There are three types of 1099's the system will track, Miscellaneous, Interest and Dividend. The form type is selected in Vendor Maintenance. The Default form can be selected in Vendor Maintenance; however, multiple types can be tracked for a vendor.

How to Setup 1099 Processing:

Click on Accounts Payable -> Setup -> Accounts Payable Options. Click the Check Box for 1099 Reporting to turn the feature on. Then enter the Default 1099 Calendar Year.

see Accounts Payable Options (TST) 10/20/2014	? _ 🗆 🗙	
1. Main 2. Additional 3. Entry 4. Printing 5. History 6. ACH		
Accounts Payable Divisions Fiscal Period Current Fiscal Year Current Period	2010 💌	
Aging Categories to Use for Invoices Days		
Aging Categories 30 Days 45 Days 60 Days 90 Days	2010	\mathcal{A}
Direlau General I edger		
Default Invoice Display Descending Invoice Date Bank Reconciliation		
Display Invoices with Zero Balance V Job Cost		
Display Cleared Checks in Vendor Maintenance		
Sales Tax Reporting		
	ancel 🔒 🕜	

Click on the History tab. Enter the number of Years to Retain 1099 Payment History.

🕫 Accounts Pa	yable Options (1	TST) 10/20/20	14			? <u> </u>
<u>1</u> . Main	2. Additional	<u>3</u> . Entry	<u>4</u> . Printing	<u>5</u> . History	<u>6</u> . ACH	
Vendor Audit- Vendor Chang Track Addition	jes to Track ns in Detail	None		Purchases Histor Years to Retain V Include Sales Ta	y	2*
-Invoice/Payme Track Detailed Retain Comme	ent History d Invoice/Payment ent Lines for Invoice	History es		Years to Retain 1	099 Payment History	7.
					Accept C	ancel 🚑 🕜

Click on Accounts Payable -> Main -> Vendor Maintenance. Select the vendor that you need to set up as a 1099 vendor. Click on the Additional Tab.

Sendor Maintenance (TST) 10/20/2014	
Vendor No. 01-ALLCLIM . Name Allclimate Maintenance	Copy From Renumber
1. Main 2. Additional 3. Statistics 4. Summa	ary <u>5</u> . History <u>6</u> . Invoices <u>7</u> . Transactions <u>8</u> . Checks <u>9</u> . P/Os
Comment Vendor Status Inactive Reason Data Entry G/L Account Equipment maintenance	Use P/O Receipt of Invoice Entry for this Vendor Primary Purchase Address 1099 Form Vendor Type Default Form None Vendor Type Invoice ID No
Separate Check	Default Box No. Misc Box 9
Printing Sort ALLCLIMATE Batch Fax	

Click the down arrow at Vendor Type and select Business or Individual.

⁸⁰⁹ Vendor Maintenance (TST) 10/20/2014	
Vendor No. 01-ALLCLIM Name Allclimate Maintenance 1. Main 2. Additional 3. Statistics 4. Summa	Copy From <u>Benumber</u> More •
Comment Vendor Status Inactive Reason Data Entry G/L Account 525-00-03 Equipment maintenance Separate Check	Use P/D Receipt of Invoice Entry for this Vendor Primary Purchase Address 1099 Form Vendor Type None Default Form Taxpayer ID No. Individual Default Box No. Individual Default Box No. Individual Default Box 9 Individual
Printing Sort ALLCLIMATE Batch Fax	Accept Cancel Delete 🖶 🕢

Click the down arrow at Default Form and select the form type for this vendor.

	~
^{sop} Vendor Maintenance (TST) 10/20/2014	
Vendor No. 01-ALLCLIM	Copy From <u>B</u> enumber More •
<u>1</u> . Main <u>2</u> . Additional <u>3</u> . Statistics <u>4</u> . Summa	ary <u>5</u> , History <u>6</u> , Invoices <u>7</u> , Transactions <u>8</u> , Checks <u>9</u> , P/Os
Comment Vendor Status Inactive Reason Data Entry G/L Account 525-00-03 Equipment maintenance Separate Check Printing Sort ALLCLIMATE Batch Fax	Use P/0 Receipt of Invoice Entry for this Vendor Primary Purchase Address 1099 Form Vendor Type Individual Default Form Miscellaneous Default Box No. Interest Dividend Misc Box 9

Enter the vendors Social Security number if the Vendor Type is an Individual or the Federal ID number if the Vendor Type is Business.

