

# 1099 Express Install & Activation Instructions

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After downloading the 1099 Express Software, run and install the software. Simply continue to click next until the program begins installing.

Once you have finished installing 1099 Express, you will need to activate the product. Follow the instructions below.

**Your copy of 1099 Express is only to be installed and activated on one single workstation.**

**Activation Code: S11028872**

To activate 1099 Express, W-2 Express or 1042-S Express follow the instructions below:

- Be sure your program is installed on the correct computer before activation.
- If not, get on the correct computer and go to [www.1099Express.com](http://www.1099Express.com) and click downloads. Then follow the directions to download and install the program.
- **Start the program** by double clicking the Red White and Blue icon on your desktop.
- Click the **Activate** button at the first ABOUT splash screen.
- Choose the **Automatic Activation** option.
- Enter the above **Activation Number** to activate.
- Click on Help/Index, then Topics 2 and 3 to get started.

(PLEASE READ)

This year we added a 2<sup>nd</sup> name field to our FPA contacts (Producers, Owners, and Vendors). This should not cause you much of an issue. But it could make some of your contacts information not print right on 1099s and other things.

To fix this, we have added the option to run a “1099 2nd Name Line Audit Report” which will show you any contacts that may not print right so you can correct them prior to exporting your 1099s out of FPA. You can find this report in the utilities section of Fiber Procurement or Accounts Payable. This will tell you if any of your addresses need to be edited for a smooth export to 1099Express



## 1099 Processing

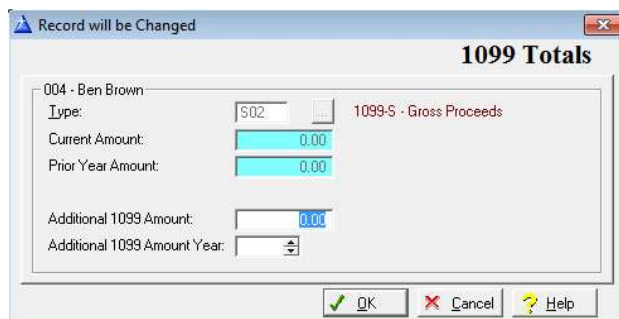
You can perform 1099 processing at any time AFTER January 1, 2018 when all checks for 2017 have been written.

### Automatic Recalculation of 1099 Amounts

If you inadvertently failed to check the “**Generate 1099**” field, during the initial add of a **producer** or **owner**, you can check the field on the Settings tab and the system will automatically recalculate the 1099 amount. This is not true for a **vendor**, since the 1099 selection is specific to each voucher.

If you inadvertently failed to check the “**Adjust 1099 Amount**” field, during the initial setup of a **producer** or **owner** deduction, you can check the field on the General Information tab and the system will automatically adjust the 1099 amount for the deduction.

### Adjusting 1099 Amounts



The screenshot shows a dialog box titled "Record will be Changed" with a sub-header "1099 Totals". It contains the following fields:

004 - Ben Brown	
Type:	S02
Current Amount:	0.00
Prior Year Amount:	0.00
Additional 1099 Amount:	0.00
Additional 1099 Amount Year:	

At the bottom are buttons for OK, Cancel, and Help.

‘**Additional 1099 Amount**’ and ‘**Additional 1099 Amount Year**’ fields are available on the ‘1099 History’ tab for producers, owners, and vendors. The amount in this field is either added or subtracted from the 1099 amount recorded in the system. You would use this field to record 1099 amounts not previously recorded in the system.

### 1099 Listing Reports

The 1099 Listing reports for Producers, Owners, and Vendors can be used to verify the accuracy of the 1099 information prior to exporting to 1099 Express. To run these reports, go to Accounts Payable/Reports/Processing Reports/1099 Listing, or Fiber Procurement/Reports, Miscellaneous/1099 Listing.

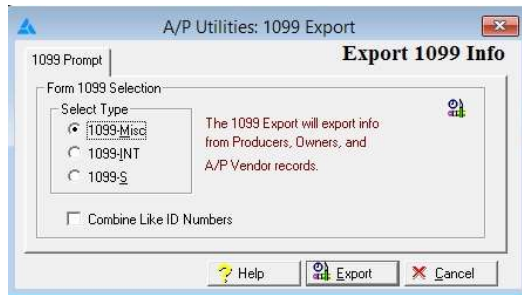
### Auditing 1099 Amounts

To verify the earnings of a particular 1099 recipient, please run the 1099 Audit Report . This report lists all checks, vouchers, and the 1099 amounts. To run this report, go to Accounts Payable/Reports/Processing Reports/1099 Audit Report, or Fiber Procurement/Reports/Miscellaneous/1099 Audit report.

