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# Button up your Vendors for 1099 time

November 26th, 2024



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# Session CPE Requirements

- You need to attend 50 minutes to receive the full 1 CPE credit.
- 4 Attendance Markers that read: “I’m Here,” will be launched during this session. You must respond to a minimum of 3 to receive the full 1 CPE credit.

**\*\*Both requirements must be met to receive CPE credit\*\***



# Learning Objectives

- *At the end of the session, you will be able to:*
  - *Identify how to confirm vendor setup in-order to track 1099 amounts.*
  - *Discuss the 1099 report in Intacct and correct incorrect balances*
  - *Recall how to print your 1099s directly from Sage Intacct*
  - *Identify automated options for electronically filing with the IRS*





# Confirm vendor setup for tracking 1099 expenses





# Getting Started

The screenshot shows the Sage Intacct Home page. At the top, there is a navigation bar with a star icon, a home icon, and the text "Applications". Below this is a section titled "Intacct product updates" which contains a "2024 Release 4 is here" announcement with a list of features and a link to "Read the release notes". Below the announcement are sections for "Get Sage Intacct certified!", "Help & Support" (with links to Help Center, Release notes, and Customer support), and "Learning" (with links to New user help, On-demand help, and Video library). At the bottom of the main content area is a "Love Sage Intacct?" section with a link to "Leave a review and receive an e-gift card!". On the right side, there is a sidebar with sections for "Entities" (with an Entity search box and "Most recent" list), "Message Board" (with "No messages"), "Applications" (with a list of application areas like Company, General Ledger, Accounts Payable, etc.), and "Resources" (with links to Intacct help, Community, Release notes, Sage University, etc.). A blue overlay box is positioned in the center, containing the text: "Purchase Sage Intacct supported forms from: Home page > Resources > Checks and Supplies OR Directly: <https://intacct.dsa-direct.com/>". A green arrow points from the bottom right of the blue box to the "Checks and supplies" link in the Resources section of the sidebar.

Applications

Intacct product updates

2024 Release 4 is here

Explore features that focus on clarity, compliance, and visibility.

- Personalize your Sage Intacct experience by setting your language to Canadian French or Spanish.
- Streamline expense reporting with automated receipt submission.
- Create clearer Accounts Receivable custom statements.
- Easily override default tax schedules in transaction lines in Order Entry and Purchasing.

And so much more. [Read the release notes](#)

Get Sage Intacct certified!

Stand out in the crowd by earning the [Sage Intacct Accounting](#) certification.

Help & Support

- [Help Center](#)
- [Release notes](#)
- [Customer support](#)

Learning

- [New user help](#)
- [On-demand help](#)
- [Video library](#)

Love Sage Intacct?

[Leave a review and receive an e-gift card!](#)

Entities

Entity

Most recent

100

201

202

Message Board

No messages

Applications

Company

[General Ledger](#)

[Accounts Payable](#)

[Purchasing](#)

[Time & Expenses](#)

[Accounts Receivable](#)

[Cash Management](#)

[Grants](#)

[Fixed Assets](#)

[Inventory Control](#)

[Allocation Management](#)

[Order Entry](#)

Resources

[Intacct help](#)

[Community](#)

[Release notes](#)

[Sage University](#)

[Checks and supplies](#)

[CSV upload templates](#)

[Marketplace partners](#)

Purchase Sage Intacct supported forms from: Home page > Resources > Checks and Supplies

OR

Directly:

<https://intacct.dsa-direct.com/>



# 1099 Setup – New Vendor Setup


Accounts Payable > Setup > Vendors > Vendors Additional Information > Tax as 1099 eligible

## ☰ Vendor information

Vendor Additional information Contact list Payment information Bank

Vendor details


Type ID

1099 eligible 

Parent

1099 name

GL group

Attachment 

If a current vendor is not tagged as 1099able, then only the 1099 link will appear, Not the 1099 eligible checkbox

