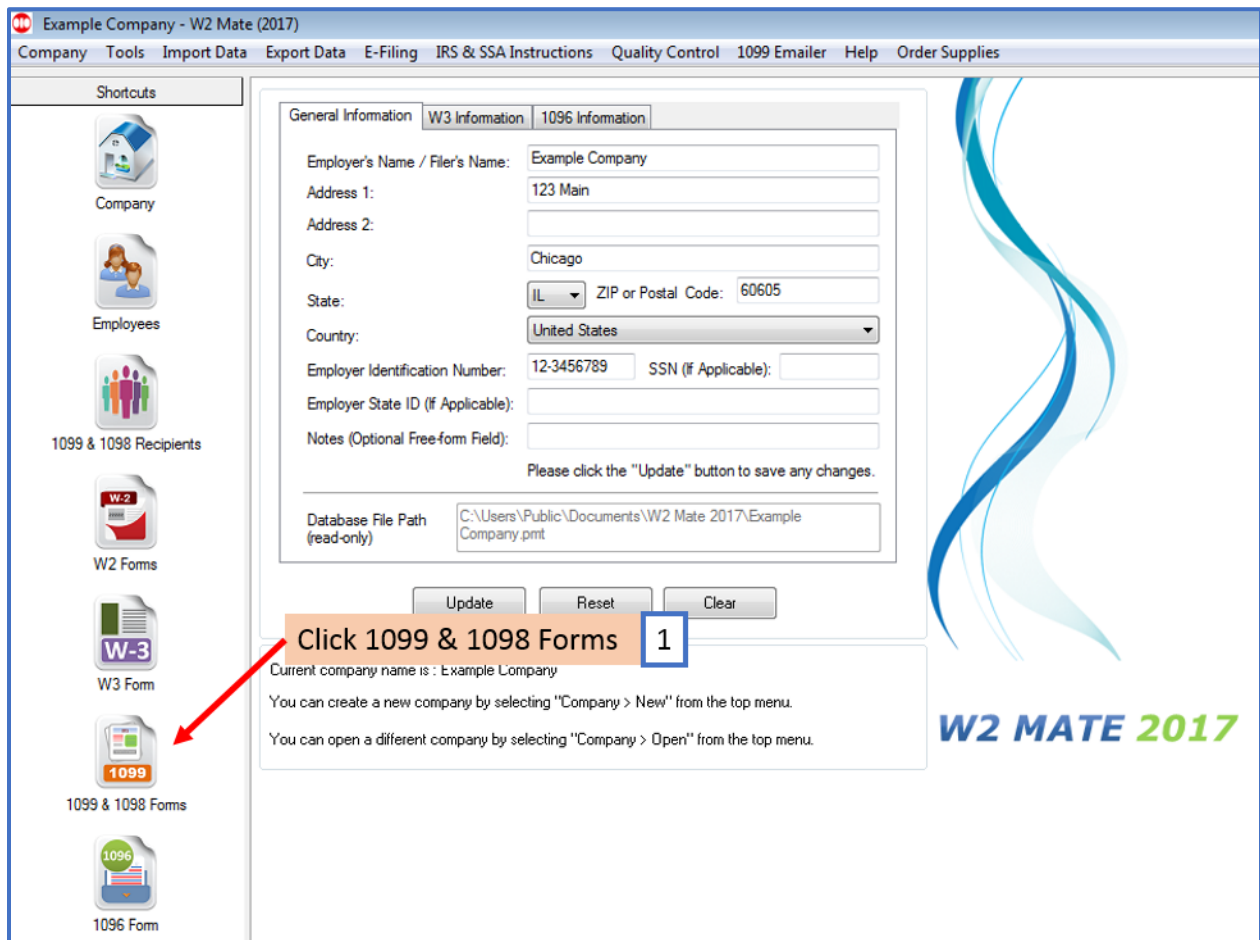


How to Edit Data on a 1099-K Form

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

The screenshot displays the W2 Mate software interface for creating a 1099-K form. The window title is "Example Company - W2 Mate (2017)". The menu bar includes "Company", "Tools", "Import Data", "Export Data", "E-Filing", "IRS & SSA Instructions", "Quality Control", "1099 Emailer", "Help", and "Order Supplies".

