



Get started with 1099s

Welcome to 2016 Year End!

We've created this guide to help you prepare, distribute, and file 1099-MISC forms for your vendors.



[See 1099 checklists and deadlines](#)



[Prepare and file 1099s in QuickBooks](#)

Thank you for your business in 2016. Here's to a successful new year in 2017!

1099 checklists and deadlines

December 2016

SU	MO	TU	WE	TH	FR	SA
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

January 2017

SU	MO	TU	WE	TH	FR	SA
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Dec 28, 2016:

Go to Company Settings and confirm that your **company name and legal address, and your tax ID** are correct.

Go to the Vendors page in QuickBooks and check each **vendor's tax ID** (Social Security number or Employer Identification Number), **name, and mailing address**.

Make sure that the **Track payments for 1099s** checkbox is selected for vendors who should receive 1099-MISC form in 2016.

Jan 31, 2017:

Give Form 1099-MISC, Copy B to your vendors.

- If you're **mailing a printed copy**, make sure it's postmarked by Jan 31, 2017.
- If you are using the **Intuit 1099 E-File Service**, download a PDF of the 1099-MISC to your computer and then email it to your vendor. You can also print the PDF on blank paper and mail it to the vendor (must be postmarked by Jan 31, 2017).
- If you are printing and mailing your 1099s, you must file your 1099, Copy A, and 1096 with the IRS by Jan 31, 2017. Make sure the package is postmarked on or before Jan 31, 2017.
- If you are **electronically filing your 1099s with the IRS**, be sure to submit them on or before the new IRS deadline Jan 31, 2017.

Prepare and file 1099s in QuickBooks

January will be here before you know it. But don't worry, we'll help you get a head start preparing your 1099-MISC forms for filing.

Before you start

[Confirm your company details in QuickBooks](#)

[Confirm your vendors' details](#)

When you're ready to file

[Create your 1099-MISC forms](#)

[Review your company details](#)

[Assign vendor payments to 1099 categories \(boxes\)](#)

[Select your 1099 vendors](#)

[Review 1099s and print a summary](#)

[Choose your filing method: e-file or print and mail](#)

[Print and mail your 1099-MISC and 1096](#) (required ONLY if you print and mail)

[Order your 1099 Kit](#) (Intuit Market website opens in a separate window)

[Preview and align forms for printing](#)

[Print your final forms](#)

Before you start

Confirm your company details in QuickBooks

We use your company name, tax ID, and legal address to prefill your vendor's 1099-MISC forms.

1 Click the Gear icon  and then click **Company Settings** (or Account and Settings depending on what you see).

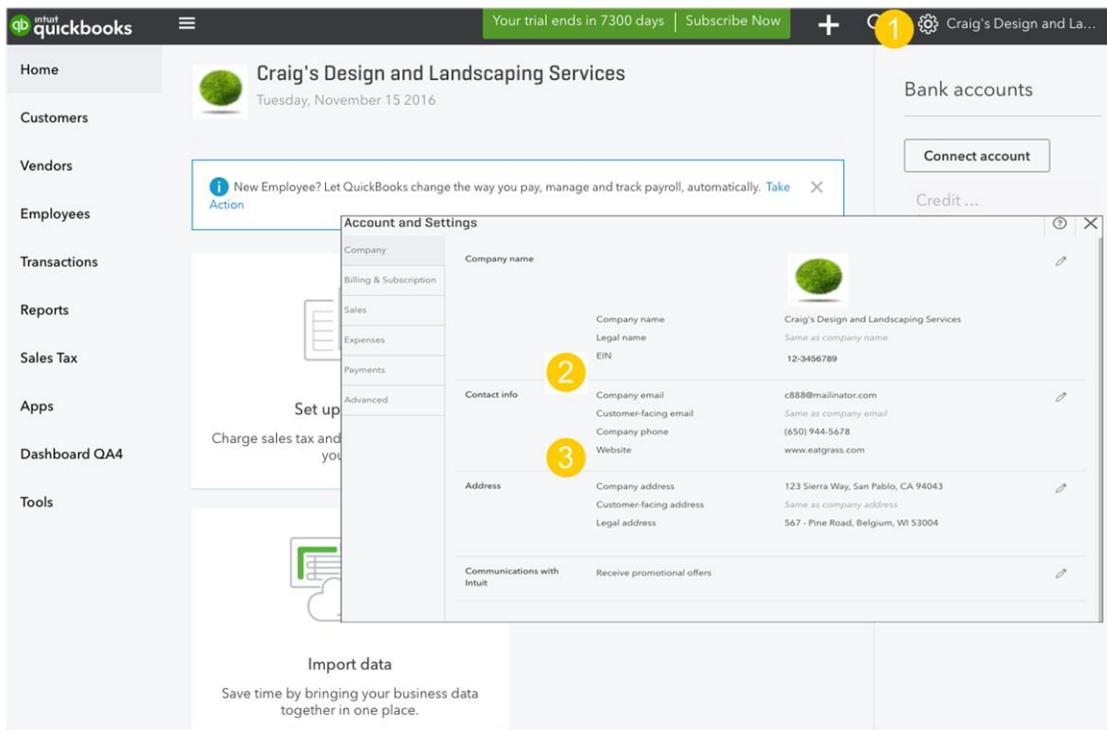
2 Confirm your company tax ID: **Employer ID (EIN)**.

