

How to Edit and Save Data on 1099 & 1098 Forms

Make sure you have the correct Company open inside W2 Mate

1. Click 1099 & 1098 Forms in Shortcuts
2. Click Select under Form Type

The screenshot shows the W2 Mate software interface for editing a 1099-MISC 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".

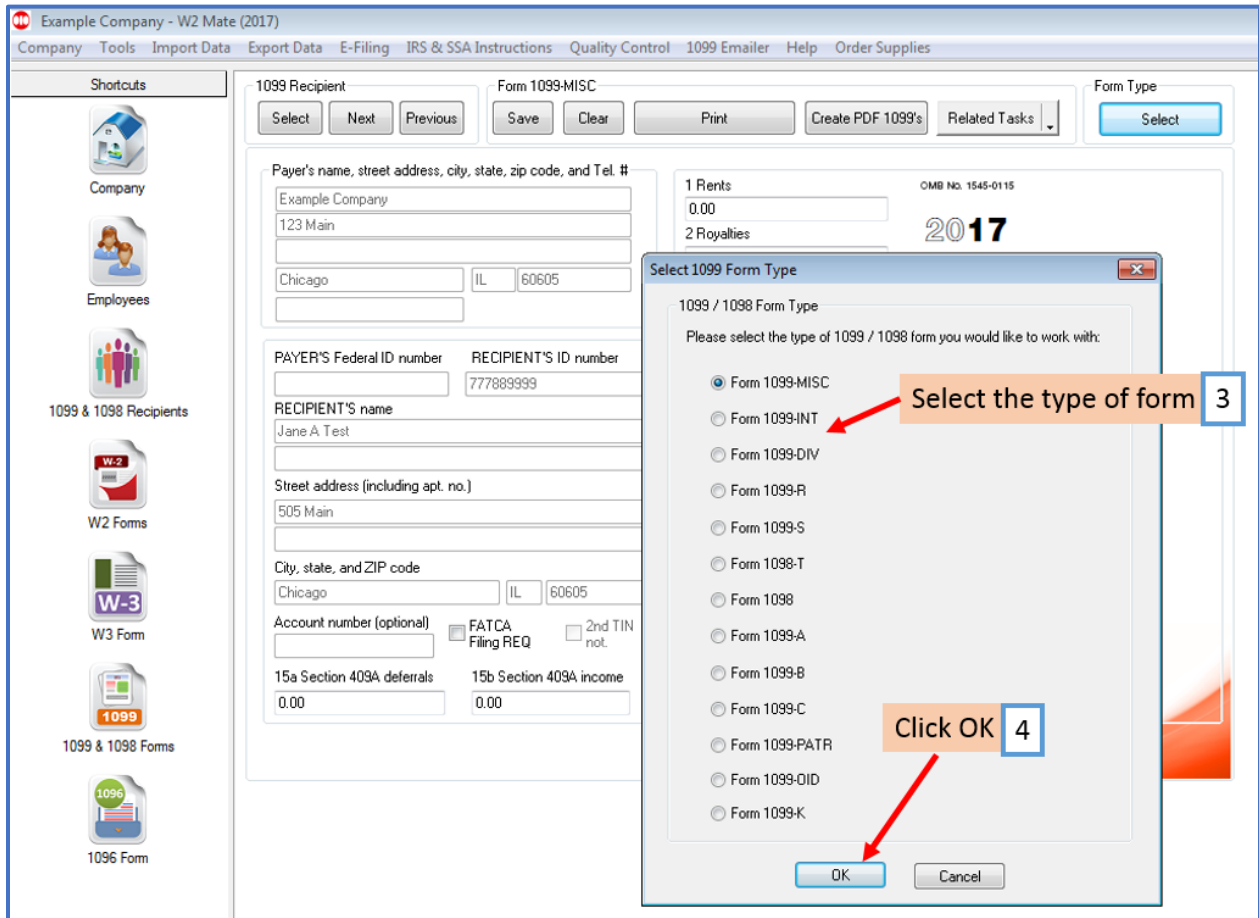
Shortcuts Panel (Left): Contains icons for "Company", "Employees", "1099 & 1098 Recipients", "W2 Forms", "W3 Form", "1099 & 1098 Forms", and "1096 Form". A red arrow points from the "1099 & 1098 Forms" icon to the "Click 1099 & 1098 Forms" annotation (1).

