

3. Choose Form 1099-MISC

The screenshot shows the W2 Mate software interface. On the left is a sidebar with shortcuts: Company, Employees, 1099 & 1098 Recipients, W2 Forms, W3 Form, 1099 & 1098 Forms, and 1096 Form. The main window is titled 'Example Company\$second name - W2 Mate (2017)' and has a menu bar with options: Company, Tools, Import Data, Export Data, E-Filing, IRS & SSA Instructions, Quality Control, 1099 E-mailer, Help, and Order Supplies. Below the menu bar are buttons for 'New 1099 / 1098 Recipient', 'Modify Recipient', and 'Delete Recipient', along with a 'Sort Recipients By:' dropdown set to 'Recipient's Name (Line One)'. The 'New 1099 / 1098 Recipient' dialog box is open, showing a 'General' tab. It has fields for 'Recipient's Tax Identification #', 'Name' (with 'Recipient Name Line One' and 'Recipient Name Line Two'), 'Address' (with 'Address 1' and 'Address 2'), 'City', 'State', 'Zip code', 'Foreign Country', and 'Email Address (Optional)'. A dropdown menu titled 'Types of 1099 / 1098 Forms Received' is open, showing a list of form types: Form 1099-MISC (checked), Form 1099-INT, Form 1099-DIV, Form 1099-R, Form 1099-S, Form 1099-T, Form 1098, Form 1099-A, Form 1099-B, Form 1099-C, Form 1099-PATR, Form 1099-DID, and Form 1099-K. A red arrow points to 'Form 1099-MISC' in the list. To the right of the list, the text 'Select Form 1099-MISC' is displayed next to a blue box containing the number '3'. Below the dropdown menu, there are checkboxes for 'Account # (optional)' and '2nd TIN not.'. At the bottom of the dialog box, there are fields for 'Common 1099-MISC Payments' (Box 1 - Rents and Box 7 - Nonemployee compensation) and a checkbox for 'Recipient is inactive [exclude from 1099 forms, 1096 form and 1099 electronic filing]'. The 'OK' and 'Cancel' buttons are at the bottom right.

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 Emitter Help Order Supplies

Shortcuts

Company

Employees

1099 & 1098 Recipients

W2 Forms

W3 Form

1099 & 1098 Forms

1096 Form

New 1099 / 1098 Recipient

Modify Recipient

Delete Recipient

Sort Recipients By: Recipient's Name (Line One)

Enter New Recipient data

General

Recipient's Tax Identification #

Types of 1099 / 1098 Forms Received

Account # (optional)

2nd TIN not.

Name

Recipient Name Line One (Example: John Doe)

Recipient Name Line Two (optional, use if you need to)

Address

Address 1

Address 2 (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 Emitter" software.

What is 1099 Emitter?

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

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

Click OK

OK

Cancel

6. Choose 1099 & 1098 Forms in shortcuts

7. Click Select under form type

Example Company - W2 Mate (2017)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions Quality Control 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-MISC

Save Clear Print Create PDF 1099's Related Tasks

Form Type Select

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

Example Company

123 Main

Chicago IL 60605

PAYER'S Federal ID number RECIPIENT'S ID number

7778889999

Click 1099 & 1098 Forms 6

RECIPIENT'S name (last, first, middle initial)

Jane A. Doe

Street address (including apt. no.)

