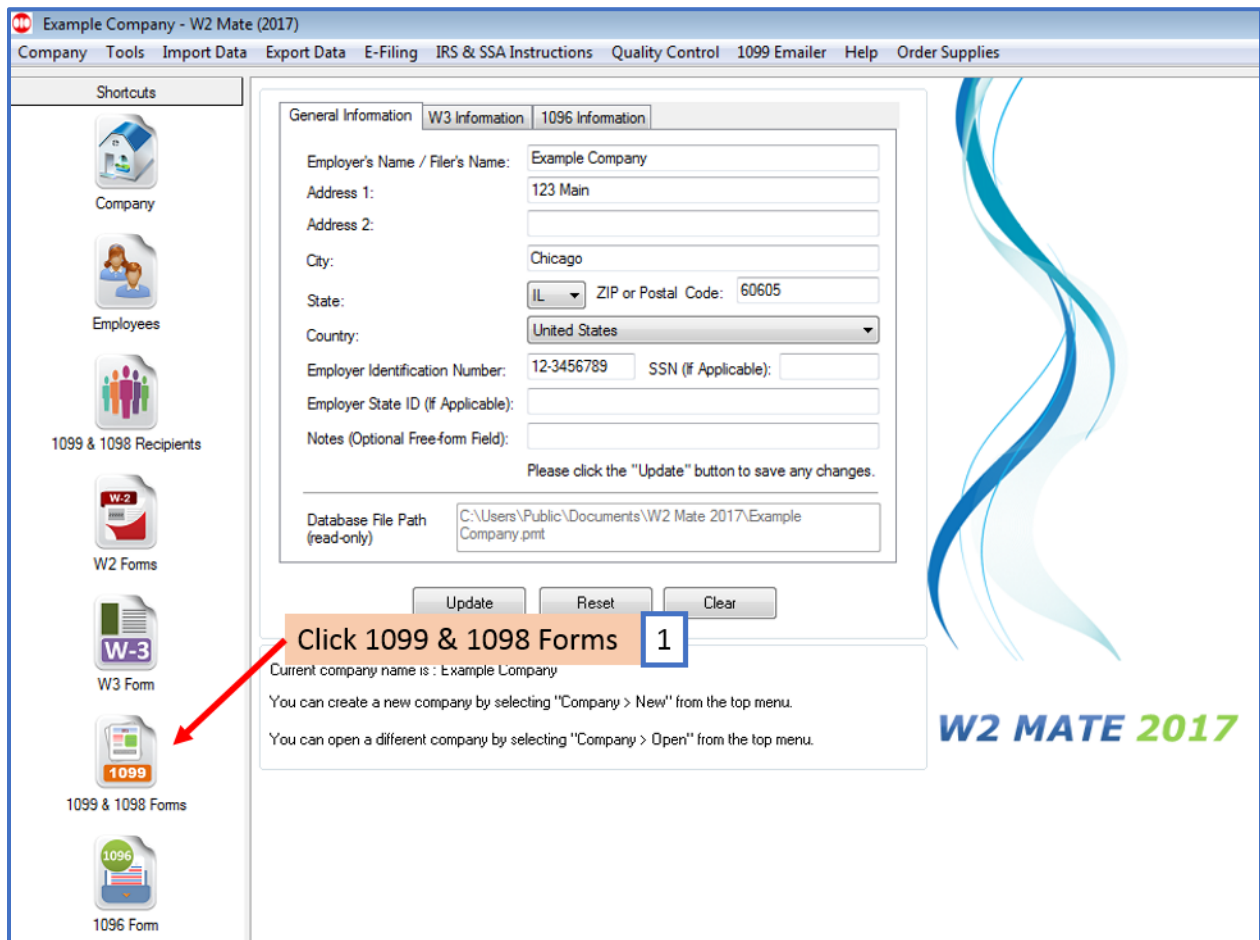


# How to Edit Data on a 1099-DIV Form

Make sure you have the correct Company open inside W2 Mate

1. Click 1099 & 1098 Forms from the Shortcuts menu



## 2. Click Select under Form Type

Example Company - W2 Mate (2017)

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

Shortcuts

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

1099 Recipient Form 1099-DIV

Select Next Previous Save Clear Print Create PDF 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 12-3456789 RECIPIENT'S ID number 777889999

