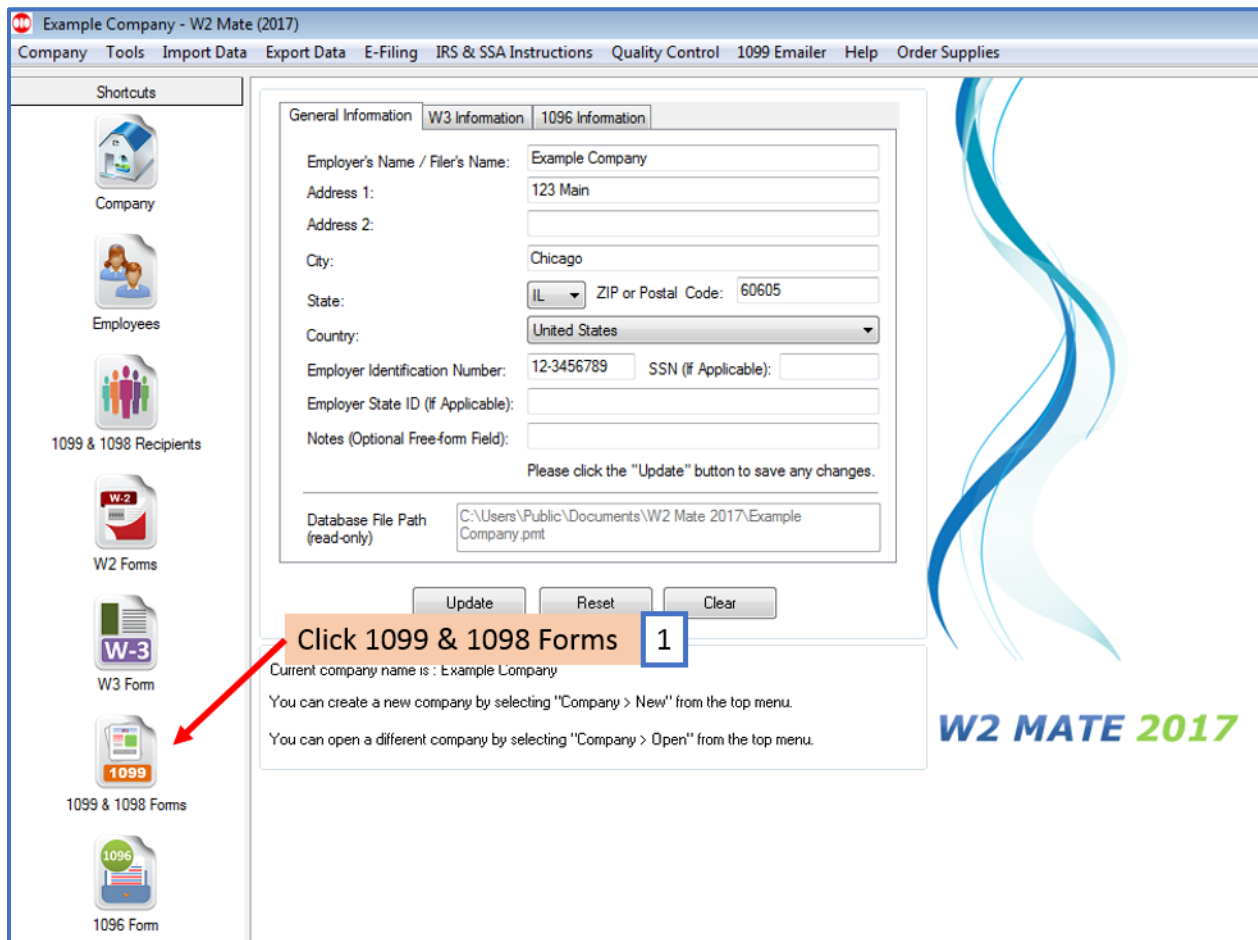


# How to Edit Data on a 1099-S Form

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-S 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 E-mailer", "Help", and "Order Supplies".