On the left side, there is a "Shortcuts" panel with 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-K". It contains several input fields and checkboxes:

- FILER'S name, street address, city, state, zip code, and Tel. #**: Example Company, 123 Main, Chicago, IL, 60605.
- Check to indicate if FILER is a (an):**
 - Payment settlement entity (PSE)
 - Electronic Payment Facilitator /Other 3rd party
- Check to indicate transactions reported are:**
 - Payment card
 - Third party network
- PAYEE'S name**: Jane A Test
- Street address (including apt. no.)**: 505 Main
- City, state, and ZIP**: Chicago, IL, 60605
- PSE'S name and telephone number**: [Empty field]
- Account number (optional)**: [Empty field]
- 2nd TIN not.**:

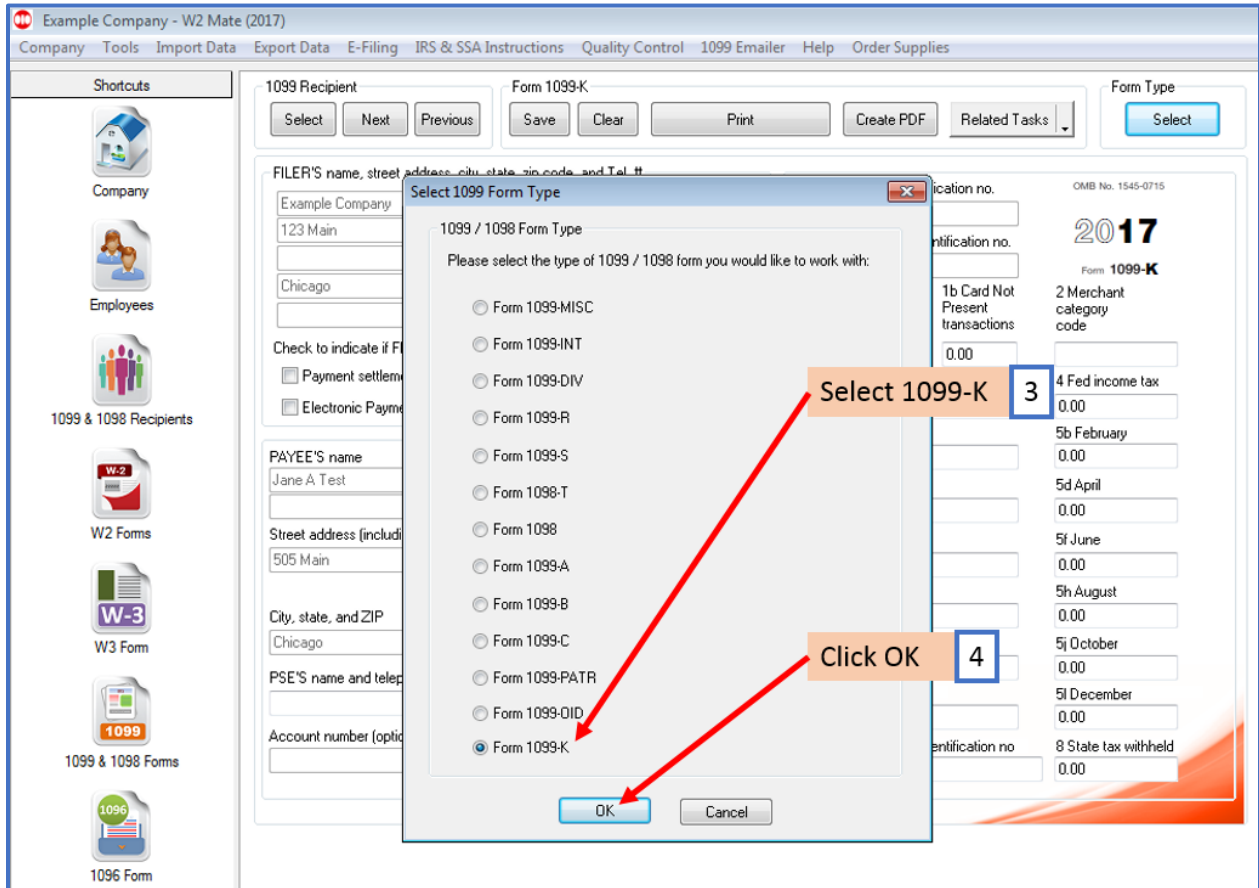
On the right side, there are fields for:

- FILER'S federal identification**: 12-3456789
- PAYEE'S taxpayer identification no.**: 777889999
- Form 1099-K**: 2017
- 1a Gross amount of payment card/3rd party network TXNs**: 0.00
- 1b Card Not Present transactions**: 0.00
- 2 Merchant category code**: [Empty field]
- 3 Number of purchase transactions**: [Empty field]
- 4 Fed income tax**: 0.00
- 5a January**: 0.00
- 5b February**: 0.00
- 5c March**: 0.00
- 5d April**: 0.00
- 5e May**: 0.00
- 5f June**: 0.00
- 5g July**: 0.00
- 5h August**: 0.00
- 5i September**: 0.00
- 5j October**: 0.00
- 5k November**: 0.00
- 5l December**: 0.00
- 6 State**: [Dropdown menu]
- 7 State identification no**: [Empty field]
- 8 State tax withheld**: 0.00

A red arrow points to the "Select" button in the "Form Type" dropdown menu, which is highlighted with a blue box containing the number "2".