If you need to enter or update your EIN, click the section and make any necessary changes.

Remember to click **Save** to save the changes before closing the section.

3 Click **Contact info** to open the section. Verify that you've entered a legal address for your company.

Remember to click **Save** to save the changes before closing the section.



The screenshot shows the QuickBooks interface for a company named "Craig's Design and Landscaping Services". The "Account and Settings" window is open, displaying various settings. A yellow circle with the number "1" highlights the gear icon in the top right corner of the main interface. Another yellow circle with the number "2" highlights the "EIN" field in the "Company name" section, which contains the value "12-3456789". A third yellow circle with the number "3" highlights the "Contact info" section, which includes fields for "Company email", "Customer-facing email", "Company phone", and "Website". The "Address" section is also visible, showing "Company address", "Customer-facing address", and "Legal address".

Section	Field	Value
Company name	Company name	Craig's Design and Landscaping Services
	Legal name	Same as company name
	EIN	12-3456789
Contact info	Company email	c888@mailinator.com
	Customer-facing email	Same as company email
	Company phone	(650) 944-5678
	Website	www.eatgrass.com
Address	Company address	123 Sierra Way, San Pablo, CA 94043
	Customer-facing address	Same as company address
	Legal address	567 - Pine Road, Belgium, WI 53004
Communications with Intuit	Receive promotional offers	

Quick Tips

Your company's legal address is the address you use when filing taxes.

If you're a sole proprietor with no employees and file no excise or pension tax returns, you can enter your Social Security number as your EIN.

Confirm your vendors' details in QuickBooks

Each vendor profile must have a first and last name, mailing address, and tax ID. We'll use this info to prefill the vendor's 1099-MISC form.

- 1 Click **Vendors** and then select the vendor you want to verify.
- 2 Click **Edit** next to the vendor name to open the Vendor Information window.
- 3 Confirm the vendor's first and last name.
- 4 Confirm the vendor's mailing address.
- 5 Confirm that the vendor's **tax ID** is correct and that the **Track payments for 1099** checkbox is selected.
- 6 Click **Save** to save any changes to the vendor's profile.

The screenshot shows the QuickBooks interface with the 'Vendor Information' window open for 'Brosnaha Insurance Agency'. The window contains the following fields and options:

- Title:** [Empty]
- First name:** Nick
- Middle name:** [Empty]
- Last name:** Brosnaha
- Suffix:** [Empty]
- Email:** [Empty]
- Company:** Brosnaha Insurance Agency
- Phone:** [Empty]
- Mobile:** [Empty]
- Fax:** [Empty]
- Other:** [Empty]
- Website:** [Empty]
- Display name as:** Brosnaha Insurance Agency
- Print on check as:** Use display name
- Address:** 56789 - Main Street, Middlefield, CA 94482
- Notes:** Some notes
- Account no.:** 7653412
- Tax ID:** 23-4567892
- Tracking:** Track payments for 1099

Numbered callouts (1-6) are placed on the screenshot to correspond with the steps in the list: 1 points to the 'Vendors' menu item, 2 to the 'Edit' button, 3 to the 'First name' field, 4 to the 'Address' field, 5 to the 'Tax ID' field, and 6 to the 'Save' button.

