



### 3. Choose Form 1099-B

The screenshot shows the W2 Mate software interface. On the left is a sidebar with shortcuts for Company, Employees, 1099 & 1098 Recipients, W2 Forms, W3 Form, 1099 & 1098 Forms, and 1096 Form. The main window displays a 'New 1099 / 1098 Recipient' dialog box. The 'General' section is active, and the 'Types of 1099 / 1098 Forms Received' dropdown menu is open, listing various form types. 'Form 1099-B' is selected and highlighted in blue. A red arrow points from a callout box labeled 'Select Form 1099-B 3' to the selected option. The dialog box also includes fields for Recipient's Tax Identification #, Name, Address, City, State, Zip code, Foreign Country, and Common 1099-MISC Payments (Box 1 - Rents, Box 7 - Nonemployee compensation). There are 'OK' and 'Cancel' buttons at the bottom.

4. Enter New Recipient information

5. Click OK

Example Company\$second name - W2 Mate (2017)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions Quality Control 1099 Emler Help Order Supplies

Shortcuts

New 1099 / 1098 Recipient Modify Recipient Delete Recipient Sort Recipients By: Recipient's Name (Line One)

Identification Number Name (Line One) Enter New Recipient data 4 Account Number

1 New 1099 / 1098 Recipient

2

3

4

General

Recipient's Tax Identification # Types of 1099 / 1098 Forms Received Account # (optional) 2nd TIN not.

Form 1099-B

Name

Recipient Name Line One (Example: John Doe) Recipient Name Line Two (optional, use if you need to)

Address

Address 1 Email Address (Optional)

Address2 (only used when "Types of 1099 Forms Received" is "Form 1099-MISC")

This field is useful if you want to bulk email 1099s using "1099 Emler" software.

City State Zip code Foreign Country

Non-US Address What is 1099 Emler?

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: Box 7 - Nonemployee compensation

0.00 0.00

Click OK 5

Recipient is inactive [exclude from 1099 forms, 1096 form and 1099 electronic filing]

OK Cancel

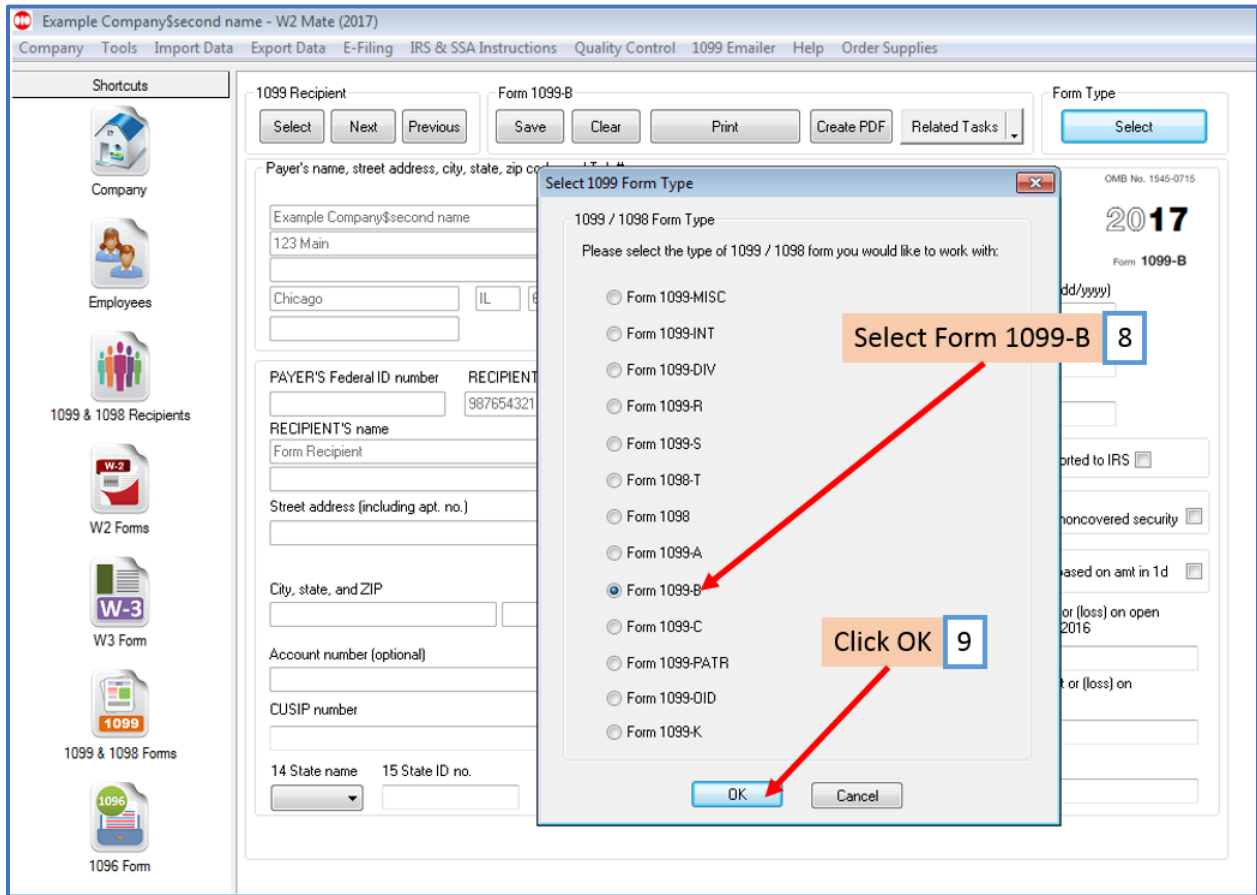
6. Choose 1099 & 1098 Forms in shortcuts