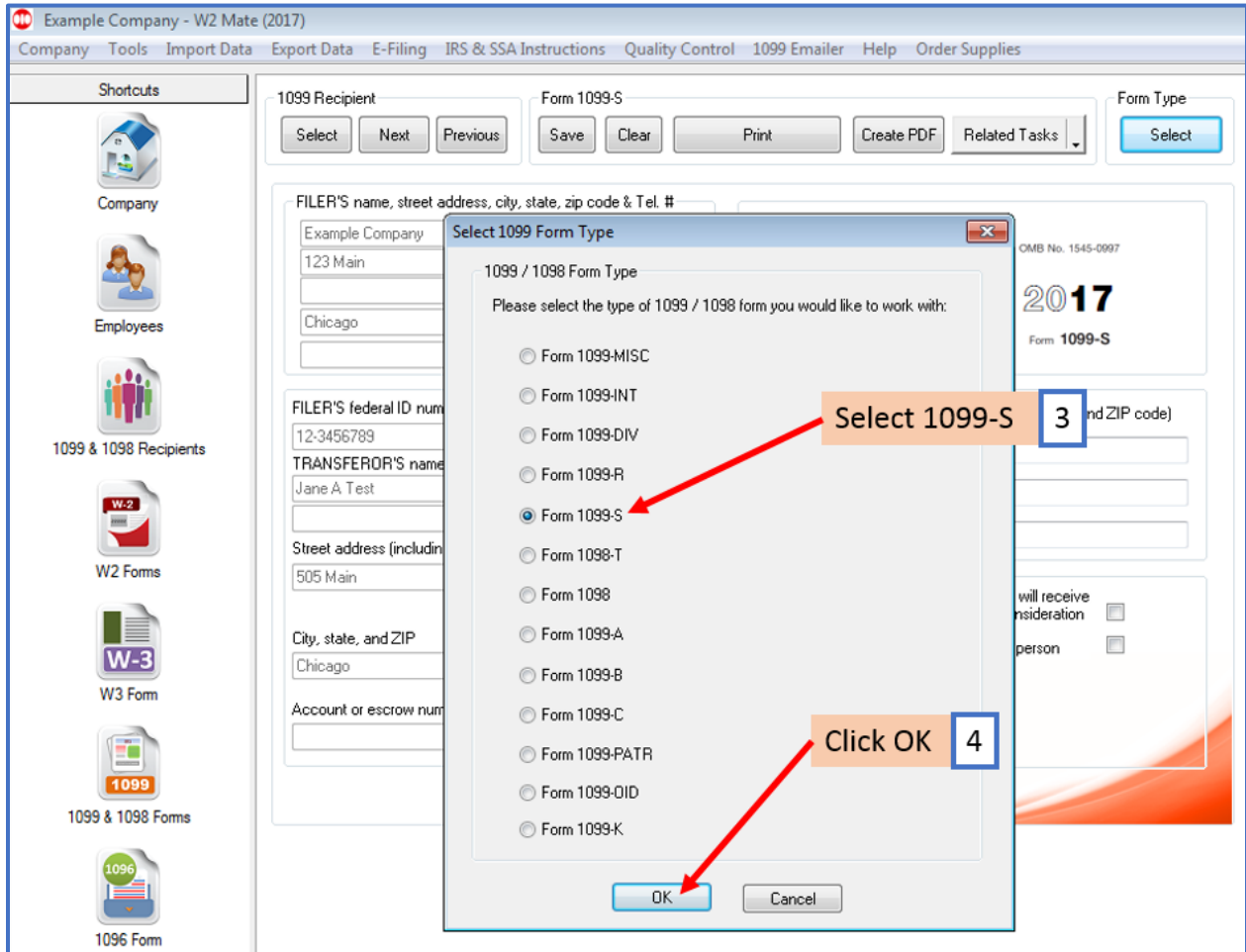
On the left side, there is a "Shortcuts" panel with icons for "Company", "Employees", "1099 & 1098 Recipients", "W2 Forms", "W3 Form", "1099 & 1098 Forms", and "1096 Form".