Vendor Additional information Contact list Payment information Bank


Vendor details

Type ID

1099 name

Parent

GL group

Attachment 





# 1099 Setup – Vendor Setup

☰ V103 -- Franklin Smith, CPA

Vendor Additional information Contact

ID	Last bill created on
V103 -- Franklin Smith, CPA	08/02/2023

Vendor

ID ⓘ  
V103

Name \*

This vendor is an individual person ⓘ  
 Yes  
 No

Primary contact

Last name

First name

Middle name

Print as \*

☰ V103 -- Franklin Smith, CPA

Vendor Additional information Con

Vendor details

Type ID

Parent

GL group

Tax ID

1099 name



# 1099 Setup – Vendor Setup

- Specific 1099 Contact
- No need to update the primary contact
- Simplifies the process of having a different address for 1099's

**Note:** The 1099 Contact is not available to be uploaded\*

☰ V103 -- Franklin Smith, CPA

Vendor	Additional information	Contact li
Pay to and return to		
Primary contact *		
Same as vendor		
Pay-to contact * ?		
Same as vendor		
Return-to contact * ?		
Same as vendor		
1099 contact *		
Same as vendor		

If there is a 1099 Contact, the Name will print on the 1099 in place of the “Print As” field on the Vendor record. If there is a 1099 Name on the Vendor record it will print that first and then the Contact Name, if they are different. If they are the same, only one name will print.



# 1099 Setup – Vendor Setup

This screen displays **after** you Save the vendor:

- To enter YTD balances for this year:
  - Select the default date found in the **Initial Values for Year** drop-down list.
  - **IF** 1099's need to be printed per Entity you will have an additional Entity drop-down list to select from.
- Year drop-down list
  - Enter the starting YTD balances in the blank fields.
- Future amounts you pay the vendor through Sage Intacct are added to the amounts you enter here.
- **Tip:** Remember to only enter the calendar year-to-date 1099 balance for each vendor
- **NOTE: neither AP Advances nor credit card transactions can be tagged as 1099able, so you may need to include these in your Initial Values for the year.**

## Form 1099 Information with Default Box

Form name  
Miscellaneous Information (Form 1099)

Default 1099 box  
3 - Other income

Initial values for year  
2022

1 - Rents

2 - Royalties

3 - Other income

4 - Federal income tax withheld



# 1099 Setup – Vendor Setup

## AP Adjustments – can be tagged as 1099able

- If there is a cash payment against an adjustment, the payment will be included in the 1099 form

Therefore:

- If there is an AP Debit Memo(DM) fully applied against an AP Bill and both flagged as 1099 = true, since no cash payment, the 1099 form will not include the amount
- If an AP DM is applied against a bill for partial amount and the remaining payment of the bill is cash, the cash portion will be included in the 1099 form but not the DM amount
- If you have an AP Credit Memo(CM) and it was paid in cash against the CM, then the form will include the amount paid

**\*\*1099 reporting is on a cash basis. Only amounts paid, are included on the 1099\*\***



# 1099 Setup – Vendor Setup

- Multi-shared companies –
  - **Issue a separate 1099 per entity** checkbox is selected - initial YTD amounts are entered at the top level by selecting the entity, or at the entity level for each entity. In this mode, vendors in each entity are assigned entity-specific initial amounts
  - **Issue a separate 1099 per entity** checkbox is **NOT** selected - initial amounts for all vendors and all entities are entered at the top-level

The screenshot displays the 'Configure Multi Entity' interface. It features a 'Value approval currency setup' section with a dropdown menu for 'Value approval currency' set to 'USD'. Below this is a section for '1099' with a checkbox labeled 'Issue a separate 1099 per entity' which is checked and highlighted in yellow.



# 1099 Setup – Vendor Setup

## Other form 1099 boxes

16 - State/Payer's state no.

FATCA filing requirement

2nd TIN not.

