

How to E-File 1099-S Forms Using W2 Mate

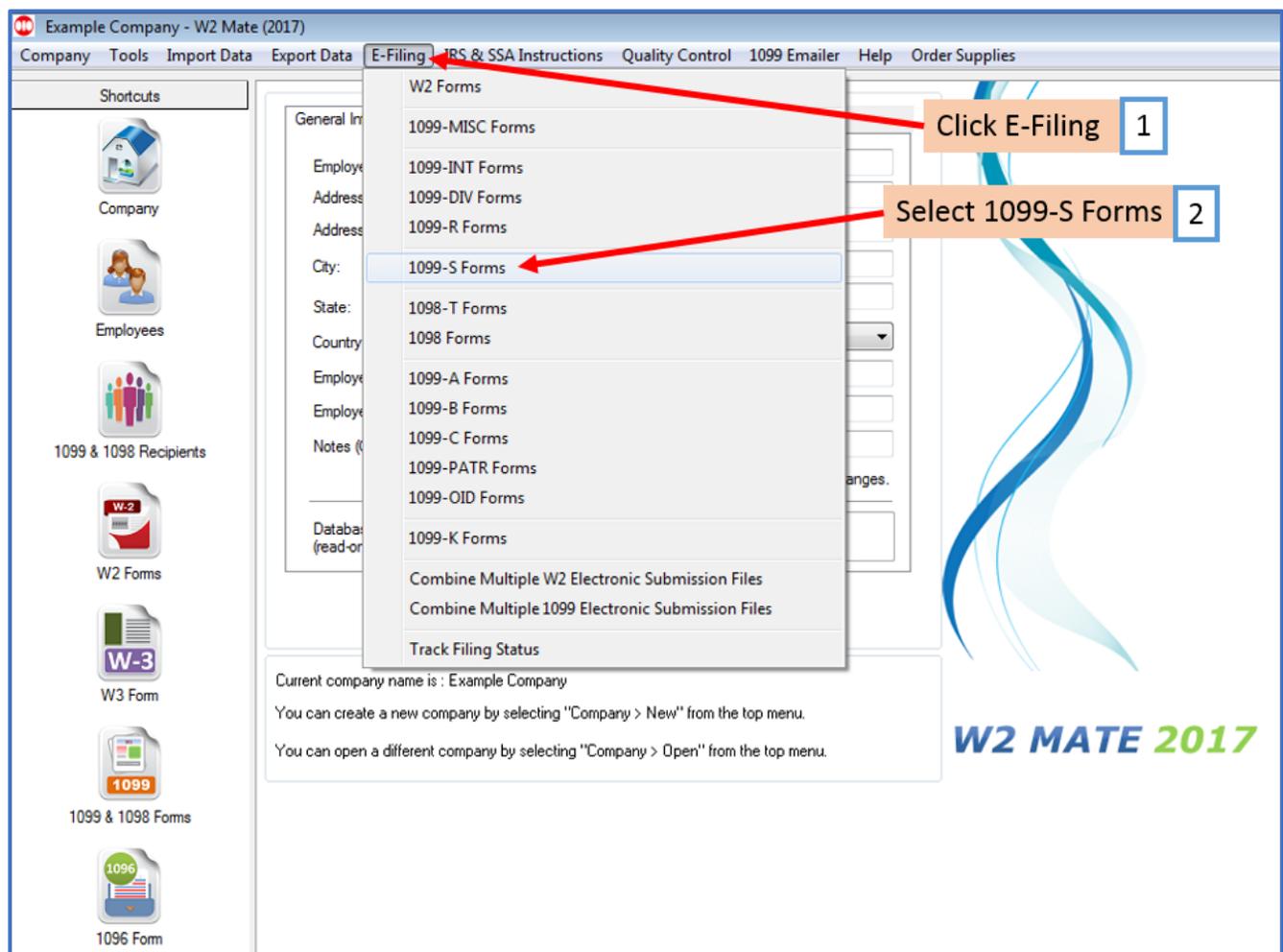
Note: Before you can file electronically with the IRS you need to obtain a TCC code (Transmitter Control Code). If you filed with the IRS electronically before, then you should already have a TCC code.

If this is the first time you are filing electronically then you can easily obtain a TCC code by submitting Form 4419 to the IRS. You will need a TCC code to electronically file regardless whether you use our software or any other software.

