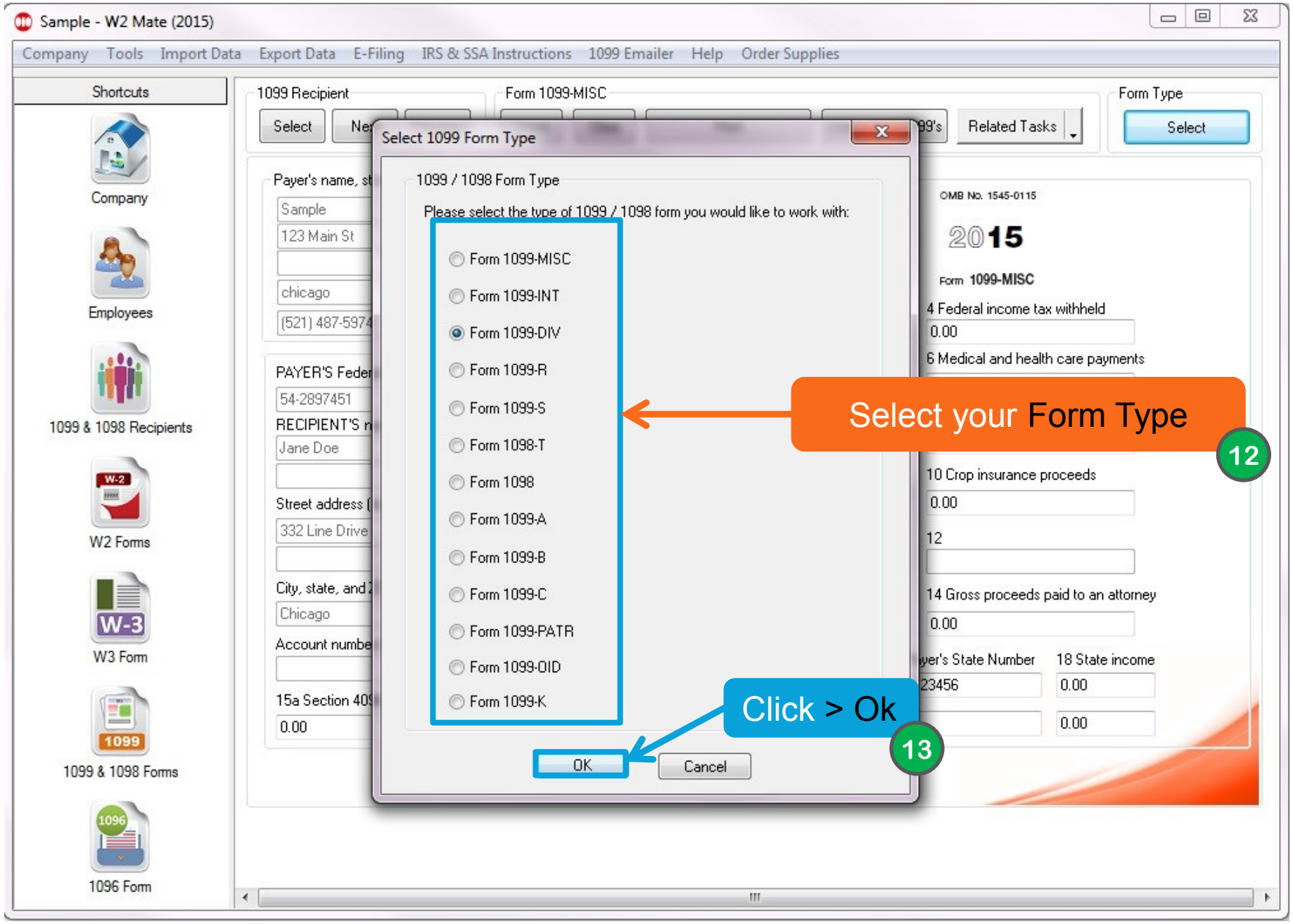

Go to > Company > Open
1
Tutorial Company - W2 Mate (2015)
Company
Tools
Import Data
Export Data
E-Filing
IRS & SSA Instructions
1099 Emailer
Help
Order Supplies
New... Ctrl+N
Open ... Ctrl+O
Save [Company File Auto-saved] Ctrl+S
Delete Ctrl+D
Exit
W3 Information
1096 Information
Filer's Name:
Tutorial 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

