

1099 Instructions

Activating the 1099 feature:

Edit – Preferences

Click Tax: 1099, on the left

Company Preferences Tab

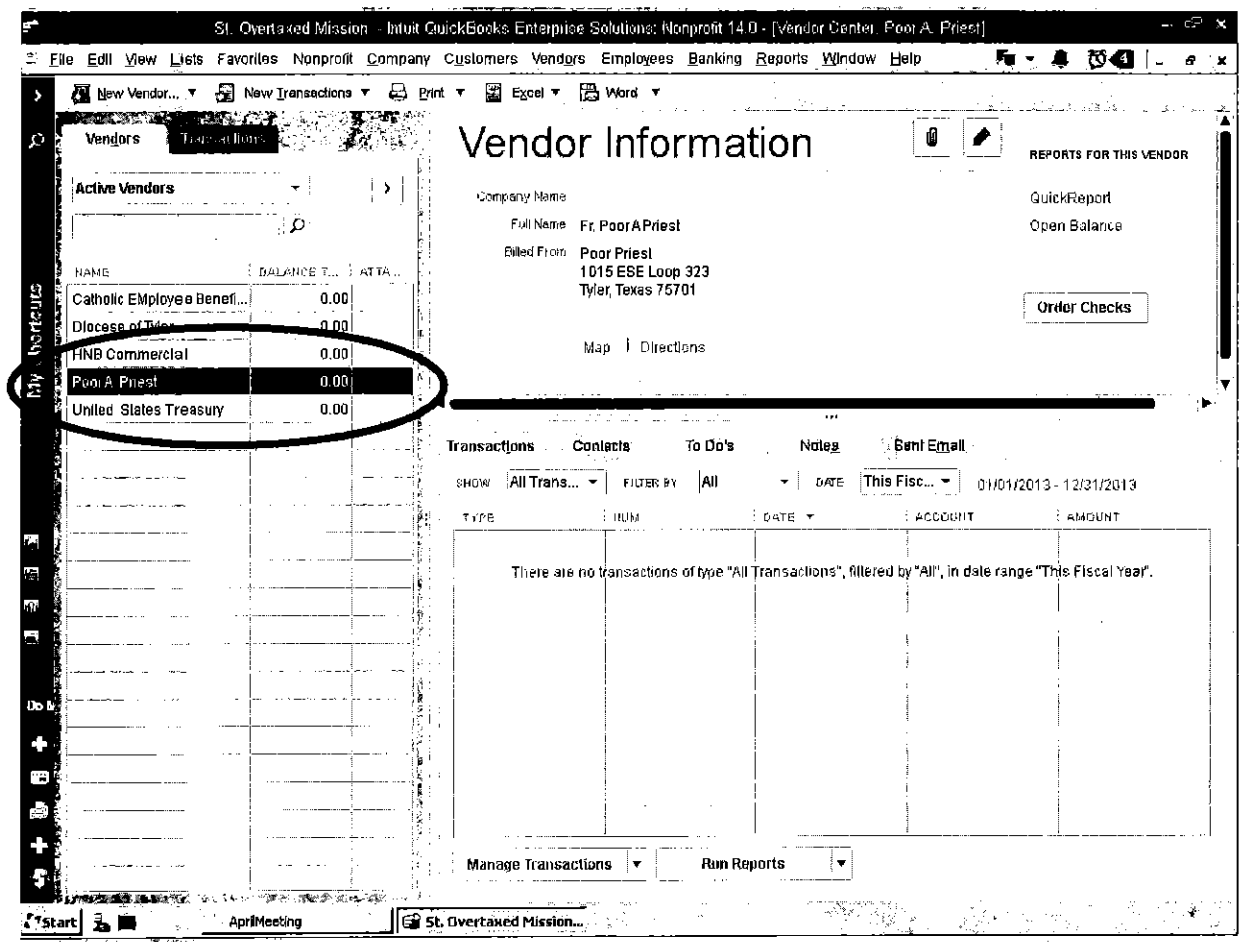
Do you file 1099-MISC forms? Select Yes

Click OK to save preferences

Setting up Vendors to receive Form 1099-MISC:

Vendors – Vendor Center

From the list of vendors on the left, right mouse click on a vendor's name and click edit to open the edit vendor window.



