

Office - 1099 Wizard

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Frequently Asked Questions

Q: Does Clubessential sell 1099 Forms?

A: Clubessential does not sell 1099 Forms; they can be purchased at Staples, Office Depot or most office supply stores.

Q: Can we print our 1099 through Clubessential?

A: Clubessential does not print the 1099, but the information needed to enter manually can be obtained using the 1099 Summary Report in Interactive Reports.

Q: Do I have to enter the recipient name on the 1099 tab of vendor file or will it pick up the default vendor name?

A: No, only if the recipient name on the 1099 is different than the Vendor name.

Q: In the 1099 generation wizard, do the available vendors include all vendors setup for 1099, or only ones that I've paid \$600 or more this calendar year?

A: After the first of the year, when the programmers get the official guidelines, they will adjust the programming code as needed and only the vendors who meet the limit will receive the 1099

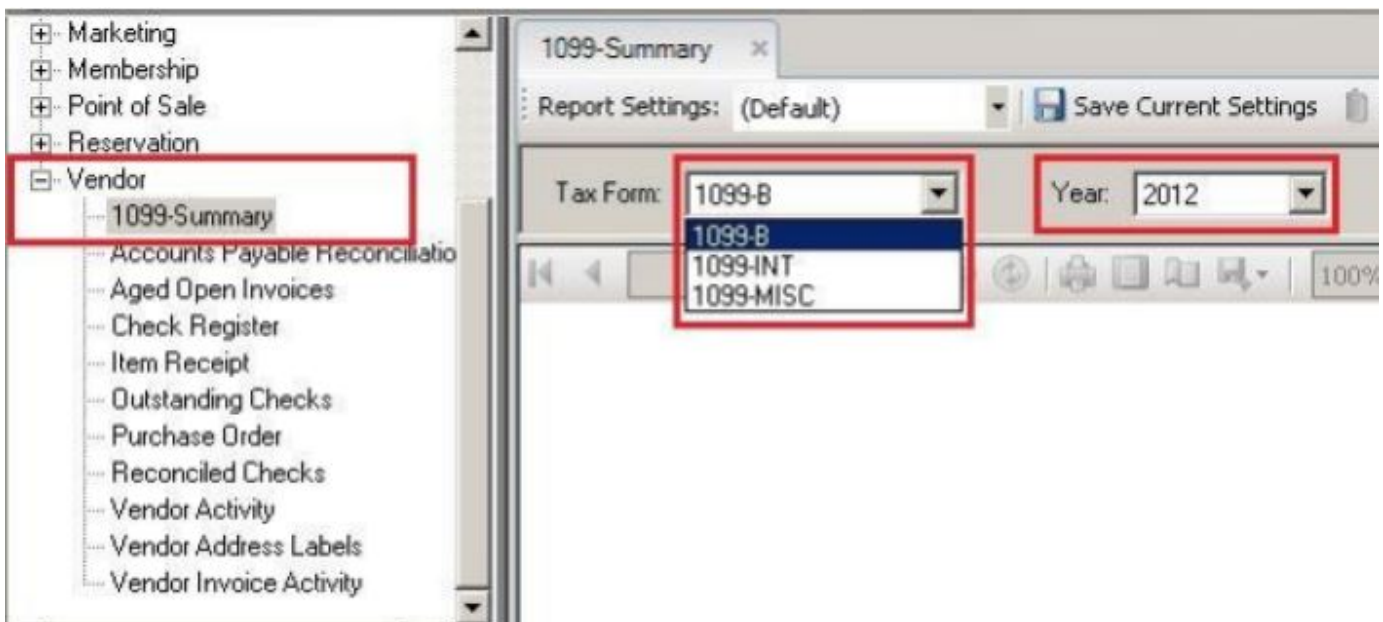
Accounts Payables 1099s

Prior to Printing 1099s:

Step 1: Check what Vendors are setup to receive a 1099 and the amount: go to Interactive Report



Step 2: Click on the + sign next to **Vendor** > select **1099- Summary** > **Tax Form** criteria will list the different tax form types: select a **Form** > select the **Year** > select **View Reports**



The screenshot shows a software interface for generating 1099 forms. On the left, a tree view shows the 'Vendor' folder expanded, with '1099-Summary' selected. On the right, the '1099-Summary' report settings are displayed. The 'Tax Form' dropdown is set to '1099-B' and the 'Year' dropdown is set to '2012'. The 'Report Settings' are set to '(Default)'. A 'Save Current Settings' button is visible.