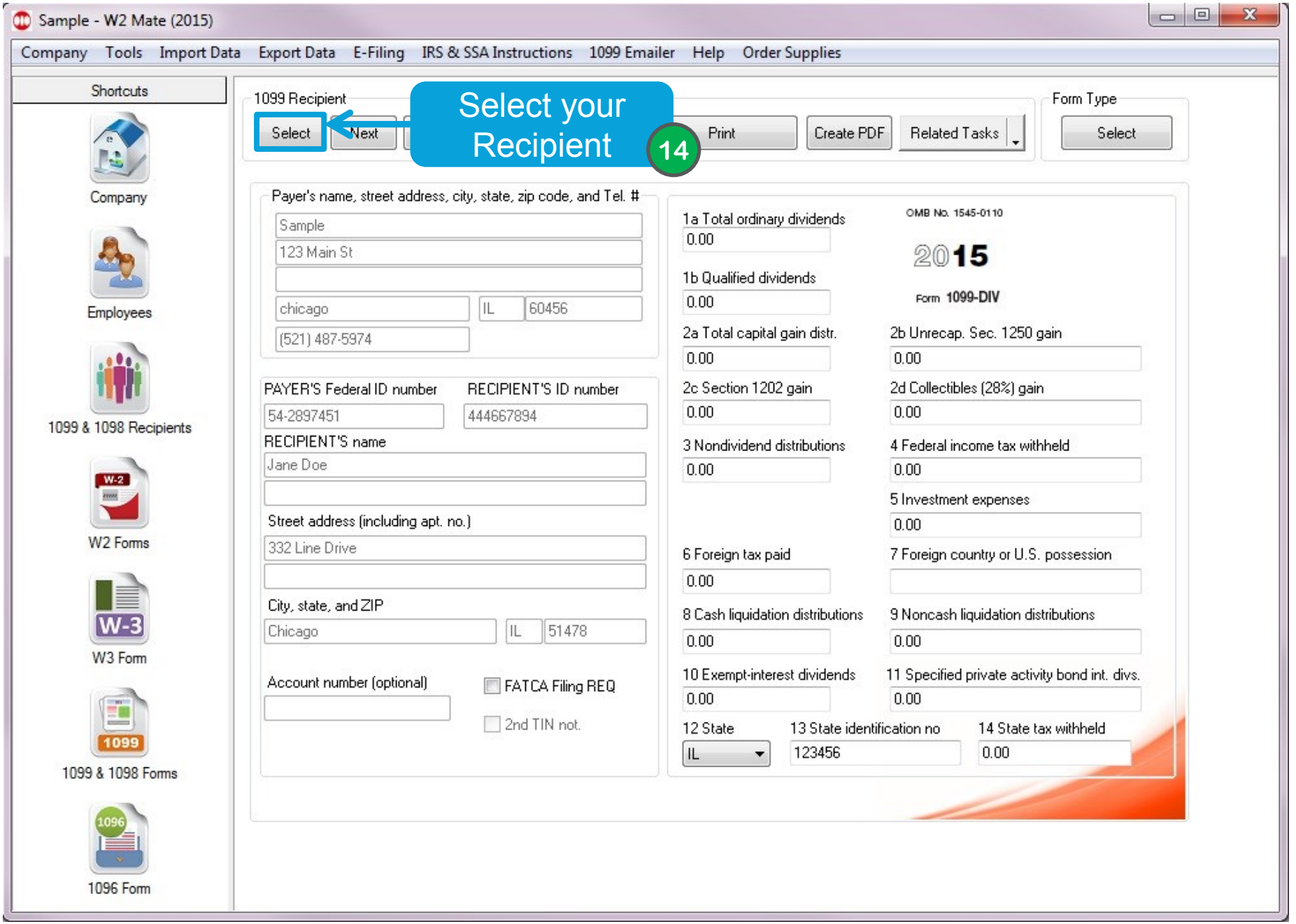

Sample - W2 Mate (2015)
Company
Tools
Import Data
Export Data
E-Filing
IRS & SSA Instructions
1099 Emailer
Help
Order Supplies
Shortcuts
Company
Employees
1099 & 1098 Recipients
W2 Forms
1099 & 1098 Forms
New 1099 / 1098 Recipient
Modify Recipient
Delete Recipient
Sort Recipients By:
Recipient's Name (Line One)
Identification Number
Name (Line One)
Name (Line Two)
Account Number
1 444667894 Jane Doe
Smith
6 00000000000 Sample Sample
7 514253648 Sample Sample
Click > New 1099/1098 Recipients
5
Click > 1098&1099 Recipients
4