🔓 Vendor Maintenance (TST) 10/20/2014	
Vendor No. 01-ALLCLIM	Copy From
1. Main 2. Additional 3. Statistics 4. Summa	ry <u>5</u> . History <u>6</u> . Invoices <u>7</u> . Transactions <u>8</u> . Checks <u>9</u> . P/Os
Comment Vendor Status Inactive Reason Data Entry G/L Account 525-00-03 Equipment maintenance Separate Check	Use P/D Receipt of Invoice Entry for this Vendor Primary Purchase Address 1099 Form Vendor Type Individual Default Form Miscellaneous Social Sec No. 111-22-353 Default Box No. 1 Misc Box 9 1099 History
Printing Sort ALLCLIMATE Batch Fax	
	Accept Cancel Delete 🖨 🕢

IMPORTANT!! Select the CORRECT Box No. Then click Accept. The system will now automatically track 1099 information during Invoice Data Entry.

^{sage} Vendor Maintenance (TST) 10/20/2014	
Vendor No. 01-ALLCLIM	Copy From) <u>B</u> enumber More •
<u>1</u> . Main <u>2</u> . Additional <u>3</u> . Statistics <u>4</u> . Summa	ary <u>5</u> . History <u>6</u> . Invoices <u>7</u> . Transactions <u>8</u> . Checks <u>9</u> . P/Os
Comment Vendor Status Inactive Reason Data Entry G/L Account 525-00-03 Equipment maintenance Separate Check	Use P/0 Receipt of Invoice Entry for this Vendor Primary Purchase Address Vendor Type Individual Indititatio Individual Individu
Sort ALLCLIMATE Batch Fax	5 6 7 8
	13 14 15a 15b 16 16 15 16 15 16 16 10 13 14 14 15 14 15 16 16 16 16 16 16 16 16 16 16

Invoice Data Entry:

Note: Information for invoices that qualify for 1099 payments can be entered in both Accounts Payable and Purchase Order – Receipt of Invoice.

If you have an invoice where part of it qualifies for 1099, but the other part does not, you have to enter two different invoices.

Click on Accounts Payable -> Main -> Invoice Data Entry. Select vendor and enter Invoice number. The 1099 information for this vendor will be displayed in the lower right hand corner. Enter the line information as usual.

^{sage} A/P Invoice Data Entry (TST) 10/20/2014	
Vendor No. 01-ALLCLIM Name Allclimate Maintenance Invoice No. 45687 1. Header 2. Lines	⊻endor
Invoice Date 10/20/2014 100 10/20/2014 100 100 100 100 100 100 100 100 100	Improvide 01
	Hold Payment Separate Check Comment 1099 Payment Form Miscellaneous Sox
	Accept Cancel Delete 🖶 🕢

The 1099 information will appear on the Invoice Register.

Accounts Pa Journal Post Register Nur	iyable Invoic ting Date: 10 nber:AP-000	e Register)/20/2014 020				ABC Distri	bution a	nd Serv	vice Corp. (TST)
Division Number:	01 TRADE ACC	OUNTS PAYABI	.E		_/				
Vendor Number Invoice Number	Invoice	Dates Due	Discount	Invoice Amount	K	Disc	count		Distribution Amount
ALLCLIM 45687	Allclimate Maint	enance		1099 Form: M	Box: 7	Separate Check: No			
	10/20/2014 G/L Account:	10/30/2014 525-00-03	Equ Division 01 Total:	650.00 uipment maintenance 650.00			0.00		650.00
						Prepaid Amount:		0.00	
			Report Total:	650.00		Prepaid Amount:	0.00	0.00	650.00

NOTE: 1099's are based on Paid invoices. So you will **not** see the 1099 information from the invoice that was just entered until that invoice is **Paid**.