RECIPIENT'S name Jane A Test

Street address (including apt. no.) 505 Main

City, state, and ZIP Chicago IL 60605

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

1a Total ordinary dividends 0.00  
1b Qualified dividends 0.00  
2a Total capital gain distr. 0.00  
2c Section 1202 gain 0.00  
3 Nondividend distributions 0.00  
6 Foreign tax paid 0.00  
8 Cash liquidation distributions 0.00  
10 Exempt-interest dividends 0.00  
12 State

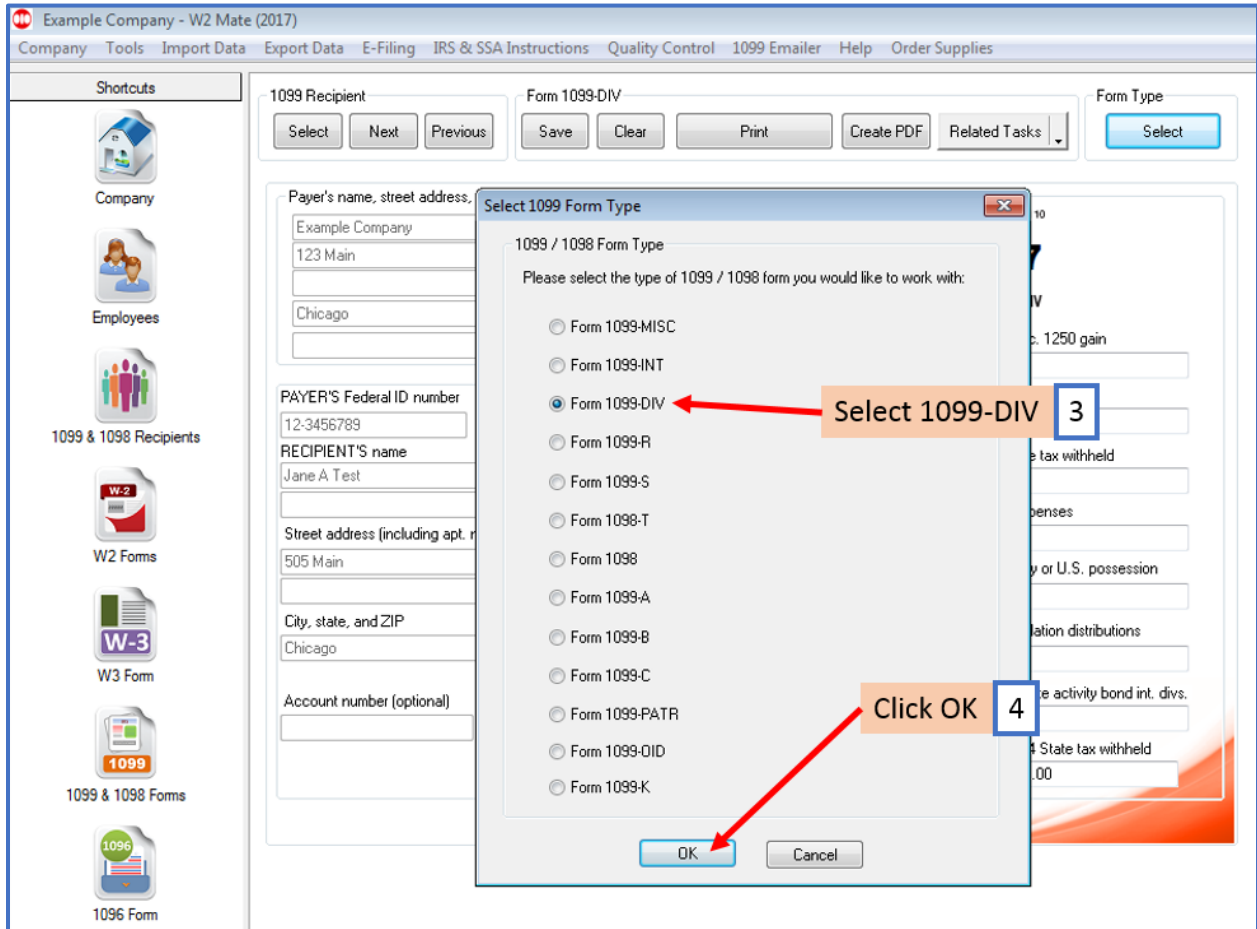
OMB No. 1545-0047  
**2017**  
Form 1099-DIV