7 - Payer made direct sales totaling \$5000 or more of consumer products to recipient for resale

## Entering Information for "Other Form 1099 Boxes"

- Some information required for a 1099 form may not be available in the Sage Intacct system
- Example: 1099-NEC form, box 6 (State/Payer's state no.) is information that is not available in the Sage Intacct system
- Blank fields are provided for you to enter this information



# 1099 Setup – Vendor Setup

## Setting 1099 information by vendor type -

- A 1099 form and box can be also be assigned to a vendor type. If the vendor type is defined as eligible for 1099, all vendors for whom you chose that vendor type become 1099 eligible, and amounts are accumulated to the vendor type default 1099 form and box for each vendor.

## Assigning line items on a bill to a 1099 form

- If the setup in AP is enabled for the update of the 1099 Flag and the 1099 Form/Box, when entering a line item of a bill, you can assign each line of a bill a different 1099 form and box if needed.



# 1099 Setup – Company Federal Tax ID

- **To update the company’s Federal Tax ID:**
  1. Go to **Company** from the top navigation bar
  2. Select the **Setup** tab and choose **Company** from the menu
  3. Click **Edit** (upper right corner)
  4. Select the **General Information** tab
  5. Locate the field titled **Federal ID** and enter the appropriate ID
  6. **Save** when complete

**Note:** If “Federal ID” is not an option on the Company Information screen in a Multi-Entity client, this means that the company has enabled “Issue a separate 1099 per entity.” The Federal ID field will be available on the Entity Information screen rather than the Company Information screen.







# 1099 Report and updating discrepancies.



# 1099 Setup – Update Existing Vendor

- On the vendor record, changes to the 1099 Vendor Form or Box will provide the ability to update all associated transactions with the new default Form and Box.
- **\*\*This process only updates transactions already tagged for 1099 treatment and does not update non-1099 transactions**

**If in 2022, and select to update all transactions, this will change transactions for 2021 and 2022**

The screenshot shows a vendor record interface with tabs for Vendor, Additional information, Contact list, Payment information, Bank file, Payment providers, and Item cross references. The 'Additional information' tab is active. The 'Vendor details' section includes fields for Type ID, Parent, GL group, Account label, Tax ID, 1099 name, Form 1099, 1099 Box, Attachment, and Payment\_Type. A dialog box titled 'Confirm 1099 updates' is overlaid on the right, asking 'How would you like to apply the updates?' with three radio button options. The third option, 'Don't update previous transactions', is selected. A red arrow points from the green text on the left to the 'Update all transactions for the current and prior year based on modified 1099 information' option.



# Reporting

The screenshot displays the 'Accounts Payable' section of a financial reporting application. The left sidebar lists various modules, with 'Accounts Payable' highlighted in green. The main content area is divided into three columns: 'Vendors', 'Payments', and 'Subledger'. The 'Reports' section is expanded, showing a list of report types. A red box highlights the '1099s' report type, which has a sub-menu open showing '1099 report' selected.

**Accounts Payable** ▾

- Dashboards >
- Budgets >
- Prepaid Expense Amortizat... >
- Reports >
- Cash Management >
- Company >
- General Ledger >
- Purchasing >
- Accounts Payable** >
- Accounts Receivable >

**All** Setup Overview ↗

- Vendors**
  - Approve vendors
- Bills**
  - Pay bills
  - Recurring bills
- Checks**
  - Check reconciliation
  - Check run

**Payments**

- Adjustments
- Advances
- Manual payment
  - Payment files ▶
  - Posted payments
  - Print payment copies
  - View payment requests

**Subledger**

**Custom views** ▶

**Reports**

- Custom reports ▶
- Memorized reports
- My stored reports
- 1099s** ▶
  - 1099 report
- AP ledger
- AP recurring



