

# 1099 FAQs (2019)

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## *What tax forms does Sage Intacct support?*

Sage Intacct supports the following tax forms: 1096, 1099-MISC, 1099-DIV, 1099-INT, 1099-R, 1099-S, 1099-PATR, 1099-G and 1099-W-2G purchased from [www.formsforIntacct.com](http://www.formsforIntacct.com).

## *What is the difference between the IRS forms and the Sage Intacct forms?*

The IRS forms are one form per page, whereas Sage Intacct forms have two per page. Your 1099 information correctly prints to fit the Sage Intacct forms. Be sure to purchase your forms from [www.formsforIntacct.com](http://www.formsforIntacct.com).

## *Where can I get tax forms?*

The forms you'll find in our *Forms Center* are the only ones we support.

### **To purchase Sage Intacct supported 1099 forms:**

- On the Home page, go to Resources > Checks & Supplies > 1099s and other tax forms.
- OR, go to <http://www.formsforIntacct.com>.

## *How do I add initial 1099 values for my vendors?*

There are two ways to add initial 1099 values for vendor records: manually or via CSV import.

### **To manually add initial 1099 values:**

1. Go to **Accounts Payable** from the navigation bar.
2. Select the **All** tab.
3. Select **Vendors** from the menu.
4. **Edit** the appropriate vendor.
5. Go to the **Additional Information** tab.
6. Click on the **1099 Form** link (Note: this only appears in edit mode).
7. Select the correct **1099 year**.
8. Select the appropriate **1099 form** for this vendor and enter the amounts you want to add to the vendor's current 1099 balance.
9. **Save** the changes.

### **To add initial 1099 values via CSV import:**

1. Go to **Company** from the navigation bar.
2. Select the **Setup** tab.
3. Select **Import Data** from the menu.
4. Locate the **Set-Up AP Master List, Open Bills and Adjustments** section.
5. From the **Vendor 1099 Opening Balances** field, click **"Template."**
6. Open the **Excel** file.
7. Fill out the required information and **save as .CSV** format:
  - a. **Vendor ID**
  - b. **Vendor Name**
  - c. **Entity** (only applicable if in a multi-entity company where "Entity issues separate 1099 forms" is selected)
  - d. **Form 1099 Type**
  - e. **Form 1099 Box**
  - f. **Amount**
8. **Save** the file as **.CSV format**.

9. Navigate back to the **Vendor 1099 Opening Balances** field in the **Company Setup Checklist**.
10. Click **Import**.
11. **Import the CSV** file.

### *How do I update or change the 1099 amount for a vendor?*

#### **You can manually update a Vendors 1099 amount by doing the following:**

1. Go to **Accounts Payable** from the navigation bar.
2. Select the **All** tab.
3. Select **Vendors** from the menu.
4. **Edit** the appropriate vendor.
5. Go to the **Additional Information** tab.
6. Click on the **Form 1099** link (Note: this only appears in edit mode).
7. Select the correct **1099 year**.
8. Select the appropriate **1099 form** for this vendor and enter the amounts you want to add to the vendor's current 1099 balance.
9. **Save** the changes.

*Note:* In order to reduce the vendor's 1099 amount, a negative number can be entered.

### *Can I update all existing transactions after making a vendor 1099able?*

To update existing transactions for a newly 1099 vendor, select the option "Update all transactions for this vendor for the current and prior year based on modified 1099 information" when prompted after saving the vendor record. This prompt will appear if there are existing bills and you have just elected to make this vendor 1099able.

### *Why is my 1099 Report blank? / Why is my vendor or bill missing from the 1099 report?*

This is normally caused by 1099 information not selected for a vendor.

#### **To check this, do the following:**

1. Go to **Accounts Payable** from the navigation bar.
2. Select the **All** tab.
3. Select **Vendors** from the menu.
4. **Edit** the appropriate vendor.
5. Go to the **Additional Information** tab.
6. Click on the **1099 Form** link (Note: this only appears in edit mode).
7. Select the correct **1099 year**.
8. Verify the **1099 type** has been selected.

**No, it is not selected:** Select the default 1099 for type and box. Next, enter the vendor's 1099 amount in the appropriate box for the amount to be shown on the vendors 1099. This must be done; just selecting the box does not update previously created bills.

**Yes, it is selected:** Then verify the following:

1. The bills for this vendor do have the 1099 box checked as true (this is a box that can be unchecked by anyone).
2. Ensure the "Paid Date" of the bills is in the correct 1099 year - the 1099 amount appears in the year it was paid.

