

How to Select a Recipient

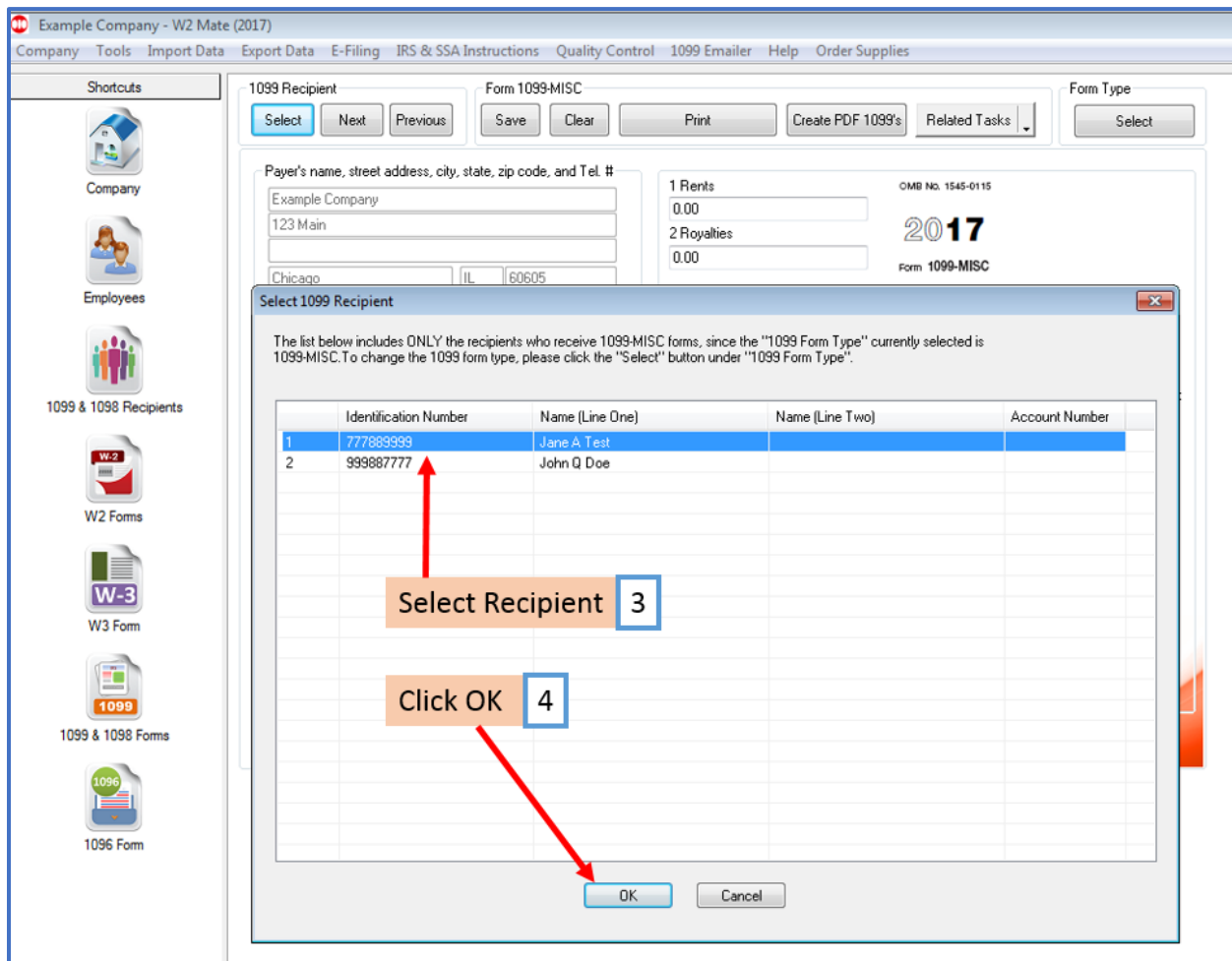
Make sure you have the correct Company open inside W2 Mate

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

The screenshot displays the W2 Mate software interface for 'Example Company - W2 Mate (2017)'. The interface includes a menu bar with options like 'Company', 'Tools', 'Import Data', 'Export Data', 'E-Filing', 'IRS & SSA Instructions', 'Quality Control', '1099 E-mailer', 'Help', and 'Order Supplies'. A 'Shortcuts' sidebar on the left contains icons for 'Company', 'Employees', '1099 & 1098 Recipients', 'W2 Forms', 'W3 Form', '1099 & 1098 Forms', and '1096 Form'. The main window is titled '1099 Recipient' and 'Form 1099-MISC'. It features a 'Select' button highlighted with a blue box and a red arrow, and a 'Click Select' callout with the number '2'. Below this, there are input fields for 'Payer's name, street address, city, state, zip code, and Tel. #', 'PAYER'S Federal ID number', 'RECIPIENT'S ID number', 'RECIPIENT'S name', 'Street address (including apt. no.)', 'City, state, and ZIP code', '15a Section 409A deferrals', and '15b Section 409A income'. A 'Click 1099 & 1098 Forms' callout with the number '1' and a red arrow points to the '1099 & 1098 Forms' icon in the sidebar. The right side of the form contains a grid of 18 numbered fields for various income and tax amounts, with '2017' and 'Form 1099-MISC' displayed prominently.

3. Select the Recipient

4. Click OK



The information for the Recipient you selected will appear on screen