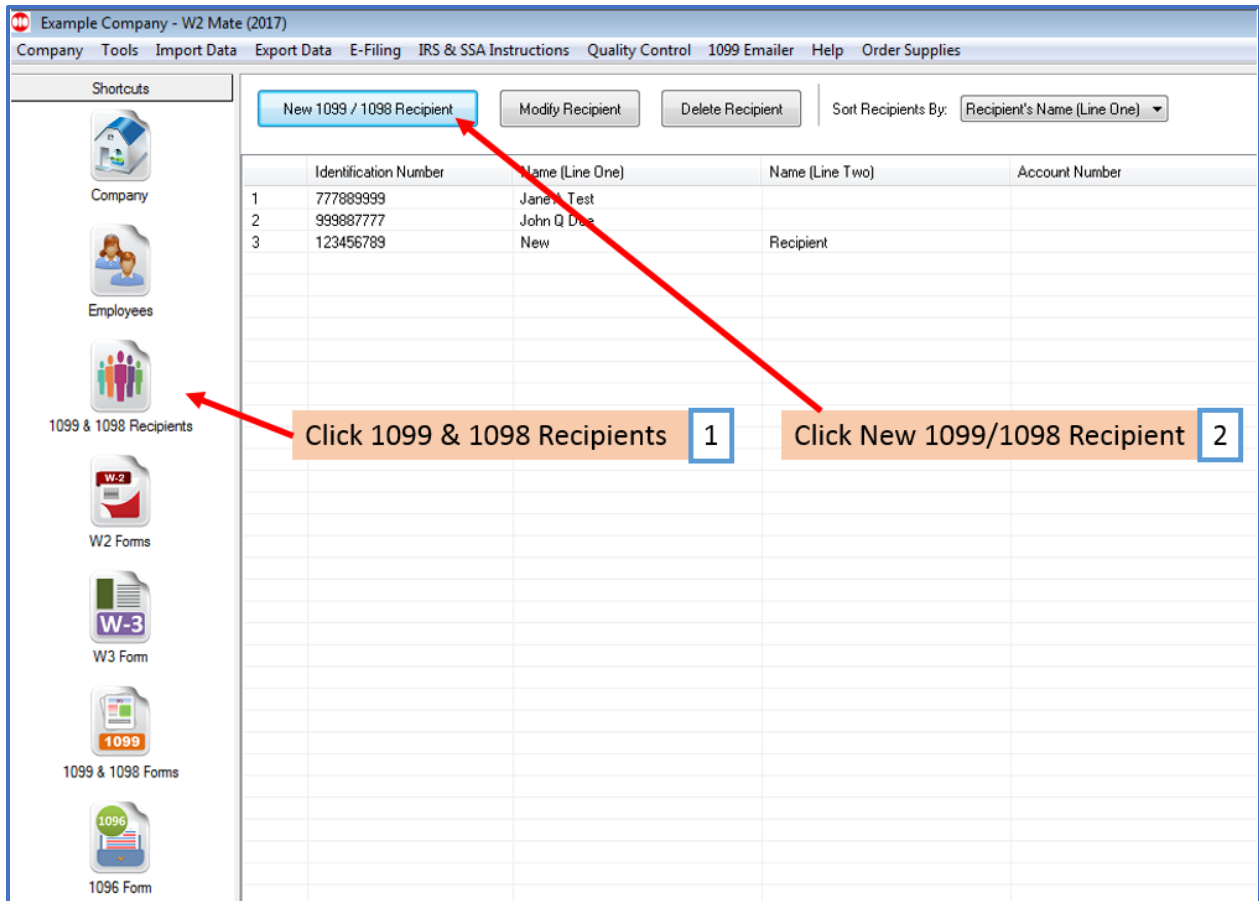


How to Create, Populate and Print 1099-K Forms

Make sure you have the correct Company open inside W2 Mate

Note: In order to use this feature you must purchase and enable W2 Mate Option #5 for Additional 1099 forms