4	See Vendor Maintenance (TST) 10/20/2014					
ı	Vendor No. 01- Name A	ALLCLIM	_ 0 ×	Copy From		
:	1. Main 1099 Form Type Miscellaneous Comment Calendar Year 2014					nsactions 8.Checks 9.P/Os
	Vendor Status		Вох	Year to Date =		
	Inactive Heaso	1	1 Rent	.00		
	-Data Entry	2	2 Royalties	.00		
	G/L Account	3	3 Other income	.00		
		4	4 Fed income tax	.00		
1	Separate Checl	5	5 Fishing boat	.00		
		6	6 Medical care	.00		1099 History
	L	7	7 Nonemployee	.00		
:	Printing	8	8 Substitute pymnt	.00		
1	Sort A	9	10 Crop Insurance	.00		
•	Batch Fax	10	13 Excess Parachute Pmnts	.00		
	·	11	14 Proceeds to attorney	.00		
		12	15a Section 409A deferrals	.00		
1		13	15b Section 409A income	.00		
		14	16 State income tax	.00		Accept Lancel Delete 🖨 💔
7		15	18 State income	.00		
		16	17 State/Payer No.			
					:	

Vendor Payment:

^{sage} Manual Check and Payment Entry (TST) 10/20/2014	
Bank Code 🛛 🖂 🦄 📢 🌒 🕨	<u>⊻</u> endor
Payment Type Check	
Cash Accou	nt 101-01-00
<u>I. Header</u> <u>2</u> . Lines	1
Check Date 10/20/2014	
Check Amount 650.00	
Vendor No. 01-ALLCLIM 🔍 Allclimate Maintenance	
	ancel Delete 🔒 🕢 ;

😤 Manual Check and Payment Entry (TST) 10/20/2014						
Bank Code D Image: Second sec			Cash Account	⊻endor		
	ick Row	1 🛃				
Invoice No.	Invoice Date	Invoice Amt	Discount Amt	Comment		
45687	10/20/2014	650.00	.00			
2		.00	.00			
Due Date 10/30/2014				>		
Discount Date						
1099 Form Miscelleneous						
1099 Box 7						
G/L Distribution						
		Check Distribu	ition Balance	0.00 Payment Total 650.00		
				Accept Cancel Delete 🖨 📀		

Manual Check and Payment Register Journal Posting Date: 10/20/2014 Register Number: MC-000005

ABC Distribution and Service Corp. (TST)

007894	10/20/2014	01-ALLCLIM	Allclimate Maintenance			
1099 Form: M	10/20/2014 Box: 7		650.00	0.00 (ON FILE)	650.00	
7	Ba	nk D Total:	650.00	0.00	650.00	
	Re	eport Total:	650.00	0.00	650.00	

Once the Check Register is posted, the 1099 information for the Vendor is updated in the Vendor Maintenance. Click on the 1099 History button. The YTD totals PAID to this vendor will be seen on this screen.

. 099 Pa 99 Form Ilendar \	Type Miscellaneous V (ear 2014 V		
	Вох	Year to Date] 🔜 🗸
1	1 Rent	.00	_ =∽
2	2 Royalties	.00	
3	3 Other income	.00	
4	4 Fed income tax	.00	
5	5 Fishing boat	.00	
6	6 Medical care	.00	
7	7 Nonemployee	650.00	
8	8 Substitute pymnt	.00	
9	10 Crop Insurance	.00	
10	13 Excess Parachute Pmnts	.00	
11	14 Proceeds to attorney	.00	
12	15a Section 409A deferrals	.00	
13	15b Section 409A income	.00	
14	16 State income tax	.00	
15	18 State income	.00	
16	17 State/Payer No.		
			el 🔇

How to Reconcile Your 1099's:

Create a Custom Lookup to list to show which Vendors are set up as 1099 Vendors. Click on the magnifying glass to open the Vendor List. Click on the Custom button.

🔓 Vendor List					
Vendor No 🛆	Name	Status	Zip Code	Phone Number	
01-AIRWAY	Airway Property	Active	92669-0001	(714) 555-0980	
01-ALLCLIM	Allclimate Maintenance	Active	92626	(714) 555-1013	
01-ANDERS	Anders Auto Repair	Active	92969	(714) 555-3030	
01-COMPAQ	Compag Computer Corporation	Active	92626	(714) 555-9921	
01-CONT	Container Corporation Of Usa	Active	65436	(312) 555-7721	
01-IBM	Ibm Corporation	Active	92775	(415) 555-9981	
01-POSTMST	U.S. Postmaster	Active	92626	(714) 555-7659	
01-SOCALGA	Southern California Gas Co.	Active	91771	(714) 555-0098	
01-STEV	Stevens Supply	Active	95052	(408) 555-6781	
01-UNITED	United Computers	Active	75285		
01-UPS	United Post Office Service	Active	92711		
02-AIRTRAV	Airport Service Travel	Active	92660		
02-AMERALR	American Alarm Service	Active	46222	(617) 555-5561	
02-AMEX	American Express Company	Active	75363	(800) 555-6675	
02-ARROW	Arrowsmith Drinking Water	Active	85072	(213) 555-5541	-
•					
Search Vendo	or No 📃 Begins with				<u> </u>
Filters					
]
Custom			<u>S</u> elect	<u>C</u> ancel	80
Found 29 records					

