

1099 Forms - Prepare and Print and/or eFile

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|-------------|------|----------|-------------------------|
| Document #: | 3043 | Product: | CenterPoint® Accounting |
|-------------|------|----------|-------------------------|

This document describes how to prepare, print and/or eFile 1099 forms. You can print and eFile forms in any combination. For example, many people choose to eFile the Federal and State copies and then print the vendor/employee copies. An increasing number of people are using the complete eFile process in which Federal and State copies are eFiled and the vendor/employee copy is printed and mailed by Aatrix. Click [here](#) to view a video that guides you through the steps needed to set up CenterPoint to prepare for processing 1099 forms. Click [here](#) to view a video that discusses the integration that CenterPoint has with Aatrix and the steps to take to print or eFile your 1099 forms.

A 1099 will be processed for each vendor that have all three of these factors:

1. The vendor has the Issue 1099 for this vendor selected (and a TIN assigned).
2. The accounts used to pay the vendor are assigned to the 1099 User Defined report.
3. The total amount paid to the vendor must exceed the minimum amount for the 1099.

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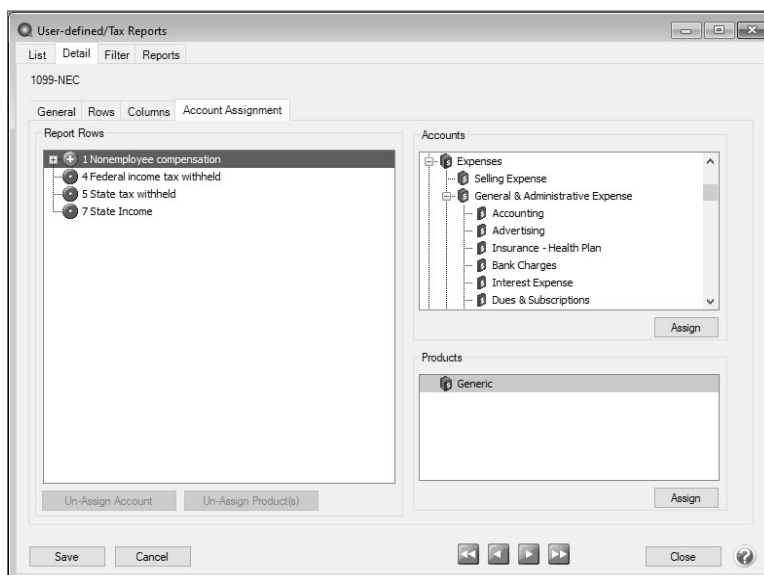
Step A - Mark Vendors to Receive 1099s

1. Select **Setup > Vendors** or **Setup > Names > Names**.
2. Edit a vendor that will need a 1099.
3. Click on the **General** tab.
4. Specify the **Federal Tax Id** for this vendor (this is a required field when printing 1099s).
5. Select the **Issue 1099 for this Vendor** check box.
6. Select the **Consent to Electronic 1099** check box if this vendor consents to receiving only a 1099 form that can be viewed through Aatrix (the vendor will not receive a paper form). If this box is selected, a signed consent form must be on file.
7. Click **Save**. Repeat for all vendors that require a 1099.

Step B - Assign Accounts to the 1099 Forms

Accounts and/or account categories must be assigned to the appropriate boxes of the 1099s. This identifies what amounts should go in each box on the 1099 and the type of 1099. To assign accounts and account categories to the 1099 forms and boxes:

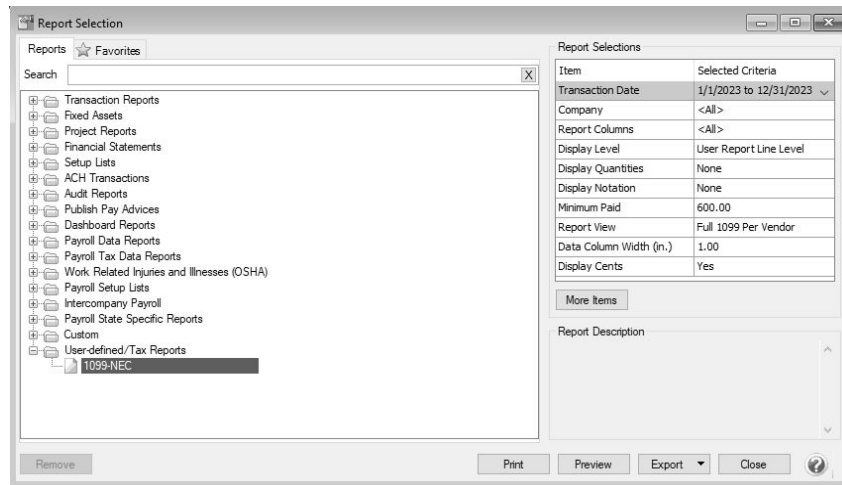
1. Select **Setup > User-defined/Tax Reports**.
2. If the 1099 form you need is not listed in the User Defined Reports list or the User Defined Reports folder is not in the Reports list, that form or forms have not yet been imported. To import the form or forms:
 - A. Select **Setup > User-defined/Tax Reports**.
 - B. Click on **Tax Reports**. Select the forms (1099-NEC, 1099-DIV, etc.) needed, and then click **OK**.
3. Select the appropriate **Form** (1099-NEC, 1099-DIV, etc.), and click on **Edit**.
4. Select the **Account Assignment** tab.



5. On the left side of the screen, in the **Report Rows** section, select the 1099 report row you want to assign accounts to on the 1099.
6. On the right side of the screen, in the **Accounts** section, individual accounts or entire account categories can be assigned to that box. Right-click and select **Expand All**.
7. Select the **Account** or **Account Category** and click **Assign**. If the Assign button is not active, the account or account category is not selected at the appropriate level. For example, if you have an Account selected you may need to select the Account Category instead.
8. Repeat step 5 -7 for each box you'll be using on this 1099 form. When finished, click **Save**.
9. The same process should be repeated for each 1099 form that you will be distributing.