Make sure you have the correct Company open inside W2 Mate

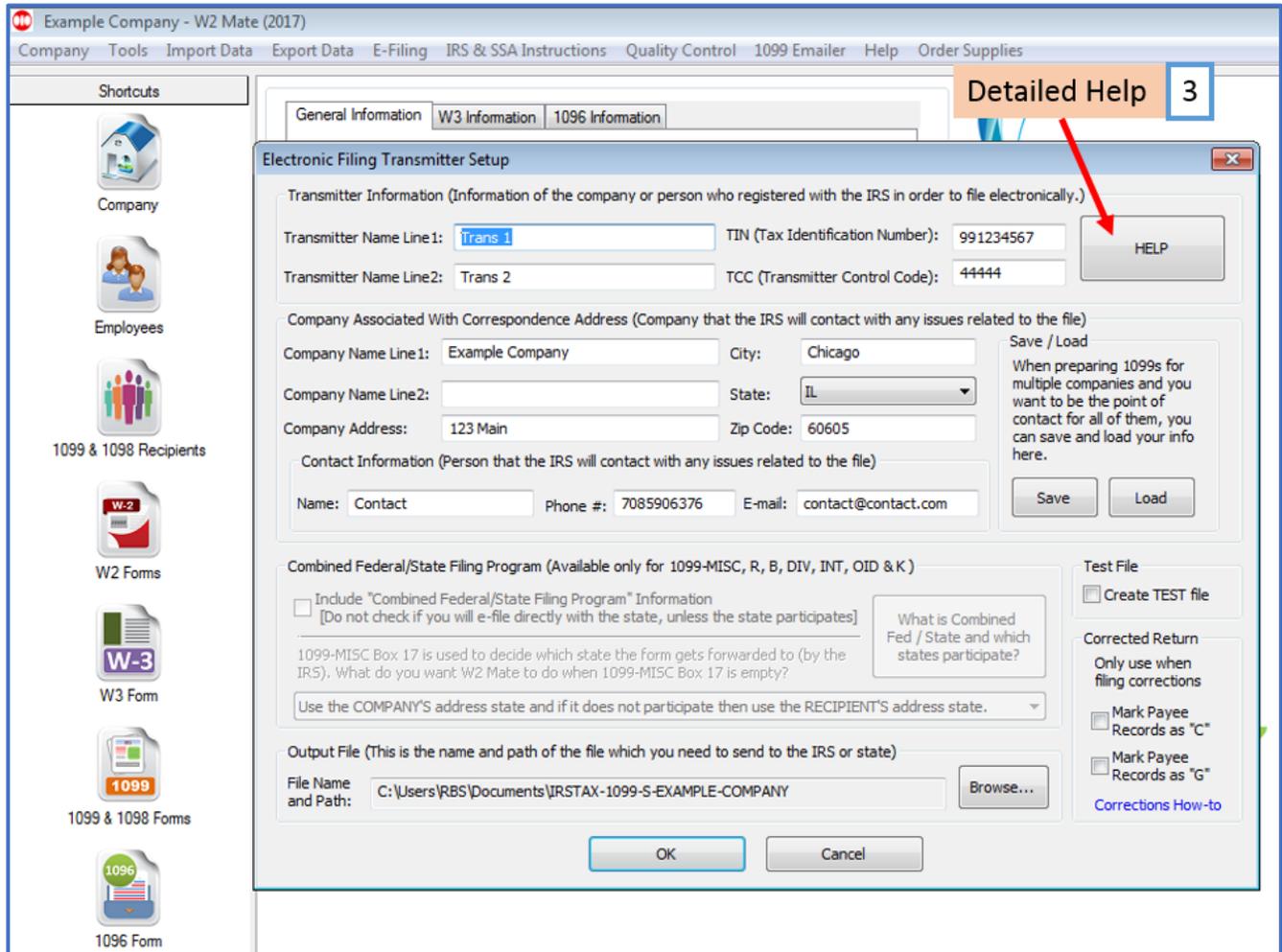
Note: In order to use this feature you must purchase and enable W2 Mate Option #4 to electronically file

1. Click E-Filing
2. Click 1099-S Forms



This will open the Electronic Filing Transmitter Setup

3. To see detailed help with the electronic filing process, click on the HELP button



4. Fill in all transmitter and company information
5. Enter Contact Information
6. Select Create a TEST file to create a test file, if needed

Example Company - W2 Mate (2017)

Company Tools Import Data Export Data E-Filing

Complete Transmitter and Company Information 4

General Information W3 Information 1096 Information

Electronic Filing Transmitter Setup

Transmitter Information (Information of the company or person who registered with the IRS in order to file electronically.)