Note:

- Run the report for each Tax Form Type
- Only vendors who have been set up with a 1099 Form Type and a check mark on Use 1099 in vendor maintenance will be listed on the report.
- Only vendors listed on the report will receive a 1099.

Make Corrections to the 1099 Amount or Form

Step 1: Go to **Accounts Payable** on left menu > select the **Vendor** you wish to edit > select the **1099 Tab** on the left pane> On the **Adjustment Tab** click on the **Add New icon**

Step 2: Enter the information and adjustment amount > **Save and Exit** the adjustment screen when done > **Save and Exit** the Vendor Maintenance screen.

Note: If there have been previous adjustments made they will be listed in Yellow; see below image.

Step 3: You can edit the adjustment or delete by highlighting the line and choosing the Edit Icon or Delete icon .

Vendor Information

Name: Abbott Paint & Carpet Account Number: ABB050 Inactive Vendor

Remit Name: Abbott Paint & Carpet Vendor Status: Active On Hold

Primary Contact: Vendor Category: All

Primary Address: 2223 4th Street Primary Email:

Primary Phone:

Default 1099 Form: Use 1099

Default 1099 Box: 2nd TIN not

Recipient Name:

Account Number:

Special Instructions:

Adjustments 1099-B 1099-MISC 1099-INT

Year	Amount	Tax Form Box	Tax Form
2015	\$250.00	Rents	1099-MISC

0 of 0 records found.

Note:

If a Vendor is to receive different 1099 Forms for different services, make an adjustment entry and select the correct 1099 Form and Box for each amount.

Print 1099

The 1099 Wizard is used to print 1099 forms. It uses any standard form available at office supply stores It will only print 1099s for vendors who have met the payment threshold set by the government.

Please Note: Clubessential Office does not print the 1096, but the information needed to enter the information manually can be obtained using the 1099 Summary Report in Interactive Reports.

Step 1: Select **Accounts Payable** on Left Menu > select **1099 Wizard** > In the Form 1099 Generation Wizard select the form and year > select **Next** to move to step 2.

Form 1099 Generation Wizard

Select 1099 form.



Select a form and enter a year

Form:

Year:

Cancel

Previous

Next

Finish

Step 2: In the **Available Vendor** box will display only vendors setup to receive a 1099: **highlight the vendor** > using the arrows move the Vendor to **Selected Vendor box** > select Next to move to step 3.

Form 1099 Generation Wizard

Select vendors you wish to generate 1099 for.



Selected Vendors

Name

Available Vendors

Name
Bill Juberian
Bob Deichert
Forever In Bloom Floral
Fredrikson & Byron
Frontier Ag & Turf
Gina Wood
Hasler, Inc.
Jaclee Slaba
James Manthis
mywedding.com
Prime Turf Inc.
Simply Designed

Navigation buttons: [Left Arrow], [Right Arrow], [Double Left Arrow], [Double Right Arrow]

Bottom buttons: [Cancel], [Previous], [Next], [Finish]

Notes:

- Only Vendors in the Selected Vendor box will print a 1099
- The double arrows will select all vendors, the single arrow will select only the vendor highlighted

Step 3: Select the **Print Options > Adjust Margins** if needed > Print a **Test Page** > Select **Finish** to move to step 4

Form 1099 Generation Wizard

Select your printing options. Click Finish to complete the wizard.



Print Options

- One vendor, one copy per page
- One vendor, multiple copies per page
- Multiple vendors per page
- Load report from file

Browse...

- Generate e-file for IRS FIRE system

Save As...