Step C - Review and Export Data from CenterPoint Accounting

1. Select **Reports > Reports > Reports** tab > **User-defined/Tax Reports**.
2. Select the appropriate **1099 Form**.



3. In the **Report Selections** section on the right side of the screen, select the **Transaction Date** and the **Company/Fund** you want to prepare/file 1099 forms for.
4. Select a **Display Level**. These options are only used when printing a report with your 1099 information. If you are printing the actual 1099 forms, the selection for this field will be ignored. The options are:
 - » **User Report Line Level** to view the 1099 totals for each vendor. This generates one row per vendor based on the report view selected.
 - » **Account Total** to view the 1099 totals for each vendor with subtotals for each account. For example: if multiple accounts are assigned to the Non-employee Compensation box, you will see a subtotal for each account under Non-employee Compensation.
 - » **Individual Transactions** lists all 1099 transactions for each vendor.
5. Select a **Report View**. These options are only used when printing a report with your 1099 information. If you are printing the actual 1099 forms, the selection for this field will be ignored. The options are:
 - a. **Full 1099 Per Vendor** groups by the Vendor, second by the User Defined Line, and thirdly the Account.
 - » Combined with using Display Level "User Report Line Level" generates a collapsed view by vendor and total for each user defined line reported for that vendor.
 - » Combined with using Display Level "Account Totals" groups the data first by Vendor, next User Defined Line and finally a total for each account.
 - » Combined with Using Display Level "Individual Transactions" additionally includes the transactions details under each Account.
 - b. **1099 Line Summary** groups by the User Defined Line, second by Vendor and thirdly the Account.
 - » Combined with using Display Level "User Defined Row" groups by User Defined Line with a total for each vendor under each user defined line. **Note: This report is helpful to verify totals displayed on a Form 1096.**
 - » Generates a collapsed view with one row per vendor. This report is helpful to verify totals for each 1099.
 - » Combined with using Display Level "Account Totals" additionally adds account totals under each vendor.
 - » Combined with Using Display Level "Individual Transactions" additionally includes the transactions details under each Account.
6. By default, 1099 information will only be displayed for those vendors whose payments are greater than the Minimum Paid amount specified by the government. If you would like a 1099 printed even if they have not met that minimum paid amount, select **Minimum Paid** and change the amount to zero.
7. Click **Preview** to view a report that allows you to verify the vendor name, Federal ID number, and the line on the 1099 that the transaction is assigned to. When you preview the report, you will be able to drill-down to report detail. Drilling-down from the Line Level launches a new report that displays the Account Level report for the line selected. Drilling-down from

the Account Level report launches the report at the Transaction Level for the account selected. Drilling-down from the Transaction Level attempts to display the transaction form that displays the original entry of the transaction.

Preview - (1099-NEC)

12/7/2023 8:23 AM

CenterPoint Farm, CenterPoint Orchard

1099-NEC

1/1/2023 to 12/31/2023

| Account | Cash | Payments and Receipts | Journal Entries | Total |
|---|-------------------|-----------------------|-----------------|-------------------|
| All Power Equipment 385 Central Avenue Owatonna, MN 55060 | | | | |
| 1 Nonemployee compensation | | | | |
| Legal Expense | 1,305.00 | 0.00 | 0.00 | 1,305.00 |
| Machinery Hire Cost | 0.00 | 420.00 | 0.00 | 420.00 |
| Repairs / Maintenance Cost | 373.00 | 0.00 | 0.00 | 373.00 |
| 1 Nonemployee compensation Totals | \$1,678.00 | \$420.00 | \$0.00 | \$2,098.00 |
| All Power Equipment Totals | \$1,678.00 | \$420.00 | \$0.00 | \$2,098.00 |
| Meyers, Sam 222-33-4444 38583 Lakeside Road Red Wing, MN 55066 | | | | |
| 1 Nonemployee compensation | | | | |
| Machinery Hire Cost | 854.00 | 0.00 | 0.00 | 854.00 |
| 1 Nonemployee compensation Totals | \$854.00 | \$0.00 | \$0.00 | \$854.00 |
| Meyers, Sam Totals | \$854.00 | \$0.00 | \$0.00 | \$854.00 |
| MKGP Services 8327 West Oak Street Red Wing, MN 55066 | | | | |
| 1 Nonemployee compensation | | | | |
| Legal Expense | 0.00 | 3,500.00 | 0.00 | 3,500.00 |
| Trucking & Freight Expense | 1,500.00 | 0.00 | 0.00 | 1,500.00 |
| 1 Nonemployee compensation Totals | \$1,500.00 | \$3,500.00 | \$0.00 | \$5,000.00 |
| MKGP Services Totals | \$1,500.00 | \$3,500.00 | \$0.00 | \$5,000.00 |

Report Options

Transaction Date: 1/1/2023 to 12/31/2023

Display Level: User Report: Line Level

Display Quantities: None

Display Notation: None

Minimum Paid: 600.00

Report View: Full 1099 Per Vendor

Data Column Width (in.): 1.00

Display Cents: Yes

8. To generate and print the 1099 forms from the Report Preview screen, click the **Print** or **Print To** icons and then continue with Step 9.

or

To generate and print the 1099 forms from the Report Selections screen, click the **Print** button and then continue with Step 9.

Print Options

What would you like to do?

Print Tax Forms Launch the Aatrix application to print forms.

Register with Aatrix Registration Status: WARNING Expires in 24 days. Saturday, December 30, 2023

Print the Report Print the selected report.

Cancel You will be returned to the selection screen.

9. After selecting the Print To or Print icons or the Print button, the **Print Options** screen will display. If the **Registration Status** is **GOOD**, then you can continue by clicking **Print Tax Forms**. Otherwise, select **Register with Aatrix**, and follow the on screen registration instructions. It may take several minutes for the data to be transferred to the 1099 printing process. The actual time will depend on the number of vendors in your database.



Note: A **Warning** message will display if the Federal Tax Id (EIN) is not filled in for the company/fund you selected to prepare/file 1099 forms for. If this message is received, click **OK**. Then within CenterPoint, select **Setup > Companies. Edit** your **Company**. Enter the correct **Federal Tax Id** on the **Additional Detail** tab. Then begin with Step C again.


Missing Company EIN

! Your company EIN is missing in your payroll data file.

OK

Forms Update


If you have internet access and the latest version of Federal/State Tax Forms (Aatrix) is not installed, a **Forms Update** screen will automatically display. Click **Automatic Update**, and then follow the on screen instructions.

 **Note:** Once the update begins, the window may be behind your program window. If you minimize your program window, you will see the progress of the update or there may be an icon in your task bar that when clicked will display the progress of the update.