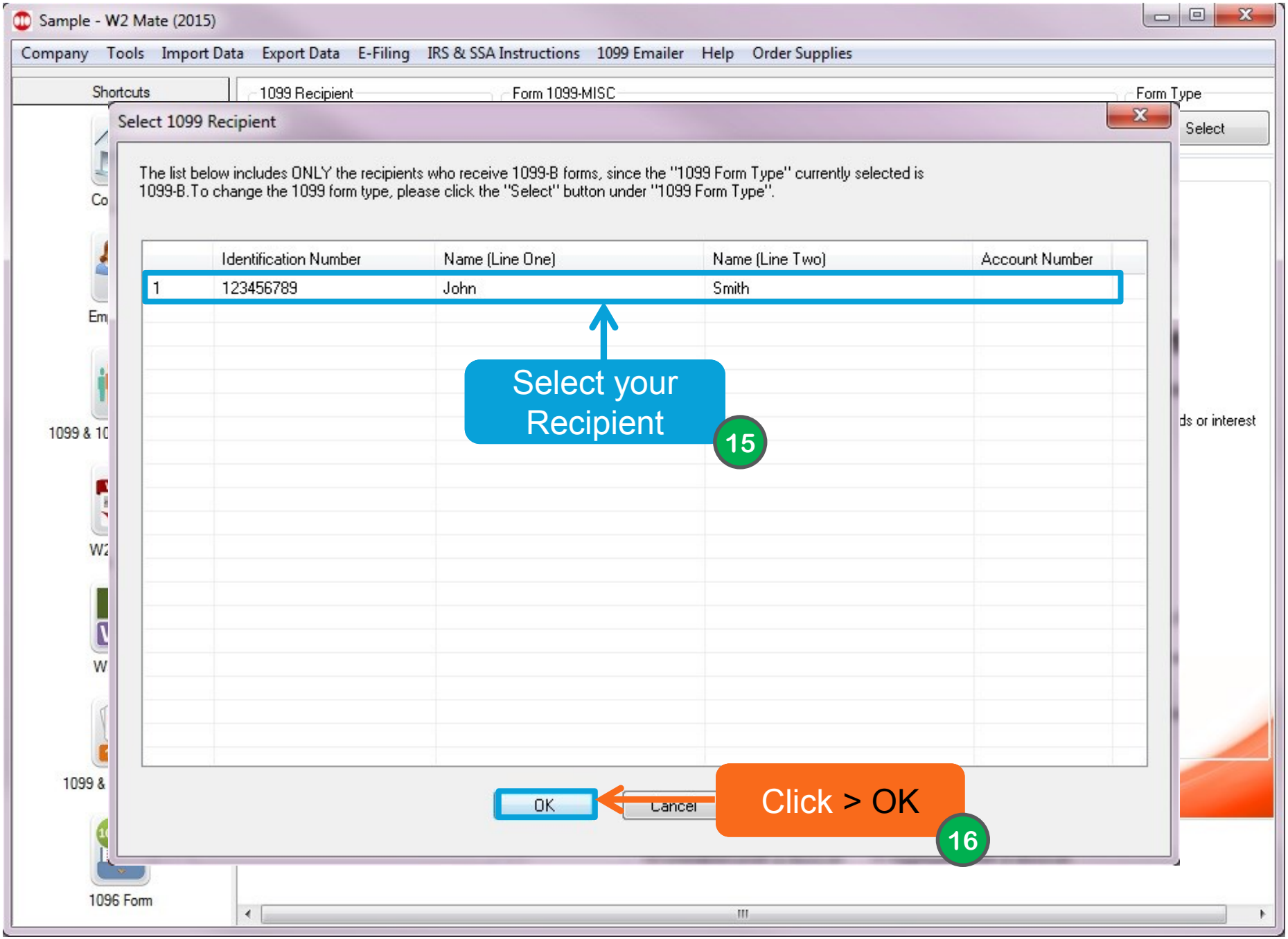

Sample - W2 Mate (2015)
Company
Tools
Import Data
Export Data
E-Filing
IRS & SSA Instructions
1099 Emailer
Help
Order Supplies
Shortcuts
Company
W2 Forms
W3 Form
1099 & 1098 Forms
New 1099 / 1098 Recipient
General
Recipient's Tax Identification #
00000000000
Types of 1099 / 1098 Forms Received
Form 1099-DIV
Form 1099-MISC
Form 1099-INT
Form 1099-DIV
Form 1099-R
Form 1099-S
Form 1098-T
Form 1098
Form 1099-A
Form 1099-B
Form 1099-C
Form 1099-PATR
Form 1099-OID
Form 1099-K
Account # (optional)
2nd TIN not.
Name Line Two (optional, use if you need to)
Email Address (Optional)
This field is useful if you want to bulk email 1099s using "1099 Emailer" software.
What is 1099 Emailer?
Address2 (only used when "Types
MISC")
City
State
Zip code
Foreign Country
Non-US Address
Box 1- Rents:
0.00
Box 7 - Nonemployee compensation
0.00
Recipient is inactive [exclude from 1099 forms, 1096 form and 1099 electronic filing]
OK
Cancel
Fill in the Recipient's Tax Identification Number
6
Choose their 1099 form
7