1. Click 1099 & 1098 Recipients in shortcut
2. Click New 1099/1098 Recipient



3. Choose Form 1099-K

The screenshot shows the 'New 1099 / 1098 Recipient' dialog box in the W2 Mate software. The 'Types of 1099 / 1098 Forms Received' dropdown menu is open, showing a list of form types. 'Form 1099-K' is selected and highlighted in blue. A red arrow points from the text 'Select Form 1099-K' (which is enclosed in a blue box with the number '3') to the 'Form 1099-K' option in the dropdown menu. The dialog box also contains fields for Recipient's Tax Identification #, Name, Address, City, State, Zip code, and Foreign Country. There are also checkboxes for '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', and 'Form 1099-K'. The 'Form 1099-K' checkbox is checked. Below the dropdown menu, there are fields for 'Box 1 - Rents' and 'Box 7 - Nonemployee compensation', both with a value of 0.00. There is also a checkbox for 'Recipient is inactive [exclude from 1099 forms, 1096 form and 1099 electronic filing]'. The dialog box has 'OK' and 'Cancel' buttons at the bottom.

4. Enter New Recipient information

5. Click OK

Example Company - 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)

1099 Recipient: KForm Recipient **4**

General

Recipient's Tax Identification # 987654321 Types of 1099 / 1098 Forms Received Form 1099-K Account # (optional) 2nd TIN not.

Name

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

KForm Recipient

Address

Address 1

Address 2 (only used when "Types of 1099 Forms Received" is "Form 1099-MISC")

City State Zip code Foreign Country

Email Address (Optional)

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 5

OK Cancel

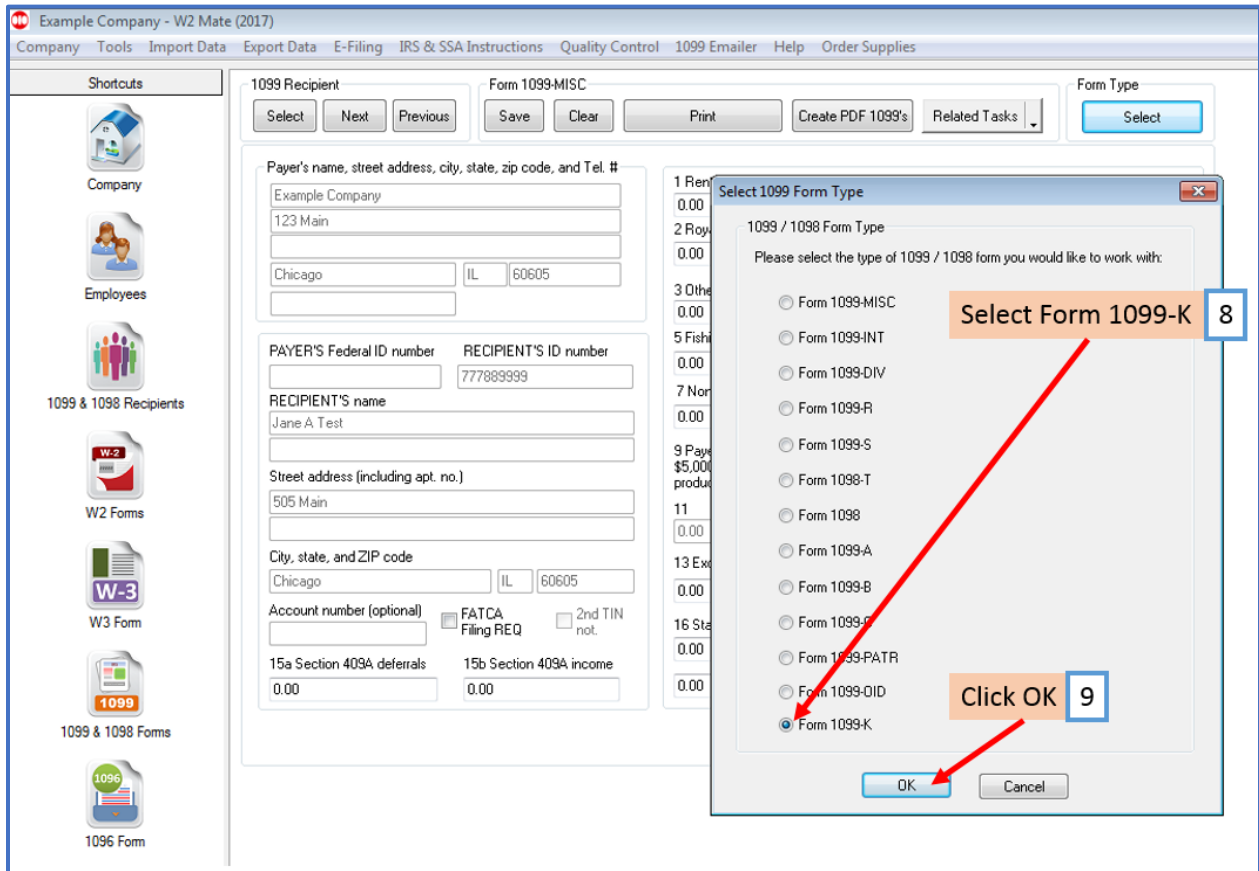
6. Choose 1099 & 1098 Forms in shortcuts