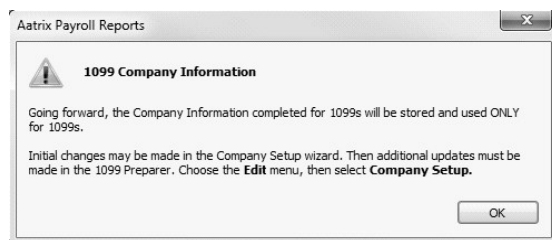


If a Forms Update was required, from the Report Preview screen, click the **Print** or **Print To** icons again or from the Report Selections screen, click the **Print** button again. If an update was not required, the 1099 Company/Fund Information screen will display.

The 1099 Company Information screen displays to remind you that changes are stored only for 1099s and if needed to change Company Information from **Edit > Company Setup** in the 1099 Preparer in Aatrix. Click **OK**.

 **Note:** Changing company information in Aatrix does not change company information in your Red Wing Software program. If a change is needed, it is suggested to change company information in your Red Wing Software program.

 **Note:** The following screen may not appear on top of your other open windows. You may need to minimize any open windows to continue.



Step D - Setup 1099 Forms

1. If this is the first time 1099s are being processed this year, the **1099 Setup Wizard** will automatically be displayed. If you wish to test the 1099 Setup Wizard without saving any of the test information, select either the 25 recipients or All recipient test drive options. If you want to continue the 1099 process, select the **No thanks, start processing my 1099/1096s** option, and then click **Next**.




1099 Setup Wizard

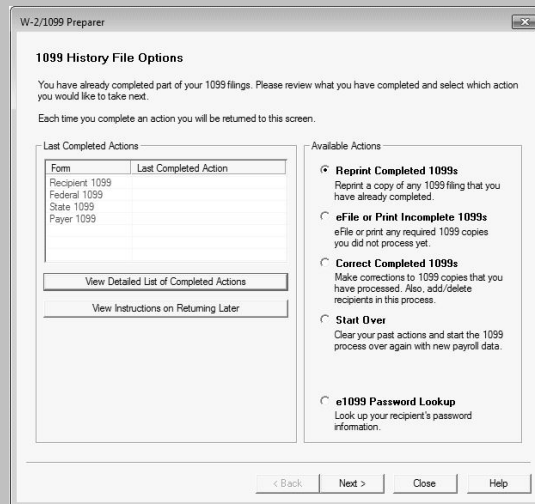
We noticed that you have not processed any 1099s for the current filing year. Before you begin filing your 1099s, would you like to do any of the following?

☐ I want to test drive the 1099/1096 Wizard with only the first 25 of my recipients.
☐ I want to test drive the 1099/1096 Wizard with all of my recipients.
☒ No thanks, start processing my 1099/1096s.

NOTE: The 1099/1096 Wizard test drive allows you to see how the process works but does NOT save any of your information.

< Back Next > Cancel

 **Note:** If you started processing 1099s previously, the 1099 Setup Wizard screen will not be displayed. Instead, you'll see the **1099 History File Options** screen below. Choose the appropriate **Action**, and then click **Next**.



1099 History File Options

You have already completed part of your 1099 filings. Please review what you have completed and select which action you would like to take next.

Each time you complete an action you will be returned to this screen.

| Form | Last Completed Action |
|----------------|-----------------------|
| Recipient 1099 | |
| Federal 1099 | |
| State 1099 | |
| Payer 1099 | |

View Detailed List of Completed Actions

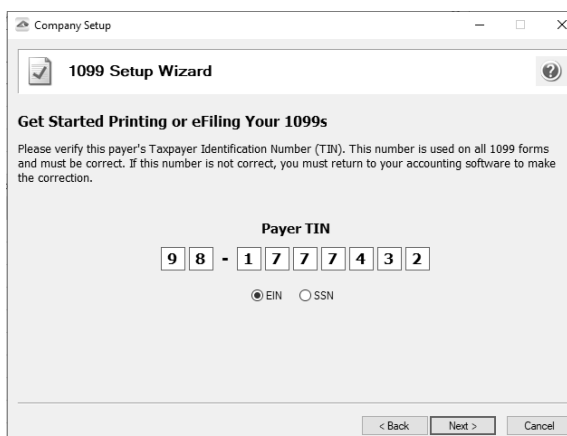
View Instructions on Returning Later

Available Actions

- ☒ **Reprint Completed 1099s**
Reprint a copy of any 1099 filing that you have already completed.
- ☐ **eFile or Print Incomplete 1099s**
eFile or print any required 1099 copies you did not process yet.
- ☐ **Correct Completed 1099s**
Make corrections to 1099 copies that you have processed. Also, add/delete recipients in this process.
- ☐ **Start Over**
Clear your past actions and start the 1099 process over again with new payroll data.
- ☐ **e1099 Password Lookup**
Look up your recipient's password information.

< Back Next > Close Help

2. Verify that the **Payer TIN** is correct, select whether the Payer TIN is an **EIN** or **SSN** , and then click **Next**.



1099 Setup Wizard

Get Started Printing or eFiling Your 1099s

Please verify this payer's Taxpayer Identification Number (TIN). This number is used on all 1099 forms and must be correct. If this number is not correct, you must return to your accounting software to make the correction.

Payer TIN

9 8 - 1 7 7 7 4 3 2

☒ EIN ☐ SSN

< Back Next > Cancel



Note: If you receive an Incorrect Format message on the Company Setup screen, click **Cancel**. Then within CenterPoint, select **Setup > Companies**. **Edit** your **company**. Enter the correct **Federal Tax Id** on the **Additional Detail** tab. Then begin with Step C again.

The screenshot shows the '1099 Setup Wizard' window. It has a title bar 'Company Setup' and a subtitle '1099 Setup Wizard'. The main heading is 'Get Started Printing or eFiling Your 1099s'. Below this is a paragraph: 'Please verify this payer's Taxpayer Identification Number (TIN). This number is used on all 1099 forms and must be correct. If this number is not correct, you must return to your accounting software to make the correction.' The 'Payer TIN' field is displayed as '7 3 - 2 9 8 9 8 ? ?'. A tooltip with an error icon and the text 'Incorrect Format' and 'Example: 12-1234567' points to the '8' in the TIN. At the bottom are buttons for '< Back', 'Next >', and 'Cancel'.