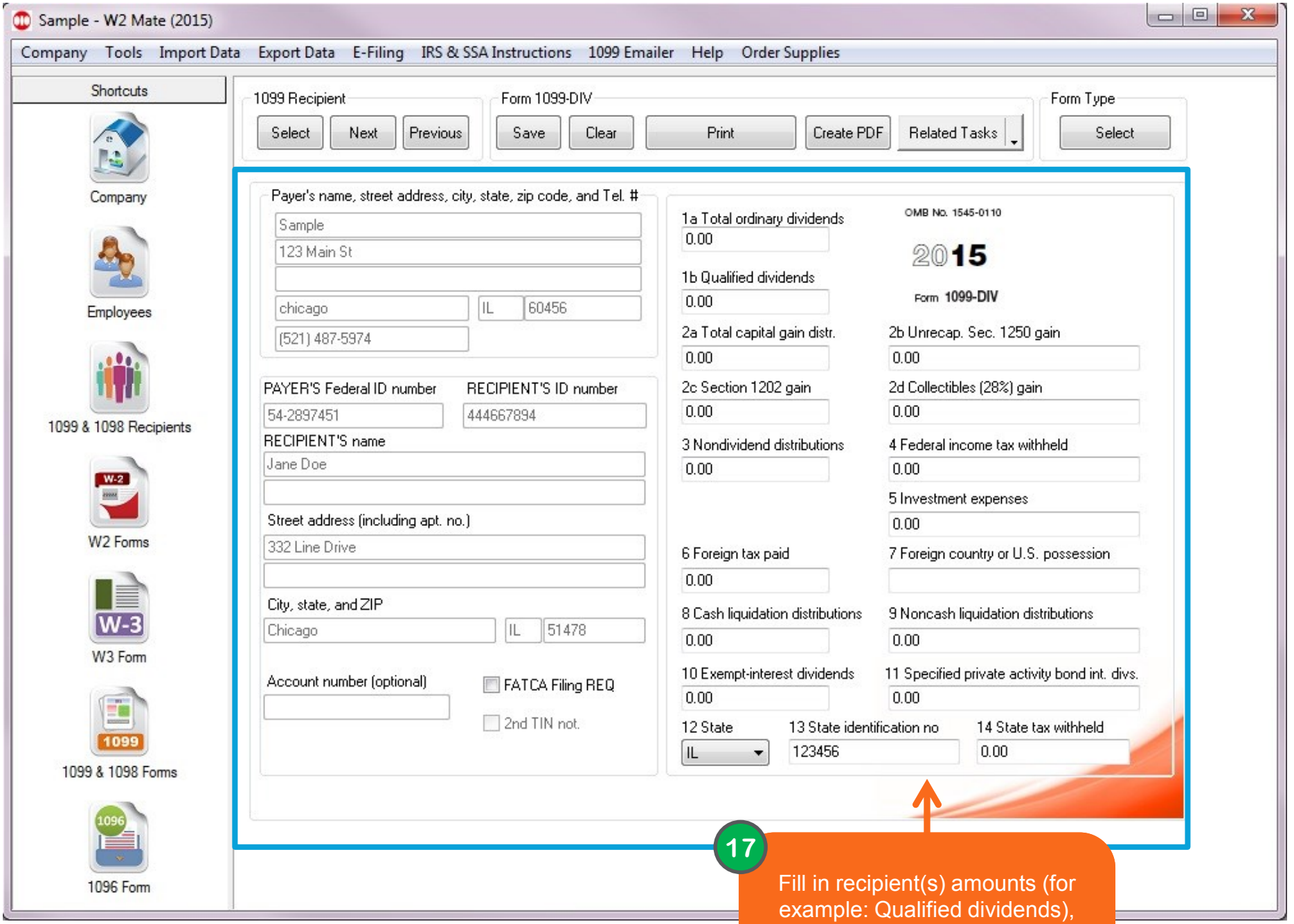

Sample - W2 Mate (2015)
Company
Tools
Import Data
Export Data
E-Filing
IRS
Shortcuts
Company
Employees
1099 & 1098 Recipients
W2 Forms
W3 Form
1099 & 1098 Forms
New 1099 / 1098 Recipient
Fill in Recipient information
General
Recipient's Tax Identification #
00000000000
Types of 1099 / 1098 Forms Received
Form 1099-DIV
8
2nd TIN not.
Name
Recipient Name Line One (Example: John Doe)
Recipient Name Line Two (optional, use if you need to)
Address
Address 1
Address2 (only used when "Types of 1099 Forms Received" is "Form 1099-MISC")
City
State
Zip code
Foreign Country
Non-US Address
Email Address (Optional)
This field is useful if you want to bulk email 1099s using "1099 Emailer" software.
What is 1099 Emailer?
Common 1099-MISC Payments
The boxes below can be used to enter common amounts reported on form 1099-MISC. Use the "1099 & 1098 Forms" screen, if you need to report / edit any other amounts on form 1099-MISC or any other form such as 1099-INT.
Box 1- Rents:
0.00
Box 7 - Nonemployee compensation
0.00
Recipient is inactive [exclude from 1099 forms, 1096 form and 1099 electronic filing]
Click > OK
9
OK
Cancel


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
1099 & 1098 Forms
1096 Form
1099 Recipient
Select Next Previous
Form 1099-DIV
Save Clear Print Create PDF Related Tasks
Form Type
Select
Payer's name, street address, city, state, zip code, and Tel. #
Sample
123 Main St
chicago IL 60456
(521) 487-5974
PAYER'S Federal ID number
54-2897451
RECIPIENT'S ID number
444667894
RECIPIENT'S name
Jane Doe
Street address (including apt. no.)
Chicago IL 51478
Account number (optional)
FATCA Filing REQ
2nd TIN not.
OMB No. 1545-0110
2015
1a Total ordinary dividends 0.00
1b Qualified dividends 0.00
2a Total capital gain distr. 0.00
2c Section 1202 gain 0.00
2d Collectibles (28%) gain 0.00
3 Nondividend distributions 0.00
4 Federal income tax withheld 0.00
5 Investment expenses 0.00
6 Foreign tax paid 0.00
7 Foreign country or U.S. possession
8 Cash liquidation distributions 0.00
9 Noncash liquidation distributions 0.00
10 Exempt-interest dividends 0.00
11 Specified private activity bond int. divs. 0.00
12 State IL
13 State identification no 123456
14 State tax withheld 0.00
Click > 1099&1098 Forms
10
11
To Select a different form.
Click > Select


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
1099 Recipient
Select
Form 1099-MISC
Related Tasks
Form Type
Select
Select 1099 Form Type
1099 / 1098 Form Type
Please select the type of 1099 / 1098 form you would like to work with:
Form 1099-MISC
Form 1099-INT
Form 1099-DIV
Form 1099-R
Form 1099-S
Form 1098-T
Form 1098
Form 1099-A
Form 1099-B
Form 1099-C
Form 1099-PATR
Form 1099-OID
Form 1099-K
OK
Cancel
Select your Form Type
12
Click > Ok
13
OMB No. 1545-0115
2015
Form 1099-MISC
4 Federal income tax withheld
6 Medical and health care payments
10 Crop insurance proceeds
12
14 Gross proceeds paid to an attorney
18 State income