Quick Tips

Whenever you add a vendor to your QuickBooks company profile and think they may qualify for a 1099, select the **Track payments for 1099** checkbox and let QuickBooks track their payments for you.

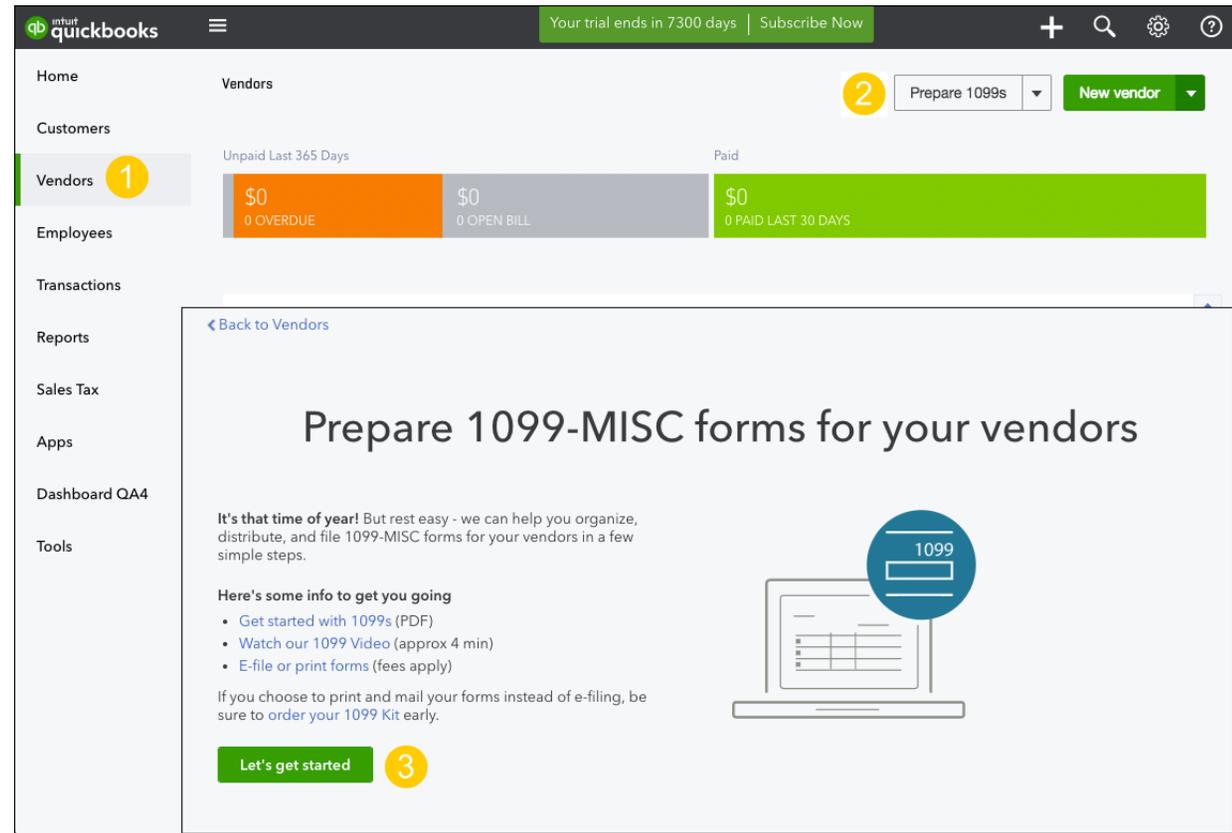
Not sure if a vendor should get a 1099-MISC? Consult your accountant or financial advisor for help. Or [visit the IRS website](https://www.irs.gov/) (https://www.irs.gov/) for more information.