Enter Description – 1099 Vendors in the Description field. DO NOT check Default View box. Click Next.

^{sage} Lookup Customiza	tion Wizard	? ×
Select view parameters Company TST, User SJ	for Lookup - AP Vendor Master List D	
View	Create new view	
Description	1099 Vendors	
Default View		
Delete	< <u>B</u> ack Next≻ Einish	Cancel

Remove the fields that you don't need from the Selected Columns pane. Add the fields listed below by double clicking them in the Available Fields pane. Click Next, then Finish.

⁸³⁹ Lookup Customization Wizard		<u>?</u> ×
Select or modify the column(s) for Lookup Company TST, User SJD View - 1099 Ver	AP Vendor Master List dors	
Available Fields	Selected Columns Vendor No Name Status VendorType Form1099 TaxpayerIDSocialSecurityNo Box1099 MiscBox9	
New Field		Modify
<u>D</u> elete	< <u>B</u> ack <u>N</u> ext > <u>F</u> inish	<u>C</u> ancel

Click the down arrow at View and select your new view.

^e Vendor List					
Vendor No 🛛 🛆	Name	Status	Zip Code	Phone Number	"
01-AIRWAY	Airway Property	Active	92669-0001	(714) 555-0980	
01-ALLCLIM	Allclimate Maintenance	Active	92626	(714) 555-1013	
01-ANDERS	Anders Auto Repair	Active	92969	(714) 555-3030	
01-COMPAQ	Compag Computer Corporation	Active	92626	(714) 555-9921	
01-CONT	Container Corporation Of Usa	Active	65436	(312) 555-7721	
01-IBM	Ibm Corporation	Active	92775	(415) 555-9981	
01-POSTMST	U.S. Postmaster	Active	92626	(714) 555-7659	
01-SOCALGA	Southern California Gas Co.	Active	91771	(714) 555-0098	
01-STEV	Stevens Supply	Active	95052	(408) 555-6781	
01-UNITED	United Computers	Active	75285	· ·	
01-UPS	United Post Office Service	Active	92711		
02-AIRTRAV	Airport Service Travel	Active	92660		
02-AMERALR	American Alarm Service	Active	46222	(617) 555-5561	
02-AMEX	American Express Company	Active	75363	(800) 555-6675	
02-ARROW	Arrowsmith Drinking Water	Active	85072	(213) 555-5541	-
•					
Convolo					
Vendo	r No 💽 Begins with	<u>n</u>			<u> </u>
Filters	View Standard	-			
	Standard				
	1099 Vendors				
Custom			Select	<u>C</u> ancel	(⇔ €
und 29 records					

You can sort the Vendor Type field by clicking on the column heading. Review the Vendor List. Verify that the Form 1099 code, Tax Payer ID and Box 1099 Code are correct.

This list can be printed or exported to Excel using the Excel icon button.

Vendor No	Name	Status	VendorType	Form1099	TaxpayerIDS	Box1099	MiscBo	
01-ANDERS	Anders Auto Repair	Active	В	М	033627154	1	N	
02-CONSULT	Tax Consultants, Inc.	Active	В	М	950100645	7	N	
01-AIRWAY	Airway Property	Active	I	М	111223333	7	N	
01-ALLCLIM	Allclimate Maintenance	Active	I	М	111223333	7	N	
02-LEARNER	Roger W. Learner	Active	I	М	303540251	1	N	
01-COMPAQ	Compag Computer Corporation	Active	N	N			N	
01-CONT	Container Corporation Of Usa	Active	N	N			N	
01-IBM	Ibm Corporation	Active	N	N			N	
01-POSTMST	U.S. Postmaster	Active	N	N			N	
01-SOCALGA	Southern California Gas Co.	Active	N	N			N	
01-STEV	Stevens Supply	Active	N	N			N	
01-UNITED	United Computers	Active	N	N			N	
01-UPS	United Post Office Service	Active	N	N			N	
02-AIRTRAV	Airport Service Travel	Active	N	N			N	
02-AMERALR	American Alarm Service	Active	N	N			N	
02-AMEX	American Express Company	Active	N	N			N	•
Search Vend	or No 💌 Begins with				Find			
	Mour 1000 Mandau							
Filters	TU33 Vendors							
Custom					S	elect C	jancel 🛛 🔀	