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

- Navigation:** Buttons for "Select", "Next", "Previous", "Save", "Clear", "Print", "Create PDF", "Related Tasks", and a "Form Type" dropdown menu with a "Select" button. A red arrow points to this "Select" button, which is highlighted with a blue box and the text "Click Select 2".
- FILER'S name, street address, city, state, zip code & Tel. #:** Fields for "Example Company", "123 Main", "Chicago", "IL", and "60605".
- 1 Date of closing (mm/dd/yyyy):** A field with "2017" entered. A "Form 1099-S" label is also present.
- 2 Gross proceeds:** A field with "0.00" entered.
- FILER'S federal ID number:** "12-3456789".
- TRANSFEROR'S ID number:** "777889999".
- TRANSFEROR'S name:** "Jane A. Test".
- Street address (including apt. no.):** "505 Main".
- City, state, and ZIP:** "Chicago", "IL", "60605".
- Account or escrow number (see instructions):** An empty field.
- 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".

3. Select Form 1099-S

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 top 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-S". It contains several sections:

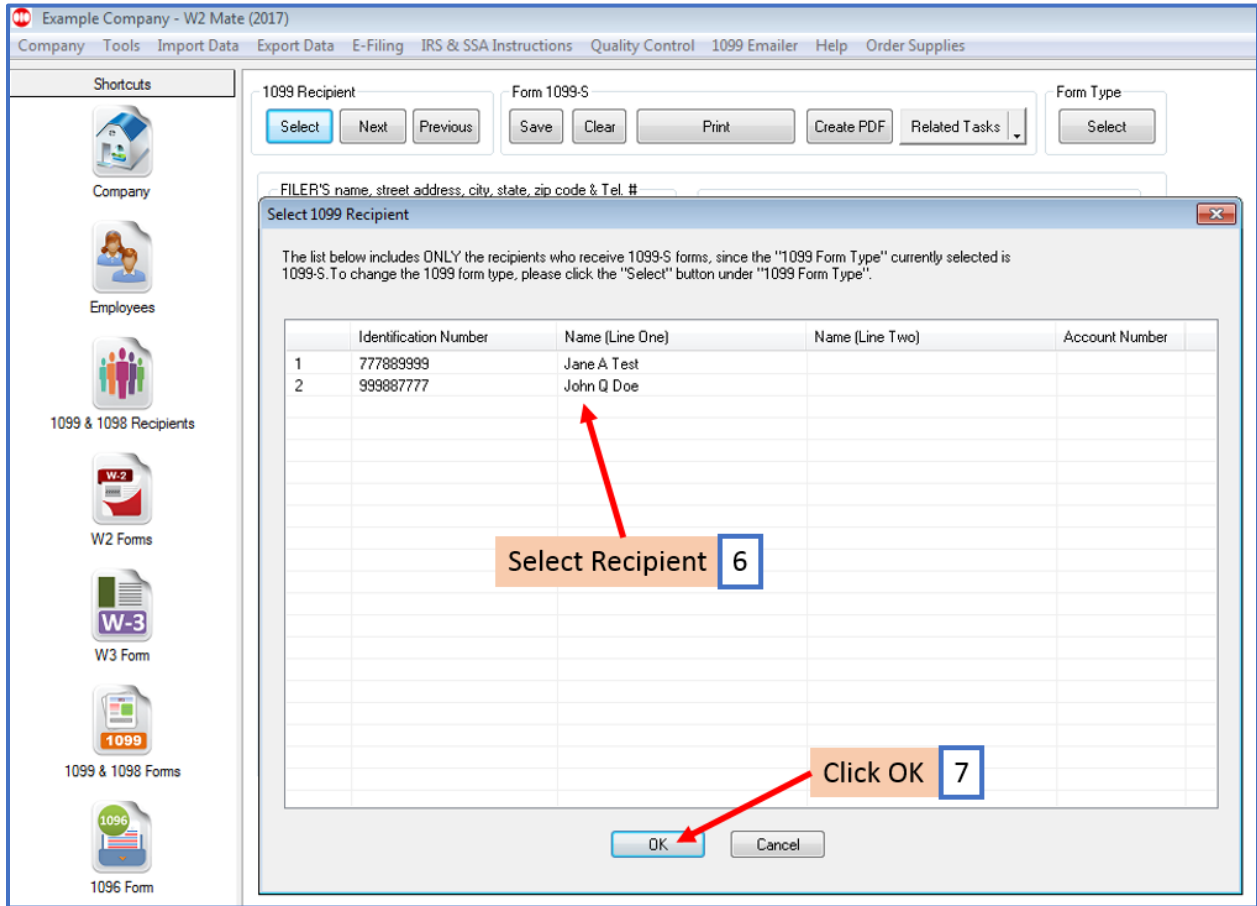
- Buttons:** "Select", "Next", "Previous", "Save", "Clear", "Print", "Create PDF", "Related Tasks", and "Form Type" (with a "Select" button).
- Address Field:** A text input field containing "123 Main", "Chicago", "IL", and "60605". A blue box highlights the number "5" in the address field, with a red arrow pointing to the "Select" button. A callout box says "Click Select 5".
- 1 Date of closing (mm/dd/yyyy):** A text input field.
- 2 Gross proceeds:** A text input field containing "0.00".
- 3 Address or legal description (including city, state, and ZIP code):** A text input field.
- 4 Check here if the transferor received or will receive property or services as part of the consideration:** A checkbox.
- 5 Check here if the transferor is a foreign person:** A checkbox.
- 6 Buyer's part of real estate tax:** A text input field containing "0.00".

