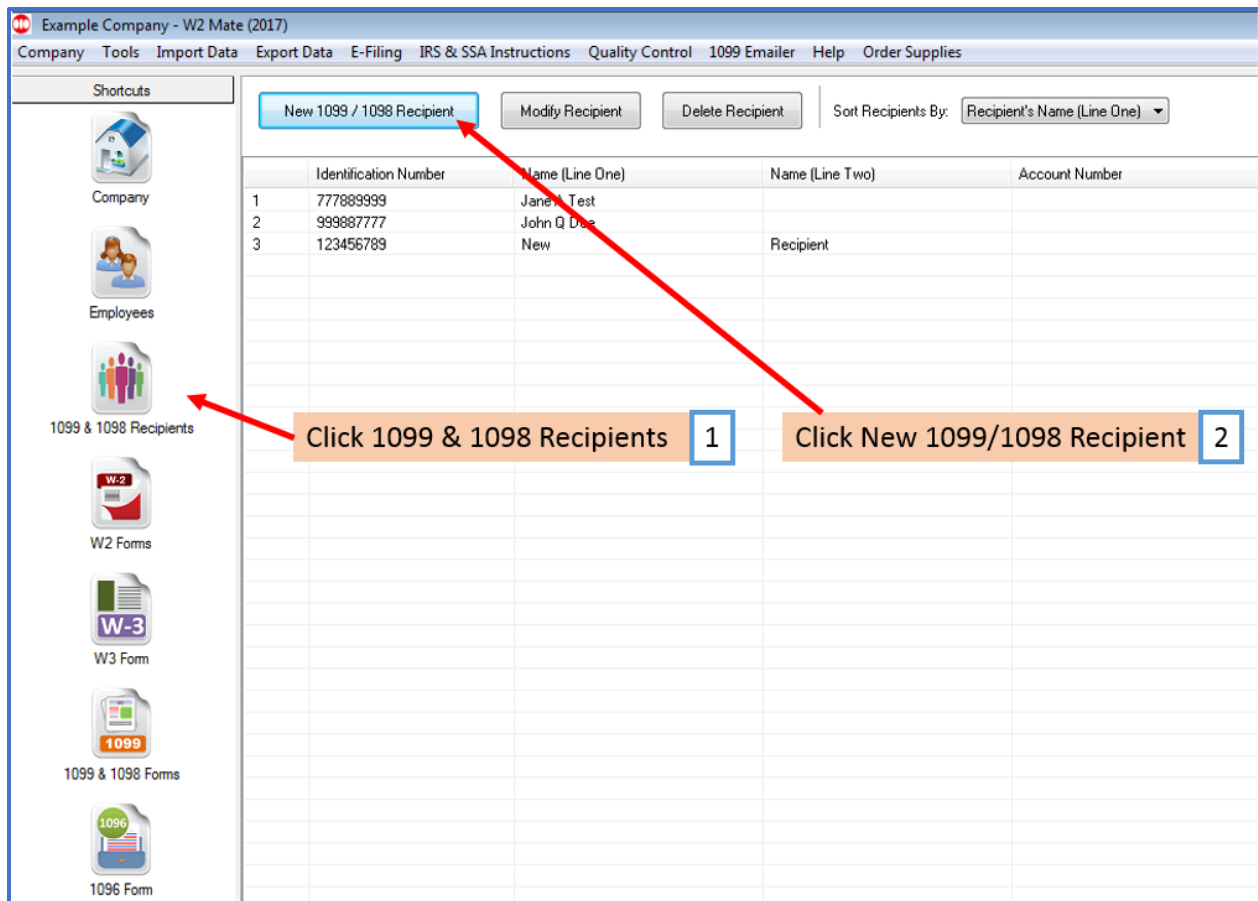


How to Create, Populate and Print 1099-S Forms

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-S

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 has a menu bar (Company, Tools, Import Data, Export Data, E-Filing, IRS & SSA Instructions, Quality Control, 1099 E-mailer, Help, Order Supplies) and buttons for 'New 1099 / 1098 Recipient', 'Modify Recipient', and 'Delete Recipient'. A 'Sort Recipients By:' dropdown is set to 'Recipient's Name (Line One)'. The 'New 1099 / 1098 Recipient' dialog box is open, showing fields for General information (Tax ID, Name, Address, City, State, Zip, Country), Account #, 2nd TIN, and Email Address. A red box highlights the 'Types of 1099 / 1098 Forms Received' dropdown menu, which is open and shows 'Form 1099-S' selected. A red arrow points to the 'Form 1099-S' option. A blue box with the number '3' is next to the text 'Select Form 1099-S'. Below the dropdown, there are checkboxes for 'Form 1099-MISC', 'Form 1099-INT', 'Form 1099-DIV', 'Form 1099-R', 'Form 1098-T', 'Form 1098', 'Form 1099-A', 'Form 1099-B', 'Form 1099-C', 'Form 1099-PATR', 'Form 1099-OID', and 'Form 1099-K'. At the bottom of the dialog, there are fields for 'Box 1 - Rents' and 'Box 7 - Nonemployee compensation', both set to 0.00. A checkbox for 'Recipient is inactive [exclude from 1099 forms, 1096 form and 1099 electronic filing]' is also present. '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 4

New 1099 / 1098 Recipient

General

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

☒ Form 1099-S

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: 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

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

777888888

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-S

9. Click OK

The screenshot shows 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 has a menu bar (Company, Tools, Import Data, Export Data, E-Filing, IRS & SSA Instructions, Quality Control, 1099 Emailer, Help, Order Supplies) and a toolbar (Select, Next, Previous, Save, Clear, Print, Create PDF, Related Tasks, Select). The '1099 Recipient' section contains fields for FILER'S name, street address, city, state, FILER'S federal ID number, TRANSFEROR'S name, Street address, City, state, and ZIP, and Account or escrow number. A 'Form 1099-S' dialog box is open, titled 'Select 1099 Form Type'. It asks 'Please select the type of 1099 / 1098 form you would like to work with:' and lists options: Form 1099-MISC, Form 1099-INT, Form 1099-DIV, Form 1099-R, Form 1099-S (selected), Form 1098-T, Form 1098, Form 1099-A, Form 1099-B, Form 1099-C, Form 1099-PATR, Form 1099-OID, and Form 1099-K. A red arrow points to 'Form 1099-S' and another red arrow points to the 'OK' button. A blue box with the number '8' is next to 'Form 1099-S', and a blue box with the number '9' is next to the 'OK' button.

