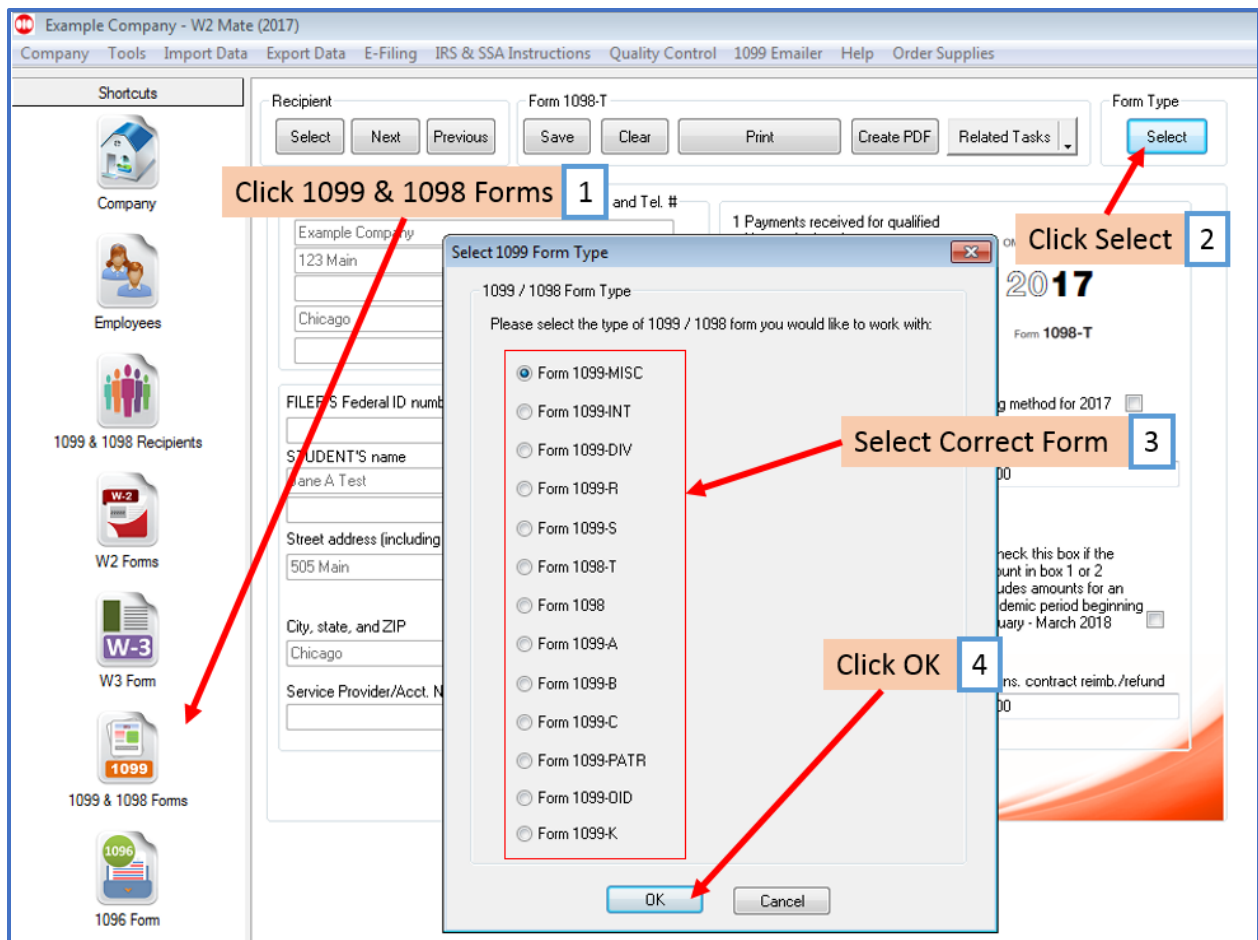


How to Clear Data on 1099 and 1098 Forms

Make sure you have the correct Company open inside W2 Mate

1. Click 1099 and 1098 Forms in shortcuts
2. Click Select for Form Type
3. Select correct form type
4. Click OK



5. Click Select for 1099 Recipient

The screenshot shows the W2 Mate software interface for creating a 1099-MISC form. The title bar reads "Example Company - W2 Mate (2017)". The menu bar includes "Company", "Tools", "Import Data", "Export Data", "E-Filing", "IRS & SSA Instructions", "Quality Control", "1099 E-mailer", "Help", and "Order Supplies".

On the left is a "Shortcuts" sidebar with icons for "Company", "Employees", "1099 & 1098 Recipients", "W2 Forms", "W3 Form", "1099 & 1098 Forms", and "1096 Form".

The main area is titled "1099 Recipient" and "Form 1099-MISC". At the top, there are buttons for "Select", "Next", "Previous", "Save", "Clear", "Print", "Create PDF 1099's", "Related Tasks", and "Form Type". A red arrow points to the "Select" button.