File Edit View Lists Favorites Nonprofit Company Customers Vendors Employees Banking Reports Window Help

New Vendor... New Transactions... Print... Excel... Word...

Vendors

Active Vendors

NAME	BALANCE T...	ATTAL...
Catholic Employee Benefi...	0.00	
Diocese of Tyler	0.00	
HNB Commercial	0.00	
Poor A. Priest	0.00	

United State: Find... Use Ctrl+U Refresh

Edit Vendor

- New Vendor
- Delete Vendor
- Add/Edit Multiple Suppliers
- Make Vendor Inactive
- Customize Columns...
- Show Full Vendor List Only
- Write Checks
- Enter Bills
- Pay Bills
- Enter Credit Card Charges
- QuickReport: Poor A. Priest
- Open Balance: Poor A. Priest
- Attach

Vendor Information

Company Name: QuickReport
Full Name: Fr. Poor APriest
Billed From: Poor Priest
1015 ESE Loop 323
Tyler, Texas 75701

Map | Directions

REPORTS FOR THIS VENDOR

- QuickReport
- Open Balance

Order Checks

Transactions Contacts To Do's Notes Sent Email

SHOW: All Trans... FILTER BY: All DATE: This Fisc... 01/01/2013 - 12/31/2013

TYPE	NUM	DATE	ACCOUNT	AMOUNT
There are no transactions of type "All Transactions", filtered by "All", in date range "This Fiscal Year".				

Manage Transactions Run Reports

Start AprilMeeting St. Overtaxed Mission...

Click the address info tab and validate this data.

St. Overtaxed Mission - Intuit QuickBooks Enterprise Solutions: Nonprofit 14.0 - [Edit Vendor]

File Edit View Lists Favorites Nonprofit Company Customers Vendors Employees Banking Reports Window Help

VENDOR NAME: **Poor A. Priest**

CURRENT BALANCE 0.00 How do I adjust the current balance?