When you're ready to file

Create your 1099-MISC forms

Now that you've confirmed your details, you can get started.

- 1 Click **Vendors** in the navigation bar.
- 2 Click **Prepare 1099s**.
- 3 Click **Let's get started** in the window that appears.



The screenshot shows the QuickBooks interface. On the left is a navigation menu with 'Vendors' highlighted. The top navigation bar includes 'Prepare 1099s' and 'New vendor' buttons. The main dashboard area displays financial summaries: 'Unpaid Last 365 Days' with '\$0 0 OVERDUE', '\$0 0 OPEN BILL', and 'Paid' with '\$0 0 PAID LAST 30 DAYS'. A modal window titled 'Prepare 1099-MISC forms for your vendors' is open, featuring a 'Let's get started' button and a '3' in a yellow circle. The modal text includes: 'It's that time of year! But rest easy - we can help you organize, distribute, and file 1099-MISC forms for your vendors in a few simple steps.' and 'Here's some info to get you going' with links for 'Get started with 1099s (PDF)', 'Watch our 1099 Video (approx 4 min)', and 'E-file or print forms (fees apply)'. A note mentions ordering a '1099 Kit' if printing. An illustration of a laptop with a '1099' form is also present.

Quick Tips

Don't worry if you skipped the instructions in Before You Start. You'll also be able to confirm your company and vendor details here.

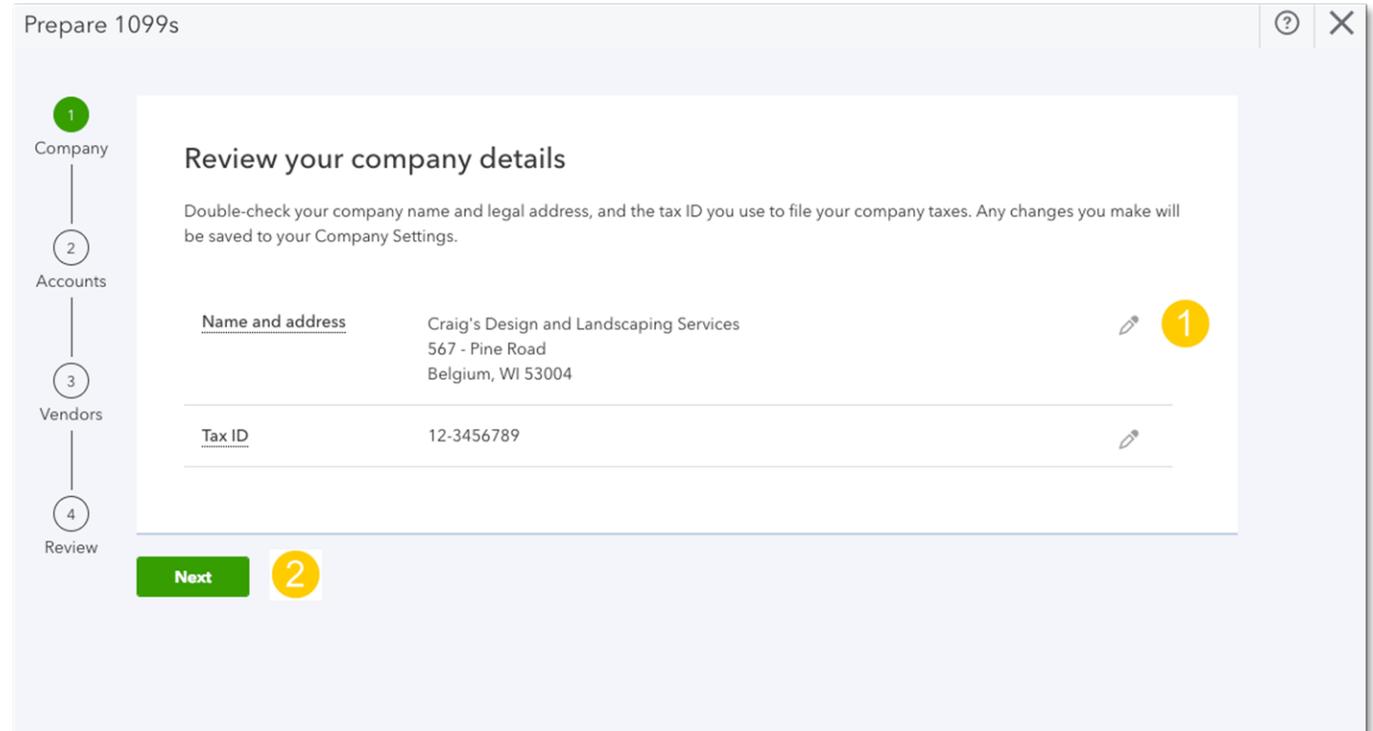
While preparing your 1099s, you can always click **Save and finish later** if you need to stop and take a break. QuickBooks saves all of your details so you can come back and pick up where you left off.

