

How to Move to the Next Recipient

Make sure you have the correct Company open inside W2 Mate

1. Click 1099 & 1098 Forms in Shortcuts
2. Click Next until you get to the Recipient you want

The screenshot shows the W2 Mate software interface for the year 2017. The title bar reads "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 is a "Shortcuts" sidebar with icons for Company, Employees, 1099 & 1098 Recipients, W2 Forms, W3 Form, 1099 & 1098 Forms (highlighted with a red arrow and a box labeled "1"), and 1096 Form. The main area displays the "1099 Recipient" form for "Form 1099-MISC". The form header has buttons: Select, Next (highlighted with a red arrow and a box labeled "2"), Previous, Save, Clear, Print, Create PDF 1099's, Related Tasks, and Form Type (Select). The form fields include: Payer's name, street address, city, state, zip code, and Tel. # (Example Company, 123 Main, Chicago, IL, 60605); PAYER'S Federal ID number (999887777); RECIPIENT'S ID number (999887777); RECIPIENT'S name (John Q. Doe); Street address (including apt. no.) (101 Front); City, state, and ZIP code (Chicago, IL, 60605); 15a Section 409A deferrals (0.00); 15b Section 409A income (0.00); and a grid of 18 other income and withholding categories, all currently set to 0.00. The year "2017" is prominently displayed in the center.