Address Info COMPANY NAME

Payment Settings FULL NAME: Fr. Poor A Priest

Tax Settings JOB TITLE

Account Settings Main Phone Main Email

Additional Info Work Phone CC Email

Mobile Website

Fax Other 1

ADDRESS DETAILS

BILLED FROM

Poor Priest
1015 ESE Loop 323
Tyler, Texas 75701 Copy >>

SHIPPED FROM

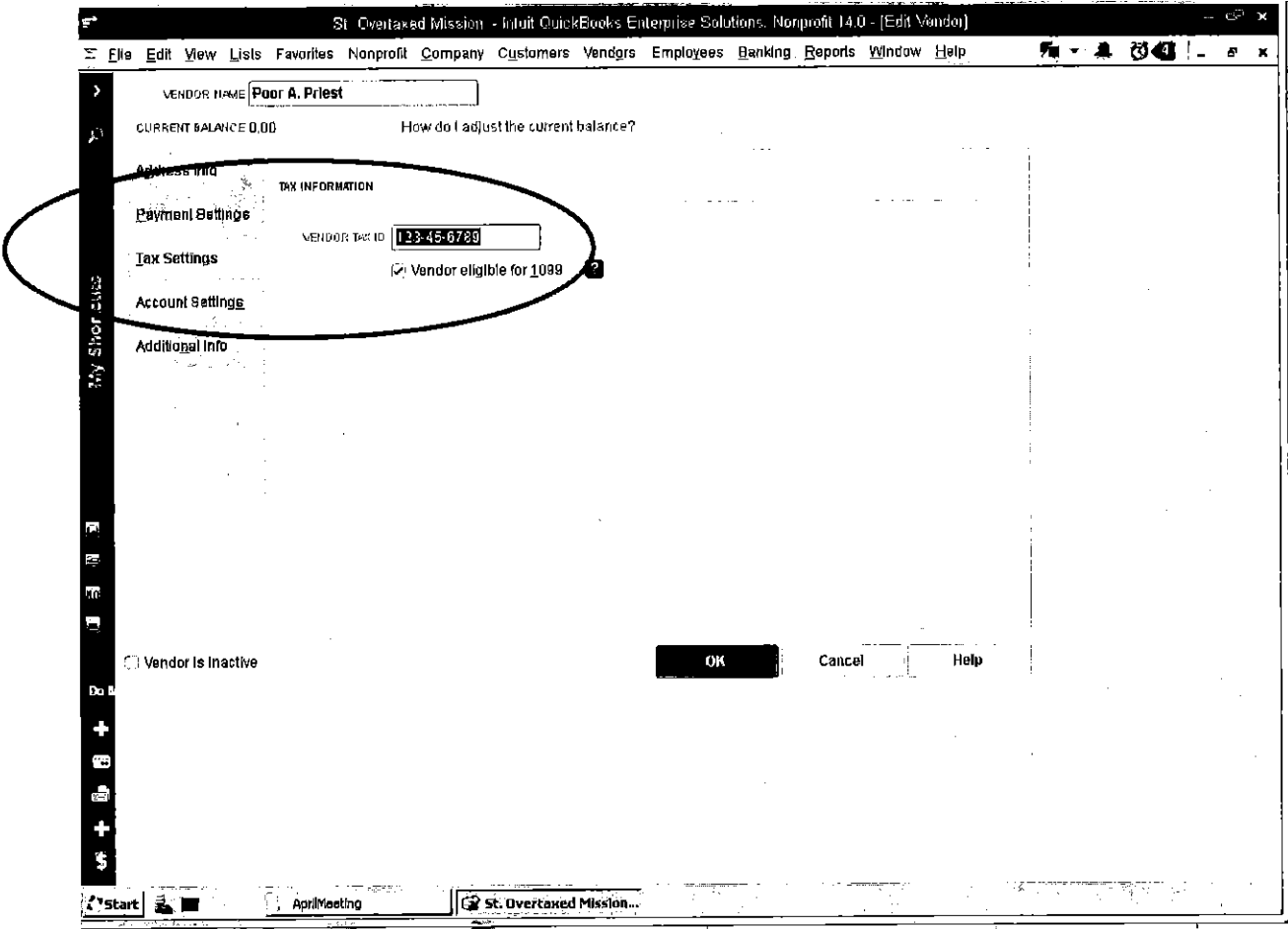
Vendor is inactive

OK Cancel Help

Start St. Overtaxed Mission...

Click on the Tax Settings tab on the left.

Enter the Vendor's Tax ID# and put a check mark in the box in front of vendor eligible for 1099