2b Unrecap. Sec. 1250 gain 0.00  
2d Collectibles (28%) gain 0.00  
4 Federal income tax withheld 0.00  
5 Investment expenses 0.00  
7 Foreign country or U.S. possession  
9 Noncash liquidation distributions 0.00  
11 Specified private activity bond int. divs. 0.00  
13 State identification no  
14 State tax withheld 0.00

Click Select 2

3. Select Form 1099-DIV

4. Click OK



5. Click Select under 1099 Recipient

Example Company - W2 Mate (2017)

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

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- W3 Form
- 1099 & 1098 Forms
- 1096 Form

1099 Recipient

Select Next Previous

Form 1099-DIV

Save Clear Print Create PDF Related Tasks

Form Type

Select

Click Select 5

Address, city, state, zip code, and Tel. #

123 Main

Chicago IL 60605

PAYER'S Federal ID number 12-3456789

RECIPIENT'S ID number 777889999

RECIPIENT'S name Jane A Test

Street address (including apt. no.) 505 Main

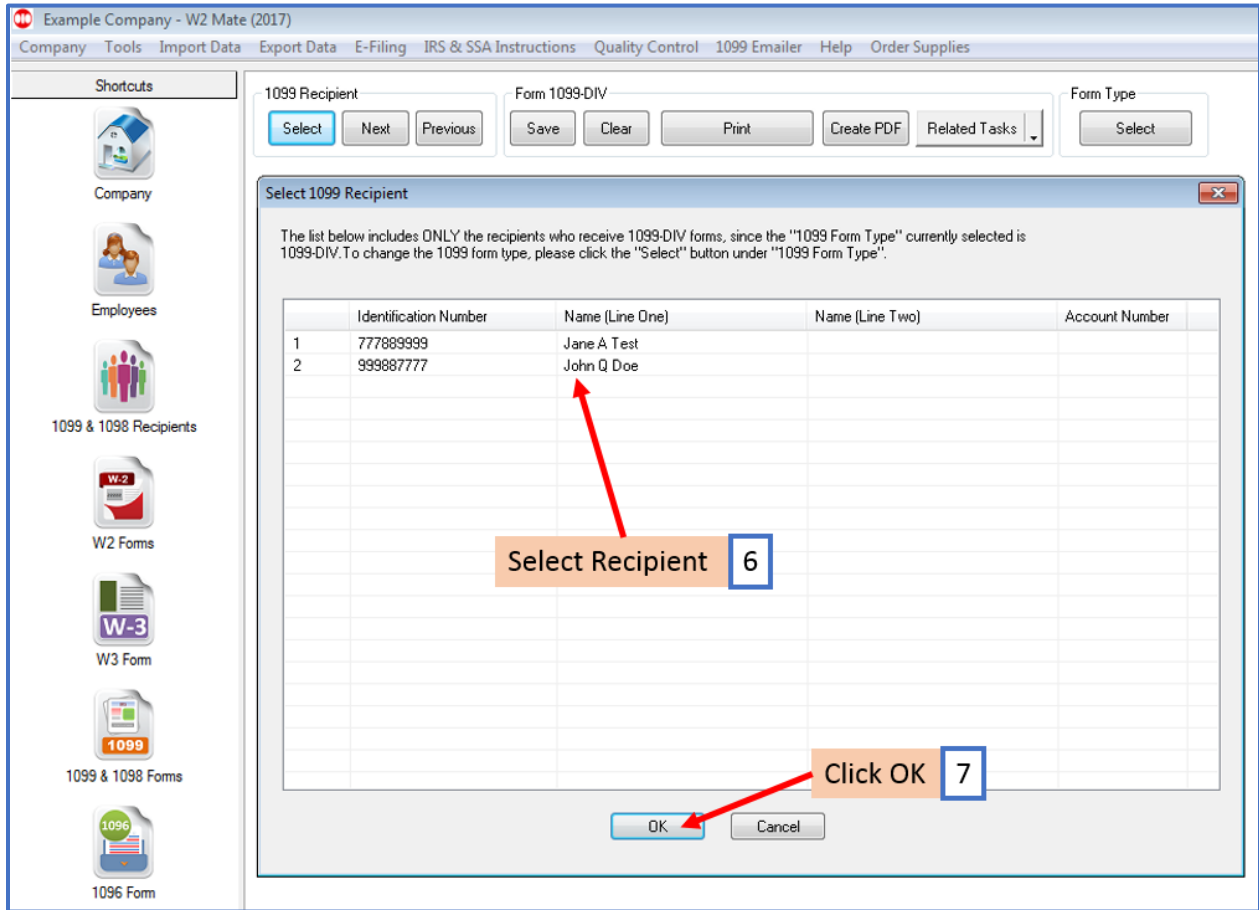
City, state, and ZIP Chicago IL 60605

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

1a Total ordinary dividends	0.00	OMB No. 1545-0110
1b Qualified dividends	0.00	<b>2017</b>
2a Total capital gain distr.	0.00	Form 1099-DIV
2b Unrecap. Sec. 1250 gain	0.00	
2c Section 1202 gain	0.00	
2d Collectibles (28%) gain	0.00	
3 Nondividend distributions	0.00	
4 Federal income tax withheld	0.00	
5 Investment expenses	0.00	
6 Foreign tax paid	0.00	
7 Foreign country or U.S. possession		
8 Cash liquidation distributions	0.00	
9 Noncash liquidation distributions	0.00	
10 Exempt-interest dividends	0.00	
11 Specified private activity bond int. divs.	0.00	
12 State	13 State identification no	14 State tax withheld
		0.00

6. Select Recipient

7. Click OK



The screenshot shows the 'Select 1099 Recipient' dialog box in the W2 Mate software. The dialog contains a table with the following data:

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

Annotations in the image include:

- A red arrow pointing to the 'Select Recipient' button, labeled with a blue box containing the number '6'.
- A red arrow pointing to the 'OK' button, labeled with a blue box containing the number '7'.

8. Edit 1099-DIV Data as needed

9. Click Save

Example Company - W2 Mate (2017)

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

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1099 Recipient Form 1099-DIV