NOTE: Be sure the Box 1099 code is correct. This is usually where we see most errors.

Verify 1099 YTD Totals:

Print the Payment History Report from the Reports menu. Make the following changes:

Sort Report By: Select Vendor Number Print 1099 Vendors Only: Click in Checkbox Include Credit Card Vendors: Select No Starting/Ending Period: Select Period 1 and Period 12 Print 1099 Vendors Only: Click in Checkbox

Click the down arrow next to Save button. Select Save As. Enter Report Setting – 1099 Vendors, take checkmark out of Default Report box.

^{soge} Payment Histo	ry Report (TST) 10/2()/2014					
Report Setting Description	STANDARD Payment History Report	Q				S <u>a</u> ve 💌	
Setting Options – Type Default Report	Public 🗾	Print Repo Three Hole	rt Settings] Num] Colla	ber of Copies ated		
Sort Report By	Vendor Number	-					
All Types Voided Checks	Print Auto Check Reversals	s 🗸	Manual Checks Credit Card Trans	fers 🗸	Electronic Payr	ments 🔽	
Options Selection Criteria Fiscal Year Starting Period Ending Period	By Period 💌 2010 💌 01 1/1/2010 💌 12 12/31/2010 💌		Include Credit Car Print Credit Card 1 Print 1099 Vendo	rd Vendors [Transfer Details] rs Only] rt Settting	No 🔽		? X
Selections Select Field Vendor Number Vendor Name Bank Code	d UPD PCL 6	Keep Win Print	Report Setting Description Setting Options Type Default Report Office Merge Opt Always use this to Template	1099 VENDOR Payment History Public	S y Report		
			·			<u>o</u> k (Cancel

Use this report to check the Vendor 1099 History in Vendor Maintenance.

Payment History Report Sorted By Vendor Number Activity From: 1/1/2010 to 12/31/2010

Bank			Check		Check			
Code	Description/		NunDiacou	nt	Date		CheckAmount	CheckType
	Invoice Number	Invoice Date	Amou	nt	Invoice	Amount		
Vend	orNumber: 01-AIRWAY Airway Prop	erty						
Α	Security Pacific Checking		001666		5/15/2010		3,500.00	Auto
	0000105019	5/2/2010		0.00		3,500.00		
				Vend	or01-AIRW	AY Total:	3,500.00	
Vend	orNumber: 01-ALLCLIM Allclimate N	laintenance						
Α	Security Pacific Checking		001667		5/15/2010		150.00	Auto
	0000105019	5/2/2010		0.00		150.00		
Α	Security Pacific Checking		001669		5/19/2010		75.00	Auto
	0000108040	5/15/2010		0.00		75.00		
				Vendo	r01-ALLCI	IM Total:	225.00	
Vend	orNumber: 01-ANDERS Anders Auto	Repair						
A	Security Pacific Checking		001668		5/15/2010		2,500.00	Auto
	0000112384	5/2/2010		0.00		2.500.00		
Α	Security Pacific Checking		001670		5/19/2010	_,	1.176.00	Auto
	0000118495	5/15/2010		24.00		1,200.00		
Α	Security Pacific Checking		001729		5/5/2010		3,540.50	Auto
	1028340	3/10/2010		0.00		3,540.50		
				Vendo	or01-ANDE	RSTotal:	7,216.50	
Vend	orNumber: 02-CONSULT Tax Cons	ultants. Inc.						
D	Wells Eargo Checking		C00003		5/1/2010		1 835 00	CCPayment
	AMEX 000	5/1/2010	000000	0.00	01112010	1 835 00	1,000.00	oor aymax
			1	/endor	02-CONSU	LT Total:	1 835 00	
					Den	ortTotal	10,770,50	
					Rep	on rotal:	12,776.50	

ABC Distribution and Service Corp. (TST)

If the totals are not correct, research why, then manually adjust them in Vendor Maintenance.