## Exporting and Processing 1099's

### Step 1: Export 1099

Select Fiber Procurement/Utilities Menu/1099 Export, or Select Accounts Payable/Utilities Menu/1099 Export



Select the 1099 form type to export and click the “Export” button. Repeat this process for each 1099 form type to be exported. The 1099 file can be exported as many times as necessary. The 1099 file should be edited through the file maintenance option for producers, owners, and vendors instead of through 1099 Express.

#### New Feature in 2015-2016:

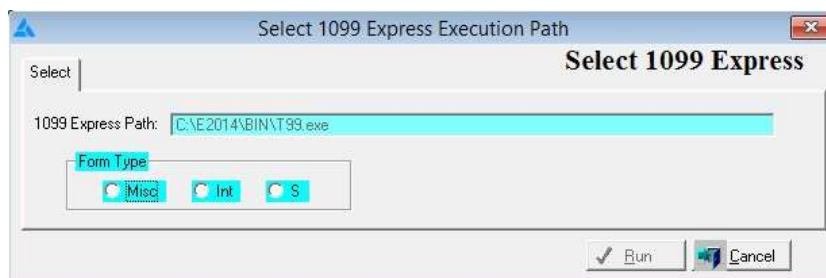
- Last year we added a check box on the export window that will allow you to combine 1099s for recipients with the same federal ID number.
- You need to do this for each 1099 form type.
- You could always do this in the 1099 Express software in years past but this enables the user to do so at the time of the export itself.

### Step 2: Access 1099 Express

Select Fiber Procurement/Utilities Menu/1099 Express Tax Prep Software, or Select Accounts Payable/Utilities Menu/1099 Express Tax Prep Software.

### Step 3: Choose 1099 Form Type to Edit

When you complete **Step 2** you should be presented with the window shown below. On this screen there is a section labeled **Form Type** with three choices to choose from. Here you will choose which form type you would like to open. If you have more than one type of 1099 to print, you would use **Step 2 & Step 3** for each 1099 type you have.



1099 Express should now be open. If you do not see the window, it may be in the background behind FPA. Your 1099 information has already been imported and should be open inside of 1099 Express already. If it is not, please complete Steps 1, 2, and 3 again.

#### Step 4: Check and Enter Filer Information

Now we need to check and finish your filer information. Click on the **Filer** button on the left side of the 1099 Express window.

1099 Express Enterprise 2015.54 1099-Misc C:\E2015\ABC\_Corp\_Misc\_2015\_example.src

File Add F3 Options Edit Search Select Form Internet e-File Deadlines Transfer License Help

Open Save Add PDF Print

1099-Misc 1099-INT 1099-9 1099-41a 1099-41b 1099-41c 1099-41d 1099-41e 1099-41f 1099-41g 1099-41h 1099-41i 1099-41j 1099-41k 1099-41l 1099-41m 1099-41n 1099-41o 1099-41p 1099-41q 1099-41r 1099-41s 1099-41t 1099-41u 1099-41v 1099-41w 1099-41x 1099-41y 1099-41z 1099-41aa 1099-41ab 1099-41ac 1099-41ad 1099-41ae 1099-41af 1099-41ag 1099-41ah 1099-41ai 1099-41aj 1099-41ak 1099-41al 1099-41am 1099-41an 1099-41ao 1099-41ap 1099-41aq 1099-41ar 1099-41as 1099-41at 1099-41au 1099-41av 1099-41aw 1099-41ax 1099-41ay 1099-41az 1099-41ba 1099-41bb 1099-41bc 1099-41bd 1099-41be 1099-41bf 1099-41bg 1099-41bh 1099-41bi 1099-41bj 1099-41bk 1099-41bl 1099-41bm 1099-41bn 1099-41bo 1099-41bp 1099-41bq 1099-41br 1099-41bs 1099-41bt 1099-41bu 1099-41bv 1099-41bw 1099-41bx 1099-41by 1099-41bz 1099-41ca 1099-41cb 1099-41cc 1099-41cd 1099-41ce 1099-41cf 1099-41cg 1099-41ch 1099-41ci 1099-41cj 1099-41ck 1099-41cl 1099-41cm 1099-41cn 1099-41co 1099-41cp 1099-41cq 1099-41cr 1099-41cs 1099-41ct 1099-41cu 1099-41cv 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1099-41zy 1099-41zz

2015 1099-Misc

FILER EM 74-298457 ABC Corporation, Inc.