Generate Test File (must contain at least 11 vendors)

Adjust Margins

Top:

Left:

Print a Test Page

Cancel

Previous

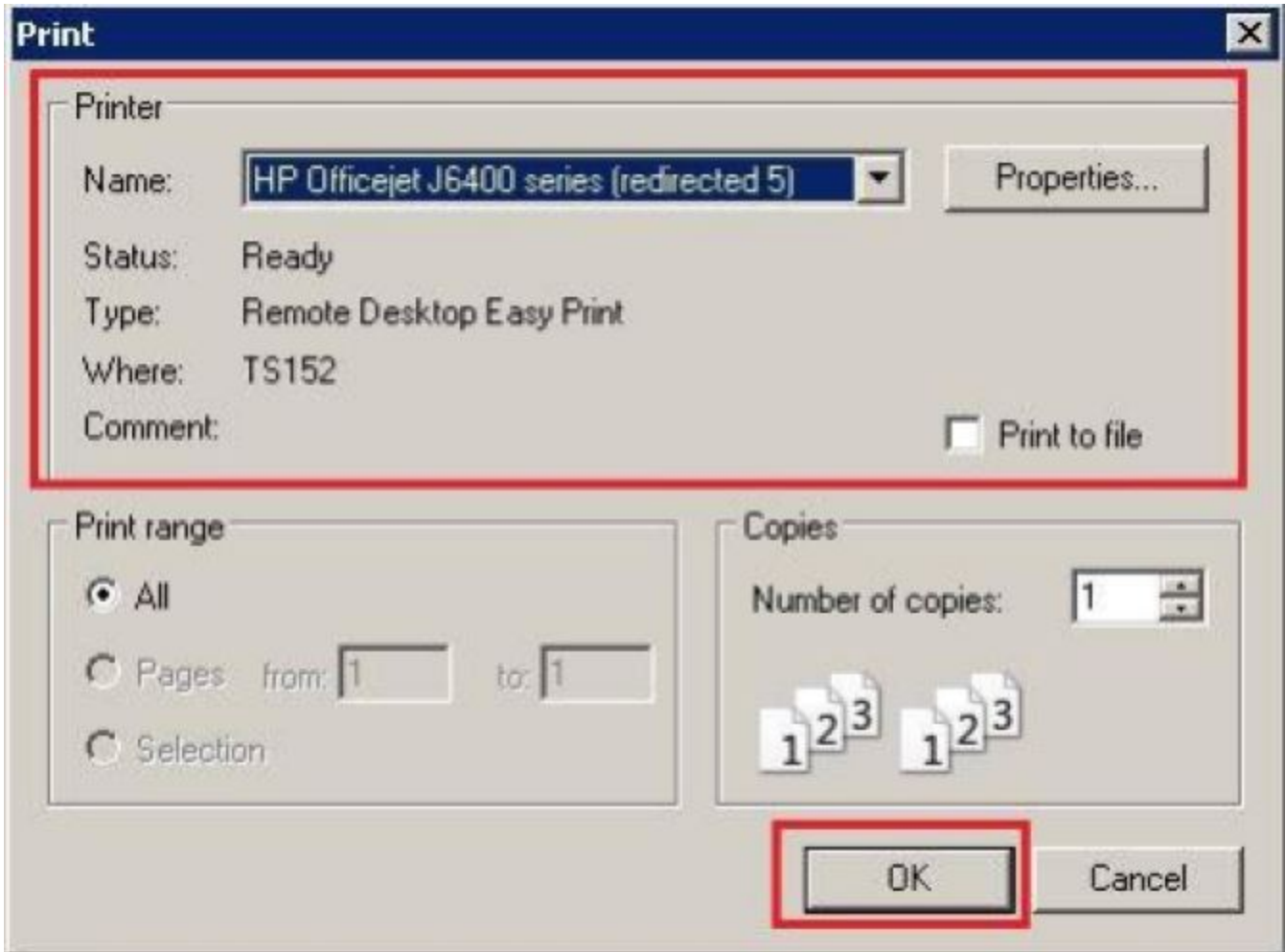
Next

Finish

Notes:

- Select the Print Option that matches the format being used
 - One Vendor, one copy per page
 - One vendor, multiple copies per page
 - Multiple vendors per page
 - Load report from file
 - Generate e-file for IRS FIRE system
- Adjust Margins - Enter adjustment amounts in inches, .25 = ¼ inch.

Step 4: Select the Printer > number of Copies > select OK when ready to print



Step 5: Select Close when printing is complete.