🕮 1099 Pa	ayment History		_ 🗆 ×
1099 Form Calendar Y	r Type Miscellaneous 💌		
	Box	Year to Date	
1	1 Rent	.00	E (P)
2	2 Royalties	.00	
3	3 Other income	.00	
4	4 Fed income tax	.00	
5	5 Fishing boat	.00	
6	6 Medical care	.00	
7	7 Nonemployee	225.00 🗐	
8	8 Substitute pymnt	.00	
9	10 Crop Insurance	.00	
10	13 Excess Parachute Pmnts	.00	
11	14 Proceeds to attorney	.00	
12	15a Section 409A deferrals	.00	
13	15b Section 409A income	.00	
14	16 State income tax	.00	
15	18 State income	.00	
16	17 State/Payer No.		
L		<u>O</u> K <u>C</u> ano	el 🕜

How to Print 1099's:

Choose Form 1099 eFiling and Reporting from the Reports menu. Select the Form Type for printing 1099's. Enter the Minimum YTD Payment amount. Click Accept.

🔓 Form 1099 eFilir	ng and Repo	orting						
Form to Use Ne Form Type Mis Options Vendor Type to Pri	w 💌 ccellaneous nt All Type	•		Minimu 1099 C	m YTD Paymeni alendar Year	2014	600.00	
Company Name Address City	ABC Distribu 1525 Techno Irvine	tion and Serv blogy Drive	vice Corp).	Fede Telep Fax	al ID No. hone	43-1111111 (555) 111-1212 (555) 222-1212	
State	CA	ZIP Code	77356					
Select Field Vendor Number		Operand All	•	Value			C	
Activate							Accept Can	cel

The 1099 Setup Wizard screen will appear. You can run a Test Drive for your Vendors. Click Next.

🛍 1099 Setup Wizard	_ 🗆 🗙
1099 Setup Wizard	0
We noticed that you have not processed any 1099s for the current filing year. Before you begin filing your 1099s, would you like to do any of the following?	
 I want to test drive the 1099/1096 Wizard with only the first 25 of my recipients. I want to test drive the 1099/1096 Wizard with all of my recipients. No thanks, start processing my 1099/1096s. 	
NOTE: The 1099/1096 Wizard test drive allows you to see how the process works but does NOT save any of your info	mation.
< <u>B</u> ack Next >	Cancel

Click Next.

🕺 1099 Setup Wizard [Test Drive]
1099 Setup Wizard
Get Started Printing or eFiling Your 1099s
Please verify this payer's Taxpayer Identification Number (TIN). This number is used on ALL 1099 forms and MUST be correct. If this number is NOT correct, you MUST return to your accounting software to make the correction.
Payer TIN
< <u>B</u> ack <u>Next</u> > Cancel

Verify the information on the Payer Screen. Click Next.

攬 1099 Setup \	Wizard [Test Drive]			<u>_ ×</u>
Pay	yer Information			•
Company name:	ABC Distribution and Service Corp.	Other name:		
First name:	Middle:	Last name:		
Country:	USA (United States)			•
Address line 1:	1525 Technology Drive			
Address line 2:				
City:	Irvine	State:	CA ZIP code: 77356	
Contact name:		Title:		
Phone:	(555) 111-1212	Email:	sjd	
Fax:	(555) 222-1212	Transfer agent:		
			< <u>B</u> ack <u>N</u> ext > C	ancel

缩 1099 Setup Wizard [Test Drive]	_ 🗆 🗙
	•
Which type of filer are you?	
• I am filing for my company/employer.	
O I am a third-party, paid Tax Preparer, filing for one or multiple companies/EINs.	
If you have 10 or more companies, you may sign up for the Batch eFiling Service (fees apply). Visit <u>http://aatrix.com/batchefiling</u> to learn more.	
< Back Next >	Cancel