Create your 1099-MISC forms: Review your company details

Double-check your company name and legal address, and the tax ID you use to file your company taxes.

1 Click the pencil icon  if you need to make any changes.

2 Click **Next** to continue.



The screenshot shows a window titled "Prepare 1099s" with a sidebar on the left containing four steps: 1 Company, 2 Accounts, 3 Vendors, and 4 Review. The "Company" step is highlighted with a green circle. The main content area is titled "Review your company details" and contains the following text: "Double-check your company name and legal address, and the tax ID you use to file your company taxes. Any changes you make will be saved to your Company Settings." Below this text are two rows of information:

<u>Name and address</u>	Craig's Design and Landscaping Services 567 - Pine Road Belgium, WI 53004	 1
<u>Tax ID</u>	12-3456789	

At the bottom of the window, there is a green "Next" button and a yellow circle with the number "2".

Quick Tips

If you see **red text**, then you'll need to enter or update some info before you file your forms. But don't worry, QuickBooks saves all of your details so you can come back and pick up where you left off.

Any changes you make here will be saved to your Company Settings.

Create your 1099-MISC forms: Assign 1099 categories to QuickBooks accounts

Each checkbox represents a box on the 1099-MISC form, which are 1099 categories defined by the IRS. Pick all the categories that apply to your vendors and then tell us which QuickBooks accounts you used when you paid them.

- 1 Select the checkboxes next to categories that apply to your vendor payments.
- 2 In the drop-down that appears, select one or more accounts you use to track the payments in QuickBooks.
- 3 Click **Next** to continue.

Prepare 1099s

1 Company

2 Accounts

3 Vendors

4 Review

Assign your vendor payments to 1099 categories

Pick all the categories that apply to your vendors and then tell us which QuickBooks accounts you use to track the payments.
Tip! The most common 1099 category for small businesses is Box 7: Nonemployee compensation.
[Not sure which categories to choose?](#)

- Box 1: Rents
- 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**
Multiple Accounts ... Advertising, Commissions & fees, Legal & Professional Fees
- Box 8: Substitute Payments
- Box 9: Direct Sales
- Box 10: Crop Insurance Proceeds
- Box 13: Excess Golden Parachute

Back Next Save and finish later

Quick Tips

The most common 1099 category for small businesses is Box 7: Nonemployee compensation. But if you're not sure which category to choose, talk to your accountant or financial advisor, or [visit the IRS website](https://www.irs.gov/) (<https://www.irs.gov/>) and review the Form 1099-MISC instructions.

You might want to rename or create new expense accounts in QuickBooks so they're easy to identify when writing checks or paying bills to 1099 vendors throughout the year. For example, you could add "1099" to the name of each account you want to use for tracking 1099 payments.

Create your 1099-MISC forms: Select your vendors

Make sure all of your 1099 vendors are listed and that their details are correct.