3. The **Multiple 1099 Data Files** screen will display. Select **Yes** if you have multiple payroll databases with the same EIN and see the FAQ section in this document for more information. Otherwise, select **No**, and then click **Next**.


The screenshot shows the 'Multiple 1099 Data Files' window. It has a title bar 'Multiple Payroll Data Files [77-9876543]' and a subtitle 'Multiple 1099 Data Files'. The main heading is 'Please Read Carefully'. Below this is a paragraph: 'Answering incorrectly may require you to restart the filing process.' The question is 'Do you use multiple 1099 data files for the same federal EIN and form type?'. Below this is a paragraph: 'You may be using multiple 1099 data files in your accounting software to handle:'. A bulleted list follows: 'multiple companies', 'multiple departments', 'multiple divisions', 'multiple sites'. Below this is a paragraph: 'all under the same federal EIN.' There are two radio buttons: 'Yes, I use multiple 1099 data files for this EIN.' (selected) and 'No, I use a single 1099 data file for this EIN.' At the bottom are buttons for '< Back', 'Next >', and 'Cancel'.

4. Review your **Payer Information**. The system will notify you if any required fields have incorrect or missing information. Click **Next** if the screen is correct, if it's incorrect, click **Cancel**. You will need to go back into CenterPoint and select **Setup > Companies/Funds** to correct the information and then start the export process again.


The screenshot shows the 'Payer Information' window. It has a title bar 'Payer Information [77-9876543]' and a subtitle 'Payer Information'. The form contains the following fields: 'Company name:' (CenterPoint Orchard), 'DBA name:' (CenterPoint Orchard), 'First name:', 'Middle:', 'Last name:', 'Country:' (USA (United States)), 'Address line 1:' (491 Highway 19), 'Address line 2:', 'City:' (Red Wing), 'State:' (MN), 'ZIP code:' (55066), 'Contact name:', 'Title:', 'Phone:' ((800) 555-1234), 'Email:' (support@redwingsoftware.com), 'Fax:', and 'Transfer agent:'. At the bottom are buttons for '< Back', 'Next >', and 'Cancel'.

5. Select the appropriate filer type on the **Tax Preparer Type** screen, and then click **Next**.

6. The **State Tax Items** screen will display. The Setup Wizard will automatically verify that all required information for listed states are complete and conform to the required formats (Vermont, Pennsylvania, Oregon, Louisiana, and Wisconsin all require complete state information). If it finds a blank field or data is incorrect, it will automatically prompt you to correct the data. You will not be able to continue to the next screen until all required fields are correct. Click **Next**.

 **Note:** Changing state information in Aatrix does not change state information in CenterPoint. If a change is needed, it is suggested to change state tax information in CenterPoint.

7. The **Local Tax Items** screen will display. The Setup Wizard will automatically verify that all required information for listed local taxes are complete and conform to the required formats. If it finds a blank field or data is incorrect, it will automatically prompt you to correct the data. You will not be able to continue to the next screen until all required fields are correct. Click **Next**.


 **Note:** Changing local tax information in Aatrix does not change local tax information in CenterPoint. If a change is needed, it is suggested to change local tax information in CenterPoint.

Step E- Prepare 1099 Forms

The W-2/1099 Preparer will walk you through the process of eFiling and/or printing your 1099s. Once the displayed data has been reviewed, click **Next** to continue to the next screen. When you click on Next, the W-2/1099 Preparer will automatically verify that all required fields are filled in and the data is formatted correctly. Anytime the Preparer finds data that is incorrect or missing, it will automatically prompt you to correct it.

This is an example of what the W-2/1099 Preparer will display if it finds incorrect or missing data. If this screen is displayed, simply click on the **Go Back and Correct** button and the data that needs to be corrected will be displayed in red. Click on the red data and correct the information. Once all data has been corrected, click **Next** again to continue to the next screen.

Error

 Errors were found and will be highlighted in red.

Please complete or correct required RED fields. Use TAB for the next RED field.

Error / Warning Description:

Invalid Recipient Identification Number. [1 error found]

Go Back and Correct Print List... Save Detailed List... Help...

1. The first screen of the **W-2/1099 Preparer** displays the **Taxpayer Identification Number (TIN)** for each recipient. Make any needed changes, and then click the **Next** button at the top of the screen.



Note: Changing the figures on this screen will only change the printed Federal reports, it will not change the data in your CenterPoint program. The total for the columns appears above the column in the Totals Row.

W-2/1099 Preparer [77-9876543 CenterPoint Orchard]

File Edit View Help

Verify Recipient Taxpayer Identification Numbers (TIN)

PREVIOUS NEXT COMPANY SETUP

< > Help Tips - Did you know? Read more... ?

To correct any items in the Preparer, even after filing, access the reports through the history, and

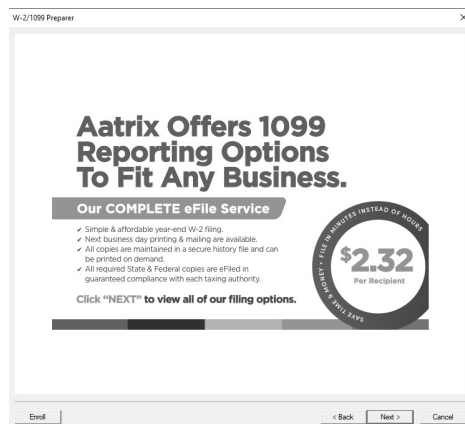
| TOTALS: | | Recipients (3) | | | | | | | \$7952.00 | | | | |
|---------------------|----------------------|-----------------------|--------------------|-------------------------------------|------------------------|---------------|-------------------|--|--------------------------|--|-----------------------------|--------------|--|
| Recipient Last Name | Recipient First Name | Recipient Middle Name | Recipient TIN | TIN Flag | Recipient Company Name | Optional Name | Recipient Address | | Box 1 | Box 2 | Box 4 | Filing State | |
| Last Name | First Name | Middle Name | Taxpayer ID Number | Check if FEIN | Company Name | Full Name | Address | | Nonemployee Compensation | Payer Made Direct Sales of \$5,000 or More | Federal Income Tax Withheld | Filing State | |
| 1 | | | | <input checked="" type="checkbox"/> | All Power Equipment | | 385 Centr | | 2098.00 | <input type="checkbox"/> | | MN | |
| 2 | | | | <input checked="" type="checkbox"/> | MKGP Services | | 8327 We | | 5000.00 | <input type="checkbox"/> | | MN | |
| 3 | Meyers | Sam | 222-33-4444 | <input type="checkbox"/> | | | 38583 Lai | | 854.00 | <input type="checkbox"/> | | MN | |