RecType	FormType	SSN	COR	FOR	BAR	CS	NAME	NAME2	ADDR	CITY	ST	ZIP	ACCT	Box1	Box2	Box3	Box4	Box5	Box6	Box7	Box8	Box9	
1	B	A					Bill Bishop		and Asst 737 Commerce	Oakland	CA	98722	45000-C										
2	B	A					William A. Jones		P. O. Box 361 Casper	WY	59834	234W											
3	B	A					Sally Smith		345 Tampa Driv Orlando	FL	33409	5A-888											
4	B	A					Able Vaughn		P. O. Box 3478 Dallas	TX	75344	348-322											
5	B	A					Owens Gilbert		Product P. O. Box 3367	Houston	TX	77544	W1234										
6	B	A					Ian Smithemane		Snather P. O. Drawer 77	Reno	NV	78044	Account										
7	B	A				1	Glenn Oil Corpor		Attn Dr. Lower Fitzwillas	Dublin 2, Ire			Owner 2										
8	B	A					Nevada Smith		Retail C 1834 Louisa	Denver	CO	77901	Samuel										
9	B	A					Bill Westerman		103-A Canal Lax Cypress	Gari FL		33567	129876										
10	B	A					Bill Westerman		103-A Canal Lax Cypress	Gari FL		33567	973763										
11	B	A					Bill Westerman		103-A Canal Lax Cypress	Gari FL		33567	98763-C										
12	B	A					Michael Woodr		78 Senec Drive Tampa	FL	78993	345-99											
13	B	A					John M. Jones, I		345 North Main Norman	OK	78343-3	Account											
14	B	A					Col. Wm. Bishop		P. O. Box 434 Washington	DC	78411-3	PN344											
15	B	A					Wm. Carlson		309-B West Ma Cleveland	OH	27893-3	A23478											
16	B	A					Williams-Richard		#3 Patterson Bl Victoria	TX	77903	ClearVie											
17	B	A					Don Morgan		P. O. Box 342 Tulsa	CO	77903	Account											
18	B	A					Rev. Bill Bishop		1834 Elvira Driv Denver	CO	77903	Four W											
19	B	A					Phil Rosa		33 W. 32nd St. New York	NY	01944	9934											

Transmitter

Row: 1 Last Row: 25 File Unchanged C:\E2015\Bin\ Visible Rows: 20 12/8/2015

1099 Company/Filer Information

Payer's ID No. Names Special Re-Populate

Program Year 2015

Tax Year 2015

Enter the Company/Filer/Payer's Tax ID Number in the box below. Dashes may or may not be included. If the payer is an individual, enter the individual's Social Security Number.

74-2984567

Next Cancel Help Ok 10


When the Filer Information box opens you will be on the **Payer's ID No.** tab, verify the **Tax Year** and the **Tax ID Number**.

Now click on the second tab labeled **Names**.

Be sure to check this information carefully and fill in any areas that are blank. When finished, click ok to close the box.

#### Step 5: Checking 1099 FPA Import for Errors

*Reminder: You may want to have the “Helpful Tips for using 1099 Express” page handy to help make finding things easier. It is also included in the documentation these instructions were found.*

To check your 1099 file for errors click on Options/Verify Format or you can click on this button  in the toolbar.

If any errors are found, 1099 Express will show you exactly what the errors are and where they must be corrected.

This box will pop up if you have any errors:



Click on **Correct**, this will bring up a prompt telling you what the error is for. Click OK and the 1099 form box will appear allowing you to make the change that is need to correct the error. Do this for all errors if there is more than one.

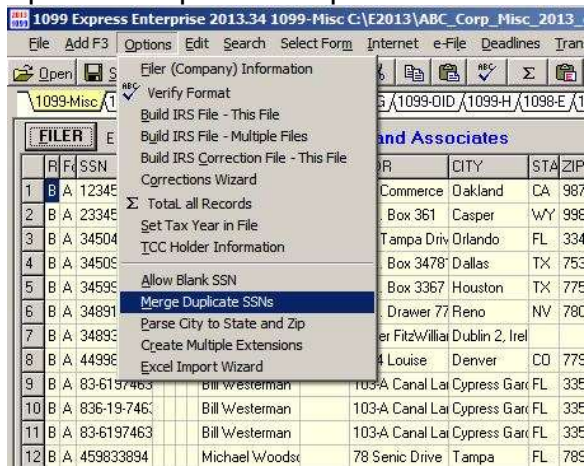
Once you have finished correcting errors, click on the **Verify Format** button again to verify there are no other errors.