Additional fields include:

- FILER'S federal ID number:** 12-3456789
- TRANSFEROR'S ID number:** 777889999
- TRANSFEROR'S name:** Jane A Test
- Street address (including apt. no.):** 505 Main
- City, state, and ZIP:** Chicago, IL, 60605
- Account or escrow number (see instructions):** (empty)

6. Select Recipient

7. Click OK



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 Form 1099-S Form Type

Select Next Previous Save Clear Print Create PDF Related Tasks Select

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

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	777889999	Jane A Test		
2	999887777	John Q Doe		

Select Recipient 6

Click OK 7

OK Cancel

8. Edit 1099-S Data as needed

9. Click Save

Example Company - W2 Mate (2017)

Company Tools Import Data Export Data E-Filing IRS & SSA Instru **Click Save** 9 99 Emailer 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 Select

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

Example Company  
123 Main  
Chicago IL 60605

FILER'S federal ID number TRANSFEROR'S ID number  
12-3456789 777889999

TRANSFEROR'S name  
Jane A Test

Street address (including apt. no.)  
505 Main

City, state, and ZIP  
Chicago IL 60605

Account or escrow number (see instructions)

1 Date of closing (mm/dd/yyyy) OMB No. 1545-0097  
2 Gross proceeds **2017**  
0.00 Form 1099-S

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

**Edit Data** 8

10. Click Yes

The screenshot displays the W2 Mate software interface for creating a Form 1099-S. 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 E-mailer", "Help", and "Order Supplies". On the left, a "Shortcuts" sidebar lists various form types: 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-S". It contains several input fields for recipient information, including name, address, city, state, and zip code. A "Date of closing" field is set to "10/10/2017". The "Gross proceeds" field is set to "0.00". A "Warning" dialog box is overlaid on the form, asking "Are you sure you want to save the current fields?". The dialog box has a yellow warning icon and two buttons: "Yes" and "No". A red arrow points from the "Yes" button to the "Click Yes" text in the instruction "10. Click Yes". The "Form Type" dropdown menu is set to "Form 1099-S".