# Transaction Update Options

- Manually update transactions from the report to remove non-1099able expenses
- Manually update bills and mark as 1099able if they were incorrectly coded
- Vendor 1099 Transactions Update: mass update many transactions at once with an import
- Vendor 1099 Open Balances: manually update or import the 1099 balance on the vendor record (will not update transactions)
- Vendors: mass update existing vendors with 1099 information



# Transaction Update Options

There are 3 uploads that impact 1099 processing for Vendors

- **Vendors** – can be used to import new vendors and update existing vendors
- **Vendor 1099 Transactions Update**
- **Vendor 1099 Opening Balances**

Set up AP master list, open bills, and adjustments			
Summary type	Summary type <input type="button" value="v"/>		
<input checked="" type="checkbox"/>	<a href="#">Configure Accounts Payable module</a>		
<input checked="" type="checkbox"/>	Accounts Payable terms	<a href="#">Create</a>	
<input checked="" type="checkbox"/>	<b>Vendors*</b>	<a href="#">Create</a>	<a href="#">Import</a> <a href="#">Template</a>
	Vendor visibility*	<a href="#">Import</a>	<a href="#">Template</a>
	<b>Vendor 1099 transaction update*</b>	<a href="#">Import</a>	<a href="#">Template</a>
<input checked="" type="checkbox"/>	<b>Vendor 1099 opening balances</b>	<a href="#">Import</a>	<a href="#">Template</a>
	Vendor account number for entities	<a href="#">Import</a>	<a href="#">Template</a>
	Accounts Payable bills	<a href="#">Create</a>	<a href="#">Import</a> <a href="#">Template</a>
<input checked="" type="checkbox"/>	Update vendors for ACH*	<a href="#">Import</a>	<a href="#">Template</a>
<input checked="" type="checkbox"/>	Update vendors for bank file payment*	<a href="#">Import</a>	<a href="#">Template</a>
	Accounts Payable adjustments	<a href="#">Import</a>	<a href="#">Template</a>



# Vendor Update

**Vendor Upload** - FORM1099TYPE, FORM1099BOX, and NAME1099 can be imported when the Vendors are imported. **\*Note:** The 1099 Contact is not available to be uploaded\*

**\*Note:** The 1099 Contact is not available for upload\*  
**\*\*TIP\*\*** Make sure to remove columns of data you are NOT updating.

O	P	Q	R	
<b>TS</b>	<b>FORM1099TYPE</b>	<b>FORM1099BOX</b>	<b>NAME1099</b>	<b>CURREN</b>
: COMMENTS	Field Name: FORM1099TYPE	Field Name: FORM1099BOX	Field Name: NAME1099	Field Name: CURREN
ne: Comments	UI Field Name: Form Name	UI Field Name: Default 1099	UI Field Name: 1099 Name	UI Field Name: CURREN
cter	Type: Character	Box	Type: Character	Currency
	Length: N/A	Type: Character	Length: 100	Type: Character
ue: None	Default Value: None	Length: 1	Default Value: None	Length: 3
s: Any	Valid Values: DIV, INT, MISC,	Default Value: None	Valid Values: Alphanumeric	Default Value: None
ies: None	R, S	Valid Values: Positive Integers	and underscore	Valid Values: None
lo	Dependencies: None	Dependencies: Box types vary	Dependencies: None	letter ISO
is	Required: No	according to the form type	Required: No	Dependent
	Editable: Yes	Required: No, unless	Editable: Yes	previous
		FORM1099TYPE is defined		transactio
		Editable: Yes		Company
				Transactio
				Required:
				Editable: '
				Note: This
				companie
				transactio

