

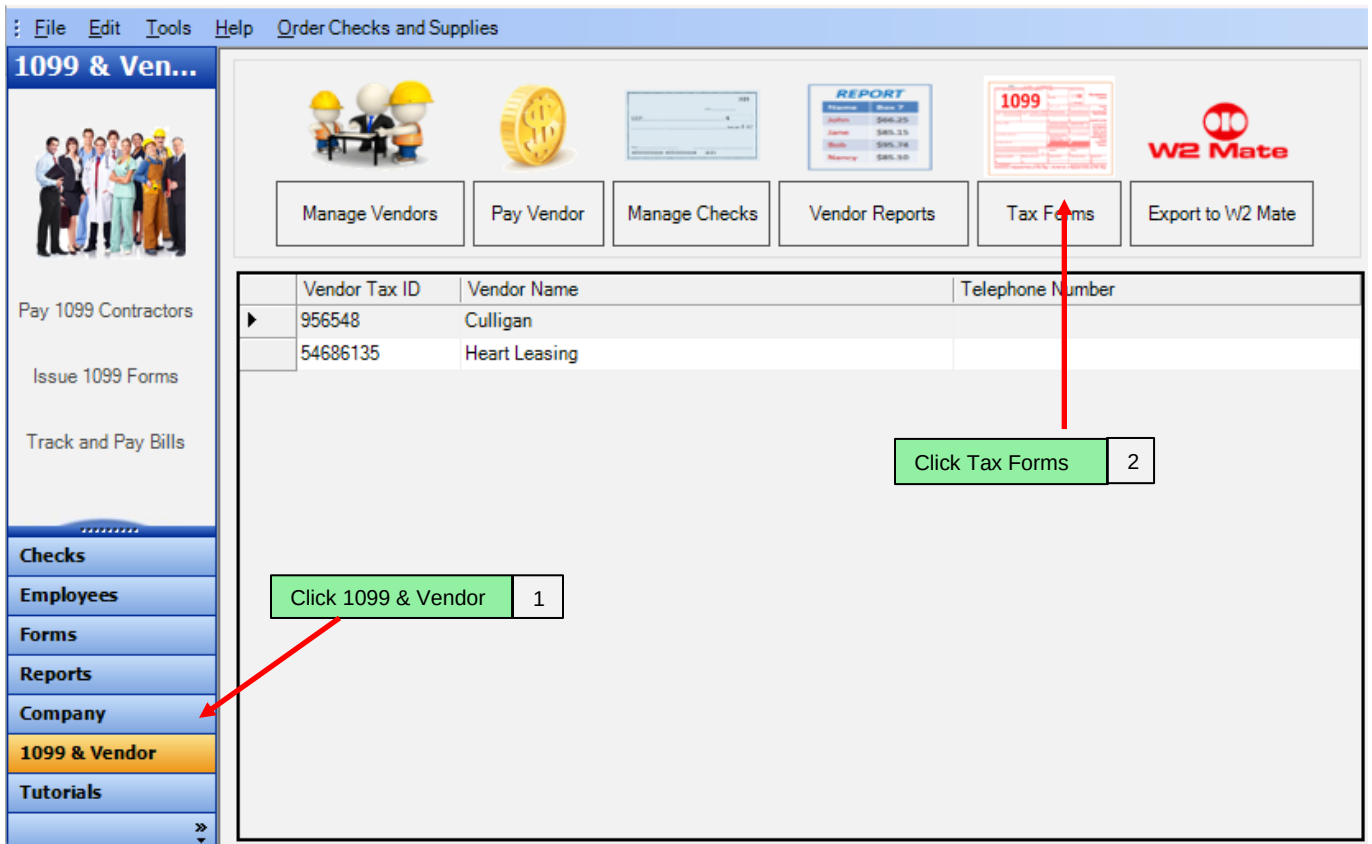
HOW TO PRINT FORM 1099-MISC

Question

PLEASE REFER TO THE STEPS BELOW:

Answer

1. Click on **1099 & Vendor** from the shortcut menu
2. Click on **Tax Forms**



The screenshot shows the Payroll Mate software interface. The menu bar at the top includes File, Edit, Tools, Help, and Order Checks and Supplies. The sidebar on the left has a '1099 & Ven...' menu item. The main workspace contains several buttons: Manage Vendors, Pay Vendor, Manage Checks, Vendor Reports, Tax Forms, and Export to W2 Mate. A table below these buttons lists vendors with their Tax IDs and Names. A red arrow points from the '1099 & Vendor' menu item to the 'Tax Forms' button, with a callout 'Click 1099 & Vendor 1'. Another red arrow points from the 'Tax Forms' button to the table, with a callout 'Click Tax Forms 2'.