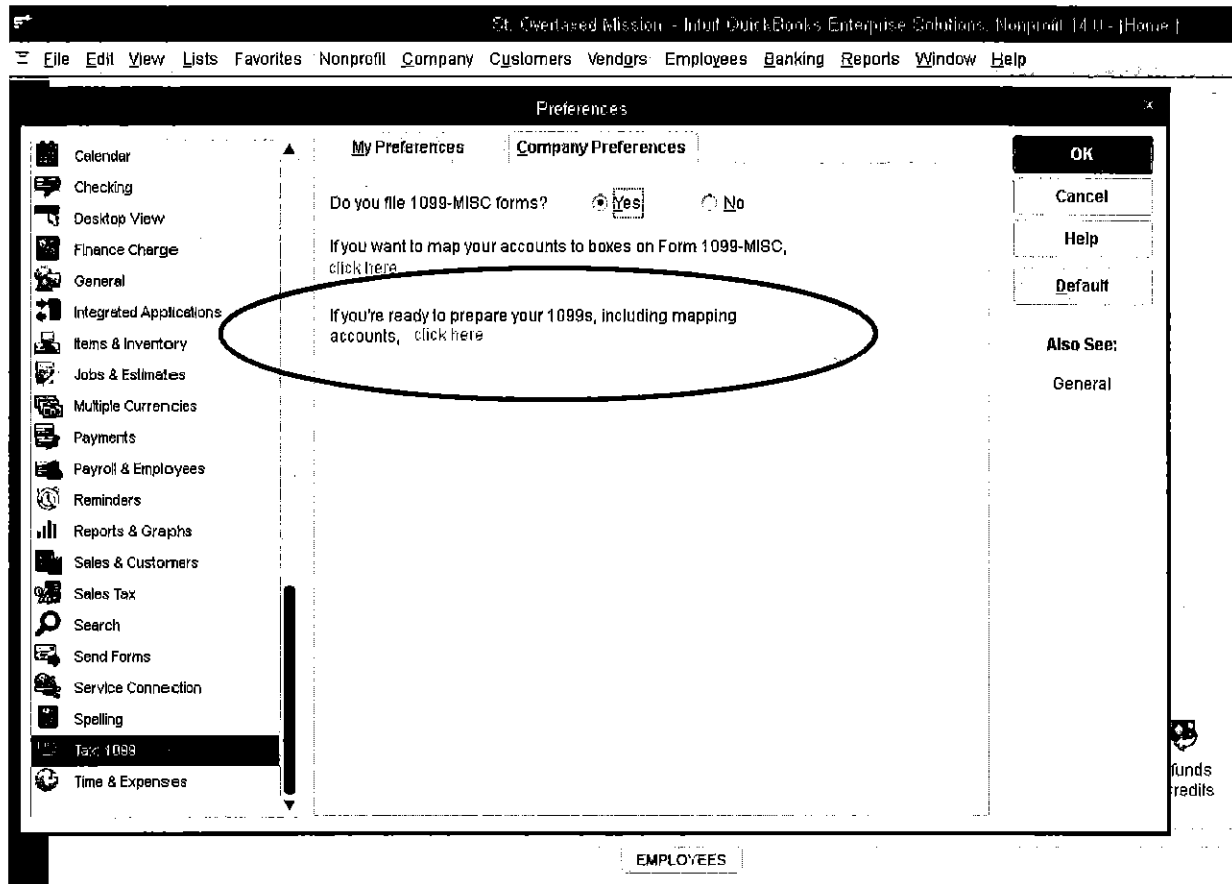
Repeat for each 1099-eligible vendor.

Next, each expense account associated with vendor payments has to be set up in the preferences:

Edit – Preferences

On the left select **Tax: 1099**

Click on the **Company Preferences** tab.



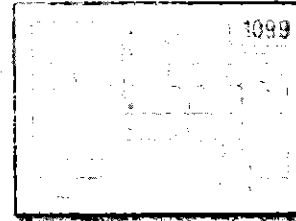
This brings you to where you click to open the 1099 Wizard.

Click on if you are ready to prepare your 1099s, including mapping accounts, to begin at the beginning of the wizard

To prepare and file your 1099-MISC/1096 forms



- 1** **Select your 1099 vendors**
Select vendors to receive 1099-MISC forms.
 - 2** **Verify vendor information**
Review and edit information for selected vendors.
 - 3** **Map your accounts**
Choose which payments to report in each box on Form 1099-MISC.
 - 4** **Review vendor payments**
Select debit, gift card and PayPal transactions to exclude from 1099-MISC forms.
 - 5** **Confirm 1099-MISC entries**
Review the amounts to be reported on each vendor's Form 1099-MISC.
 - 6** **Choose a filing method**
 - **Print** 1099s and 1096 on preprinted forms to file by mail.
 - **E-file** 1099s electronically with the IRS using the Intuit 1099 E-File Service. You can also print copies on plain paper.
- ?** Learn more about these options



Get Started

Here you can select your 1099 vendors and also verify vendor information.