- 1 Click **Select 1099 vendors** if you need to add or remove vendors from the list.
- 2 Filter the list by entering a vendor's first, last, or company name, or by selecting the checkbox next to a name.
Click **Save** to save the changes.
- 3 Make sure the vendor's details are correct. If they aren't, click **Edit** and make any necessary changes.
Click **Save** to save the changes to the vendor's profile.
- 4 Click **Next** to continue.

Prepare 1099s

1 Company
2 Accounts
3 Vendors
4 Review

Confirm your 1099 vendors

Make sure your vendors' details are correct. To see vendors that meet the 1099 threshold for this year, click **Next**.

1 **Select 1099 vendors** ⚙️

VENDOR NAME	ADDRESS	TAX ID	ACTION
Nick Brosnaha Brosnaha Insurance Agency	56789 - Main Street Middlefield CA 94482	23-	
Pam Seitz Pam Seitz CPA	222 - Oak Tree Belgium WI 53004	23-	

3

2

Select vendors eligible for 1099s

When you select or clear a checkbox, you update the **Track payments for 1099** setting in the vendor's profile.

Filter by name

- VENDOR
- Bessie McLeod
Books by Bessie
- Nick Brosnaha
Brosnaha Insurance Agency
- Pam Seitz
Pam Seitz CPA

< First Previous 1-3 of 3 Next Last >

Back Next 4

Quick Tips

Adding or removing a vendor from the list selects or clears the **Track payments for 1099** checkbox in the vendor's profile. If you want to track the vendor's payments for 1099 in 2017, make sure that the checkbox is selected in the vendor's profile before you make your first 2017 payment.

Don't see all your vendors? Click the Gear icon () next to the Select 1099 vendors button and then select the number of vendors you want to see at any given time.

Create your 1099-MISC forms: Review 1099 vendors and payments

Review the payments and make sure that they're assigned to the correct 1099 categories. To see transaction details, click an amount.

1 Make sure that you've selected the appropriate year. By default, we show the current tax year and those 1099 vendors who meet the 1099 threshold.

2 If you see **red text**, click the vendor's name and enter the requested info. Any changes you make here will be saved to the vendor's profile.

3 Click the **Print Information Sheet** button to print a summary of 1099 (and 1096) info for your accountant or your company records.

4 Click an amount to open the 1099 Transaction List by Vendor report to see the payments that made up the total amount.

5 Click **Next** to continue.

The screenshot shows the 'Prepare 1099s' window. On the left sidebar, steps 1-4 are listed: 1. Company, 2. Accounts, 3. Vendors, and 4. Review. The main area has a 'Review 1099 vendors and payments' section with a 'TOTAL' of 2 vendors and \$3,450.00. A red warning box says 'Looks like some info is missing. You'll need to enter it before you file your forms.' Below this is a table of vendors: Pam Seitz (\$650.00) and Nick Brosnaha (\$2,800.00). A 'Print Information Sheet' button is visible. At the bottom, there are 'Back' and 'Next' buttons. A 'Transaction List by Vendor' report for 'Craig's Design and Landscaping Services' is open, showing a table of transactions with columns for DATE, TRANSACTION TYPE, NUM, POSTING, MEMO/DESCRIPTION, ACCOUNT, and AMOUNT.

DATE	TRANSACTION TYPE	NUM	POSTING	MEMO/DESCRIPTION	ACCOUNT	AMOUNT
Brosnaha Insurance Agency						
10/14/2016	Bill Payment (Check)	B01	Yes	7653412	Checking	-2,000.00
10/28/2016	Bill Payment (Check)	B02	Yes	7653412	Checking	-800.00
11/15/2016	Bill		Yes	Some insurance for stufts	Accounts Payable (A/P)	10,000.00
Pam Seitz CPA						
10/28/2016	Bill	PS-03	Yes		Accounts Payable (A/P)	8,000.00
10/30/2016	Bill Payment (Check)	B03	Yes	12323243	Checking	-650.00

Quick Tips

If you want to see vendors paid in a prior tax year, who aren't marked for 1099s, or whose total payments fall below the IRS-defined thresholds, click the filter icon and update the settings.