Vendor Tax ID	Vendor Name	Telephone Number
956548	Culligan	
54686135	Heart Leasing	

3. The 1099 / 1096 Wizard window will appear with important information.
Carefully read the information and click **Next** to continue.

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1099 / 1096 Wizard

This wizard allows you to print 1099-MISC/1099-NEC and 1096 forms.

The wizard contains 3 pages (Settings, 1099, 1096).

The Settings Page allows you to set the "Payments Threshold" and select the group of vendors to be shown/included on the 1099/1096 forms.

Any vendor whose total payments during the year are less than the "Payments Threshold" will NOT show on the list of vendors.

The list of vendors shows only the ones who have been set up to receive 1099 forms (in the Edit Vendor window) and whose total payments are equal to or more than the "Payments Threshold".

You can use the Vendor drop down list in the 1099 page to move between the different vendors.

Please note that any changes you apply to the 1099 boxes will be lost once you exit this wizard.

If you make any changes to the 1099 boxes that you want to get reflected on the printed 1099/1096 forms, please make sure to print the forms (1099/1096) before you exit this wizard.

To continue, please click "Next".

Click Next

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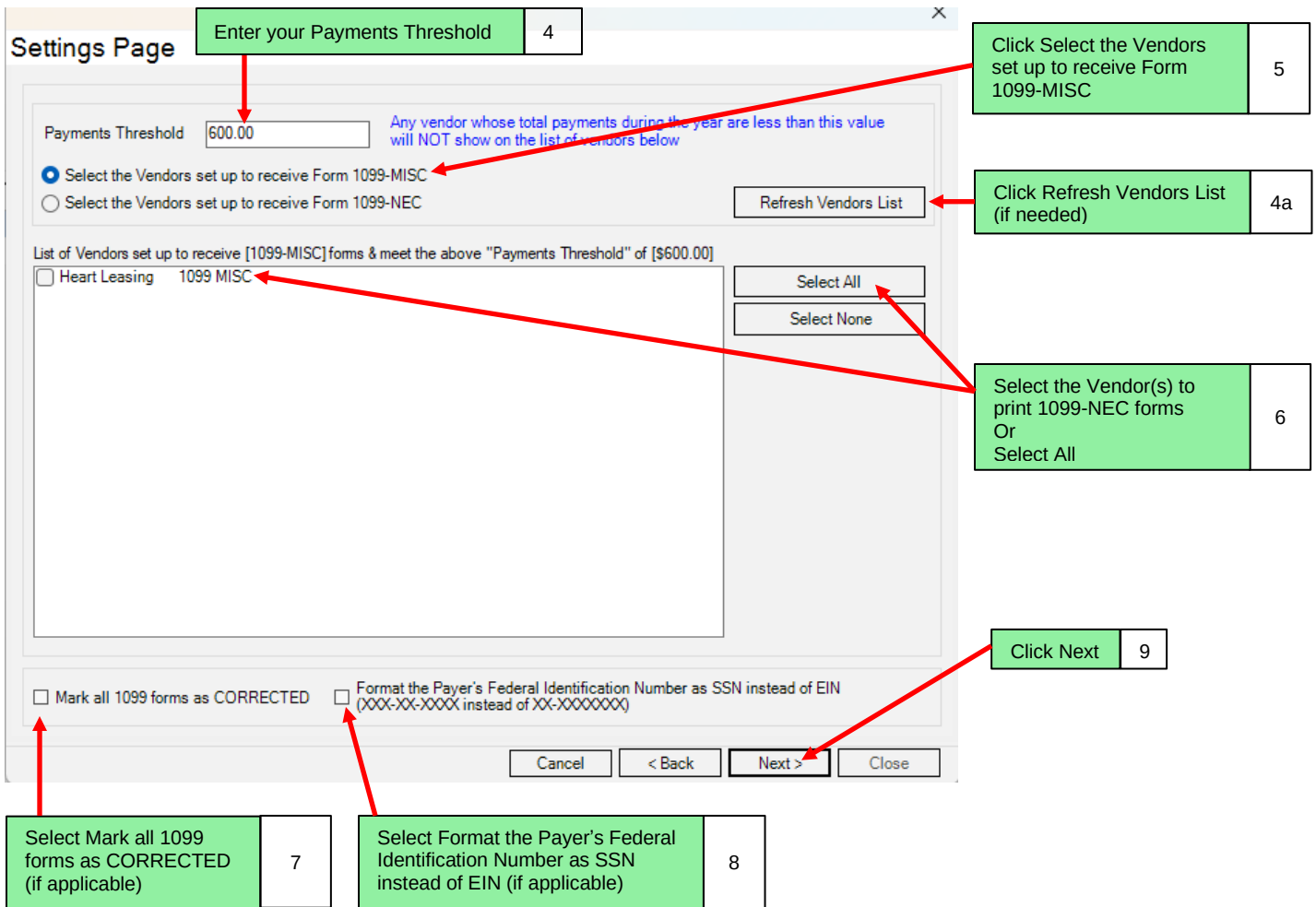
Cancel