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), Recipient's ID number, Recipient's name (Jane A.), street address (505 Main), city/state/zip (Chicago, IL 60605), account number, FATCA Filing REQ, 2nd TIN not, and various income and tax fields (1-18) with values of 0.00. The year '2017' is displayed prominently.

8. Select Form 1099-K

9. Click OK



10. Click Select under Recipient

11. Select 1099-K 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-Click Select 10', 'Quality Control', '1099 Emailer', 'Help', and 'Order Supplies'. The '1099 Recipient' section has buttons for 'Select', 'Next', 'Previous', 'Save', 'Clear', 'Print', 'Create PDF', 'Related Tasks', and 'Form Type' (with a 'Select' button). A 'Select 1099 Recipient' dialog box is open, displaying a table of recipients. The table has the following data:

	Identification Number	Name (Line One)	Name (Line Two)	Account Number
1	777889999	Jane A Test		
2	999887777	John Q Doe		
3	987854321	KForm Recipient		

Red arrows indicate the following steps: 1. Clicking the 'Select' button in the main window (labeled 'Click Select 10'). 2. Selecting the third row in the dialog box (labeled 'Select Recipient 11'). 3. Clicking the 'OK' button in the dialog box (labeled 'Click OK 12').

13. Fill in recipient(s) amounts (for example: Gross amount of payment card, number of purchase transactions, etc.)

14. Click Save

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

The screenshot shows the W2 Mate software interface for the 2017 tax year. The main window is titled "Example Company - W2 Mate (2017)". The top menu bar includes "Company", "Tools", "Import Data", "Export Data", "Click Save", "14", "ons", "Quality", "Complete Information for Recipient", and "13". The "Click Save" and "13" are highlighted with orange boxes. A red arrow points to the "Save" button in the top navigation bar. The main form is titled "1099 Recipient Form 1099-K". The form is divided into several sections: "FILER'S name, street address, city, state, zip code, and Tel. #", "FILER'S federal identification no.", "PAYEE'S taxpayer identification no.", "PAYEE'S name", "Street address (including apt. no.)", "City, state, and ZIP", "PSE'S name and telephone number", "Account number (optional)", "2nd TIN not.", "1a Gross amount of payment card/3rd party network TXNs", "1b Card Not Present transactions", "2 Merchant category code", "3 Number of purchase transactions", "4 Fed income tax", "5a January", "5b February", "5c March", "5d April", "5e May", "5f June", "5g July", "5h August", "5i September", "5j October", "5k November", "5l December", "6 State", "7 State identification no", and "8 State tax withheld". The form is for the year 2017. The sidebar on the left contains shortcuts for "Company", "Employees", "1099 & 1098 Recipients", "W2 Forms", "W3 Form", "1099 & 1098 Forms", and "1096 Form".