### *Can a paid bill that is not 1099 be edited to 1099 eligible?*

#### **Yes. To update the 1099 status of Accounts Payable bills:**

1. Go to **Company** from the navigation bar.

2. Select the **Setup** tab.
3. Select **Import Data** from the menu.
4. Locate the **Set-Up AP Master List, Open Bills and Adjustments** section.
5. From the **Vendor 1099 Transaction Update** field, click "**Template.**"
6. Open the **Excel** file.
7. Fill out the required information and **save as .CSV** format
8. Navigate back to the **Vendor 1099 Transaction Update** field in the **Company Setup Checklist**.
9. Click **Import**.
10. **Import the CSV** file.

Note: This feature will only update bills which were manually created in the system and will not update the status of any bills uploaded through the CSV import tool.

### *Where do I set 1099 printer settings (print offsets)?*

**To set your 1099 printer settings do the following:**

1. Go to **Accounts Payable** from the navigation bar.
2. Select the **All** tab.
3. Select **1096/1099** from the menu.
4. Choose **Form 1096** or **Form 1099**.
5. Locate the section titled **Printing Offsets (In Inches)** and adjust accordingly.
6. When printing the 1099s, a prompt will appear to select your printer. The following selections are recommended:
  - a. Page Scaling should be set to "None"
  - b. Auto Rotate should be unchecked

### *Can a 1096 be printed from Sage Intacct?*

**Yes, a 1096 can be printed from Sage Intacct. To do this:**

1. Go to **Accounts Payable** from the navigation bar.
2. Select the **All** tab.
3. Select **1096/1099** from the menu.
4. Choose the option: **Form 1096**.
5. Select applicable the **tax year**.
6. Click **Print**.

### *Where can I print my 1099 forms in a multi-entity company?*

You can print the 1099 forms at either the Top-Level or the Entity level, depending on your Multi-Entity Configuration. The Top-Level will combine the 1099 amounts for all entities based on Federal Tax ID and address at the Top-Level company, or issue separate 1099s per entity. Or, at the Entity Level, you can print individual 1099's based on entity by using the Tax IDs and addresses set on each specific entity. See the Sage Intacct Help Center topic here for more information.

### *How do I print a separate 1099 per entity?*

**To configure your Multi-Entity Company to print a separate 1099 per entity:**

1. Go to **Company** from the navigation bar.
2. Select the **Admin** tab.
3. Select **Subscriptions** from the menu.
4. Click **Multi-Entity Console**.
5. Click **Configure** when prompted.
6. Locate the **1099** section.

7. Select the checkbox: **Issue a separate 1099 per entity**.
8. **Save** the configuration page.

*Note:* Once the configuration is selected, confirm each entity has an assigned Federal Tax ID and address within the Entity Information page. However, if more than one entity has the same Federal Tax ID, they will need to be printed onto the same form using a Location Group containing the entities with the same ID.

### *Can I enable employees as 1099 eligible?*

Yes, an employee can be enabled as 1099 eligible.

#### **To enable an employee record for 1099s:**

1. Go to **Time & Expenses** from the navigation bar.
2. Select the **All** tab.
3. Select **Employees** on the menu.
4. Click **Edit** next to the **Employee** record.
5. Locate the **Employee Information** Tab.
6. Enter the **1099 Name** into the field provided.
7. Click the link **Form 1099**.
8. You will be taken to a new screen where you will select the following:
  - a. **Form Name**
  - b. **Default 1099 Box**
  - c. **Initial Values Year**
9. Enter the **initial values** into the appropriate field for the selected year.
10. Click **Save** on the “**Form 1099 Information with Default Box**” screen.
11. **Save** the employee record when complete.

### *How do I update or change the 1099 amount for an employee?*

#### **You can manually update an Employee’s 1099 amount by doing the following:**

1. Go to **Time & Expenses** from the navigation bar.
2. Select the **All** tab.
3. Select **Employees** from the menu.
4. **Edit** the appropriate employee.
5. On the **Employee Information** tab, click on the **1099 Form** link (Note: this only appears in edit mode).
6. Select the correct **1099 year**.
7. Select the appropriate **1099 form** for this vendor and enter the amounts you want to adjust on the employee’s current 1099 balance.
8. **Save** the changes when complete.

