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1099 Processing for Multiple EINs

Settings > Accounts Payable > 1099 Codes

The system can accommodate tracking and printing 1099 forms for more than one company and EIN#. Instructions are as follows:

- **Go to *Settings > Accounts Payable > 1099 Codes*.** This table assigns the box# and form type where the specific code will print and be reported.
  - You will want to add the same code for each company. For example, if you have two companies, you would add a code N=Non Employee Compensation (Form 1099-NEC) for Company 1 and a code N2=Non Employee Compensation (Form 1099-NEC) for Company 2. The codes can be names of your choice. See Help for 1099 Codes for details.

- **Go to *Settings > Accounts Payable > 1099 Formats*.** You must have a federal format for each company. Add a federal format for Company 1 and a second federal format for Company 2. The names can be anything you choose. Both 1099-MISC and 1099-NEC reporting will use the same federal format.
  - Edit the format and select Line Type **Paper Form**. Enter the company name/address information, phone number, and federal ID. Save the format. This information will be printed on the form and in the electronic file for this company.
  - Select Line, type **File Header,** and enter the Transmitter Control Code, Contact Name, Phone#, and Email Address. This screen does not require any other changes.

- On the 1099 Browse screen, when tagging payments for 1099 reporting, tag the amounts with the appropriate code (i.e., N vs. N2) to represent Company 1 vs. Company 2.

- On the 1099 Browse screen, you may filter what is displayed by clicking on Tagged Codes and selecting Company 1 or Company 2 codes. Click Display to refresh the screen. This will help you to analyze the reportable payments by company and by tagged code. Click the Reports drop-down arrow to export anything displayed on the screen to Excel.

- When printing the forms, select the year and the form type (MISC, NEC, etc.) and the appropriate format for printing (Company 1, Company 2, etc.).

NOTE: *Forms are printed based on what is tagged for printing on the appropriate form, regardless of what is filtered at any time on the 1099 Browse screen.*