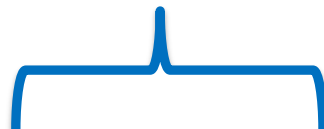


# Vendor Open Balance Import

DON+IMPORT	VENDORID	VENDORNAME	ENTITY	FORM1099TYPE	FORM1099BOX	AMOUNT
# Any row which starts with a # will be ignored during import	Field Name: VENDORID UI Field Name: Vendor ID Type: Character Length: 20 Default Value: None Valid Values: Alphanumeric and underscore Dependencies: Must reference an existing Vendor ID Required: Yes Editable: N/A Note: This is the key field used to reference the vendor.	Field Name: VENDORNAME UI Field Name: Vendor Name Type: Character Length: 100 Default Value: None Valid Values: Alphanumeric and underscore Dependencies: None Required: No Editable: N/A Note: This field is for reference only to help you identify correct vendors in the list. It is not updated in the system.	Field Name: ENTITY UI Field Name: Entity Type: Character Length: 20 Default Value: None Valid Values: Alphanumeric and underscore Dependencies: Refers to a valid entity Required: No, unless the application preference "Entity Issues Separate Subscriptions > Multi Entity Sign Up). Editable: N/A Note: This is the Entity ID, not the name of the entity.	Field Name: FORM1099TYPE UI Field Name: Form Name Type: Character Length: N/A Default Value: None Valid Values: DIV, INT, MISC, R, S, PATR, G, NEC Dependencies: None Required: N/A Editable: N/A This field specifies the form type for the opening balance only, and does not update the default form type.	Field Name: FORM1099BOX UI Field Name: Default 1099 Box Type: Character Length: Up to 3 Default Value: None Valid Values: Positive Integers followed by an optional alpha character as applicable (example: 2A) Dependencies: Box types vary according to the form type Required: Yes Editable: N/A Note: This field specifies the box for the opening balance, and does not change the default form type.	Field Name: AMOUNT UI Field Name: Amount Type: Number Length: 38,2 Default Value: None Valid Values: Non-zero with negatives designated by a leading dash Dependencies: None Required: Yes Note: This field is updated if a value is present. If the value is blank, the system leaves the existing value in the system. To remove the existing value, enter the value NULL.



# Bill Transaction Update Import



DONOTIMPORT	VENDORID	VENDORNAME	NAME1099	DEFAULT1099TYPE	DEFAULT1099BOX	UPDATETRANS	FROMDATE	TODATE
# Any row which starts with a # will be ignored during import	Field Name: VENDORID UI Field Name: Vendor ID Type: Character Length: 20 Default Value: N/A Valid Values: Alphanumeric and underscore Dependencies: Must reference an existing Vendor ID Required: Yes Editable: No Note: This is the key field used to reference the vendor.	Field Name: VENDORNAME UI Field Name: Vendor Name Type: Character Length: 100 Default Value: None Valid Values: Alphanumeric and underscore Dependencies: None Required: No Editable: N/A Note: This field is for reference only to help you identify correct vendors in the list. It is not updated in the system.	Field Name: NAME1099 UI Field Name: 1099 Name Type: Character Length: 100 Default Value: None Valid Values: Alphanumeric and underscore Dependencies: None Required: No Editable: Yes Note: This field is updated if a value is present. If the value is blank, the system leaves the existing value in the system. To remove the existing value, enter the value NULL.	Field Name: DEFAULT1099TYPE UI Field Name: Form Name Type: Character Length: N/A Default Value: None Valid Values: DIV, INT, MISC, R, S, PATR, G, NEC Dependencies: None Required: No, unless FORM1099BOX is selected or UPDATETRANS is 'Y' Editable: Yes Note: Changes default form type for vendor and form type for the specified transactions. This field is updated if a value is present. If the value is blank, the system leaves the existing value in the system. To remove the existing value, enter the value NULL.	Field Name: DEFAULT1099BOX UI Field Name: Default 1099 Box Type: Character Length: Up to 3 Default Value: None Valid Values: Positive Integers followed by an optional alpha character as applicable (example: 2A) Dependencies: Must reference a box that is valid for the form type Required: No, unless FORM1099TYPE is selected or UPDATETRANS is 'Y' Editable: Yes Note: Changes default box for vendor and box for the specified transactions. This field is updated if a value is present. If the value is blank, the system leaves the existing value in the system. To remove the existing value, enter the value NULL.	Field Name: UPDATETRANS UI Field Name: N/A Type: Character Length: 1 Default Value: None Valid Values: 'Y', 'N', or 'A' Dependencies: None Required: Yes Editable: N/A Note: Retroactively marks the vendor's transactions as 1099-able based on date range and Form 1099 Type and Box listed in this upload. Value 'A' updates ALL bills and bill lines as 1099able. Value 'Y' only updates bills and bill lines already marked as 1099able. Value 'N' will not update any bills. For CSV-imported bills, you can mark bills as 1099-able if you imported them as unpaid or partially paid, but not if you imported them as paid.	Field Name: FROMDATE UI Field Name: N/A Type: Date Length: 10 Default Value: None Valid Values: Numeric and forward slash (/) Dependencies: None Required: Yes, if transactions are to be updated Editable: N/A Note: Start of the date range for transactions to be updated. Use the format MM/DD/YYYY.	Field Name: TODATE UI Field Name: N/A Type: Date Length: 10 Default Value: None Valid Values: Numeric and forward slash (/) Dependencies: None Required: Yes, if transactions are to be updated Editable: N/A Note: End of the date range for transactions to be updated. Use the format MM/DD/YYYY.