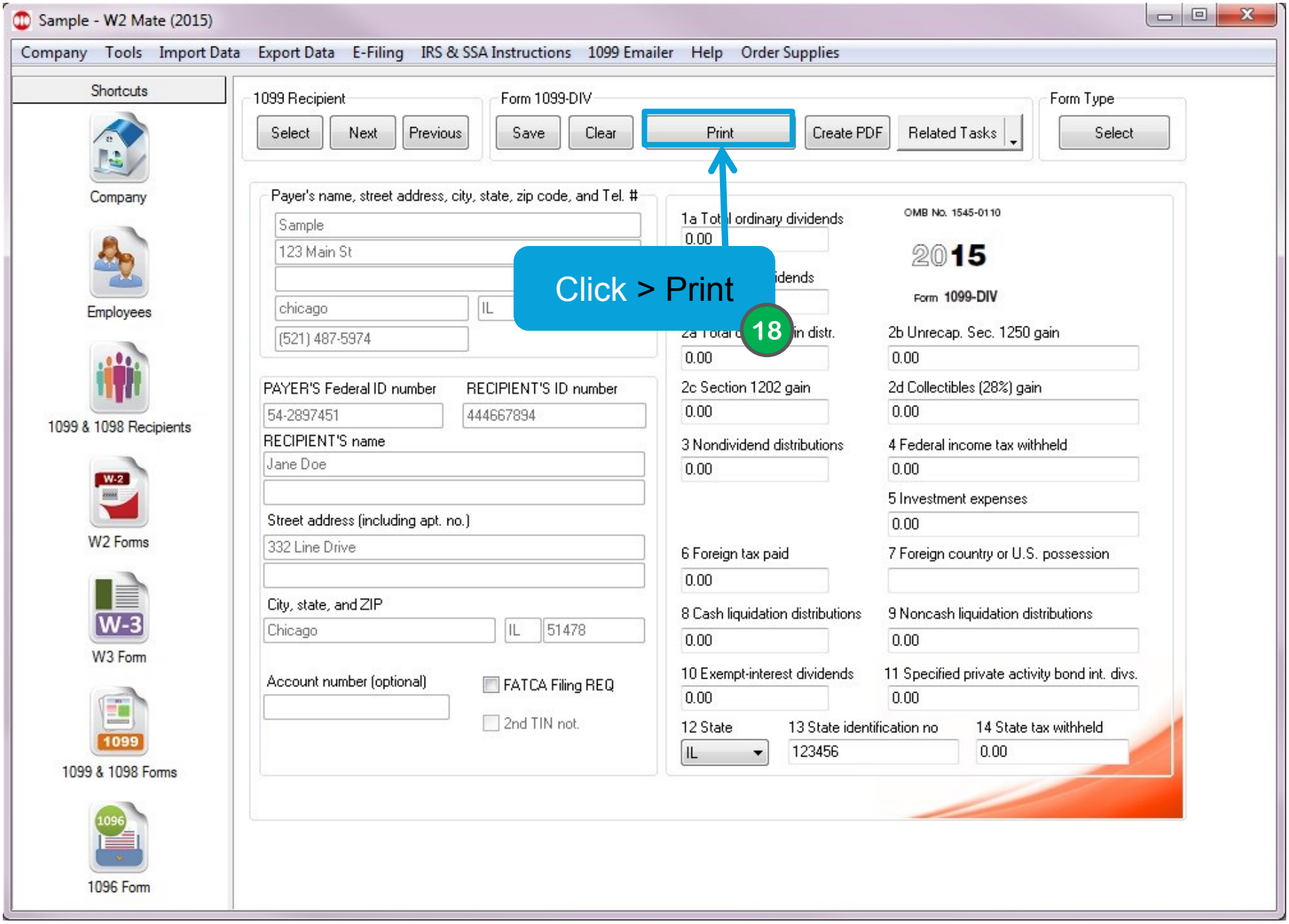

Sample - W2 Mate (2015)
Company
Tools
Import Data
Export Data
E-Filing
IRS & SSA Instructions
1099 Emailer
Help
Order Supplies
Shortcuts
Company
Employees
1099 & 1098 Recipients
W2 Forms
W3 Form
1099 & 1098 Forms
1096 Form
1099 Recipient
Select
Next
Select your Recipient
14
Print
Create PDF
Related Tasks
Form Type
Select
Payer's name, street address, city, state, zip code, and Tel. #
Sample
123 Main St
chicago
IL
60456
(521) 487-5974
PAYER'S Federal ID number
54-2897451
RECIPIENT'S ID number
444667894
RECIPIENT'S name
Jane Doe
Street address (including apt. no.)
332 Line Drive
City, state, and ZIP
Chicago
IL
51478
Account number (optional)
FATCA Filing REQ
2nd TIN not.
1a Total ordinary dividends
0.00
1b Qualified dividends
0.00
OMB No. 1545-0110
2015
Form 1099-DIV
2a Total capital gain distr.
0.00
2b Unrecap. Sec. 1250 gain
0.00
2c Section 1202 gain
0.00
2d Collectibles (28%) gain
0.00
3 Nondividend distributions
0.00
4 Federal income tax withheld
0.00
5 Investment expenses
0.00
6 Foreign tax paid
0.00
7 Foreign country or U.S. possession
8 Cash liquidation distributions
0.00
9 Noncash liquidation distributions
0.00
10 Exempt-interest dividends
0.00
11 Specified private activity bond int. divs.
0.00
12 State
IL
13 State identification no
123456
14 State tax withheld
0.00

