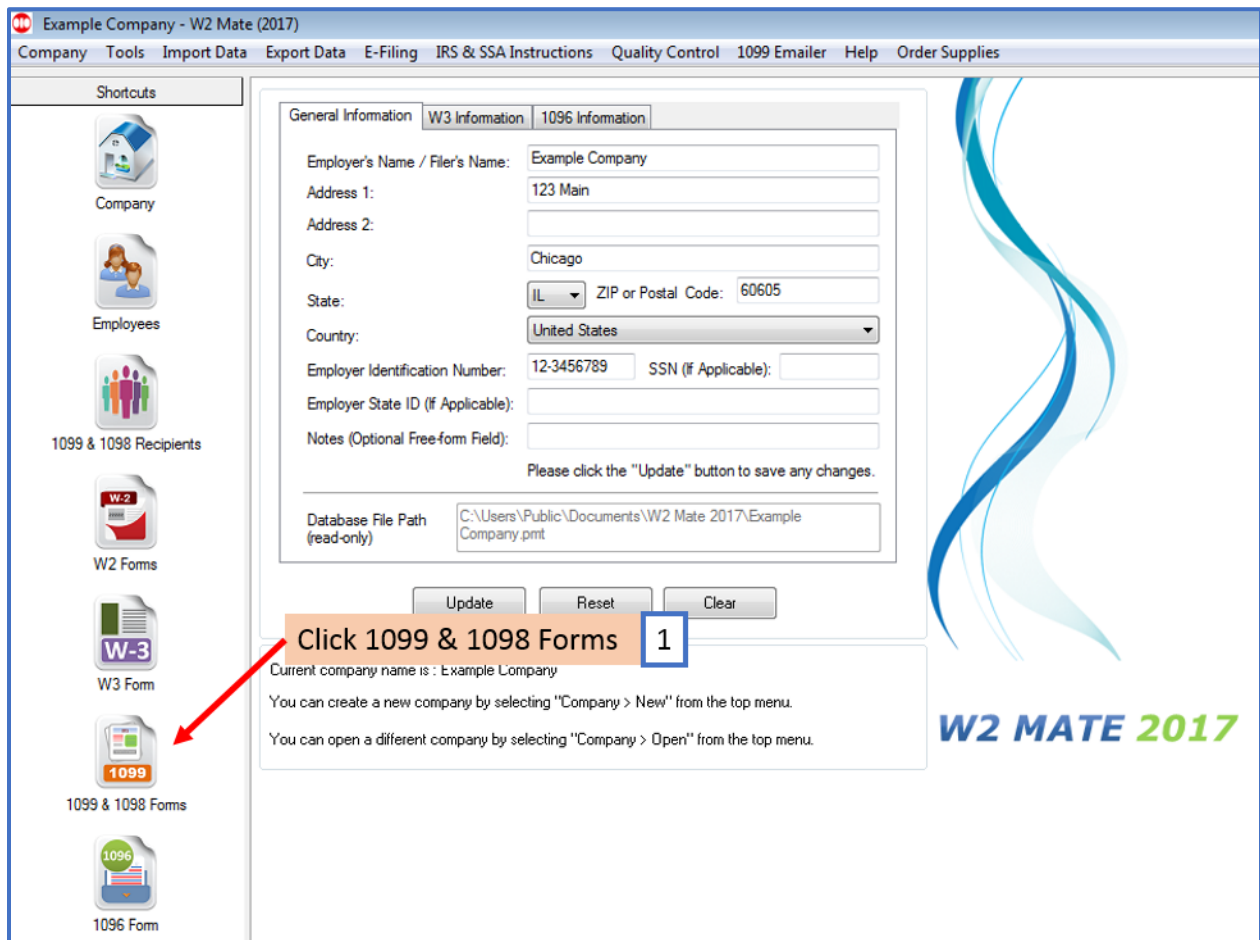


How to Edit Data on a 1099-MISC Form

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-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
123 Main
Chicago IL 60605