Ready CAP NUM SCRL

- » To add a line to the W-2/1099 Preparer grid, right-click over one of the line numbers on the left side of the screen and select **Insert Row**, enter the number of rows you want to add to the end of the list of employees, and then manually enter the new information into the grid.
 - » To delete a line from the W-2/1099 Preparer grid, right-click over the line you want to remove and select **Remove Row**.
 - » To copy a line on the W-2/1099 Preparer grid, right-click over the line you want to copy, and then select **Copy**.
 - » To add a copied line to the W-2/1099 Preparer grid, right-click over the line where the copied row should be inserted, and then click **Paste**.
 - » To Find information in a column in the W-2/1099 Preparer grid, right-click on the column header name, select **Find**, in the **Find What** box, enter the information you want to locate, and then click **Find Next**.
2. The next step allows you to verify the **TIN Flag**. The **TIN Flag Check if FEIN** should be selected for each recipient that has a TIN that is an FEIN. Make any needed changes, and then click **Next Step**.
 3. Verify that the recipients names and addresses are correct. The recipients names will be in the Recipient Last Name, Recipient First Name, and Recipient Middle Name columns. If the recipients names are not in the correct columns,

please see the second question in the Frequently Asked Questions section of this document. Make any needed changes, and then click **Next**.

4. Continue verifying all Income boxes, Filing State, and any other amounts for the recipients, make any needed changes, and then click **Next** until all data is accurate.
5. When all data is accurate, click **Next** to begin printing and/or eFiling 1099s.
6. If a Complete eFile Service informational screen displays, click **Next**.



7. The **1099 Printing and Filing Options** screen will be displayed. All printing and eFiling options are displayed with the costs associated for eFiling and Complete Filing Service (which does all the printing and eFiling for you). Choose the appropriate options for your **company** and click **Next**.

W-2/1099 Preparer

1099 Printing and Filing Options

eFile Services allow you to pick Filing Dates. **FREE** Corrections before selected Filing Dates. [More info?](#)

| COMPLETE 1099 eFiling Service | Next Business Day Mailing | # Recipients | Price/Recip. | Subtotal |
|--|------------------------------|-------------------|----------------|----------------|
| The eFile Center will: | | | | |
| - Print and Mail Recipient Copies | | 3 | \$2.32 | \$6.96 |
| - e1099 Only Recipient Copies | What's This? | 0 | \$0.99 | \$0.00 |
| - File your Federal 1099s and 1096 | | | included | FREE |
| - File all applicable State 1099s and Reconciliation Forms | | | included | FREE |
| - e1099s Available for all Recipients | | | included | FREE |
| | | Total Cost | Minimum | \$24.95 |

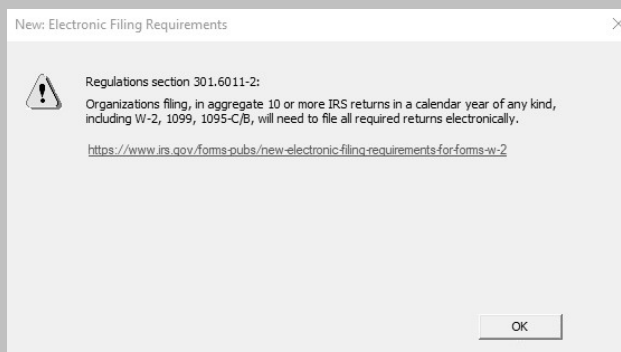
Other Options [eFileers receive Free Corrections before selected Filing Dates](#)

| | | | | |
|--|--|---|-------------------|---------------|
| <input type="checkbox"/> Print Recipient 1099 Copies | | | | |
| <input type="checkbox"/> eFile Federal 1099s and 1096 | | 3 | \$0.49 | \$0.00 |
| <input type="checkbox"/> eFile State 1099s and Reconciliation Forms | | 3 | \$0.69 | \$0.00 |
| <input type="checkbox"/> Print Federal 1099s and 1096 | | | | |
| <input type="checkbox"/> Print State 1099s and Reconciliation Forms | | | | |
| Official Payer 1099s will display when any Federal 1099s are selected | | | Total Cost | \$0.00 |

< Back Next > Cancel

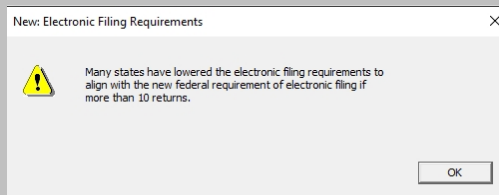


Note: If you chose to print your Federal forms, you will receive a New Electronic Filing Requirements screen. This screen outlines the regulation the IRS and the Department of Treasury changed on February 21, 2023 which changed the Federal eFile threshold for 2023 from 250 to 10. Click [here](#) for more information. For specific 1099 series information, click [here](#). Click **OK** to return to the filing options screen to continue printing if you are compliant or make eFiling selections to remain compliant.

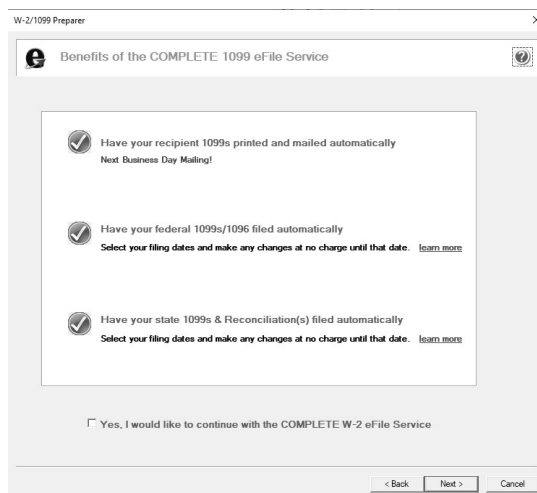




Many states have lowered the eFiling requirements to align with the new Federal requirement and you will receive a New Electronic Filing Requirements screen when printing state copies. Click **OK** to return to the filing options screen to continue printing if you are compliant or make eFiling selections to remain compliant.