505 Main

City, state, and ZIP code

Chicago IL 60605

Account number (optional) FATCA Filing REQ 2nd TIN not

15a Section 409A deferrals 15b Section 409A income

0.00 0.00

1 Rents 0.00

2 Royalties 0.00

3 Other income 0.00

5 Fishing boat proceeds 0.00

7 Nonemployee compensation 0.00

9 Payer made direct sales of \$5,000 or more of consumer products to a buyer for resale

11 0.00

13 Excess golden parach. 0.00

16 State tax withheld 0.00

17 State / Payer's State Number

18 State income 0.00

4 Federal income tax withheld 0.00

6 Medical and health care payments 0.00

8 Substitute payments in lieu of dividends or interest 0.00

10 Crop insurance proceeds 0.00

12 0.00

14 Gross proceeds paid to an attorney 0.00

OMB No. 1545-0115

2017

Form 1099-MISC

Click Select 7

8. Select Form 1099-MISC

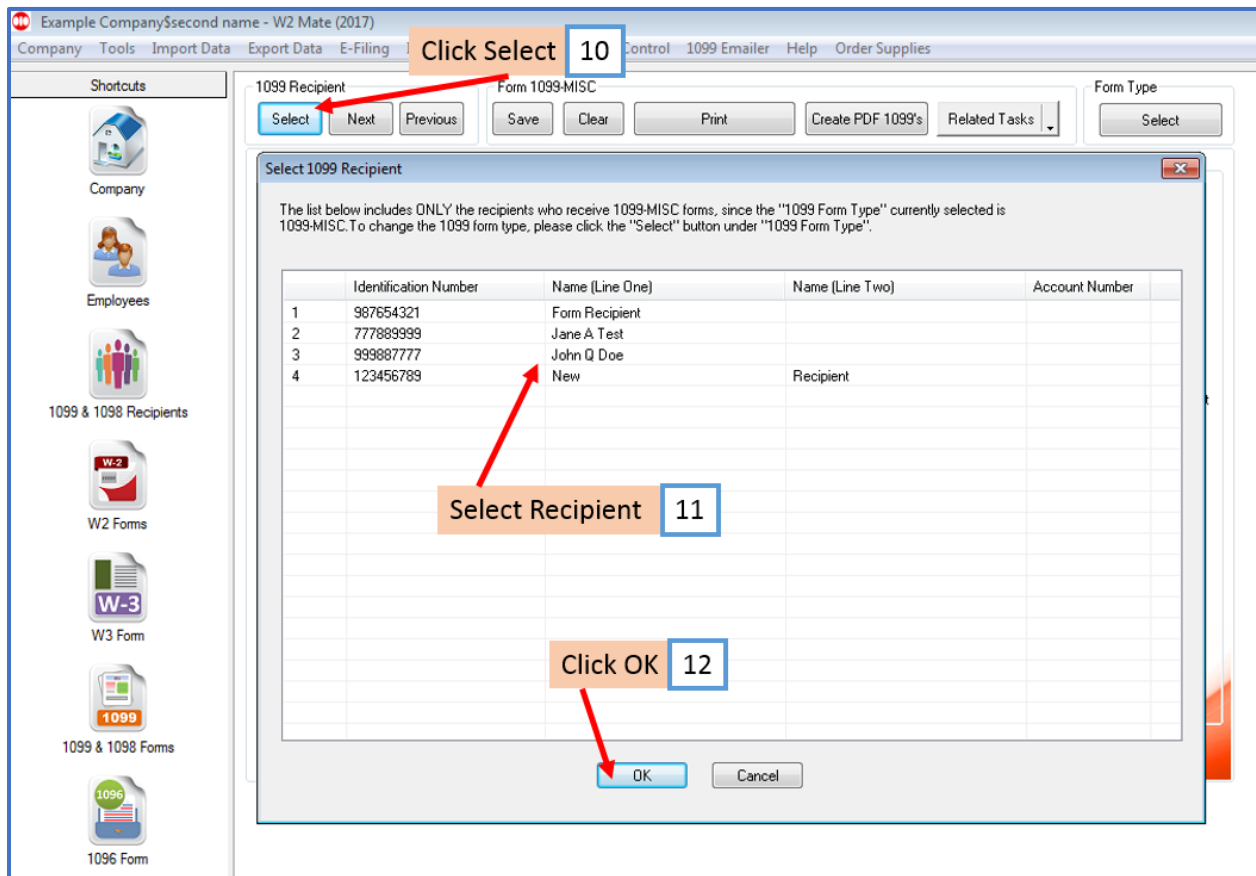
9. Click OK

The screenshot displays the W2 Mate software interface. 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 window is titled 'Example Company\$second name - W2 Mate (2017)' and contains a menu bar (Company, Tools, Import Data, Export Data, E-Filing, IRS & SSA Instructions, Quality Control, 1099 Emailer, Help, Order Supplies) and a toolbar with buttons for Select, Next, Previous, Save, Clear, Print, Create PDF 1099's, and Related Tasks. A 'Form Type' dropdown is set to 'Select'. The '1099 Recipient' section includes fields for Payer's name, address, city, state, and ZIP, PAYER'S Federal ID number, RECIPIENT'S name, address, city, state, and ZIP, Account number (optional), and 15a Section 409A deferrals. A 'Select 1099 Form Type' dialog box is open in the center, titled '1099 / 1098 Form Type'. It contains the text 'Please select the type of 1099 / 1098 form you would like to work with:' and a list of radio buttons: Form 1099-MISC (selected), 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-DID, and Form 1099-K. An orange callout box with a blue border and the number '8' points to the 'Form 1099-MISC' option with the text 'Select Form 1099-MISC'. Another orange callout box with a blue border and the number '9' points to the 'OK' button with the text 'Click OK'. The 'OK' button is highlighted in blue.

10. Click Select under Recipient

11. Select 1099-MISC Recipient

12. Click OK



13. Fill in recipient(s) amounts (for example: Rents, Royalties, 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 Export Data Click Save 14 ns Quali Complete Information for Recipient 13

Shortcuts

- Company
- Employees
- 1099 & 1098 Recipients