10. Click Select under Recipient

11. Select 1099-S Recipient

12. Click OK

Example Company\$second name - W2 Mate (201...)

Company Tools Import Data Export Data E-F Click Select 10 Quality Control 1099 Emailer Help Order Supplies

Shortcuts

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

1099 Recipient Form 1099-S Form Type

Select Next Previous Save Clear Print Create PDF Related Tasks Select

Select 1099 Recipient

The list below includes ONLY the recipients who receive 1099-S forms, since the "1099 Form Type" currently selected is 1099-S. 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	987654321	Form Recipient		
2	777889999	Jane A Test		
3	999887777	John Q Doe		
4	123456789	New	Recipient	

Select Recipient 11

Click OK 12

OK Cancel

13. Fill in recipient(s) amounts (for example: Date of closing, Gross Proceeds, 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 Actions Qu Complete Information for Recipient 13

Shortcuts

Company

Employees

1099 & 1098 Recipients

W2 Forms

W3 Form

1099 & 1098 Forms

1096 Form

1099 Recipient Form 1099-S

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

FILER'S name, street address, city, state, zip code & Tel. #

Example Company\$second name

123 Main

Chicago IL 60605

FILER'S federal ID number TRANSFEROR'S ID number

987654321

TRANSFEROR'S name

Form Recipient

Street address (including apt. no.)

City, state, and ZIP

Account or escrow number (see instructions)

1 Date of closing (mm/dd/yyyy)

2 Gross proceeds

0.00

3 Address or legal description (including city, state, and ZIP code)

4 Check here if the transferor received or will receive property or services as part of the consideration

5 Check here if the transferor is a foreign person

6 Buyer's part of real estate tax

0.00

OMB No. 1545-0097

2017

Form 1099-S

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 **Click Print 15** Help Order Supplies

Shortcuts

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

1099 Recipient Form 1099-S

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)
1	<input type="checkbox"/>	987654321	Form Recipient	
2	<input type="checkbox"/>	777889999	Jane A Test	
3	<input type="checkbox"/>	999887777	John Q Doe	
4	<input type="checkbox"/>	123456789	New	Recipient

Select Current Recipient Only
Select All Recipients
Select None
Select Recipient Range
Find Recipient

Select Recipients 16

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

☐ Print a recipient / payer copy: Copy B-For Transferor ☐ 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 ☐ 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 Space between second and third form. Default is 1.0 Inch 1.00

Click OK 18

OK Cancel

19. Select the correct printer

20. Click OK