Select Next Previous Save Clear Print Create PDF Related Tasks Select

Click Save 9 Edit Data 8

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

Example Company  
123 Main  
Chicago IL 60605

PAYER'S Federal ID number 12-3456789 RECIPIENT'S ID number 777889999

RECIPIENT'S name Jane A Test

Street address (including apt. no.) 505 Main

City, state, and ZIP Chicago IL 60605

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

1a Total ordinary dividends 0.00  
1b Qualified dividends 0.00  
2a Total capital gain distr. 0.00  
2c Section 1202 gain 0.00  
3 Nondividend distributions 0.00  
6 Foreign tax paid 0.00  
8 Cash liquidation distributions 0.00  
10 Exempt-interest dividends 0.00  
12 State 13 State identification no 14 State tax withheld 0.00

OMB No. 1545-0110  
2017  
Form 1099-DIV

2b Unrecap. Sec. 1250 gain 0.00  
2d Collectibles (28%) gain 0.00  
4 Federal income tax withheld 0.00  
5 Investment expenses 0.00  
7 Foreign country or U.S. possession  
9 Noncash liquidation distributions 0.00  
11 Specified private activity bond int. divs. 0.00

10. Click Yes

The screenshot shows the W2 Mate (2017) software interface. A confirmation dialog box is overlaid on the form, asking "Are you sure you want to save the current fields?". The dialog has "Yes" and "No" buttons. A red arrow points from a callout box labeled "Click Yes" to the "Yes" button. The callout box also contains the number "10".

**1099 Recipient**  
Form 1099-DIV

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

Payer's name, street address, city, state, zip code, and Tel. #  
Example Company  
123 Main  
Chicago IL 60605

1a Total ordinary dividends 0.00  
1b Qualified dividends 0.00

OMB No. 1545-0110  
**2017**  
Form 1099-DIV

2 Unrecap. Sec. 1250 gain

W2 Mate (2017)  
Are you sure you want to save the current fields?  
Yes No

Click Yes 10

PAYER'S Federal ID number 12-3456789  
RECIPIENT'S name Jane A Test  
Street address (including apt. no.) 505 Main  
City, state, and ZIP Chicago IL 60605  
Account number (optional) FATCA Filing REQ 2nd TIN not

6 Foreign tax paid 0.00  
8 Cash liquidation distributions 0.00  
10 Exempt-interest dividends 0.00  
12 State  
13 State identification no  
14 State tax withheld 0.00

7 Foreign country or U.S. possession  
9 Noncash liquidation distributions 0.00  
11 Specified private activity bond int. divs. 0.00

Federal income tax withheld 0.00  
Investment expenses 0.00