Don't see all your vendors? Click the Gear icon (⚙️) next to the Select 1099 vendors button and then select the number of vendors you want to see at any given time.

The 1099 Transaction List by Vendor report opens in a separate browser window or tab. After you review the report, click the browser's back button to return to the Review window.

If you need to add or edit a payment in QuickBooks, click **Save and finish later** and make the appropriate updates in QuickBooks.

Create your 1099-MISC forms: Choose e-file or print

Select how you want to file – electronically or by print and mail.

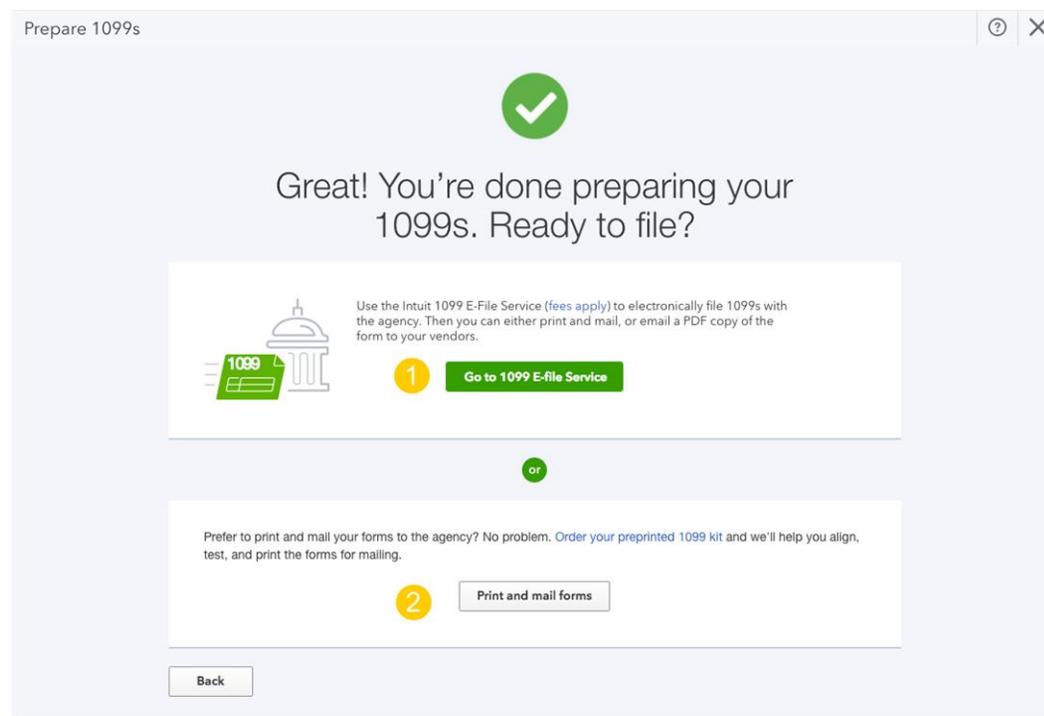
Rather print and mail your 1099-MISC forms instead of e-filing? Later, we'll help you preview, align, and review your forms for mailing.

- 1 Click **Go to 1099 E-file Service** to electronically file your 1099 forms with the IRS. This sends the form to the Intuit E-File service.

or

- 2 Click **Print and mail forms** to print 1099s.

If you select to print, this opens the Print 1099s page. Preview and print your 1099s, 1096, and a summary of your entire return. For printing and mailing instructions, go to [Print and mail your 1099-MISC forms](#)



Quick Tips

Save time and hassle by using [Intuit 1099 E-File Service](#) to file your 1099-MISC forms and your 1096 information to the IRS. If you e-file, you don't need to order preprinted 1099-MISC forms. You can either email a PDF copy of the 1099-MISC or you can print the form on plain paper and mail them to your vendors on or before **Tuesday January 31, 2017**.

Prefer to print and mail? Make sure you have enough 1099 Kits on hand for your vendors. If you haven't ordered them yet, [go to the Intuit Market website](#) and order your kits.