🏂 1099 Setup Wizard [Test Drive]	
Recipient Identification Numbers	0
Would you like to truncate Recipient Identification Numbers (RINs) on recipient copies? SSNs, ITINs, and ATINs will only display the last 4 digits of all printed recipient copies. This will not apply to EINs.	
 No truncation. Example: 123-45-6789 Truncate with asterisks. Example: ***-**-6789 	
C Truncate with Xs. Example: XXX-XX-6789	
Would you like to print RINs on recipient copies that are reported as zeros?	
 Yes, print zeros. Example: 000-00-0000 or 00-0000000 No, leave them blank. 	
< Back	Cancel

🏂 1099 Setup Wizard [Test Drive]	_ 🗆 🗙
Multiple 1099 Data Files	0
Please Read Carefully Answering incorrectly may require you to restart the filing process.	
Do you use multiple 1099 data files for the same federal EIN ?	
You may be using multiple 1099 data files in your accounting software to handle:	
multiple companies multiple departments multiple divisions multiple sites	
all under the same federal EIN.	
O Yes, I use multiple 1099 data files for this EIN.	
No, I use a single 1099 data file for this EIN.	
< <u>B</u> ack Next >	Cancel

Verify Vendor information. Click the Next Step button.

Efe Eat Dev Step Verify Recipient Taxpayer Identification Numbers Next Step Image: Step Step Recipient L Recipient ML Recipient TML Recipient L Recipient ML Step Box 1 Box 2 Box 3 Box 4 Box 5 Box 7 Box 8 Box 9 Last Name First Name Middle Name Taxpayer ID Rents Revise Difference Fielderal Inc. Fishing Boa. Medical and. Nonemploy. Totals 1 Recipient(s) Box 1 Box 2 Box 3 Box 4 Box 5 Box 7 Box 8 Box 9 Interview 111-22-3333 Image: Step Image: Step Image: Step Image: Step Interview 1 Recipient(s) Image: Step Step Interview Image: Step Image: Step Interview Image: Step Image: Step <th>👬 ABC</th> <th>Distributio</th> <th>n and Service</th> <th>Corp W2/</th> <th>1099 Prepare</th> <th>r</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th>	👬 ABC	Distributio	n and Service	Corp W2/	1099 Prepare	r									
Recipient L Recipient M Recipient TM Recipient T	Eile E	^{dit} ⊻iew <u>H</u> rify Recip	^{≞p} pient Taxp	ayer Iden	itification N	Numbers	<u>Next</u>	Step	0	Prev Step	Next Step				
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Internal Revenue Service FILER'S name ABC DISTRIB	UTION AND SERVI	CE CORP.		<u> </u>
Street address (inclu 1525 TECHNO City or town, provinc	uding room or suite number) LOGY DRIVE xe or state, country, and ZIP or fore	ign postal code		
IRVINE Name of person to conta	CA 7	7356 US Telephone number 555 111-1212	For Official U	se Only
SJD 1 Employer identification numb 43-1111111	er 2 Social security number	Fax number 555 222-1212 3 Total number of forms 4 1 \$	Fields	
6 Enteran "X" in only one 8 W-2G 1097-8TC 1098 32 50 81	Does below to indicate the type of fi 1098-C 1098-E 1098-T 1099-A 76 84 83 80	orm being filed. 71 1099-8 1099-C 1099-C 1099-C 1099-CAP 109	Please complete required REI TAB for next RED field.	D fields. Enter information and
1099-R PATR 31 98 97	1099-S 1099-SA 3921 3922 75 94 25 26	5498 5498-ESA 5498-SA 28 72 27		
Return this entir Under penalties of perjury, I and complete.	re page to the Interna declare that I have examined this re	I Revenue Service. Phot turn and accompanying documents, and,	to the best of my knowledge and belief, the	ble. ey are true, correct,
Signature >		Title	▶ Date ▶	10/20/2014
Som Only se you ca If	e agencies do NOT re end this 1096 to the ag an keep this copy for you have questions a	equire a 1096 to be subr gency if it is required. If informational purposes bout your state require	nitted with your state 109 your agency does NOT ro s to provide totals of your ements please contact the	9 forms. equire a 1096 r State 1099's. e agency.
or Help, press E1				