Transmitter Name Line1: TIN (Tax Identification Number): 991234567

Transmitter Name Line2: TCC (Transmitter Control Code): 44444

Company Associated With Correspondence Address (Company that the IRS will contact with any issues related to the file)

Company Name Line1: City:

Company Name Line2: State:

Company Address: Zip Code:

Contact Information (Person that the IRS will contact with any issues related to the file)

Name: Phone #: E-mail:

Combined Federal/State Filing program (Available only for 1099-MISC, R, B, DIV, INT, OID & K)

Enter Contact Information 5 [state participates]

1099-MISC Box 17 is used to decide which state the form gets forwarded to (by the IRS). What do you want W2 Mate to do when 1099-MISC Box 17 is empty?

Use the COMPANY'S address state and if it does not participate then use the RECIPIENT'S address state.

Output File (This is the name and path of the file which you need to send to the IRS or state)

File Name and Path:

Create Test File 6

Test File

Create TEST file

Corrected Return

Only use when filing corrections

Mark Payee Records as "C"

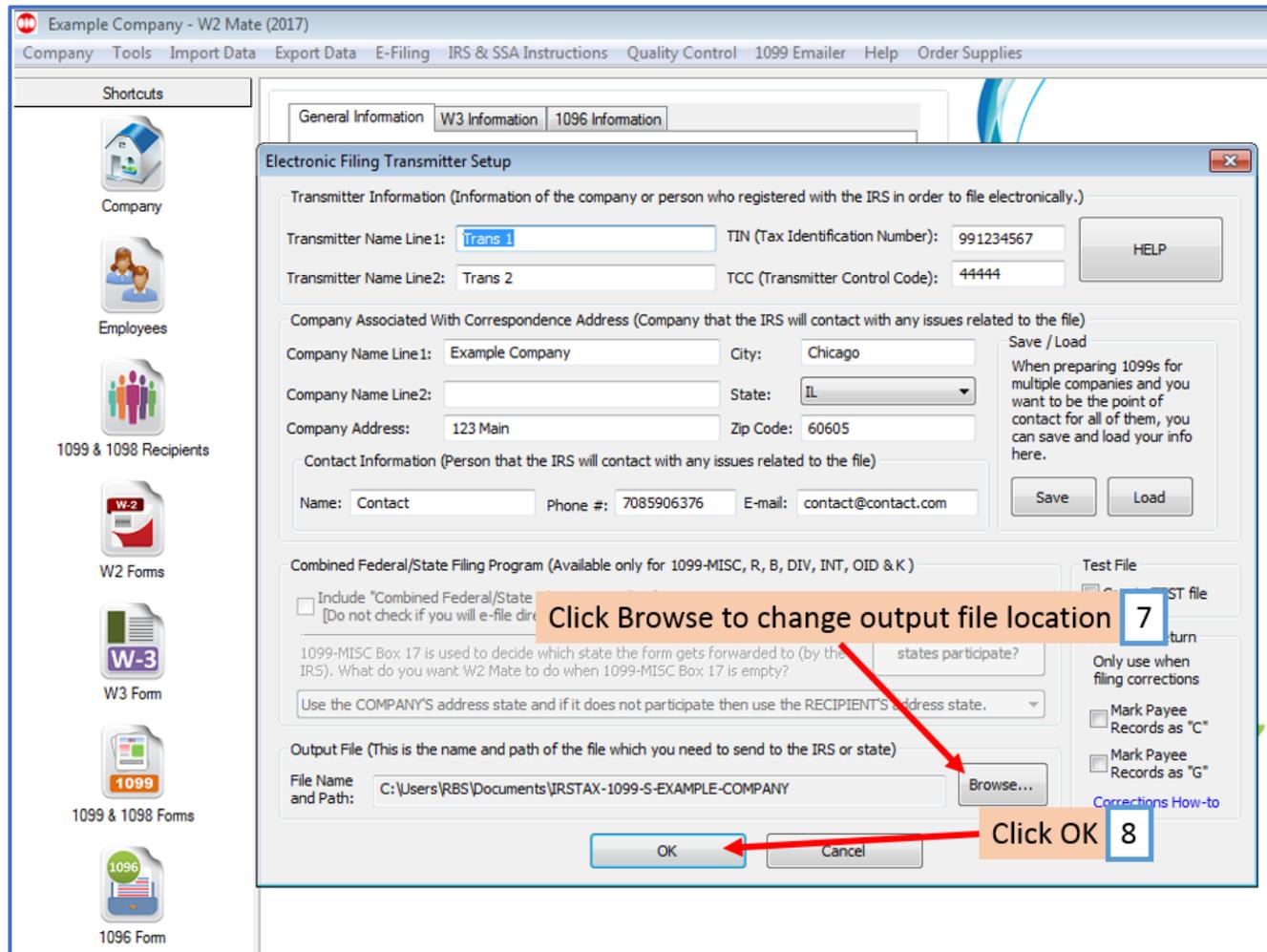
Mark Payee Records as "G"