### *Can I make an adjustment 1099able?*

Yes. After 2017 Release 4.1, users can now select the 1099 flag at the line-level of Accounts Payable Adjustments. No additional configuration is needed, as long as the vendor is 1099able.

### *Can Sage Intacct print, mail, and file my 1099 forms for me?*

No. Sage Intacct only generates 1099 forms that you can print and mail on your own. However, Sage Intacct has Marketplace Partners which are third-party services that specialize in printing and mailing tax forms. These services also file the required information with the Internal Revenue Service. Sage Intacct tax partners can be located by going to <http://marketplace.intacct.com/> and searching for 1099

#### **To export your 1099 data to provide to a third-party service:**

1. Go to **Accounts Payable** from the navigation bar.

2. Select the **All** tab.
3. Select **1096/1099** from the menu.
4. Choose **Create 1099 File**.
5. Select applicable the tax year from the **Year Ending** drop-down menu.
6. Choose any corresponding **Filters** from the options provided.
7. Select the **Form to Print**.
8. Click **Export** to generate the file, or **Process and Store** to retrieve it later.

### *Updating transactions to show on the 1099 Report:*

#### **To Update the Vendor Transactions:**

1. Go to **Company** from the navigation bar.
2. Select the **Setup** tab.
3. Select **Import Data** from the menu.
4. Locate the **Vendor 1099 Transaction Update** option and Click **Template**.
5. Open the file in **Excel**.

#### **To gather the information:**

1. Go to **Accounts Payable** from the navigation bar.
2. Select the **All** tab.
3. Select **Vendors** from the menu.
4. Click **Manage Views** in the upper left-hand corner of the list.
5. Select **Create New View** from the menu.
6. Choose the applicable **columns** that match the 1099 template and de-select the rest.
7. Click **Save**.
8. Give the view a **Name**.
9. Click **Deploy** if you'd like to deploy the view.
10. Click **Save** again.
11. Within the **Vendor** list, select the drop-down next to **View**.
12. Locate and **select your recently created view**.
13. **Export** the file and plug the information into your 1099 Vendor Transactions Template (\*Example of a field in the NAME1099 column – "FORM1099").

#### **Once you have filled it out, you can import it:**

1. Go to **Company** from the navigation bar.
2. Select the **Setup** tab.
3. Select **Import Data** from the menu.
4. Select **Import** next to **Vendor 1099 Transaction Update**.
5. **Upload** and **Save**.

### *How do I set a 1099 Contact for a vendor?*

#### **To set a vendor's 1099 contact:**

1. Go to **Accounts Payable** from the navigation bar.
2. Select the **All** tab.
3. Select **Vendors** from the menu.
4. **Edit** the appropriate vendor in the list.
5. Select the **Contact List** tab.
6. Select the appropriate **1099 Contact** from the drop-down menu provided.
7. **Save** when complete.

### *How do I enable line-level override?*

#### **To enable override of the 1099 flag and/or form and box in Accounts Payable:**

1. Go to **Accounts Payable** from the navigation bar.
2. Select the **Setup** tab.
3. Select **Configuration** from the menu.
4. Scroll down to the **1099's** section.
5. Select the appropriate option(s):
  - a. **Enable 1099 flag override**
  - b. **Enable 1099 form and box override**
6. **Save** the configuration screen when complete.

#### **To enable override of the 1099 flag and/or form and box in Purchasing:**

1. Go to **Purchasing** from the navigation bar.
2. Select the **Setup** tab.
3. Select **Configuration** from the menu.
4. Scroll down to the **1099's** section.
5. Select the appropriate option(s):
  - a. **Enable 1099 flag override**
  - b. **Enable 1099 form and box override**
6. **Save** the configuration screen when complete.

### *Will the vendor type's 1099 selection override the vendor record's 1099 setting?*

The 1099 form type on the vendor record will override the 1099 form type selected on a vendor type if the vendor record already had the form selected before the vendor type was assigned to the record.

### *How do I update the Federal Tax ID?*

#### **To update the company's Federal Tax ID:**

1. Go to **Company** from the navigation bar.
2. Select the **Setup** tab.
3. Select **Company** from the menu.
4. Click **Edit**.
5. Select the **General Information** tab.
6. Locate the field titled **Federal ID** and enter the appropriate ID.
7. **Save** when complete.

#### **To update an entity's Federal Tax ID:**

1. Go to **Company** from the top navigation bar.
2. Select the **Setup** tab.
3. Select **Entities** from the menu.
4. **Edit** the appropriate **Entity**.
5. Enter a **Federal ID** in the field provided.
6. **Save** when complete.