- W2 Forms
- W3 Form
- 1099 & 1098 Forms
- 1096 Form

1099 Recipient Form 1099-MISC

Select Next Previous Save Clear Print Create PDF 1099's Related Tasks Form Type 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 code

Account number (optional) FATCA Filing REQ 2nd TIN not.

15a Section 409A deferrals 15b Section 409A income
0.00 0.00

1 Rents 0.00
2 Royalties 0.00
3 Other income 0.00
5 Fishing boat proceeds 0.00
7 Nonemployee compensation 0.00
9 Payer made direct sales of \$5,000 or more of consumer products to a buyer for resale
11 0.00
13 Excess golden parach. 0.00
16 State tax withheld 0.00
17 State / Payer's State Number
18 State income 0.00

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Form 1099-MISC

4 Federal income tax withheld 0.00
6 Medical and health care payments 0.00
8 Substitute payments in lieu of dividends or interest 0.00
10 Crop insurance proceeds 0.00
12
14 Gross proceeds paid to an attorney 0.00

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

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

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

Click Print 15

1099 Recipient Form 1099-MISC

Select Next Previous Save Clear Print Create PDF 1099's 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)
1	☐	987654321	Form Recipient	
2	☐	777889999	Jane A Test	
3	☐	999887777	John Q Doe	
4	☐	123456789	New	Recipient

Select Recipients 16

Select copy to print 17

Step 2: Please select the type of 1099 Form copy you want to print

☐ Print a recipient / payer copy: Red Copy A for IRS on Regular Paper Using Color Printer (2 recipients per page)

☒ Print DATA ONLY on a preprinted form [IRS Copy A on red-ink form or any other copy on pre-printed form]

☐ Mark as CORRECTED

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

Furnish Copy B of this form to the recipient by January 31, 2018. You can give copy B to the recipient in person, send it by mail or use W2 Mate Option #6 (Create PDF W2's and 1099's) to generate a secure PDF file, which can be sent by E-mail.

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. IMPORTANT NOTE: If reporting payments in box 7, file this form with the IRS by January 31, 2018 (whether you file on paper or 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 ☐ Move data to the LEFT 0.00 ☐ Move data UP Space between first and second form. Default is 1.0 Inch 1.00

☒ Move data to the RIGHT ☒ Move data DOWN

Click OK 18

OK Cancel

20. Click OK

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