# Bill Transaction Update Import

## Vendor 1099 Transaction Update

- This upload updates existing records, it does **not** create new records.
- The upload can retroactively mark existing transactions as 1099-able for vendors you specify **and** for a given time-period.
  - Additional fields update the 1099 form type and box, as well as the 1099 name. You may update any combination of these fields in a single upload. For example, you could update the form type and box, but not the 1099 name and transactions.

**\*\*\*Please Note: This feature will update bills manually created in Sage Intacct and will only update status of bills uploaded through the CSV Import tool if they had a General Ledger Impact.**

- Imported AP Bill that posts to GL with no payment – **can do** 1099 trans update
- Imported AP Bill that posts to GL with *manually* partially paid – **can do** 1099 trans update
- Imported Historical AP Bill with no partial payment - cannot do 1099 trans update
- Imported Historical AP Bill manually partially paid - cannot do 1099 trans update
- Imported Historical AP Bill with partial payment - cannot do 1099 trans update
- Cannot import partially paid bills to hit GL - therefore no 1099 trans update



# Bill Transaction Update Import

- The system ignores a blank in the NAME1099, DEFAULT1099TYPE, and DEFAULT1099BOX fields, and does not change the existing data. To delete the data, enter the value NULL. (case sensitive)
- **UPDATETRANS** is required
  - “A” - the system flags **all** the transactions for the given date range as 1099-able
  - “Y” - instructs the system to update only transactions already tagged as 1099able
  - “N” - instructs the system to not flag the transactions
  - If you enter “Y” or “A”, then you must also supply data for type and box, as well as the date range.
- Remember: The 1099 transaction update does NOT update HISTORICAL imported bills. (Open AP)





# Printing forms



# Printing 1099 Forms

Navigate to Accounts Payable  
> All tab > 1099s > Export 1099  
file –or- Print 1099/1096 form

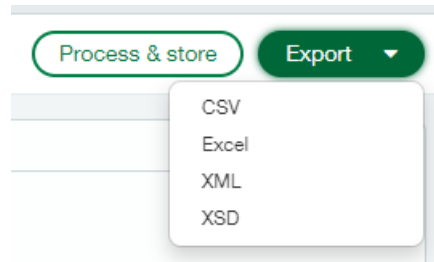
The screenshot shows a software navigation menu with two columns. The left column lists various business functions, and the right column shows sub-menus. The 'Accounts Payable' item in the left column is highlighted with a green bar. In the right column, the '1099s' sub-menu is highlighted with a red box, and it contains three options: 'Export 1099 file', 'Print 1096 form', and 'Print 1099 form'.