#### Step 6: Merging Duplicate SSNs (THIS STEP IS OPTIONAL & CAN ALSO BE DONE IN FPA AT THE TIME OF EXPORT)

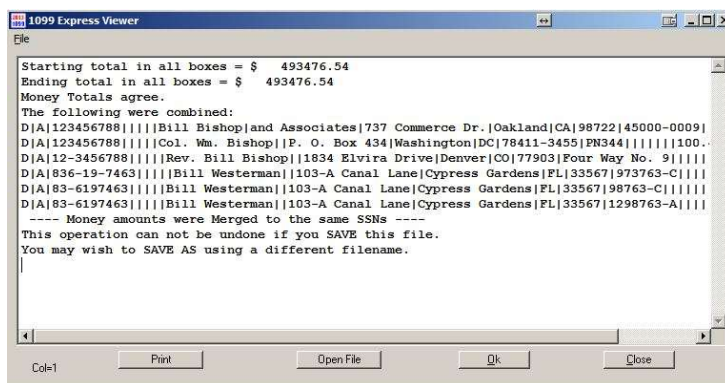
Sometimes you will have recipients with multiple 1099s. 1099 Express does not automatically combine duplicate SSNs. The IRS will accept your 1099s either way,

so this step is totally up to you. To combine multiple 1099s for one recipient into one single 1099 follow these steps.

Open the “Options” drop-down menu and select “Merge Duplicate SSNs”.



You will be prompted with a box stating that the procedure will re-order your records and cannot be undone, click “Yes” to continue. Another box will now pop up, this box shows you what duplicate SSNs were found and merged. We recommend you print this out for future reference.



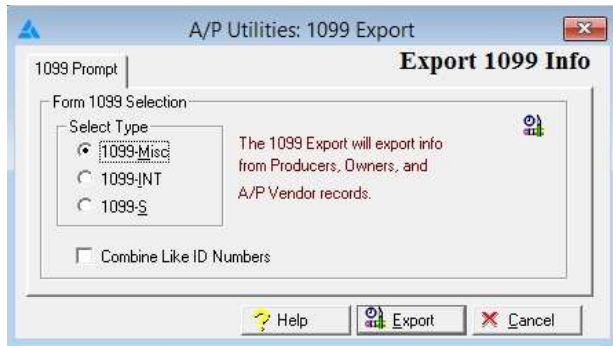
After you have printed the document, click “Close” to return to 1099 Express. You have now merged all duplicate 1099s into one for this 1099 type.

### Alternative Method:

Starting with the 2014-2015 tax season, you can now combine 1099s with like federal ID numbers in the FPA software itself at the time of export.

To do so, check the box next to “Combine Like ID Numbers” on the Export 1099 windows in FPA. This will go ahead and combine all like federal ID numbers prior to the file being in 1099 Express. If you use this newer method, you will not have to combine them again in 1099 Express so you can skip this step in the future.





### Step 7: Print Forms

In 1099 Express there are a few options for printing. You can print a test page if you want to verify that your computer is set up to print properly. You can print (Create) LASER FORMS, this will print your 1099s to blank paper. You can print on Pre-printed forms. And you can also print on form 1096. Simply open the file menu to see your printing option.

## 1099 Express e-File Instructions

### Setup e-File in 1099 Express

If you plan to e-File you will need to enter your e-File information into 1099 Express. To do so, you will click on the button labeled **Transmitter** in the bottom left corner of the 1099 Express software. This will display the same box as you see below.

Fill out all information including your TCC number. If you do not have a TCC number yet, click on the **Print 4419** button. Wait a couple minutes for everything to load. You should now see a form that you can fill out. You can fill this form out inside the window and then print it or you can print out the document and fill it out, either way will work. You will then have to fax or mail the form in; it will take between 3 – 5 days to receive you TCC number and e-File information.

## ELECTRONIC FILING DETAILS

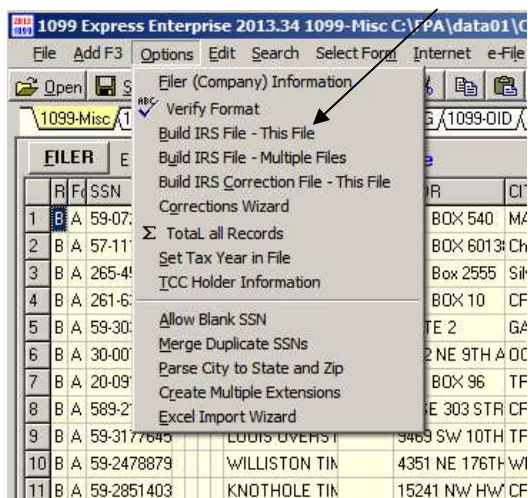
### Step1: Building the IRS1.txt File with the OPTIONS MENU.