The form fields are as follows:

- Payer's name, street address, city, state, zip code, and Tel. #:** Example Company, 123 Main, Chicago, IL, 60605.
- PAYER'S ID number:** 5 (highlighted with a blue box and a callout "Click Select").
- RECIPIENT'S name:** Jane A. Test
- Street address (including apt. no.):** 505 Main
- City, state, and ZIP code:** Chicago, IL, 60605
- Account number (optional):** (empty)
- FATCA Filing REQ:** (checked)
- 2nd TIN not:** (unchecked)
- 15a Section 409A deferrals:** 0.00
- 15b Section 409A income:** 0.00

On the right, there are 18 numbered fields for various types of income and withholdings, all currently set to 0.00. The year "2017" is displayed prominently in the center-right.

6. Select Recipient

7. Click OK

The screenshot shows the W2 Mate software interface. The main window is titled "Example Company - W2 Mate (2017)". The "1099 Recipient" section is active, showing the payer's name "Example Company" and address "123 Main". The "Form 1099-MISC" section is also active, showing "1 Rents" with a value of "0.00" and "2 Royalties" with a value of "0.00". The "Form Type" is set to "1099-MISC".

The "Select 1099 Recipient" dialog box is open, displaying a list of recipients. The list includes the following data:

	Identification Number	Name (Line One)	Name (Line Two)	Account Number
1	777889999	Jane A Test		
2	999887777	John Q Doe		
3	123456789	New	Recipient	

A red arrow points to the "New" recipient in the table, and a blue box with the number "6" is next to it. Another red arrow points to the "OK" button at the bottom of the dialog box, and a blue box with the number "7" is next to it.

8. Click Clear

The screenshot shows the W2 Mate software interface for creating a Form 1099-MISC. The window title is "Example Company - W2 Mate (2017)". The menu bar includes "Company", "Tools", "Import Data", "Export Data", "E-Filing", "IRS & SSA Instructions", "Quality Control", "1099 E-mailer", "Help", and "Order Supplies".

On the left is a "Shortcuts" sidebar with icons for "Company", "Employees", "1099 & 1098 Recipients", "W2 Forms", "W3 Form", "1099 & 1098 Forms", and "1096 Form".

The main area is titled "1099 Recipient" and "Form 1099-MISC". It contains several sections:

- Payer information:** Payer's name, street address, city, state, zip code, and tel. #. Fields contain "Example Company", "123 Main", "Chicago", "IL", and a partially visible phone number.
- Recipient information:** PAYER'S Federal ID number, RECIPIENT'S ID number (777889999), RECIPIENT'S name (Jane A Test), Street address (505 Main), City, state, and ZIP code (Chicago, IL, 60605), Account number (optional), FATCA Filing REQ, and 2nd TIN not.
- 15a Section 409A deferrals:** 0.00
- 15b Section 409A income:** 0.00
- Form 1099-MISC details:** OMB No. 1545-0115, Form 1099-MISC, and the year **2017**.
- Income and Deductions:** 1 Rents (0.00), 2 Royalties (0.00), 3 Other income (0.00), 4 Federal income tax withheld (0.00), 5 Fishing boat proceeds (0.00), 6 Medical and health care payments (0.00), 7 Nonemployee compensation (0.00), 8 Substitute payments in lieu of dividends or interest (0.00), 9 Payer made direct sales of \$5,000 or more of consumer products to a buyer for resale (checkbox), 10 Crop insurance proceeds (0.00), 11 (0.00), 12, 13 Excess golden parach. (0.00), 14 Gross proceeds paid to an attorney (0.00), 16 State tax withheld (0.00), 17 State / Payer's State Number (dropdown), 18 State income (0.00).

At the top of the form area are buttons: "Select", "Next", "Previous", "Save", "Clear", "Print", "Create PDF 1099's", "Related Tasks", and "Form Type" (with a "Select" button). A red arrow points to the "Clear" button, which is highlighted with a blue box and the text "Click Clear".

9. Click Yes to clear the form data

The screenshot displays the W2 Mate (2017) software interface. The main window is titled "Example Company - W2 Mate (2017)" and contains a menu bar with options like "Company", "Tools", "Import Data", "Export Data", "E-Filing", "IRS & SSA Instructions", "Quality Control", "1099 Emailer", "Help", and "Order Supplies". A sidebar on the left lists shortcuts for "Company", "Employees", "1099 & 1098 Recipients", "W2 Forms", "W3 Form", "1099 & 1098 Forms", and "1096 Form".

The main content area is titled "1099 Recipient" and "Form 1099-MISC". It features a "Form Type" dropdown set to "Select" and a "Form 2017" label. The form fields include:

- Payer's name, street address, city, state, zip code, and Tel. # (Example Company, 123 Main, Chicago, IL, 60605)
- PAYER'S Federal ID number (777) and RECIPIENT'S ID number (9)
- RECIPIENT'S name (Jane A Test)
- Street address (including apt. no.) (505 Main)
- City, state, and zip code (Chicago)
- Account number
- 15a Section (0.00)

On the right side, there are 18 numbered fields for various income types, all currently set to 0.00. A "W2 Mate (2017)" dialog box is overlaid on the form, asking "Are you sure you want to clear the values of all fields?". The dialog has a yellow warning icon and two buttons: "Yes" and "No". A red arrow points from the "Click Yes" text to the "Yes" button.