PAYER'S Federal ID number 12-3456789 RECIPIENT'S ID number 123456789

RECIPIENT'S name
Bob's Builders

Street address (including apt. no.)
123 Dirt Lane

City, state, and ZIP code
Chicago IL 60605

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

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

1 Rents 0.00
2 Royalties 0.00
3 Other income 0.00
5 Fishing boat proceeds 0.00
7 Nonemployee compensation 1200.00
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

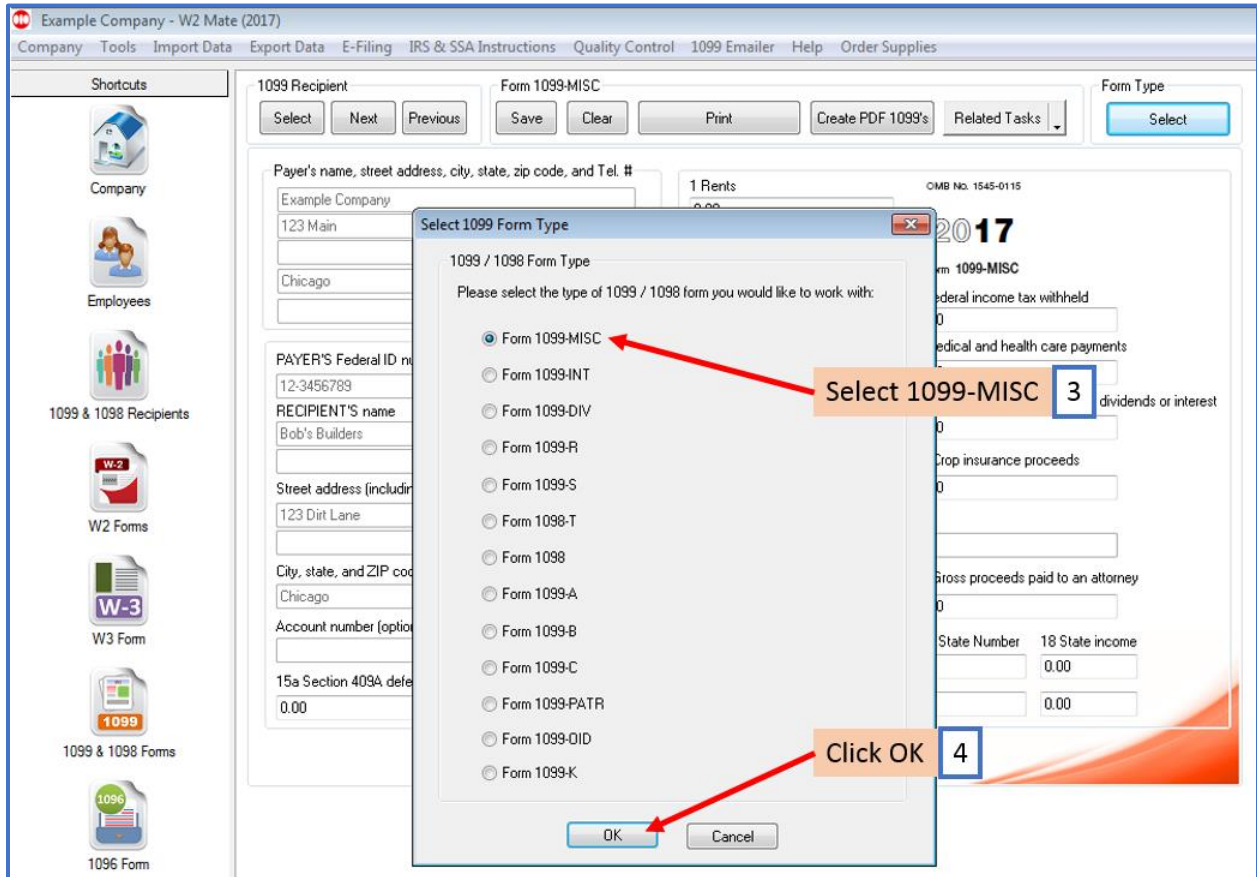
OMB No. 1545-0115
2017
Form 1099-MISC

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

Click Select 2

3. Select Form 1099-MISC

4. Click OK



5. Click Select under 1099 Recipient

The screenshot shows the W2 Mate software interface for the year 2017. 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 divided into two sections: "1099 Recipient" and "Form 1099-MISC".