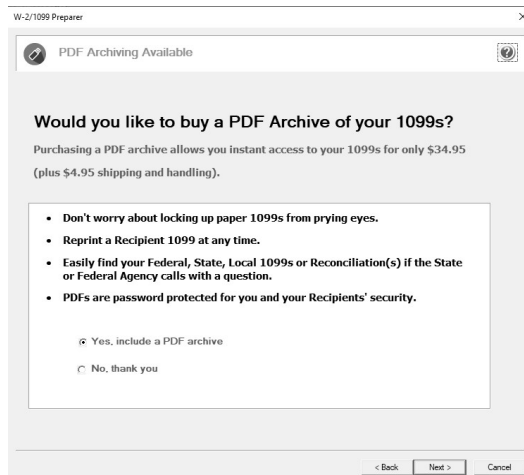
8. Information about the Complete 1099 eFiling service will be displayed. Click **Next**.
9. If you have **not** chosen the **Complete 1099 eFiling Service** option, you have another chance to select that service instead of printing the 1099s yourself. Click **Next** to continue with the original printing options selected. If you've changed your mind and would like Aatrix to print and eFile all of your 1099s, select **Yes, I would...** and then click **Next**.



10. If you chose the **1099 eFiling Service**, you have the option to purchase a PDF archive on a USB of your 1099s, select **Yes, include a PDF archive** to purchase an archive or select **No, thank you** to continue without purchasing an archive.



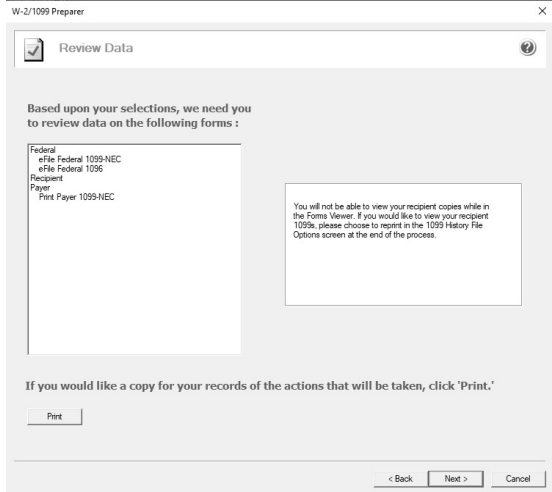
Red Wing Software recommends purchasing a PDF Archive of your 1099s as a backup so you can easily view or reprint a filed 1099 form. If your Aatrix History file becomes corrupt, the file cannot be located, or you get a new computer and the file is not copied to your new computer the PDF Archive can be used instead.



11. If you have elected to file state copies of the 1099 forms, the **Select the States you Wish to File** screen may display. If there are any states in which you do not want to file, unselect those states now.



12. The **Review Data** screen will display. If you select the Print button, a printed version of exactly what displays on this screen will be printed. If any changes are needed, click **Back**. Otherwise, click **Next** to continue.




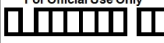
13. The first selected 1099 form will be displayed. The form type is displayed in the yellow bar at the top of the screen. It also specifies how many different forms were selected to print.

| 7171 | | <input type="checkbox"/> VOID <input type="checkbox"/> CORRECTED | | OMB No. 1545-0116 | | Aatrix Rev. 10/26/23 | |
|---|------------------------------|--|------------------------------|---|------------------------|---------------------------------|--|
| PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. CENTERPOINT ORCHARD 491 HIGHWAY 19 RED WING MN 55066 (800) 555-1234 | | | | Form 1099-NEC (Rev. January 2022) For calendar year 2023 | | Nonemployee Compensation | |
| PAYER'S TIN 77-9876543 | RECIPIENT'S TIN 22-334455 | 1 Nonemployee compensation 2098.00 | | Copy A For Internal Revenue Service Center File with Form 1096. For Privacy Act and Paperwork Reduction Act Notice, see the current General Instructions for Certain Information Returns. | | | |
| RECIPIENT'S name ALL POWER EQUIPMENT | | 2 Payer made direct sales totaling \$5,000 or more of consumer products to recipient for resale <input type="checkbox"/> | | | | | |
| Street address (including apt. no.) 385 CENTRAL AVENUE | | 3 | | | | | |
| City or town, state or province, country, and ZIP or foreign postal code OWATONNA MN 55060 | | 4 Federal income tax withheld | | | | | |
| Account number (see instructions) | | 2nd TIN not <input type="checkbox"/> | 5 State tax withheld \$ / \$ | 6 State/Payer's state no. / | 7 State income \$ / \$ | | |

Form 1099-NEC 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

14. To print this first form, click **Print Copy**. Once the data is printed, click **Next Step** to continue to the next selected form.