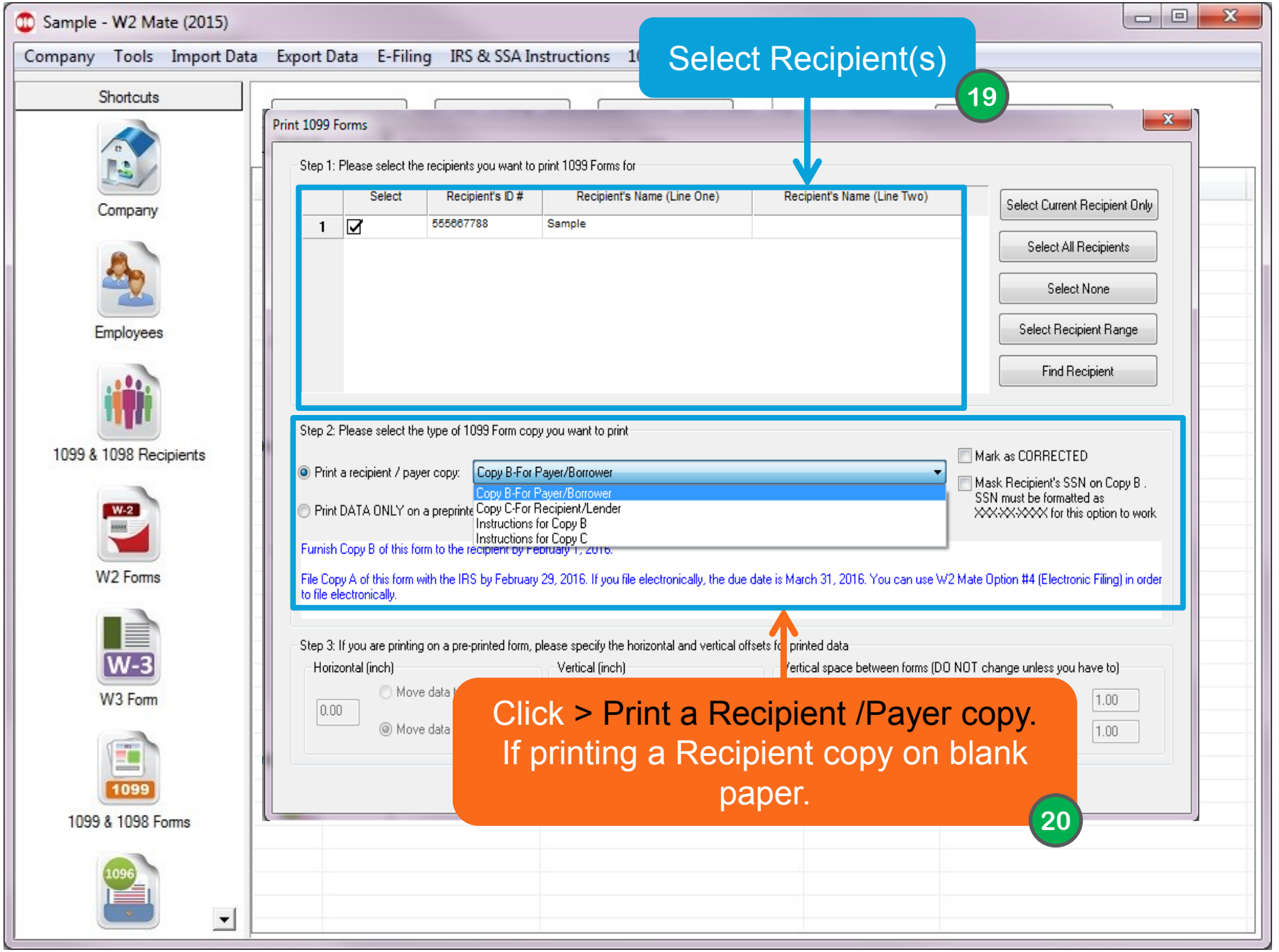

Sample - W2 Mate (2015)
Company
Tools
Import Data
Export Data
E-Filing
IRS & SSA Instructions
1099 Emailer
Help
Order Supplies
Shortcuts
1099 Recipient
Form 1099-MISC
Form Type
Select
Select 1099 Recipient
The list below includes ONLY the recipients who receive 1099-B forms, since the "1099 Form Type" currently selected is 1099-B.To change the 1099 form type, please click the "Select" button under "1099 Form Type".
Identification Number
Name (Line One)
Name (Line Two)
Account Number
1
123456789
John
Smith
Select your Recipient
15
OK
Cancel
Click > OK
16
1096 Form