[Corrections How-to](#)

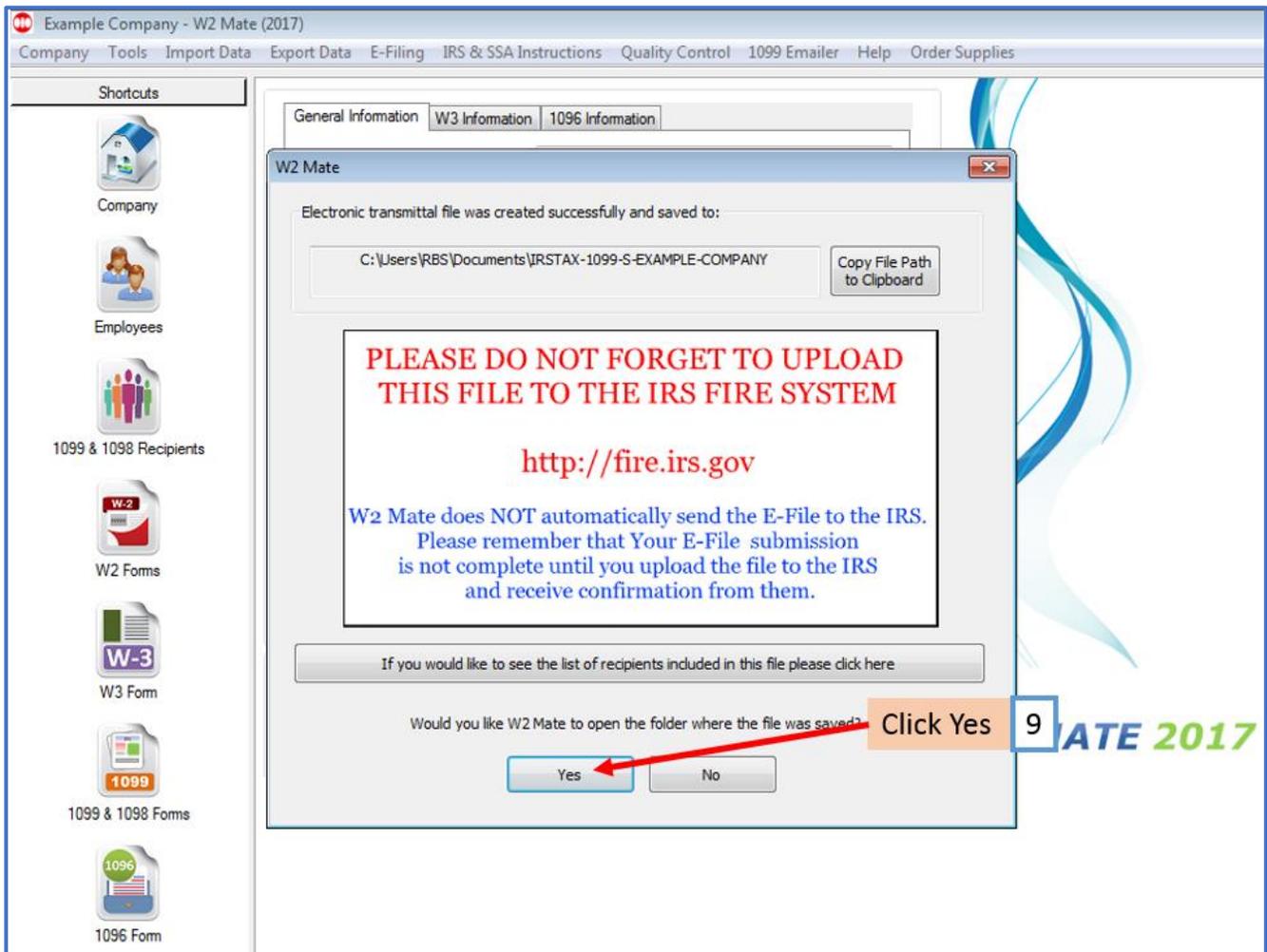
Note: Combined Federal/State Program is not available for form 1099-S

