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Print 1099 Process

Video Tutorial

Click the play button below for a video tutorial. This tutorial is about 3 minutes long. Written instructions are below the video.

NOTE: *If viewing from the right-side screen, to open the video on a larger screen, use the "Open in full site" link at the bottom left of the help display. If you are already viewing from the full site, click the play button below to begin the tutorial.*

Your browser does not support HTML5 video.

Step-by-Step Instructions

The following two form options are available for printing Form 1099-MISC and 1099-NEC:

- **Blank form** (2 up). Prints two vendors per page. Option to print Recipient Copy B with or without instructions on the back. Using a blank form requires electronic filing with the IRS. Copy B is the recipient (vendor) copy. Copy C is the payer (office) copy.
- **Preprinted IRS-approved form** (2 up). Prints two vendors per page. Reprint for additional copies. Example: Copy A (IRS), Copy B (recipient), Copy C (office), etc.

  Text

When a 1099 code is set up (*Settings > Accounts Payable > 1099 codes*), the code is assigned the form type (1099-MISC, 1099-NEC, or 1099-INT) as well as the box# to print the reportable amount on the assigned form.

1099 codes must be unique; the same code cannot exist for both misc and interest forms.

Year: The 1099 reporting year.

Form: Select the form you are about to print.

Format: Select the appropriate format for the forms you are about to print.

Minimum Amount: Specify a minimal tagged amount to print (leave zero for none). Forms will be printed only for vendors (who are included in the 1099 batch) with payment amounts equal to or above this specified amount.

Vendors: Allows you to print all vendors tagged for reporting or selected vendors. Use this if the printer jams and you need to reprint, or if you just need to print for one vendor.

Paper: Select the form you wish to print (blank stock or pre-printed). The only reason for needing to use a pre-printed form is for the Payer Copy C, if you plan to file paper forms to the IRS. Starting tax year 2023, if you have 10 or more information returns, you must file them electronically. Find details on the final e-file regulations. Recipient copies can always be printed on blank paper, regardless of how you file with the IRS.

Form: If you need to print multiple copies, simply do another print run with the appropriate selection.

Print a final total page: Prints an extra page at the end with the total forms printed and the total amount.

Paper Size and Orientation: normally should always be Letter and Portrait.

Alignment

If the 1099 Information is not lining up on the form, before adjusting your software margins, we suggest selecting the "**Fit to Page**" setting (sometimes labeled '**Scale to Fit**') in your printer dialogue window. Because every printer driver handles margins differently, this setting is often the most effective way to auto-align the forms without needing to adjust the margins.

If the "**Fit to Page**" didn't correct the alignment, change the alignment setting for the top margin in A/P options and print again. You can print a sample page to test the alignment before printing 1099 MISC forms by clicking the Test Align button. Test print to 8 ½ by 11 paper and then place one of your good forms over the top of it to see if it is lined up correctly. It helps to place it over a light. Increase the alignment number to print lower; decrease the number to print higher on the form.

Preview

Displays the 1099s that will print. It is a good idea to first preview the forms about to be printed to make sure they are all correct, so you don't end up wasting forms.