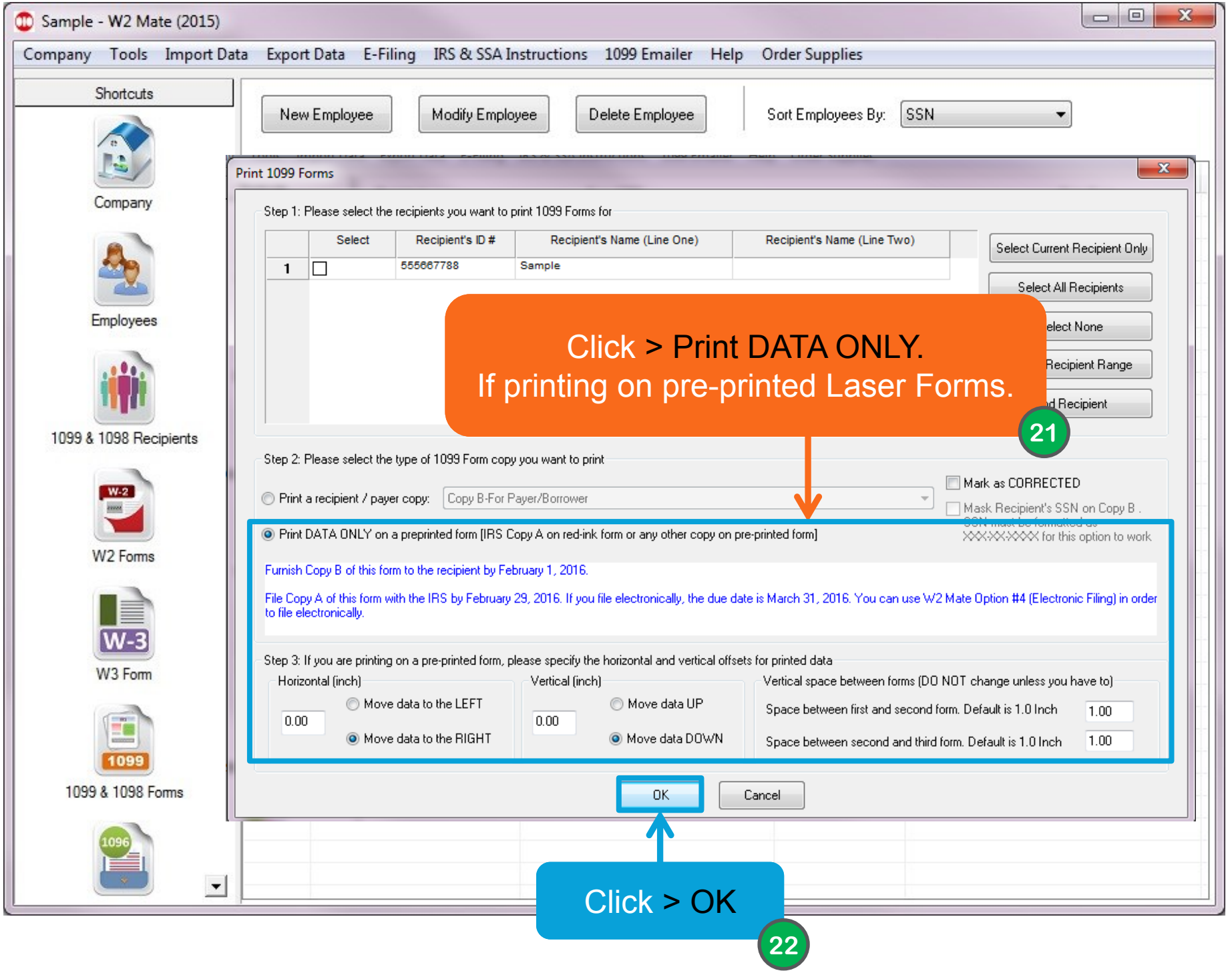


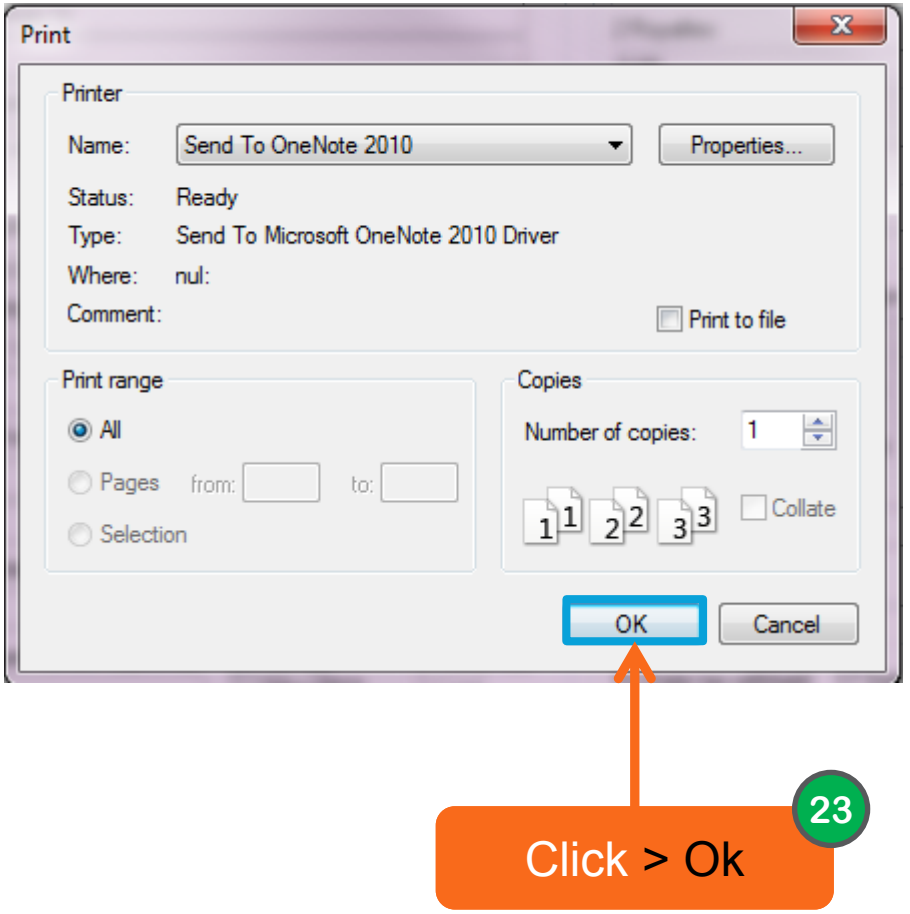
17

Fill in recipient(s) amounts (for example: Qualified dividends), and click “Save." Repeat this step for all other recipients you have added.