< Back

Next >

Close

4. In the Settings Page, type in the **Payments Threshold** amount desired
 - 4a. **IF** Payment Threshold has changed, click **Refresh Vendors List**
5. Click **Select the Vendors set up to receive Form 1099-MISC**
6. Select the **Vendor(s)** to print 1099-MISC forms
7. Select **Mark all forms as CORRECTED** (if applicable)
8. Select **Format the Payer's Federal Identification Number as SSN instead of EIN** (if applicable)
9. Click **Next**



The screenshot shows the 'Settings Page' interface. At the top, a box labeled 'Enter your Payments Threshold' contains the value '4'. Below this, the 'Payments Threshold' is set to '600.00'. A note states: 'Any vendor whose total payments during the year are less than this value will NOT show on the list of vendors below'. There are two radio button options: 'Select the Vendors set up to receive Form 1099-MISC' (selected) and 'Select the Vendors set up to receive Form 1099-NEC'. A 'Refresh Vendors List' button is to the right. Below these is a list of vendors: 'Heart Leasing 1099 MISC'. To the right of the list are 'Select All' and 'Select None' buttons. At the bottom, there are two checkboxes: 'Mark all 1099 forms as CORRECTED' and 'Format the Payer's Federal Identification Number as SSN instead of EIN (XXX-XX-XXXX instead of XX-XXXXXXX)'. At the very bottom are 'Cancel', '< Back', 'Next >', and 'Close' buttons. Red arrows point from numbered callout boxes to these specific elements: 4 to the threshold input, 4a to the refresh button, 5 to the first radio button, 6 to the 'Select All' button, 7 to the 'Mark all 1099 forms as CORRECTED' checkbox, 8 to the 'Format the Payer's Federal Identification Number...' checkbox, and 9 to the 'Next >' button.

10. The 1099 Page will display, click **Print**

Click Print 10

1099 Page

Vendor [Use this drop-down list to move between different vendors]
Heart Leasing 1099 MISC