Г		CTED.	Г		CTED
1 Rents	2Royalies	3 Other Income	1 Rents	2Royalies	3 Other Income
\$ 4 Federal Incometex withheld	\$ 5 Fishing Bost Proceeds	\$ 6.Vedical and health care	\$ 4 Federal Incometax withheld	5 Fishing Bost Proceeds	S Medical and health care
\$	\$	poyments \$	\$	\$	poyments \$
RIVERSname, street address, city of ABC DISTRIBU	rtown, province or state, country, ZP TION AND SERV.	orforeign postal code, and telephone no.	RYERS name, street address, giv or ABC DISTRIBUT	town, province or state, country, ZP, FION AND SERVI	or foreign postal code, and telephone no.
1525 TECHNOL	OGY DRIVE		1525 TECHNOLO	OGY DRIVE	
IRVINE	S S	A 77356	IRVINE UNITED STATES	с. 5	a 77356
PAYER'S federal identification	ECIPIENTSidentification Acc	ountNumber 2nd TIN not.	PAYER'S federal identification R	ECIPIENTSidentification Acco	untNumber 2nd TIN not.
43-111111	111-22-3333		43-1111111	umocr	
ALLCLIMATE M	s apline), dyer bwn, previnas er stals, auntr AINTENANCE	g and ZP or loreign postal code	RECIPENTS name, sheet address (including	aptino), dy or lown, province or state, country,	and ZIP or breign postal code
2331 TRINITY SUITE 1600 COSTA MESA	DRIVE	A 92626			
7 Nonemployee compensation	8Substitute payments in lieu dividends or interest	of 9Payermade directsales of \$5,000 ormore of consumer conducts to abuver	7 Nonemployee compensation	8Substitute payments in lieu o dividends or interest	of 9Payermade direct sales of \$5,000 ormore of consumer conductation a businer
 0 O O O 10 Crop insurance proceeds 	11 Foreign tex peid	(recipient) for resale	10 Crop insurance proceeds	11 Foreign tex peid	(recipient) for resale
\$	\$		\$	\$	
13 Excess golden parachute paymer	nts 14 Gros \$	as proceeds paid to an attorney	13 Excess golden parachute payment	ts 14 Gross \$	s proceeds paid to an attorney
15e Section 409A deferrels \$	15b Sei \$	ction 409A income	15a Section 409A deferrals	15b Sed	tion 409Aincome
15 State tax with held	17 State/Payer's state no.	18 State income	16 State tax with held	17 State/Payer's state no.	18 State income
\$	····/	\$	\$		
2013 rorm 1099-		Copy C For Payer Aatrix Rev. 12/ CTED 3 Other Income	2013 rorm 1099-1 2/13		CTED 3 Other Income
4 Federal Income tex withheld	5 Fahing Boat Proceeds	5 Medical and health care	Federal Income tex withheld	5 Fishing Bost Proceeds	5 6 Medical and health care
\$	\$	poyments \$	\$	\$	poyments \$
APERSname, street address, divo ABC DISTRIBU 1525 TECHNOL	rtown, province or state, country, ZIF TION AND SERV: OGY DRIVE	¹ orforeign postalcode, and telephone no. ICE CORP.	RYERS neme, street address, diyor ABC DISTRIBUT 1525 TECHNOLO	town, province or state, country, ZP, FION AND SERVI DGY DRIVE	orforeign postalcode, and telephone no.
UNITED STATE (555) 111-12	s 12	A //30	UNITED STATES (555) 111-121	5 12	A //300
PAYERS federal identification fr number	RECIPIENT'S identification According	ountNumber 2nd TIN not.	PAYER'S federal identification R number n	ECIPIENTSidentification Acco umber	untNumber 2nd TIN not.
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1099 History File Options

You have already completed part of your 1099 filings. Please review what you have completed and select which action you would like to take next.

Each time you complete an action you will be returned to this screen.

Form	Last Completed Action	Reprint Completed 1099s
Recipient 1099		Reprint a copy of any 1099 filing that you have already completed
Federal 1099	Printed on 10/20/2014	
State 1099	Printed on 10/20/2014	© eFile or Print Incomplete 1099s
Payer 1099	Printed on 10/20/2014	you did not process yet.
		C Correct Completed 1099s
View Det	ailed List of Completed Actions	Make corrections to 1099 copies that you have processed. Also, add/delete recipients in this process.
view in	structions on Returning Later	C Start Over
		Clear your past actions and start the 1099 process over again with new data.
		e1099 Password Lookup Look up your recipient's password information.

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