

## Preliminary 1099 Review in QB Online

- 1. Go through the 1099 setup for QB online:
  - a. Select Expenses

+ New	Expenses				
Overview	Expenses Vendors				
Books review	Vendors			Prepare 1099s 🔹	New vendor 🗸 🗸
Dashboard	× .				
Banking	Unpaid Last 365 Days	_	Paid		
Sales	\$1,712 2 OVERDUE		\$4,779 1 PAID LAST 30 DAYS		
Cash flow	*				
Expenses	>				^
Payroll	Batch actions •	Search	Q		8 B 🕸
Reports	VENDOR + / COMPANY	PHONE	EMAIL	OPEN BALANCE	ACTION
Taxes	2017 Note 1 ELZ			\$0.00	Create bill 👻
Mileage	2017 Note T ELZ			30.00	Create bill 👻
Accounting	> 2017 Note 2 ELZ			\$0.00	Create bill 🔻

## b. Select Prepare 1099s

🏶 quickbooks	= Mobler		8
+ New	Engloyees Centractors Wonsist Comp		
Overview Dachboard Tasks	Singlify your contractor payments Sign up for Sinst Ceptorit and get 1099 effings included with your plan. Laws more		
Iransectore : Expense : Soles :	Contractors	Prepare 1000v Add a contractor	
Projects Workflows in Payrol >	B BRIAN BAGENT	Pay with direct deposit 💙	
Reports ) Taxes	C Cheri Vega	Fay with direct deposit, 💙	
Mileage Accounting ) My Accountant	Christopher Eric Summer	Fay with direct deposit 😒	
Capital Apps	D Duy Nguyen	Pay with direct depositi 🐨	
Cash How	E Ephrim Perez	Fig with direct deposit 😒	

c. Follow the step to prepare 1099 forms

0		
Contowny	Categorize payments to contractors (or 1099 vendors)	
	Select the box for the types of payments you made. Then select the expense accounts you use for these payments (hot sure which categories to choose)?	
0	Most common payment types	
Accounts	Non-employee compensation that 11000.002	
0	Revets Box 3 1095-MISC	
	Other payment types	
	Royalties Bec2 1000 Atto:	
	Cther Income Bocl 1097-MISC	
	Failing Boat Proceeds Fee 1 1070 MIC	
	Medical Payments Ibus & 1000.MISC	
	DirectSales Rev 7 1000 ABVC	
114	Substitute Payments in lieu of dividends or interest. Bius 5 10% MISC	
	Crop Issurance Proceeds Nov 9 10993/05C	
	Gross Proceeds Pald to an Attorney Ilox 12 1099.485C	
	Excess Golden Parachute Box 13 1097-MISC	
	Fødøral Tax	

## d. Map Accounts for Payment Types

	Categorize payments to contractors (or 1099 vendors)
	Select the box for the types of payments you made. Then select the expense accounts you use for these payments. Not sure which categories to choose?
3	Most common payment types
	Non-employee compensation Box 1 1099-NEC
	6307000 Other Exper
	Rents Box 1 1099 MISC
	6216603Lodging *
	Other payment types
	Royalties Box 2 1099-MISC
	Other Income Box 3 1099-MISC
	Fishing Boat Proceeds Box 5 1099-MISC
	Medical Payments Box 6 1009.MISC
	Direct Sales Box 7 1099-MISC
	Substitute Payments in lieu of dividends or interest Box 8 1099-MISC
	Crop Insurance Proceeds Box 9 1099-MISC
	Gross Proceeds Paid to an Attorney Box 10 1099-MISC

- e. Assign Accounts to 1099 boxes to select multiple accounts, click on the drop-down arrow.
- f. Put a check mark next to the account you would like include for each 1099 type

g. Review the vendors for any missing information then click next:

Jenics ManufeidDB Granda Way Los Gates CA 98022 Addess indialS7-64-8074imenafeld802@yebo.comdefaBRAN BAGENTBRAN BAGENT 103 DUM CREEKLANE COLDERRING TX 77331439.38.847seinb@mobiles.com661MLDA SODA (delesed) MLDA SODA (delesed)S900 RCMONDO AVE 8205 SODO TX 777331sal-10-9443Add Email661PHLIPPE HUIC315 FERRO TX 7747 TY 764D TX 7747744431-2286Add EmailEd1Silcon Revise, LLCCalde SensitionS200 Rest Stars Street Stars To Street Ty 7008 COM TX 77477Sal-78006Add EmailEd3Consiste Monick Shew (delesed)Calde SensitionS222 Bellering Dr 2413 Sound TX 77036Sal-78006Add EmailEd4Consiste Monick Shew (delesed)Drinel Alboratis TY 7016 Sound TX 77036sal-78006Add EmailEd4Elaberth Meinde Albe (delesed)Drinel Alboratis Changen Park Rd Sound TX 77036sal-22-2318Add EmailEd4Elaberth Meinde Albe (delesed)Sonder TX 7039 Sound TX 77036sal-22-2318Add EmailEd4Falar Nan (delesed)Sonder TX 7038 Sound TX 77038sal-22-2318Add EmailEd1Falar Nan (delesed)Sonder TX 7738 Sound TX 77038sal-22-2318Add EmailEd1Falar Nan (delesed)Sonder TX 7738 Sound TX 7738sal-22-2318Add EmailEd1Falar Nan (delesed)Sonder TX 7738sal-22-2318Add EmailEd1Falar Nan (delesed)Sonder TX 77388sal-22-2318Add EmailEd1Falar Nan (delesed)Sonder	Jecob Kugler	Address missing	Tax ID missing	Add Email	bdit
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	Jonathan W Grumbles (deleted)		640-12-0277	Add Email	Edit
			46-4863809	Add Email	Edit
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- 2. Now, print the report to PDF.
  - a. Print Information Sheet and save as a pdf

Print Information She
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- b. Preview the page to make sure all the data will show on the PDF
- 3. Request W-9s for all vendors for the year.
  - a. As W-9s s are received update the vendor's record in QB Online