Home QuickBooks: 1099 Wizard

Select your 1099 vendors

Select the vendors that need a Form 1099-MISC. (Changing the selections also changes the vendors' 1099 status in your company file.)

Select All

Create Form 1099-MISC	Vendor Name	Account Used
<input checked="" type="checkbox"/>	Computer Tech	6126-Profess & Tech Services
<input checked="" type="checkbox"/>	Joe's Lawn Service	Multiple
<input checked="" type="checkbox"/>	Poor A. Priest	5141-Supply-Food & Bev for Rec
<input type="checkbox"/>	Catholic Employee Benefit Group	
<input type="checkbox"/>	Diocese of Tyler	Multiple
<input type="checkbox"/>	HNB Commercial	
<input type="checkbox"/>	United States Treasury	

Need more information? Back Save & Close Continue

Home QuickBooks: 1099 Wizard

Verify your 1099 vendors' information

Edit each vendor's information as needed. Changes you make are saved in QuickBooks.

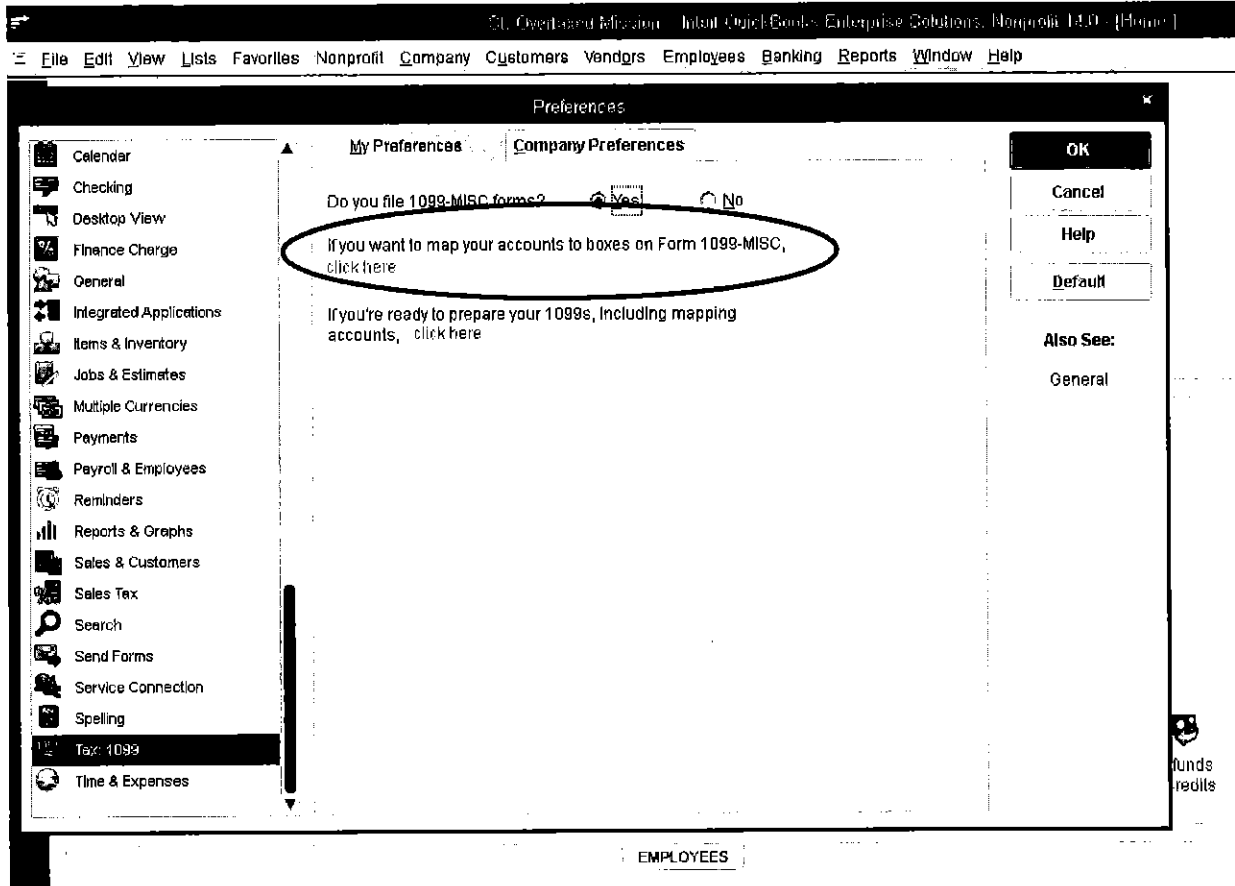
Select Vendors Verify Vendors

Vendor Name	Tax ID*	Company Name	First Name	M.I.	Last Name	Address*	Phone
Computer Tech	789-32-6547	Computer Tech				Computer Tech	
Joe's Lawn Service	456-85-6321	Joe's Lawn Service	Joe		Smith	Joe's Lawn Service	
Poor A. Priest	123-45-6789		Poor	A	Priest	Poor Priest	

*Required if e-filing

Need more information? Back Save & Close Continue

If you just want to map vendor payment accounts you can skip ahead if you select ready to map your accounts to boxes on Form 1099-MISC



Map vendor payment accounts



You used these QuickBooks accounts to track payments to your 1099 vendors. Now, tell QuickBooks where the amounts paid from each account should appear on Form 1099-MISC.

Show 1099 accounts ▼

Tip!

Most companies map the accounts they use to pay 1099 vendors to Box 7: Nonemployee Compensation on Form 1099-MISC. Tell me more about the 1099 boxes.

Report all payments in Box 7

