

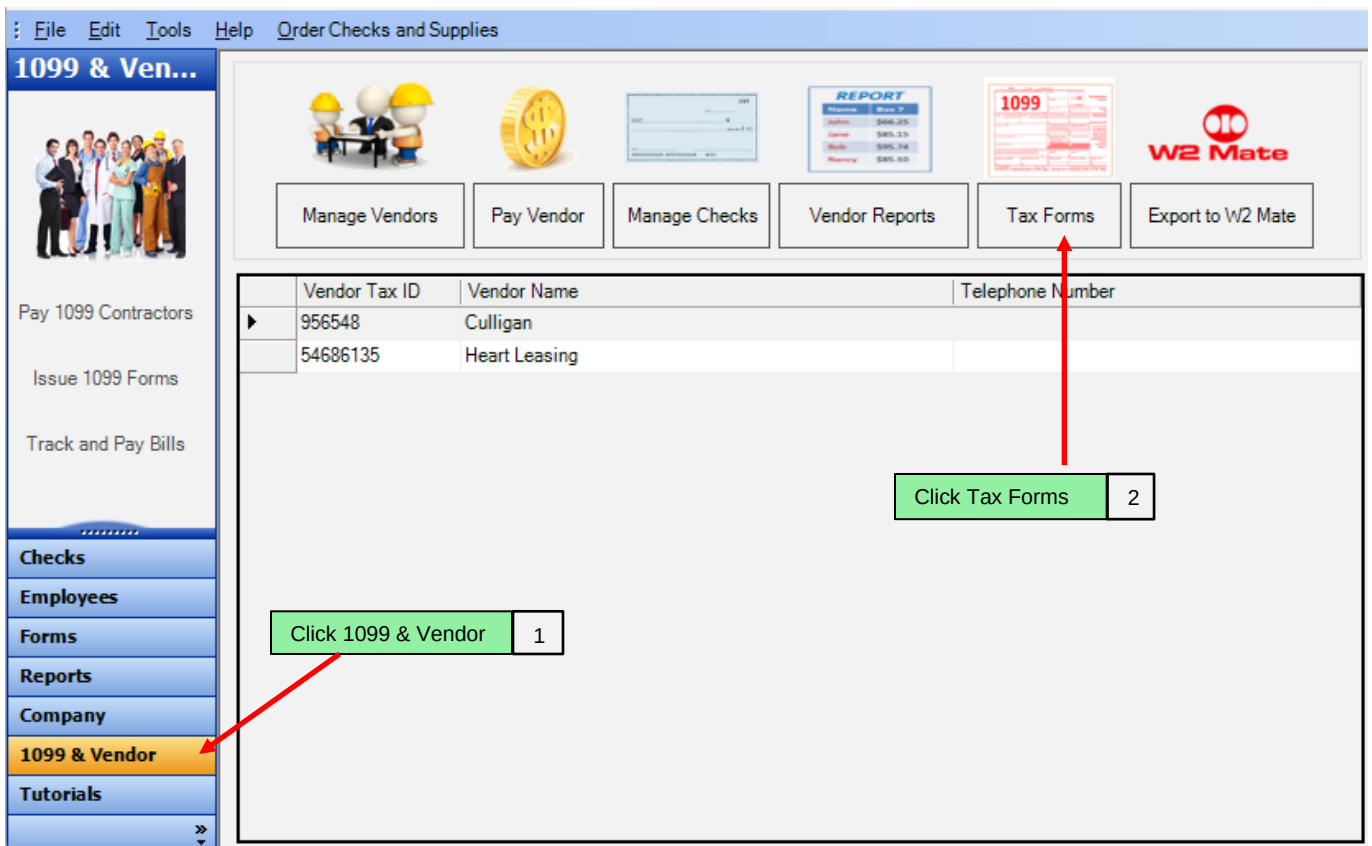
HOW TO PRINT FORM 1099-NEC

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. On the left is a vertical menu with options: Checks, Employees, Forms, Reports, Company, **1099 & Vendor** (highlighted in orange), and Tutorials. A red arrow points from the '1099 & Vendor' menu item to a green button labeled 'Click 1099 & Vendor' with a small box containing the number '1'. The main window has a title bar with 'File', 'Edit', 'Tools', 'Help', and 'Order Checks and Supplies'. Below the title bar is a toolbar with icons for 'Manage Vendors', 'Pay Vendor', 'Manage Checks', 'Vendor Reports', 'Tax Forms', and 'Export to W2 Mate'. A red arrow points from the 'Tax Forms' icon to a green button labeled 'Click Tax Forms' with a small box containing the number '2'. Below the toolbar is a table with columns: Vendor Tax ID, Vendor Name, and Telephone Number. The table contains two rows of data:

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

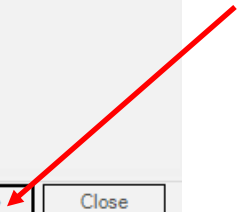
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Cancel

< Back

Next >

Close



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

Click Print 10

1099 Page

Vendor [Use this drop-down list to move between different vendors]

Culligan 1099 NEC

1099-NEC

Preview Print

Account number ☐ 2nd TIN not.

1 Nonemployee compensation

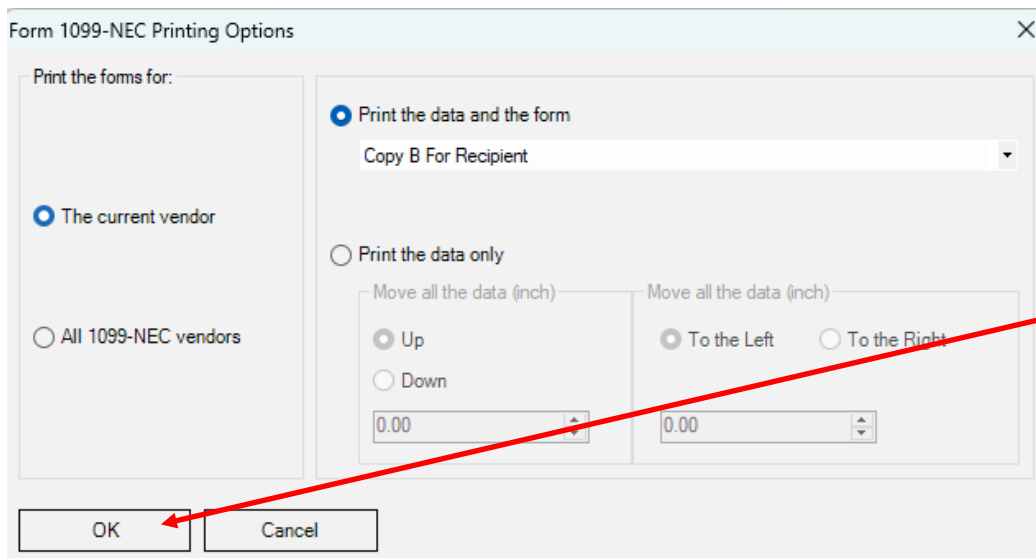
☐ 2 Payer made direct sales totaling \$5,000 or more of consumer products to recipient for resale

4 Federal income tax withheld

15 State tax withheld	16 State/Payer's state no.	17 State income
0.00		0.00
0.00		0.00

Cancel < Back Next > Close

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



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

- Print the forms for:**
 - ☒ The current vendor
 - ☐ All 1099-NEC 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)
- Buttons:** OK, Cancel

A red arrow points from the "Click OK" button to the OK button in the dialog box.

Click OK

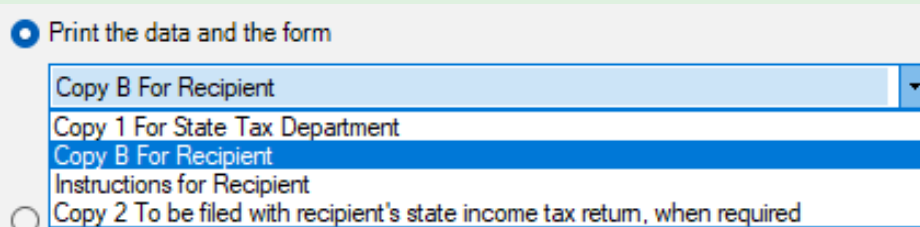
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Print the forms for:

The current vendor is the default selection
You can choose
The current vendor
or
All 1099-NEC 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.



The dropdown menu for "Print the data and the form" shows the following options:

- ☒ Print the data and the form
 - Copy B For Recipient (selected)
 - Copy 1 For State Tax Department
 - Copy B For Recipient
 - 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**