1099-MISC

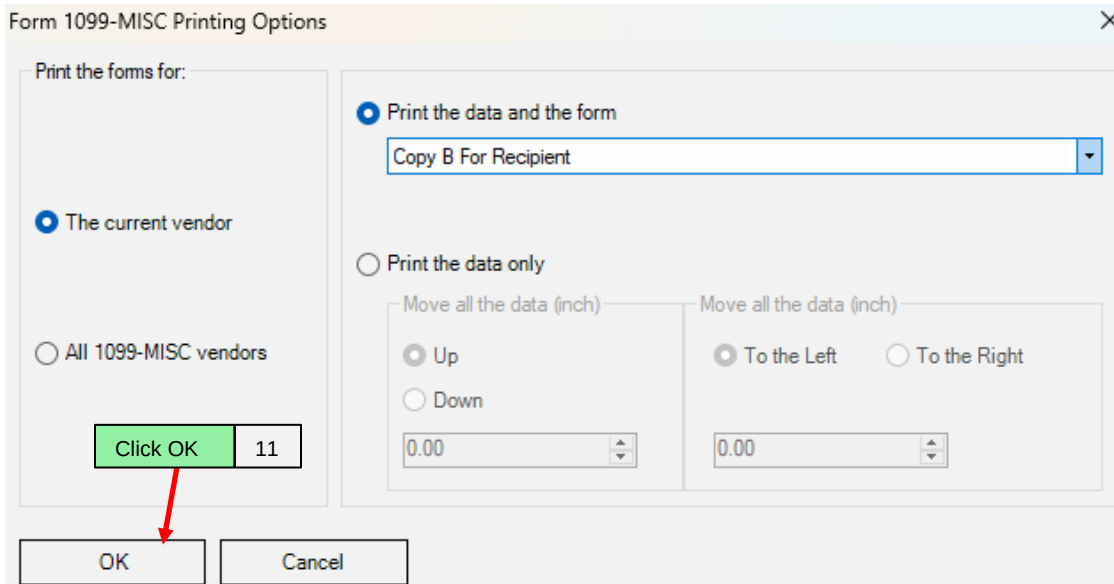
Preview Print

Account number ☐ 2nd TIN not.

1 Rents 4000.00	2 Royalties 0.00
3 Other income 0.00	4 Federal income tax withheld 0.00
5 Fishing boat proceeds 0.00	6 Medical and health care payments 0.00
7 Payer made direct sales totaling \$5,000 or more of consumer products to recipient for resale ☐	8 Substitute payments in lieu of dividends or interest 0.00
9 Crop insurance proceeds 0.00	10 Gross proceeds paid to an attorney 0.00
12 Section 409A deferrals 0.00	13 Excess golden parachute payments 0.00
14 Nonqualified deferred compensation 0.00	
15 State tax withheld 0.00	16 State/Payer's state no.
0.00	17 State income 0.00
	0.00

Cancel < Back Next > Close

11. The Form 1099-MISC Printing Options will display, click **OK**



The dialog box titled "Form 1099-MISC Printing Options" contains the following elements:

- Print the forms for:**
 - ☒ The current vendor
 - ☐ All 1099-MISC vendors
- Print the data and the form:**
 - ☒ Print the data and the form
 - Copy B For Recipient (dropdown menu)
 - ☐ Print the data only
 - Move all the data (inch):
 - ☒ Up
 - ☐ Down
 - 0.00 (spin box)
 - Move all the data (inch):
 - ☒ To the Left
 - ☐ To the Right
 - 0.00 (spin box)

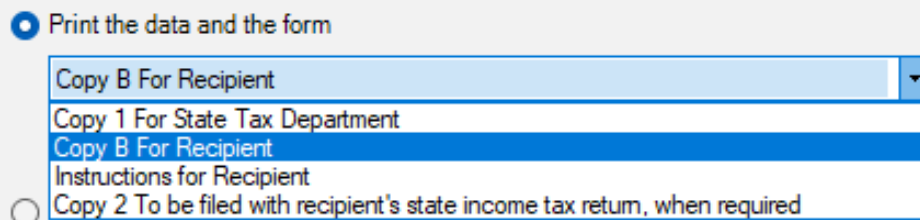
At the bottom, there is a green "Click OK" button with the number "11" next to it, and "OK" and "Cancel" buttons. A red arrow points from the "Click OK" button to the "OK" button.

Print the forms for:

The current vendor is the default selection
 You can choose
 The current vendor
 or
 All 1099-MISC vendors

Print the data and the form:

Drop down selection defaults to Copy B for Recipient but you can make a different selection if needed.



This section shows the "Print the data and the form" options with the dropdown menu open:

- ☒ Print the data and the form
 - Copy B For Recipient
 - Copy 1 For State Tax Department
 - Copy B For Recipient (highlighted)
 - Instructions for Recipient
 - Copy 2 To be filed with recipient's state income tax return, when required
- ☐ Print the data only

Print the data only:

Print data on any Pre-Printed form, use the Print DATA Only selection for all copies of Pre-Printed forms

Make adjustments if needed for printing

Apply Pre-Printed Form adjustments (as needed in .05 increments)

12. Select your printer, click **OK**