Main Form Area:

- 1099 Recipient:** Includes fields for Payer's name, address, city, state, and zip code. Example: "Example Company", "123 Main", "Chicago", "IL", "60605".
- Form 1099-MISC:** Includes fields for PAYER'S Federal ID number, RECIPIENT'S ID number (777889999), RECIPIENT'S name (Jane A. Test), Street address, 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 Data:** Fields 1 through 18 for various income and withholding amounts, all currently set to 0.00. Includes "2017" and "Form 1099-MISC" text.
- Form Type:** A dropdown menu with a "Select" button. A red arrow points to this button with the annotation "Click Select" (2).

3. Select the correct 1099/1098 form

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

Shortcuts

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

1099 Recipient Form 1099-B

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 Co
123 Main
Chicago IL 60605

PAYER'S Federal ID number RECIPIENT'S ID number
999887777

RECIPIENT'S name
John Q Doe

Street address (including apt. no.)
101 Front

City, state, and ZIP
Chicago IL 60605

Account number (optional) 2nd TIN not
CUSIP number

14 State name 15 State ID no. 16 State tax WH
0.00

Applicable check box on Form 8949

2017 Form 1099-B

1a Description of property (Example 100 sh. XYZ Co.)

1b Date acquired (mm/dd/yyyy) 1c Date sold or disposed (mm/dd/yyyy)

1d Proceeds 1e Cost or other basis
0.00 0.00

1f Accrued market discount 1g Wash sale loss disallowed
0.00 0.00

2 Short-term Long-term Ordinary 3 Basis reported to IRS

4 Federal income tax withheld 5 Check if noncovered security
0.00

6 Reported to IRS: 7 Loss not allowed based on amt in 1d
Gross proceeds Net proceeds

8 Profit or (loss) realized in 2017 on closed contracts 9 Unrealized profit or (loss) on open contracts - 12/31/2016
0.00 0.00

10 Unrealized profit or (loss) on open contracts - 12/31/2017 11 Aggregate profit or (loss) on contracts
0.00 0.00

12 Check if proceeds from collectibles 13 Bartering
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	987654321	Form Recipient		
2	777889999	Jane A Test		
3	999887777	John Q Doe		

Callout 6: Select Recipient 6 (points to the first row)

Callout 7: Click OK 7 (points to the OK button)

8. Edit Data as needed

9. Click Save

The screenshot displays the W2 Mate software interface for editing a 1099-MISC 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 sidebar, under "Shortcuts", there are icons for "Company", "Employees", "1099 & 1098 Recipients", "W2 Forms", "W3 Form", "1099", and "1096 Form". A red arrow labeled "8" points to the "Employees" icon.

The main form area is titled "1099 Recipient" and "Form 1099-MISC". At the top, there are buttons for "Select", "Next", "Previous", "Save", "Clear", "Print", "Create PDF 1099's", "Related Tasks", and "Form Type". A red arrow labeled "9" points to the "Save" button.

The form fields are as follows:

- Payer's name, street address, city, state, zip code, and Tel. #**
Example Company
123 Main
Chicago IL 60605
- PAYER'S Federal ID number**: [] **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

On the right side of the form, there are several sections:

- 1 Rents**: 0.00
- 2 Royalties**: 0.00
- 3 Other income**: 0.00
- 5 Fishing boat proceeds**: 0.00
- 7 Nonemployee compensation**: 0.00
- 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

Additional information on the right:

- 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
- 17 State / Payer's State Number**: []
- 18 State income**: 0.00

10. Click Yes

The screenshot shows the W2 Mate (2017) software interface. 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", "W-2 Forms", "W-3 Form", "1099 & 1098 Forms", and "1096 Form". The main area is titled "1099 Recipient" and "Form 1099-MISC". It features a "Save" button highlighted in blue, along with "Next", "Previous", "Clear", "Print", "Create PDF 1099's", and "Related Tasks" buttons. The form contains various input fields for payer and recipient information, including names, addresses, and IDs. A "2017" year selector is visible. A modal dialog box titled "W2 Mate (2017)" is open in the center, displaying a warning icon and the text "Are you sure you want to save the current fields?". The dialog has "Yes" and "No" buttons. A red arrow points from the "Click Yes" text to the "Yes" button. A blue box with the number "10" is also present near the dialog.

The edited data entered will be saved