7. Click Select under form type

The screenshot displays the W2 Mate software interface for creating a 1099-MISC form. The interface includes a top menu bar with options like 'Company', 'Tools', 'Import Data', 'Export Data', 'E-Filing', 'IRS & SSA Instructions', 'Quality Control', '1099 Emailer', 'Help', and 'Order Supplies'. On the left, a 'Shortcuts' sidebar contains icons for 'Company', 'Employees', '1099 & 1098 Recipients', 'W2 Forms', 'W3 Form', '1099 & 1098 Forms', and '1096 Form'. The main workspace is titled '1099 Recipient' and 'Form 1099-MISC'. It features a 'Form Type' dropdown menu with a 'Select' button highlighted by a red arrow and a blue box labeled '7'. A callout box labeled '6' points to the '1099 & 1098 Forms' icon in the sidebar. The form fields include: Payer's name (Example Company), address (123 Main, Chicago, IL 60605), PAYER'S Federal ID number (777999999), and RECIPIENT'S ID number (Jane A.). The right side of the form contains 18 numbered fields for various income and tax amounts, all currently set to 0.00. The year '2017' is displayed prominently. A red arrow also points from the '1099 & 1098 Forms' icon to the 'Form Type' dropdown.

8. Select Form 1099-B

9. Click OK



10. Click Select under Recipient

11. Select 1099-B Recipient

12. Click OK

The screenshot shows the W2 Mate software interface. The main window has a menu bar with 'Company', 'Tools', 'Import Data', 'Export Data', 'E-F', 'Quality Control', '1099 Emailer', 'Help', and 'Order Supplies'. A sidebar on the left contains shortcuts for 'Company', 'Employees', '1099 & 1098 Recipients', 'W2 Forms', 'W3 Form', '1099 & 1098 Forms', and '1096 Form'. The '1099 Recipient' section is active, showing a 'Select' button and a 'Form Type' dropdown set to '1099-B'. A dialog box titled 'Select 1099 Recipient' is open, displaying a table of recipients. A red arrow points from the 'Select' button in the main window to the dialog. Another red arrow points from the 'John Q Doe' row in the table to the 'Select Recipient' label. A third red arrow points from the 'OK' button in the dialog to the 'Click OK' label.

	Identification Number	Name (Line One)	Name (Line Two)	Account Number
1	987654321	Form Recipient		
2	777889999	Jane A Test		
3	999887777	John Q Doe		

13. Fill in recipient(s) amounts (for example: Proceeds, Cost of other basis, etc.)

14. Click Save

Note: Repeat this step for all other recipients you have added

Example Company\$second name - W2 Mate (2017)

Company Tools Import Data Expo **Click Save 14** Instructions **Complete Information for Recipient 13**

1099 Recipient Form 1099-B Form Type

Select Next Previous Save Clear Print Create PDF Related Tasks Select

Payer's name, street address, city, state, zip code, and Tel. #

Example Company\$second name  
123 Main  
Chicago IL 60605

PAYER'S Federal ID number RECIPIENT'S ID number  
987654321

RECIPIENT'S name  
Form Recipient

Street address (including apt. no.)

City, state, and ZIP

Account number (optional) 2nd TIN not

CUSIP number

14 State name 15 State ID no. 16 State tax WH  
0.00

Applicable check box on Form 8949

2017 Form 1099-B

1a Description of property (Example 100 sh. XYZ Co.)

1b Date acquired (mm/dd/yyyy) 1c Date sold or disposed (mm/dd/yyyy)

1d Proceeds 1e Cost or other basis  
0.00 0.00

1f Accrued market discount 1g Wash sale loss disallowed  
0.00 0.00

2 Short-term  Long-term  Ordinary  3 Basis reported to IRS

4 Federal income tax withheld 5 Check if noncovered security   
0.00

6 Reported to IRS: Gross proceeds  Net proceeds  7 Loss not allowed based on amt in 1d

8 Profit or (loss) realized in 2017 on closed contracts 9 Unrealized profit or (loss) on open contracts - 12/31/2016  
0.00 0.00

10 Unrealized profit or (loss) on open contracts - 12/31/2017 11 Aggregate profit or (loss) on contracts  
0.00 0.00

12 Check if proceeds from collectibles  13 Bartering  
0.00

15. Click Print

16. Select Recipients

17. Select copy to print

Note: To print a Recipient /Payer copy to blank paper choose the copy to print from the drop-down menu

To print the data on the preprinted IRS red form chose Print DATA Only

18. Click OK

Example Company\$second name - W2 Mate (2017)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions Help Order Supplies

1099 Recipient Form 1099-B

Select Next Previous Save Clear Print Create PDF Related Tasks Form Type Select

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)
<input type="checkbox"/>	987654321	Form Recipient	
<input type="checkbox"/>	777889999	Jane A Test	
<input type="checkbox"/>	999887777	John Q Doe	

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 Recipient  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]  Mask Recipient's Tax ID Number on Copy B.

Furnish Copy B of this form to the recipient by January 31, 2018.  
File Copy A of this form with the IRS by February 28, 2018. If you file electronically, the due date is April 2, 2018. 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) Vertical (inch) Vertical space between forms (DO NOT change unless you have to)

0.00 0.00 Space between first and second form. Default is 1.0 Inch 1.00

Move data to the LEFT  Move data UP

Move data to the RIGHT  Move data DOWN

OK Cancel



19. Select the correct printer

20. Click OK