7. Click browse to select the location for the file to be saved

8. Click OK



9. To open the folder where the file was saved Click Yes

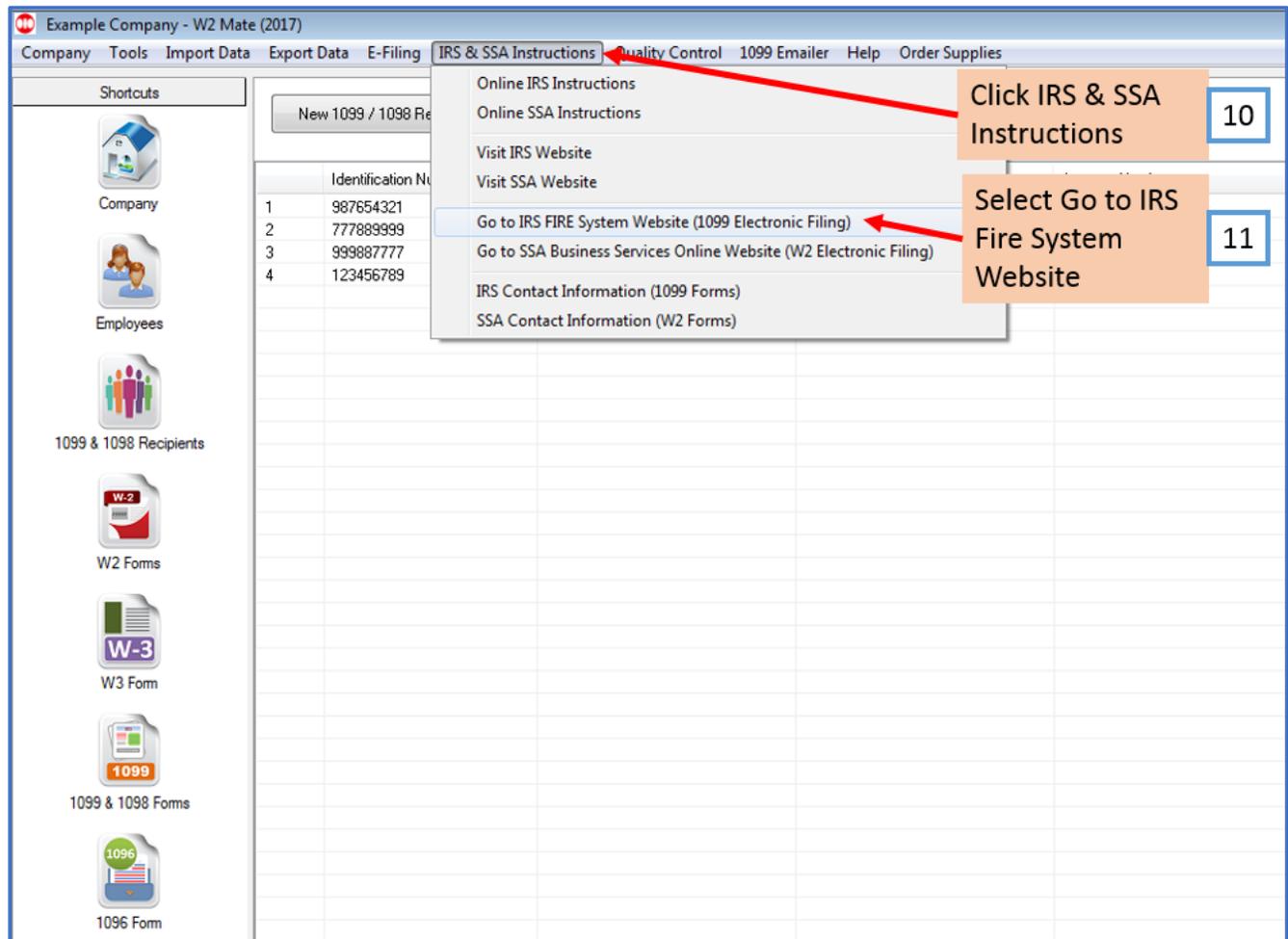


Now go to the IRS FIRE website to upload your 1099/1098 electronic submission file

To access the IRS FIRE website from inside W2 Mate:

10. Click IRS & SSA Instructions

11. Click Go to IRS FIRE System Website (1099 Electronic Filing)



You will be rerouted to the IRS FIRE Website (<http://fire.irs.gov>), where you must log in to submit the file you have created.

Note: Log into the IRS FIRE System Website. If you do not have a user name and password click "Create New Account" link and follow the instructions. If you have any questions regarding the IRS FIRE system website call (866)-455-7438.