Accounts used for 1099	Account type	Apply payments to this 1099 box
5141-Supply-Food & Bev for Res	Expense	Box 7: Nonemployee Compensation ▼
5927-Contracted-Opn of Parish	Expense	Box 7: Nonemployee Compensation ▼
5958-Other Expense	Expense	Omit these payments from 1099 ▼
6126-Profess & Tech Services	Expense	Box 7: Nonemployee Compensation ▼

Show IRS 1099-MISC filing thresholds

Need more information?

Back

Save & Close

Continue

My Shortcuts

This is where you can specify what box to apply them to on the 1099 or to omit that code from the 1099 form.

QuickBooks 1099 Wizard

Map vendor payment accounts

1 Select Vendors 2 Verify Vendors 3 Map Accounts

You used these QuickBooks accounts to track payments to your 1099 vendors. Now, tell QuickBooks where the amounts paid from each account should appear on Form 1099-MISC.

Show 1099 accounts ▾

Tip!
Most companies map the accounts they use to pay 1099 vendors to Box 7: Nonemployee Compensation on Form 1099-MISC.
Tell me more about the 1099 boxes.
 Report all payments in Box 7

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5927-Contracted-Oprtn of Parish	Expense	Box 7: Nonemployee Compensation
5958-Other Expense	Expense	Omit these payments from 1099
6126-Profess & Tech Services	Expense	Omit these payments from 1099

Box 1: Rent
 Box 2: Royalties
 Box 3: Other income
 Box 4: Federal Tax Withheld
 Box 5: Fishing Boat Proceeds
 Box 6: Medical Payments
 Box 7: Nonemployee Compensation
 Box 8: Substitute Payments
 Box 9: Direct Sales
 Box 10: Crop Insurance Proceeds
 Box 13: Excess Golden Parachute
 Box 14: Gross Proceeds to Attorney

Show IRS 1099-MISC filing thresholds

Need more information? Save & Close

St. Overtaxed Mission...

Review payments for exclusions

The IRS requires you to exclude from Form 1099-MISC any payments you make by credit card, debit card, gift card, or PayPal.