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
1099 Recipient
Select
Next
Previous
Form 1099-DIV
Save
Clear
Print
Create PDF
Related Tasks
Form Type
Select
Click > Print
18
Payer's name, street address, city, state, zip code, and Tel. #
Sample
123 Main St
chicago
IL
(521) 487-5974
PAYER'S Federal ID number
54-2897451
RECIPIENT'S ID number
444667894
RECIPIENT'S name
Jane Doe
Street address (including apt. no.)
332 Line Drive
City, state, and ZIP
Chicago
IL
51478
Account number (optional)
FATCA Filing REQ
2nd TIN not.
1a Total ordinary dividends
0.00
OMB No. 1545-0110
2015
Form 1099-DIV
2a Total capital gain distr.
0.00
2b Unrecap. Sec. 1250 gain
0.00
2c Section 1202 gain
0.00
2d Collectibles (28%) gain
0.00
3 Nondividend distributions
0.00
4 Federal income tax withheld
0.00
5 Investment expenses
0.00
6 Foreign tax paid
0.00
7 Foreign country or U.S. possession
8 Cash liquidation distributions
0.00
9 Noncash liquidation distributions
0.00
10 Exempt-interest dividends
0.00
11 Specified private activity bond int. divs.
0.00
12 State
IL
13 State identification no
123456
14 State tax withheld
0.00


Sample - W2 Mate (2015)
Company
Tools
Import Data
Export Data
E-Filing
IRS & SSA Instructions
Shortcuts
Company
Employees
1099 & 1098 Recipients
W2 Forms
W3 Form
1099 & 1098 Forms
Select Recipient(s)
19
Print 1099 Forms
Step 1: Please select the recipients you want to print 1099 Forms for
Select
Recipient's ID #
Recipient's Name (Line One)
Recipient's Name (Line Two)
1
555667788
Sample
Select Current Recipient Only
Select All Recipients
Select None
Select Recipient Range
Find Recipient
Step 2: Please select the type of 1099 Form copy you want to print
Print a recipient / payer copy:
Copy B-For Payer/Borrower
Copy B-For Payer/Borrower
Copy C-For Recipient/Lender
Instructions for Copy B
Instructions for Copy C
Print DATA ONLY on a preprinte
Mark as CORRECTED
Mask Recipient's SSN on Copy B . SSN must be formatted as XXX-XX-XXXX for this option to work
Furnish Copy B of this form to the recipient by February 1, 2016.
File Copy A of this form with the IRS by February 29, 2016. If you file electronically, the due date is March 31, 2016. You can use W2 Mate Option #4 (Electronic Filing) in order to file electronically.
Step 3: If you are printing on a pre-printed form, please specify the horizontal and vertical offsets fo printed data
Horizontal (inch)
Vertical (inch)
ertical space between forms (DO NOT change unless you have to)
0.00
1.00
1.00
Click > Print a Recipient /Payer copy.
If printing a Recipient copy on blank paper.
20


Sample - W2 Mate (2015)
Company
Tools
Import Data
Export Data
E-Filing
IRS & SSA Instructions
1099 Emailer
Help
Order Supplies
Shortcuts
New Employee
Modify Employee
Delete Employee
Sort Employees By:
SSN
Company
Employees
1099 & 1098 Recipients
W2 Forms
W3 Form
1099 & 1098 Forms
Print 1099 Forms
Step 1: Please select the recipients you want to print 1099 Forms for
Select
Recipient's ID #
Recipient's Name (Line One)
Recipient's Name (Line Two)
555667788
Sample
Select Current Recipient Only
Select All Recipients
Step 2: Please select the type of 1099 Form copy you want to print
Print a recipient / payer copy:
Copy B-For Payer/Borrower
Mark as CORRECTED
Print DATA ONLY on a preprinted form [IRS Copy A on red-ink form or any other copy on pre-printed form]
Furnish Copy B of this form to the recipient by February 1, 2016.
File Copy A of this form with the IRS by February 29, 2016. If you file electronically, the due date is March 31, 2016. You can use W2 Mate Option #4 (Electronic Filing) in order to file electronically.
Step 3: If you are printing on a pre-printed form, please specify the horizontal and vertical offsets for printed data
Horizontal (inch)
0.00
Move data to the LEFT
Move data to the RIGHT
Vertical (inch)
0.00
Move data UP
Move data DOWN
Vertical space between forms (DO NOT change unless you have to)
Space between first and second form. Default is 1.0 Inch
1.00
Space between second and third form. Default is 1.0 Inch
1.00
OK
Cancel
Click > Print DATA ONLY.
If printing on pre-printed Laser Forms.
21
Click > OK
22


Print
Printer
Name:
Send To OneNote 2010
Properties...
Status:
Ready
Type:
Send To Microsoft OneNote 2010 Driver
Where:
nul:
Comment:
Print to file
Print range
All
Pages
from:
to:
Selection
Copies
Number of copies:
1
Collate
OK
Cancel
23
Click > Ok

Congratulations. You know how to Create, Populate and Print 1099-DIV Forms!

www.W2Mate.com

1-800-507-1992