	All	Setup
Dashboards >		
Budgets >		
Prepaid Expense Amortizat... >	+ Vendors	
Reports >	Approve vendors	
Cash Management >	+ Bills	
Company >	Pay bills	
General Ledger >	+ Recurring bills	
Purchasing >	Checks	
<b>Accounts Payable &gt;</b>	Check reconciliation	
Accounts Receivable >	+ Check run	
Grants >	Check run, add to	
Order Entry >	Print checks	
Fixed Assets >	<b>1099s</b>	
Platform Services >	Export 1099 file	
Allocation Management >	Print 1096 form	
Additional Dimension >	Print 1099 form	
Time & Expenses >		



# Export File

- The 1099 Export File screen enables you to create a data file that you can send to a third-party service that specializes in printing and mailing 1099 forms. These services also file the required information with the Internal Revenue Service.
- You can export the file offline in either CSV or Excel file format, or you can export the data online in one of the following file formats: CSV, Excel, XML, or XSD.

A screenshot of the 'Export 1099 file' screen. The title is 'Export 1099 file' with a hand icon. The screen is divided into several sections: 'Time period' with a 'Year ending' dropdown set to '2022'; 'Filters' with checkboxes for 'Select all vendors', 'Select all employee', 'Exclude credit card payments', and 'Include vendors regardless of 1099 status', and dropdowns for 'From vendor', 'To vendor', 'From employee', and 'To employee'; and 'Format' with a 'Form to print' dropdown set to 'Nonemployee Compensation (Form NEC)' and a 'Sort by' dropdown set to 'Vendor ID / Employee ID'.

# 1099 Correction

- If need to print corrected 1099's, utilize the 'corrected' box, which will place an 'X' in the Corrected box on the 1099 form

## Form 1099-MISC

9595		<input type="checkbox"/> VOID <input type="checkbox"/> CORRECTED	
PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.		1 Rents \$	OMB No. 1545-0115 Form 1099-MISC (Rev. January 2022) For calendar year 20__
PAYER'S TIN		2 Royalties \$	<b>Miscellaneous Information</b>
RECIPIENT'S TIN		3 Other income \$	
RECIPIENT'S name		4 Federal income tax withheld \$	<b>Copy A For Internal Revenue Service Center</b>
Street address (including apt. no.)		5 Fishing boat proceeds \$	
City or town, state or province, country, and ZIP or foreign postal code		6 Medical and health care payments \$	<b>File with Form 1096. For Privacy Act and Paperwork Reduction Act Notice, see the current General Instructions for Certain Information Returns.</b>
Account number (see instructions)		7 Payer made direct sales totaling \$5,000 or more of consumer products to recipient for resale <input type="checkbox"/>	
2nd TIN not <input type="checkbox"/>		8 Substitute payments in lieu of dividends or interest \$	
13 FATCA filing requirement <input type="checkbox"/>		9 Crop insurance proceeds \$	
16 State tax withheld \$		10 Gross proceeds paid to an attorney \$	
17 State/Payer's state no. \$		11 Fish purchased for resale \$	
18 State income \$		12 Section 409A deferrals \$	
		14 Excess golden parachute payments \$	
		15 Nonqualified deferred compensation \$	

Form 1099-MISC (Rev. 1-2022) Cat. No. 14425J www.irs.gov/Form1099MISC Department of the Treasury - Internal Revenue Service  
**Do Not Cut or Separate Forms on This Page — Do Not Cut or Separate Forms on This Page**

## Print 1099 form

Year ending

Filters

Select all vendors

From vendor

To vendor

Select all employee

From employee

To employee

Exclude credit card payments

Include vendors regardless of 1099 status

Format

Form to print

Sort by

Do not print Vendor ID/Employee ID

Corrected





# Electronic Filing Options



# Electronic Filing

- **What if we have a third-party print and mail 1099 forms?**
  - Create a 1099 file and then export the data. If you want to see the amounts paid to vendors, along with their 1099 categories, run the 1099 Report to show all the 1099 data.
- **What if we have 250 or more 1099s?**
  - If you have more than 250 1099s, it is required that you file electronically.
  - There are third-party programs that will help you file electronically. These can be found in the Intacct Marketplace.