### *What if more than one of my entities has the same Federal ID?*

If you are issuing separate 1099s per entity and multiple entities have been assigned the same Federal ID, you will need to create location groups for each Federal ID and all entities assigned the same one Federal ID should be assigned to the same location group to run the 1099 Report and print the 1099 Forms accordingly.

#### **To create a location group, locate all entities which share the same Federal ID and do the following:**

1. Go to **Reports** from the navigation bar.

2. Select the **Setup** tab.
3. Select **Dimension Groups** from the menu.
4. Click **+Location** to add a location group.
5. Enter a **Location Group ID** and **Name**.
6. For the **Group Type**, select the option: **Specific Members**.
7. Choose the appropriate **Locations** within the **Members** section.
8. Click **Save** when complete.

Repeat these steps for each group of locations which share the same Federal ID.

### *How do I remove the vendor ID or employee ID from the 1099 form?*

#### ***In order to remove the vendor ID or employee ID from a 1099 form:***

1. Go to **Accounts Payable** from the top navigation bar.
2. Select the **All** tab.
3. Under **Reports** in the menu, select **1096/1099**.
4. Select **Form 1099** from the menu.
5. Choose the appropriate **year**.
6. Select all applicable **Filters**.
7. Under **Format**, select the option **Do not print Vendor ID/Employee ID**.
8. Click **Print**.

### *Can I get a report that shows all of my Vendor 1099 Names?*

Yes, this can be done via a Custom Report.

#### ***To create a custom report listing all Vendor ID's, Vendor Names, and their associated 1099 Name:***

1. Go to **Customization** or **Platform Services** from the top navigation bar.
2. Select **Custom Reports** from the menu.
3. Click **Add**.
4. From **Step 1**, choose the **Data Source: Vendor**.
5. In **Step 3**, select the **Columns** of data you want the report to display. Select any columns you want, but be sure to include the following:
  - a. **Vendor Name**
  - b. **Vendor ID**
  - c. **1099 Name**
6. Click **Next>>** until you get to Step 6.
7. In **Step 6**, sort the **Vendor ID** column **Ascending**.
8. Click **Save** to proceed up to **Step 11**.
9. Enter the appropriate **Name** for the report in the field provided.
10. Click **Add to Menu** in order to add this report to the Accounts Payable Custom Report menu.
11. Select the **Application: Accounts Payable**.
12. Enter a **Description**, if necessary.
13. Confirm the **Status** shows: **Active** and **Save**.

### *Creating a vendor in the Add Bill screen doesn't prompt me to set 1099 details. Why?*

The Add Bill screen only supports the creation of the vendor via the '+Add' link in the vendor drop-down menu. Once the new vendor record has been saved, you will need to select the 'View' icon next to the vendor drop-down, edit the vendor, and make 1099 setting selections from within this screen.

### *Can we move or adjust individual boxes before printing?*

Not at this time. Please submit an IDEA in the Community for this option.

*All vendors on my 1099 Report are not showing up when I print a 1099 Form. Why?*

If the vendor was paid by credit card, Form 1099-MISC always excludes the payments made with credit card (even if the checkbox to exclude credit cards is not selected). Payments made by credit card for 1099-MISC should be included with Form 1099-K. Here are the relevant instructions from the IRS:

<https://www.irs.gov/pub/irs-pdf/i1099misc.pdf>.

*Does Sage Intacct support the 1099-K Form?*

Not at this time. Please submit an IDEA in the Community for this option.

*Why is the 1099 report showing blank when my vendors have 1099able bills?*

Most commonly, this is due to the Time Period filters. The Start Date and End Date fields default to the present year, rather than the prior year. To run for the prior year, clear these dates and enter the correct Time Period into the fields provided.

*Why is my 1099 Report not picking up the vendor's initial values?*

This commonly occurs when initial 1099 values for the vendor were entered in to the incorrect year. For example, if the initial values were entered in for year 2019 on a new vendor record, they will not appear on the vendor 1099 Report for 2018.

*Will a bill show on the 1099 report if I apply an adjustment to a 1099able bill?*

If no monies are associated to the application, the 1099able bill will not appear on the 1099 report for the value of the applied adjustment. If there are monies associated to the payment (for example: The bill is \$1000 and the adjustment is \$900, so \$100 cash payment is made), then the value of the cash or other payment will appear on the 1099 report (in the example, \$100 will appear on the 1099 report).