If you made payments to vendors by debit card, gift card, or PayPal, click **View Included Payments**, and edit the check number field to include an appropriate notation so QuickBooks can exclude these payments from Form 1099-MISC.

Click **View Excluded Payments** to verify these payments have been excluded from Form 1099-MISC. (This list does not show credit card transactions, which QuickBooks automatically excludes.)

[View Included Payments](#)

[View Excluded Payments](#)

Need more information?

[Back](#)

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Add to favorites

Marking payments for exclusion from Form 1099-MISC

Beginning with the 2011 tax year, the IRS requires you to exclude from Form 1099-MISC any payments you made by credit card, debit card, gift card, or third-party payment network such as PayPal. (These payments are being reported by the card issuers and third-party payment networks on Form 1099-K.)

When you use check payments (in either Pay Bills or Write Checks) to record a vendor payment made with a credit card, debit card, or gift card, or using a third-party payment network such as PayPal, you should note the payment method in the check number field. QuickBooks recognizes, and automatically excludes from Form 1099-MISC, any check payment containing one of the following notations in the check number field (limited to 8 characters):

- Debit
- Debitcar
- DBT
- DBT card
- DCard
- Debit cd
- Visa
- Masterc
- MC
- MCard
- Chase
- Discover
- Diners
- PayPal

QuickBooks automatically excludes from Form 1099-MISC any bill payment made using the credit card payment method.

You will then get a screen where you confirm 1099 entries

Home QuickBooks 1099 Wizard

Confirm your 1099 entries

Review this summary of vendors for whom you are creating Form 1099-MISC and the amounts being reported for the calendar year shown. Double-click any amount to review transaction details.

1 Select Vendors 2 Verify Vendors 3 Map Accounts 4 Review Payments 5 Confirm Entries

Form 1099-MISC for 2012 See Other Years: Summary Report | Detail Report

Vendor Name	Tax ID	Box 7: Nonemployee compensation	Total Included on 1099	Total Unmapped Payments	Total
Poor A. Priest	123-45-6789	2,000.00	2,000.00	0.00	2,000.00
TOTAL		2,000.00	2,000.00	0.00	2,000.00

Need more information? Back Save & Close Continue

Start SCH-SPL St. Overtaxed Mission...

This is where you print your forms.

QuickBooks 1099 Wizard

1 Choose a filing method

1 Select Vendors 2 Verify Vendors 3 Map Accounts 4 Review Payments 5 Confirm Entries 6 Choose Filing

You're ready to choose a filing method!

Print
Print 1099s and the 1096 on preprinted forms and mail to the IRS. (The IRS doesn't accept forms on plain paper.)

E-file
File electronically with the IRS using the Intuit 1099 E-File Service. Fees apply.

Need to order preprinted forms?
Our forms are designed specifically for QuickBooks and print your data directly from QuickBooks on to the correct section of each form.

Get forms in as little as 3 days

Order forms **Print 1099s** **Go to Intuit 1099 E-File Service**

Is e-filing right for you?

- The IRS requires you to e-file if you submit over 250 forms.
- You can print copies for vendors or yourself on plain paper.
- When you e-file, the IRS doesn't require a 1096 summary form.
- If your state participates in the combined federal/state e-filing program, e-filing, your federal 1099s can simplify your state filings. Does my state participate?

Need more information? **Back** **Save & Close**

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Select 1099s to Print

Select vendors to print 1099-MISC / 1096 forms:

<input type="checkbox"/> VENDOR	VALID ID	VALID ADDR...	TOTAL
<input checked="" type="checkbox"/> Poor A. Priest	Yes	Yes	2,000.00

1096 SUMMARY INFORMATION

Number of vendors selected: 1
Total for vendors selected: 2,000.00

Preview 1099
Print 1099
Print 1096
Cancel
Help
Select All
Select None

Need more information? **Back** **Save & Close**