Building the IRS file converts your SOURCE (.src) file to another file in IRS format for e-Filing. **Click the Options Menu then "Build IRS File - This File"**. Some companies could be creating

up to three different 1099 formats, 1099-MISC, 1099-INT, and 1099-S. We suggest using a naming convention when building your IRS file to make them easy to distinguish.

For instance, if you are building an e-file file for 1099-MISC, name the file IRSmisc.txt. If you are building an e-file file for 1099-INT, name the file IRSint.txt. If you are building an e-file txt file for 1099-S, name the file IRSs.txt.

The IRSx.txt files will be saved in a default folder called C:\E2017\IRSFILES, unless you change this folder.



There may be errors, such as missing company information, missing TCC holder information, missing account numbers, missing SSNs, and more. 1099Express will not allow you to send errors to the IRS. After errors are corrected, your source file must be saved, before you can continue. If it says "Save File First" click the File/Save menu or click the SAVE speed button. Start over and click the Options Menu, then Build IRS File - This File, and try again.

After the IRS1.Txt file is created, you are then asked if you wish to zip (compress) the file. Tell it "Don't Zip" and continue.

## Step2: Print the Tracking Report.

After the IRSx.txt file is created, a white screen will appear showing the file to upload to the IRS. This file is **usually** named

**C:\E2014\IRSFILES\IRSx.txt**

You will be uploading this file shortly to the IRS FIRE web site. Make sure you send the .txt file you created and not the .src file. Print this screen on paper; use the print button at the bottom of the box! It contains vital tracking information, then click CLOSE to continue.

## Step3: Uploading your IRSx.txt file.

When the Text Viewer white screen is closed, you will be asked if you would like to be taken automatically to the IRS web site FIRE.IRS.GOV, choose yes if you are ready to submit this file to the IRS.



If you have an account, click **Log On**, otherwise click **Create New Account** and follow the easy instructions. When creating a new account, you will have to create a User Name such as "Sally Jones", a Password with 8 characters such as "Sally123", and a ten digit PIN such as 8005551212 (a phone number makes an easy to remember PIN).

After you log on, click **Main Menu**, and see **Uncle Sam**. Then click **Send Information Returns**, and follow prompts, entering your TCC, TIN, VERIFY, PIN, etc. when requested. When prompted for FILE TYPE, you normally choose **Original**, if this is the first time. Other file types could be Replacement, Test, or Correction. Continue until you reach the screen that has a BROWSE and UPLOAD buttons.

Click the **BROWSE** button. A "Choose File" window will appear. Navigate to the C: Drive, then the yellow folder called E2017, then the yellow folder called IRSFILES. The top window labeled "LOOK IN" should be set to C:\E2017\IRSFILES\ Click the file such as **IRSx.txt**, then click OPEN. Next click the **UPLOAD button**. You should then see an "Upload Progress" window as the file uploads to the IRS. This may be too quick to see. You will then see the "File Upload Statistics" web page showing "Total Bytes Received", which must be printed.

If you have more than one type of 1099 format (Misc, Int, S, ect...), you can upload all of them now or come back after you build each one and upload them then.

A common mistake is to upload your ".src" file. **Do not upload any file ending with the extension .src**

#### **Step4: Print the File Upload Statistics (Total Bytes Received) page.**

This is the only chance you will have to print the File Upload Statistics web page and save it as proof of delivery to the IRS. Follow the instructions on this page carefully. Be sure **this page actually prints** out before you continue. Staple it to the Tracking Report printed in Step 2.

Return to the main menu. Click **Check File Status** menu. Status should be "Not Yet Processed". Click the link for more information. Remember to check the File Status tomorrow.

#### **Step 5: Check your File Status.**

It is your responsibility to check the IRS status after your file is processed by the IRS. Within 1 or 2 days, go back to the **FIRE.IRS.Gov** website. Check the file status. If the file status is GOOD, it will be released in 10 days and posted to each person's 1040. During the 10 day grace period you have the **option to cancel the entire file** by calling the IRS at 1-866-455-7438.

If the file status is BAD, it will be necessary to find the reason why the file is BAD, correct the problem, then send the file back to the IRS as a "REPLACEMENT FILE".

#### **Notes:**

If you receive a message that your TCC does not match the TIN you provided, you should call the IRS at 866-455-7438 to get the correct TIN for your TCC. You may also get this error message if you are trying to check the file status, but no files have been uploaded to the new FIRE SYSTEM.

If you are filing more than one type of 1099, you will need to follow the steps again for each type you are creating. Meaning if you are creating 1099-MISC and 1099-INT, you would have to the steps above for each one.

Contact Automated Accounting Systems if you have any questions or need any assistance.

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