*Why isn't my positive line on a bill appearing in full value on the 1099 report or form?*

If there is a negative line and/or adjustment applied to this positive line, only the value of the bill paid with money (not credit) will appear on the 1099 report or form. The user will need to adjust the 1099 values manually in order for the full amount to appear within the report or form.

*Will an Advance applied to a bill appear on the 1099 Report and Form?*

No, an Advance applied against an AP Bill will not appear on the 1099 Report and/or Form. The "paid amount" column on the 1099 Report will reflect only the monies or charge card payment applied against the bill and will not reflect the application of an adjustment, credit on the account, or Advance.

*When running my 1099 Report at the Top Level, I get an error stating "Your filter criteria produced no data." Why?*

This error occurs in a multi-entity company when the option "Issue separate 1099 per entity" has been selected and the user is running the 1099 Report at the Top Level. You will either need to select an entity from the filters, run the 1099 Report at the Entity Level, or disable the setting "Issue separate 1099 per entity."

*Why does my Purchasing transaction not have the option for 1099 at the line level?*

The 1099 option only becomes available once a transaction definition is configured to post to the Accounts Payable module. Navigate to the transaction definition within the Purchasing Setup menu and confirm the transaction's posting settings within the "Accounting" section.

*Can I print a 1099 for an inactive vendor?*

1099 forms will still print for inactive vendors if using the "Select All Vendors" option or using the pick list to select the vendor.



### *Why can't I update the 1099 flag on historical bills?*

The 1099 transaction update import only works on bills with a GL impact. Because historical bills do not have a GL impact, they will need to be either manually edited (if unpaid) or reclassified (if partially or fully paid) to update the 1099 flag on line items.

### *Do Charge Card Transactions appear on the 1099 Report or Form?*

Charge Card Transactions do not contain a 1099 Flag and thus will not appear on the 1099 Report or Form when created directly through the Cash Management module.

### *Why doesn't the "Exclude Credit Card Payments" option work when printing a 1099-MISC form?*

Because Credit Card payments must be filed on a 1099-K form, the "Exclude Credit Card Payments" option does not apply when printing a 1099-MISC form. Credit Card payments will automatically be excluded from the 1099-MISC form, regardless of whether the checkbox has been selected.

### *Will Parent-Child Vendors print on the same 1099 Report and/or Form?*

No, they will not. Each vendor record will appear separately on the 1099 Report and will print their own individual 1099 Form.

### *1099 Form Printing Tips:*

- Be sure the forms were purchased from [www.formsforintacct.com](http://www.formsforintacct.com).
- Use the recommended starting offsets: Vertical: 0.67 and Horizontal: 0.80 (adjust up or down as necessary).
- Select the correct 1099 year from the "Year Ending" drop-down menu when printing the forms.
- Print using Adobe Reader, rather than your browser's PDF viewer.
- Page Scaling on the "Print" screen within your PDF viewer should always be set to "None" when printing 1099 forms.
- Auto Rotate on the "Print" screen within your PDF viewer should always be unchecked when printing 1099 forms.
- Printing the forms from the paper tray rather than the manual feeder will pull the forms through the printer straighter with less chance of crooked or uneven printing occurring.

### *Other 1099 Tips:*

- Don't forget to change the year before printing the forms.
- If the vendor's total 1099-MISC amount is less than \$600, Sage Intacct will not generate a 1099 for that vendor.
- 1099 amounts show in the year that the bill is paid. For example, if you pay a vendor in 2018 for a bill that was created in 2017, the payment amount will reflect on the 2018 Form 1099.
- If you'd like to exclude credit card payments from your 1099 report, simply check the box in the Filters section titled: "Exclude Credit Card Payments."
- Be sure to select the correct Time Period when running the 1099 Report (Start/End dates will default to the current year).

### *1099 Resources:*

- The Sage Intacct Learning Center provides instructional videos and eLearning courses pertaining to Accounts Payable and 1099s. Access the Learning Center here: [https://inter.viewcentral.com/events/uploads/intacct/login\\_page.html](https://inter.viewcentral.com/events/uploads/intacct/login_page.html).
- Search our Sage Intacct Community for knowledgebase articles, 1099 on-demand webinar recordings, and FAQs.
- The Sage Intacct Help Center provides multiple 1099 how-to and troubleshooting topics.