Do not staple  Aatrix Rev. 10/26/23

| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|--|----------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Form 1096 | Annual Summary and Transmittal of U.S. Information Returns | OMB No. 1545-0046 2023 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| RILEY'S name CENTERPOINT ORCHARD Street address (including room or suite number) 491 HIGHWAY 19 City or town, state or province, country, and ZIP or foreign postal code RED WING MN 55066 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Name of person to contact JOE SMITH | Telephone number 800 555-1234 | For Official Use Only  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Email address SUPPORT@REDWINGSOFTWARE.CO | Fax number | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1 Employer identification number 77-9876543 | 2 Social security number | 3 Total number of forms 3 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 4 Federal income tax withheld \$ | | 5 Total amount reported with this Form 1096 \$ 7952.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Enter an "X" in only one box below to indicate the type of form being filed: <table border="1"> <tr> <td>1099-ATC</td><td>1099-B</td><td>1099-C</td><td>1099-D</td><td>1099-E</td><td>1099-F</td><td>1099-G</td><td>1099-H</td><td>1099-I</td><td>1099-J</td><td>1099-K</td><td>1099-L</td><td>1099-M</td><td>1099-N</td><td>1099-O</td><td>1099-P</td><td>1099-Q</td><td>1099-R</td><td>1099-S</td><td>1099-T</td><td>1099-UB</td><td>1099-UC</td><td>1099-UD</td><td>1099-UE</td><td>1099-UF</td><td>1099-UG</td><td>1099-UH</td><td>1099-UI</td><td>1099-UJ</td><td>1099-UK</td><td>1099-UL</td><td>1099-UM</td><td>1099-UN</td><td>1099-UO</td><td>1099-UP</td><td>1099-UQ</td><td>1099-UR</td><td>1099-US</td><td>1099-UT</td><td>1099-UV</td><td>1099-UW</td><td>1099-UX</td><td>1099-UY</td><td>1099-UZ</td><td>1099-VA</td><td>1099-VB</td><td>1099-VC</td><td>1099-VD</td><td>1099-VE</td><td>1099-VF</td><td>1099-VG</td><td>1099-VH</td><td>1099-VI</td><td>1099-VJ</td><td>1099-VK</td><td>1099-VL</td><td>1099-VM</td><td>1099-VN</td><td>1099-VO</td><td>1099-VP</td><td>1099-VQ</td><td>1099-VR</td><td>1099-VS</td><td>1099-VT</td><td>1099-VU</td><td>1099-VV</td><td>1099-VW</td><td>1099-VX</td><td>1099-VY</td><td>1099-VZ</td><td>1099-WA</td><td>1099-WB</td><td>1099-WC</td><td>1099-WD</td><td>1099-WE</td><td>1099-WF</td><td>1099-WG</td><td>1099-WH</td><td>1099-WI</td><td>1099-WJ</td><td>1099-WK</td><td>1099-WL</td><td>1099-WM</td><td>1099-WN</td><td>1099-WO</td><td>1099-WP</td><td>1099-WQ</td><td>1099-WR</td><td>1099-WS</td><td>1099-WT</td><td>1099-WU</td><td>1099-WV</td><td>1099-WX</td><td>1099-WY</td><td>1099-WZ</td><td>1099-XA</td><td>1099-XB</td><td>1099-XC</td><td>1099-XD</td><td>1099-XE</td><td>1099-XF</td><td>1099-XG</td><td>1099-XH</td><td>1099-XI</td><td>1099-XJ</td><td>1099-XK</td><td>1099-XL</td><td>1099-XM</td><td>1099-XN</td><td>1099-XO</td><td>1099-XP</td><td>1099-XQ</td><td>1099-XR</td><td>1099-XS</td><td>1099-XT</td><td>1099-XU</td><td>1099-XV</td><td>1099-XW</td><td>1099-XX</td><td>1099-XY</td><td>1099-XZ</td><td>1099-YA</td><td>1099-YB</td><td>1099-YC</td><td>1099-YD</td><td>1099-YE</td><td>1099-YF</td><td>1099-YG</td><td>1099-YH</td><td>1099-YI</td><td>1099-YJ</td><td>1099-YK</td><td>1099-YL</td><td>1099-YM</td><td>1099-YN</td><td>1099-YO</td><td>1099-YP</td><td>1099-YQ</td><td>1099-YR</td><td>1099-YS</td><td>1099-YT</td><td>1099-YU</td><td>1099-YV</td><td>1099-YW</td><td>1099-YX</td><td>1099-YY</td><td>1099-YZ</td><td>1099-ZA</td><td>1099-ZB</td><td>1099-ZC</td><td>1099-ZD</td><td>1099-ZE</td><td>1099-ZF</td><td>1099-ZG</td><td>1099-ZH</td><td>1099-ZI</td><td>1099-ZJ</td><td>1099-ZK</td><td>1099-ZL</td><td>1099-ZM</td><td>1099-ZN</td><td>1099-ZO</td><td>1099-ZP</td><td>1099-ZQ</td><td>1099-ZR</td><td>1099-ZS</td><td>1099-ZT</td><td>1099-ZU</td><td>1099-ZV</td><td>1099-ZW</td><td>1099-ZX</td><td>1099-ZY</td><td>1099-ZZ</td> </tr> </table> | | | 1099-ATC | 1099-B | 1099-C | 1099-D | 1099-E | 1099-F | 1099-G | 1099-H | 1099-I | 1099-J | 1099-K | 1099-L | 1099-M | 1099-N | 1099-O | 1099-P | 1099-Q | 1099-R | 1099-S | 1099-T | 1099-UB | 1099-UC | 1099-UD | 1099-UE | 1099-UF | 1099-UG | 1099-UH | 1099-UI | 1099-UJ | 1099-UK | 1099-UL | 1099-UM | 1099-UN | 1099-UO | 1099-UP | 1099-UQ | 1099-UR | 1099-US | 1099-UT | 1099-UV | 1099-UW | 1099-UX | 1099-UY | 1099-UZ | 1099-VA | 1099-VB | 1099-VC | 1099-VD | 1099-VE | 1099-VF | 1099-VG | 1099-VH | 1099-VI | 1099-VJ | 1099-VK | 1099-VL | 1099-VM | 1099-VN | 1099-VO | 1099-VP | 1099-VQ | 1099-VR | 1099-VS | 1099-VT | 1099-VU | 1099-VV | 1099-VW | 1099-VX | 1099-VY | 1099-VZ | 1099-WA | 1099-WB | 1099-WC | 1099-WD | 1099-WE | 1099-WF | 1099-WG | 1099-WH | 1099-WI | 1099-WJ | 1099-WK | 1099-WL | 1099-WM | 1099-WN | 1099-WO | 1099-WP | 1099-WQ | 1099-WR | 1099-WS | 1099-WT | 1099-WU | 1099-WV | 1099-WX | 1099-WY | 1099-WZ | 1099-XA | 1099-XB | 1099-XC | 1099-XD | 1099-XE | 1099-XF | 1099-XG | 1099-XH | 1099-XI | 1099-XJ | 1099-XK | 1099-XL | 1099-XM | 1099-XN | 1099-XO | 1099-XP | 1099-XQ | 1099-XR | 1099-XS | 1099-XT | 1099-XU | 1099-XV | 1099-XW | 1099-XX | 1099-XY | 1099-XZ | 1099-YA | 1099-YB | 1099-YC | 1099-YD | 1099-YE | 1099-YF | 1099-YG | 1099-YH | 1099-YI | 1099-YJ | 1099-YK | 1099-YL | 1099-YM | 1099-YN | 1099-YO | 1099-YP | 1099-YQ | 1099-YR | 1099-YS | 1099-YT | 1099-YU | 1099-YV | 1099-YW | 1099-YX | 1099-YY | 1099-YZ | 1099-ZA | 1099-ZB | 1099-ZC | 1099-ZD | 1099-ZE | 1099-ZF | 1099-ZG | 1099-ZH | 1099-ZI | 1099-ZJ | 1099-ZK | 1099-ZL | 1099-ZM | 1099-ZN | 1099-ZO | 1099-ZP | 1099-ZQ | 1099-ZR | 1099-ZS | 1099-ZT | 1099-ZU | 1099-ZV | 1099-ZW | 1099-ZX | 1099-ZY | 1099-ZZ |
| 1099-ATC | 1099-B | 1099-C | 1099-D | 1099-E | 1099-F | 1099-G | 1099-H | 1099-I | 1099-J | 1099-K | 1099-L | 1099-M | 1099-N | 1099-O | 1099-P | 1099-Q | 1099-R | 1099-S | 1099-T | 1099-UB | 1099-UC | 1099-UD | 1099-UE | 1099-UF | 1099-UG | 1099-UH | 1099-UI | 1099-UJ | 1099-UK | 1099-UL | 1099-UM | 1099-UN | 1099-UO | 1099-UP | 1099-UQ | 1099-UR | 1099-US | 1099-UT | 1099-UV | 1099-UW | 1099-UX | 1099-UY | 1099-UZ | 1099-VA | 1099-VB | 1099-VC | 1099-VD | 1099-VE | 1099-VF | 1099-VG | 1099-VH | 1099-VI | 1099-VJ | 1099-VK | 1099-VL | 1099-VM | 1099-VN | 1099-VO | 1099-VP | 1099-VQ | 1099-VR | 1099-VS | 1099-VT | 1099-VU | 1099-VV | 1099-VW | 1099-VX | 1099-VY | 1099-VZ | 1099-WA | 1099-WB | 1099-WC | 1099-WD | 1099-WE | 1099-WF | 1099-WG | 1099-WH | 1099-WI | 1099-WJ | 1099-WK | 1099-WL | 1099-WM | 1099-WN | 1099-WO | 1099-WP | 1099-WQ | 1099-WR | 1099-WS | 1099-WT | 1099-WU | 1099-WV | 1099-WX | 1099-WY | 1099-WZ | 1099-XA | 1099-XB | 1099-XC | 1099-XD | 1099-XE | 1099-XF | 1099-XG | 1099-XH | 1099-XI | 1099-XJ | 1099-XK | 1099-XL | 1099-XM | 1099-XN | 1099-XO | 1099-XP | 1099-XQ | 1099-XR | 1099-XS | 1099-XT | 1099-XU | 1099-XV | 1099-XW | 1099-XX | 1099-XY | 1099-XZ | 1099-YA | 1099-YB | 1099-YC | 1099-YD | 1099-YE | 1099-YF | 1099-YG | 1099-YH | 1099-YI | 1099-YJ | 1099-YK | 1099-YL | 1099-YM | 1099-YN | 1099-YO | 1099-YP | 1099-YQ | 1099-YR | 1099-YS | 1099-YT | 1099-YU | 1099-YV | 1099-YW | 1099-YX | 1099-YY | 1099-YZ | 1099-ZA | 1099-ZB | 1099-ZC | 1099-ZD | 1099-ZE | 1099-ZF | 1099-ZG | 1099-ZH | 1099-ZI | 1099-ZJ | 1099-ZK | 1099-ZL | 1099-ZM | 1099-ZN | 1099-ZO | 1099-ZP | 1099-ZQ | 1099-ZR | 1099-ZS | 1099-ZT | 1099-ZU | 1099-ZV | 1099-ZW | 1099-ZX | 1099-ZY | 1099-ZZ | | | |