3. Select Form 1099-K

4. Click OK



5. Click Select under 1099 Recipient

The screenshot shows the W2 Mate software interface for the 2017 tax year. The main window is titled "Example Company - W2 Mate (2017)". The menu bar includes "Company", "Tools", "Import Data", "Export Data", "E-Filing", "IRS & SSA Instructions", "Quality Control", "1099 Emailer", "Help", and "Order Supplies".

On the left side, there is a "Shortcuts" panel with icons for "Company", "Employees", "1099 & 1098 Recipients", "W2 Forms", "W3 Form", "1099 & 1098 Forms", and "1096 Form".

The main area is titled "1099 Recipient" and "Form 1099-K". It contains several sections:

- Navigation:** "Select", "Next", "Previous", "Save", "Clear", "Print", "Create PDF", "Related Tasks", and "Form Type" buttons.
- FILER'S name, street address, city, state, zip code, and Tel. #:** Fields for name (123 Main), city (Chicago), state (IL), and zip code (60605).
- Check to indicate if FILER is a (an):** Payment settlement entity (PSE), Electronic Payment Facilitator /Other 3rd party.
- Check to indicate transactions reported are:** Payment card, Third party network.
- PAYEE'S name:** Jane A. Test
- Street address (including apt. no.):** 505 Main
- City, state, and ZIP:** Chicago, IL, 60605
- PSE'S name and telephone number:** (empty field)
- Account number (optional):** (empty field) and 2nd TIN not.
- FILER'S federal identification no.:** 12-3456789
- PAYEE'S taxpayer identification no.:** 777889999
- 2017 Form 1099-K:** A grid of fields for reporting transactions by month (January to December) and other categories like "Merchant category code", "Fed income tax", and "State tax withheld".

An orange callout box with the text "Click Select" and a blue box around the number "5" points to the "Select" button in the navigation bar.

6. Select Recipient

7. Click OK

The screenshot shows the 'Select 1099 Recipient' dialog box in the W2 Mate software. The dialog box 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		

A red arrow points to the row for 'Jane A Test' with a callout box that says 'Select Recipient 6'. Another red arrow points to the 'OK' button at the bottom of the dialog box with a callout box that says 'Click OK 7'.

8. Edit 1099-K 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 Mailer Help Order Supplies

Shortcuts

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

1099 Recipient Form 1099-K

Select Next Previous Save Clear Print Create PDF Related Tasks Select

Click Save 9 **Edit Data 8**

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

Example Company
123 Main
Chicago IL 60605

Check to indicate if FILER is a (an):
 Payment settlement entity (PSE)
 Electronic Payment Facilitator /Other 3rd party

Check to indicate transactions reported are:
 Payment card
 Third party network

FILER'S federal identification no.
12-3456789

PAYEE'S taxpayer identification no.
777889999

OMB No. 1545-0715
2017
Form **1099-K**

1a Gross amount of payment card/3rd party network TXNs	1b Card Not Present transactions	2 Merchant category code
0.00	0.00	
3 Number of purchase transactions	4 Fed income tax	
	0.00	
5a January	5b February	
0.00	0.00	
5c March	5d April	
0.00	0.00	
5e May	5f June	
0.00	0.00	
5g July	5h August	
0.00	0.00	
5i September	5j October	
0.00	0.00	
5k November	5l December	
0.00	0.00	
6 State	7 State identification no	8 State tax withheld
		0.00

PAYEE'S name
Jane A Test

Street address (including apt. no.)
505 Main

City, state, and ZIP
Chicago IL 60605

PSE'S name and telephone number

Account number (optional) 2nd TIN not.

10. Click Yes

The screenshot shows the W2 Mate software interface for creating a Form 1099-K. The main window is titled "Example Company - W2 Mate (2017)" and contains a 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, there is a "Shortcuts" sidebar with icons for "Company", "Employees", "1099 & 1098 Recipients", "W2 Forms", "W3 Form", "1099 & 1098 Forms", and "1096 Form".

The main area is divided into sections for "1099 Recipient" and "Form 1099-K". The "1099 Recipient" section includes fields for "FILER'S name, street address, city, state, zip code, and Tel. #", "FILER'S federal identification no.", "PAYER'S taxpayer identification no.", and "Check to indicate if FILER is a (an):" with checkboxes for "Payment settlement entity (PSE)" and "Electronic Payment Facilitator".

The "Form 1099-K" section includes fields for "1a Gross amount of payment card/3rd party network TXNs", "1b Card Not Present transactions", "2 Merchant category code", and a table for monthly amounts (5g July through 5l December). The year "2017" is displayed prominently.

A dialog box titled "W2 Mate (2017)" is overlaid on the screen, asking "Are you sure you want to save the current fields?". The dialog has a yellow warning icon and two buttons: "Yes" and "No". A red arrow points from the "Yes" button to a callout box that says "Click Yes 10".