15. Click Print

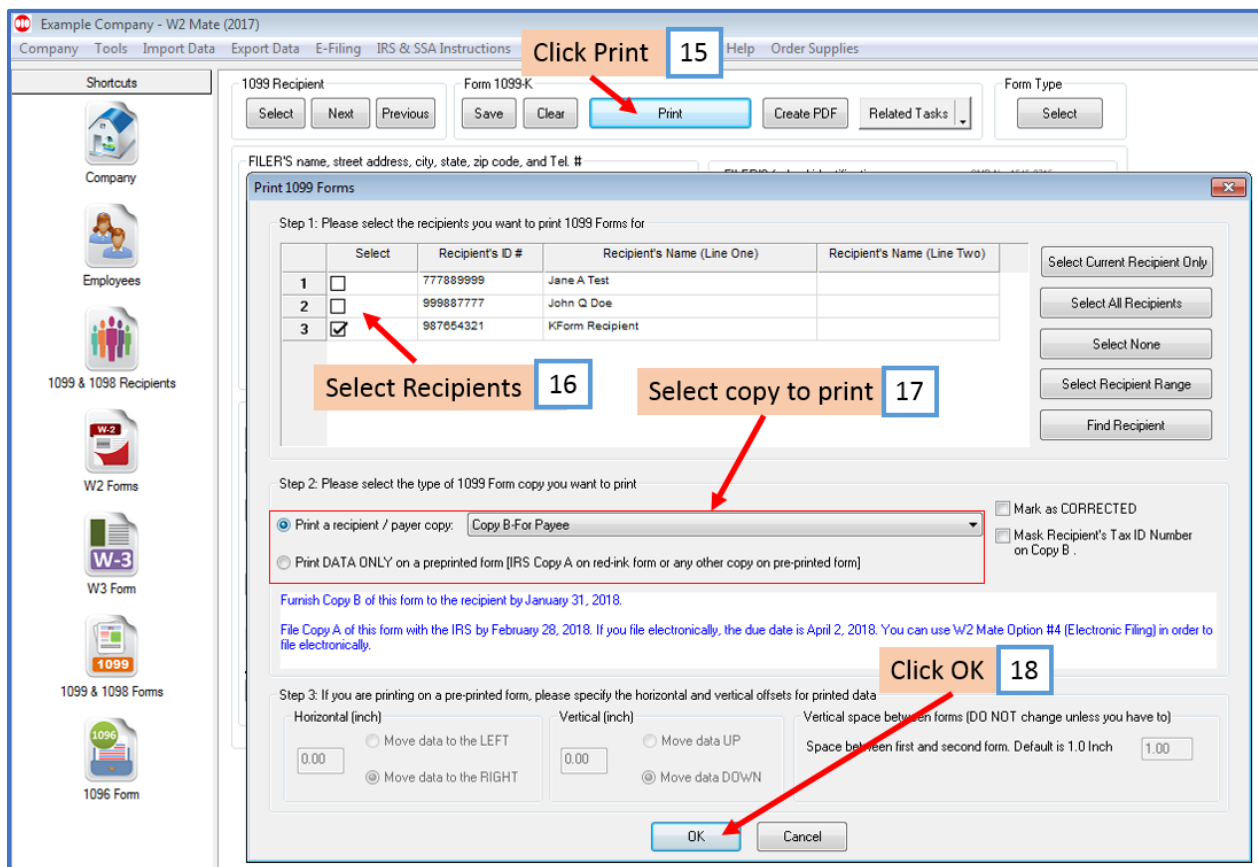
16. Select Recipients

17. Select copy to print

Note: To print a Recipient /Payer copy on 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



19. Select the correct printer

20. Click OK