[https://marketplace.intacct.com/Marketplace?search=1099\\*](https://marketplace.intacct.com/Marketplace?search=1099*)

search=1099\*





# TaxBandit

- 👍 IRS authorized e-file provider
- 👍 Over a decade of experience, processed millions of forms
- 👍 Direct integration to Sage makes 1099 filing simpler than ever before
- 👍 Easily manage 1099 e-filing status
- 👍 Pay only for what you file

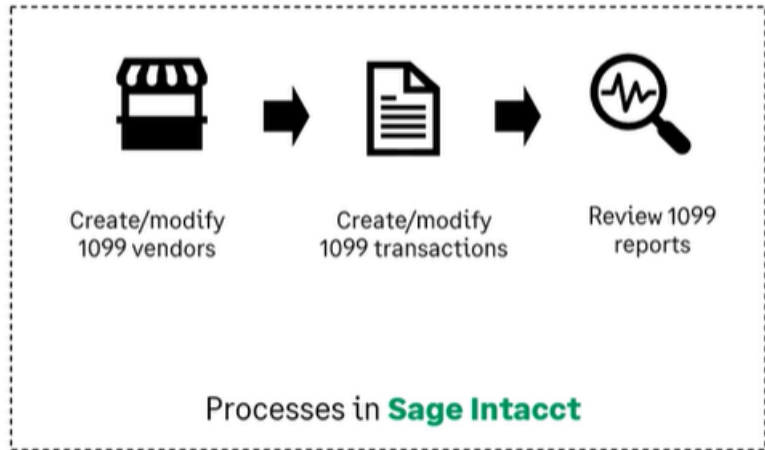


# TaxBandit

Sage



TAXBANDITS®  
Your 1099 & W2 Experts



Ready to e-file\*



\* Requires Sage Cloud Services



# Year-End Health Check

A year end health check can help you feel prepared for year-end and charter a course for the year to come. It includes:

- 2024 Review:
  - Financial reports review
  - Modules and configurations review for best practice
  - Users & permissions review
  - 1099 best practice review
  - 1 hour of year end close training
- 2025 Preparation:
  - Budget template preparation
  - Reporting periods creation
  - Review modules and configurations for opportunities for process improvements and relevant releases
  - 1 hour of Q&A

[Ready for Year-End in Sage Intacct: CLA](#)



# Resources

- Sage University Training & Release Notes
- Intacct Customer Office Hours
- View and Subscribe to the CLA Intacct Blog

<https://blogs.claconnect.com/intacct/>

- Continue to join our monthly Sage Intacct Webinars

[2024 Sage Intacct Webinar Series](#)

[2025 Sage Intacct Webinar Series](#)

## What's New in Sage Intacct's 2022 R2 and R3?

September 26, 2022 | by Ashley Klapperick

Struggling to keep up with all the enhancements pushed out in Sage Intacct's Release 2 (R2) on May 13, 2022, or Release 3 (R3) on August 19<sup>th</sup>, 2022? Keeping up with all the feature enhancements is a job along with your actual job. Intacct has pushed out a ton of exciting enhancements across the application, if you want to learn more keep reading.



### Dashboards:

Have you struggled to get to creating dashboards for your team? If this is a task that keeps getting pushed further down your list of "To-Do's" utilize Intacct's new out-of-the-box Role Based Dashboards. The new role-based dashboards provide information in a format that is easier for the viewer to consume with specific information on each dashboard. If you don't like the look or information provided, you can easily make changes to these dashboards so they suit your team's needs.



# *Thank you!*



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