Print and mail your 1099-MISC forms: Preview and align forms

Review the payments and make sure that they're assigned to the correct 1099 categories. To see transaction details, click an amount.

1 Make sure the correct tax year is selected.

2 Make sure the correct form is selected.

Note You can print a summary of the return (also called an information sheet) after you've set up your 1099s or 1096 to print.

3 Click **View preview and print sample**. Be sure to load blank paper in your printer, and then click **Print** in the Print preview window.

Place the printed sample on top of a blank page. Hold them up to the light and look for the grid.

4 If the fields line up, click **Yes, looks good!**

If the fields don't line up, click **No, it doesn't line up** and follow the instructions.

Print 1099s

1 Sample

2 Alignment

3 Final forms

Select a form type and print a sample

1 Select the type of form you want to print.

1099 1096

2 Load blank paper in your printer.

3 **View preview and print sample**

4 Place the sample on top of a blank page. Hold them both up to the light and look for the grid. Do the fields line up? If not, make a note of the misalignment.

Yes, looks good! **No, it doesn't line up**

Tax Year: 2016

Print preview

To print, right-click the preview and select Print. Or, click the Print icon if you see one below.

Craig's Design and Landscaping Service 1234567890.00
567 - Pine Road
RedLust, ME 03004 US
(850) 944-5678 1234567890.00 1234567890.00

12-3456789 12-3456789 1234567890.00 1234567890.00

*** TEST PRINT *** 1234567890.00 1234567890.00

123 Main Street 1234567890.00 1234567890.00

AnyTown, USA 12345 1234567890.00 1234567890.00

Alignment Grid

Close **Print**

Quick Tips

Change your mind and want to e-file? Save time and hassle by using [Intuit 1099 E-File Service](#) to securely file your 1099-MISC forms and your 1096 information to the IRS. If you e-file, you don't need to order preprinted 1099-MISC forms. You can either email a PDF copy of the 1099-MISC to your vendors or you can print their 1099-MISC on plain paper and mail them to your vendors.

Print and mail your 1099-MISC forms: Print final forms

Preview, align, and review your forms for mailing. After you preview your forms and make sure the alignment is correct, you can print the final forms for mailing.

- 1 Select the form you want to print.
- 2 Load the preprinted forms in your printer.
- 3 Click **View preview and print forms**, then click **Print** in the Print preview window.
- 4 Fold the 1099-MISC, Copy B forms and insert them in the envelopes you received with your 1099 Kit.

Make sure your company name and address, and the vendor's name and address appear correctly in the envelope windows.

The screenshot displays the 'Print 1099s' application interface. On the left, a vertical navigation pane shows three steps: 'Sample' (1), 'Alignment' (2), and 'Final forms' (3). The main area is titled 'Select a form type and print' and includes a 'Tax Year' dropdown menu set to '2016'. Under the heading '1 Select the type of form you want to print.', there are three radio button options: '1099' (which is selected), '1096', and 'Summary'. Below these options are three preview thumbnails of the respective form types. A section labeled '2 vendors selected' contains a 'View selected 1099 vendors' button. Below that is a 'View preview and print forms' button. A list of instructions follows: '2 Load the 1099 forms in your printer.', '3 Don't forget to fill out boxes 16-17 by each of your vendors did work for you each of their 1099 forms. Get more info here.', and '4 5 Mail forms to your vendors and send them to the IRS.' At the bottom of the main window are 'Back' and 'Next' buttons. An inset 'Print preview' window is open, showing a sample 1099-MISC form for 'Craio's Design and Landscaping Service' with a total amount of 2800.00. The preview window has a 'Print' button at the bottom right.

Quick Tips

Prevent delays when you mail the forms to vendors and to the IRS. Affix the correct postage to the envelopes.

Printing a Summary (also called an information sheet) for your company records can help you verify which forms you've already printed. This is especially useful if you have to reprint a form or you provide your accountant or financial advisor with the information.

Keep an eye on your 1099 dates and deadlines. Mail 1099-MISC, Copy B to your vendors, and 1099-MISC, Copy A and 1096 to the IRS by **Tuesday January 31, 2017**.