1099 Recipient Section:

- Buttons: "Select" (highlighted with a red arrow and a blue box containing the number 5), "Next", "Previous", "Save", "Clear", "Print", "Create PDF 1099's", "Related Tasks", and "Form Type" (with a "Select" button).
- Fields: "Payer's name, street address, city, state, zip code, and Tel. #", "PAYER'S Federal ID number" (12-3456789), "RECIPIENT'S ID number" (123456789), "RECIPIENT'S name" (Bob's Builders), "Street address (including apt. no.)" (123 Dirt Lane), "City, state, and ZIP code" (Chicago, IL, 60605), "Account number (optional)", "FATCA Filing REQ", "2nd TIN not.", "15a Section 409A deferrals" (0.00), and "15b Section 409A income" (0.00).

Form 1099-MISC Section:

- Fields: "1 Rents" (0.00), "2 Royalties" (0.00), "3 Other income" (0.00), "5 Fishing boat proceeds" (0.00), "7 Nonemployee compensation" (1200.00), "9 Payer made direct sales of \$5,000 or more of consumer products to a buyer for resale" (checkbox), "11" (0.00), "13 Excess golden parach." (0.00), "16 State tax withheld" (0.00), "17 State / Payer's State Number" (dropdown), "18 State income" (0.00).
- Other fields: "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).

Additional information: "OMB No. 1545-0115", "2017", and "Form 1099-MISC".

6. Select Recipient

7. Click OK

The screenshot shows the W2 Mate software interface. The main window is titled "Example Company - W2 Mate (2017)". The "1099 Recipient" section is active, showing "Form 1099-MISC" and "Form Type" set to "1099-MISC". A "Select 1099 Recipient" dialog box is open, displaying a list of recipients. The list has the following data:

	Identification Number	Name (Line One)	Name (Line Two)	Account Number
1	123456789	Bob's Builders		
2	777889999	Jane A Test		
3	999887777	John Q Doe		
4	987654321	Thomas Trains		

Annotations in the image include a red arrow pointing to the "Select Recipient" button with a callout box containing the number "6", and another red arrow pointing to the "OK" button with a callout box containing the number "7".

8. Edit 1099-MISC 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

1099 Recipient Form 1099-MISC

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

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 code
Chicago IL 60605

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

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

1 Rents 0.00 OMB No. 1545-0115
2 Royalties 0.00 **2017**
Form 1099-MISC
3 Other income 0.00 4 Federal income tax withheld 0.00
5 Fishing boat proceeds 0.00 6 Medical and health care payments 0.00
7 Nonemployee compensation 0.00 8 Substitute payments in lieu of dividends or interest 0.00
9 Payer made direct sales of \$5,000 or more of consumer products to a buyer for resale 10 Crop insurance proceeds 0.00
11 0.00 12
13 Excess golden parach. 0.00 14 Gross proceeds paid to an attorney 0.00
16 State tax withheld 0.00 17 State / Payer's State Number 18 State income 0.00
0.00 0.00

Click Save 9 Edit Data 8

10. Click Yes

The screenshot shows the W2 Mate software interface for creating a 1099-MISC form. A confirmation dialog box is displayed in the center, asking "Are you sure you want to save the current fields?". A red arrow points from the "Click Yes" text to the "Yes" button in the dialog. The background form is partially obscured but shows fields for Payer's name, address, and various income and withholding amounts. The year 2017 is prominently displayed.

1099 Recipient Form 1099-MISC

1099 Recipient: 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
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 apartment or suite number): 505 Main

City, state, and ZIP code: Chicago IL 60605

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

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

1 Rents: 0.00
2 Royalties: 0.00
3 Other income: 0.00
5 Fishing boat proceeds: 0.00

4 Federal income tax withheld: 0.00
6 Medical and health care payments: 0.00
7 Dividends or interest: 0.00
8 Crop insurance proceeds: 0.00
9 Other income: 0.00
14 Gross proceeds paid to an attorney: 0.00

16 State tax withheld: 0.00 17 State / Payer's State Number: 18 State income: 0.00

2017 Form 1099-MISC

Click Yes 10