Return this entire page to the Internal Revenue Service. Photocopies are not acceptable.
 Send this form, with the copies of the form checked in box 6, to the IRS in a flat mailer (not folded).
 Under penalties of perjury, I declare that I have examined this return and accompanying documents and, to the best of my knowledge and belief, they are true, correct, and complete.


Signature **SIGNATURE ON FILE - AATRIX** Title _____ Date **12/07/2023**

15. The next form will be displayed. Click **Print Copy** to print the form, then click **Next Step** to continue to the next form. The last form will be displayed. Click **Print Final** to print the form, then click **Next Step**.


| | |
|---|--------------------------------------|
| <input type="checkbox"/> VOID <input type="checkbox"/> CORRECTED | |
| 1 Nonemployee compensation \$ 2098.00 | |
| 2 Federal income tax withheld \$ | |
| PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. CENTERPOINT ORCHARD 491 HIGHWAY 19 RED WING MN 55066 (800) 555-1234 | |
| PAYER'S TIN 77-9876543 | RECIPIENT'S TIN 22-3344455 |
| RECIPIENT'S name, street address (including apt. no.), city or town, state or province, country, and ZIP or foreign postal code ALL POWER EQUIPMENT 395 CENTRAL AVENUE OWATONNA MN 55060 | |
| Account number (see instructions) | 2nd TIN, not |
| 3 Payer made direct sales totaling \$5,000 or more of consumer products to recipient for resale <input type="checkbox"/> | |
| 4 State tax withheld \$ State Payer's state no. 5 State income \$ | |
| 2023 Form 1099-NEC Copy C For Payer | |

| | |
|---|---------------------------------------|
| <input type="checkbox"/> VOID <input type="checkbox"/> CORRECTED | |
| 1 Nonemployee compensation \$ 854.00 | |
| 2 Federal income tax withheld \$ | |
| PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. CENTERPOINT ORCHARD 491 HIGHWAY 19 RED WING MN 55066 (800) 555-1234 | |
| PAYER'S TIN 77-9876543 | RECIPIENT'S TIN 222-33-4444 |
| RECIPIENT'S name, street address (including apt. no.), city or town, state or province, country, and ZIP or foreign postal code SAM MEYERS 38583 LAKESIDE ROAD RED WING MN 55066 | |
| Account number (see instructions) | 2nd TIN, not |
| 3 Payer made direct sales totaling \$5,000 or more of consumer products to recipient for resale <input type="checkbox"/> | |
| 4 State tax withheld \$ State Payer's state no. 5 State income \$ | |
| 2023 Form 1099-NEC Copy C For Payer | |

eFile 1099 Forms

 This section will not display if you did not chose to eFile your 1099 forms.

- » If you chose to eFile any of your forms, and you have not filed previously, the Aatrix Secure eFile screen will be displayed.

 Aatrix Secure eFile - EIN NOT ENROLLED! X

EIN 779876543 Not Enrolled

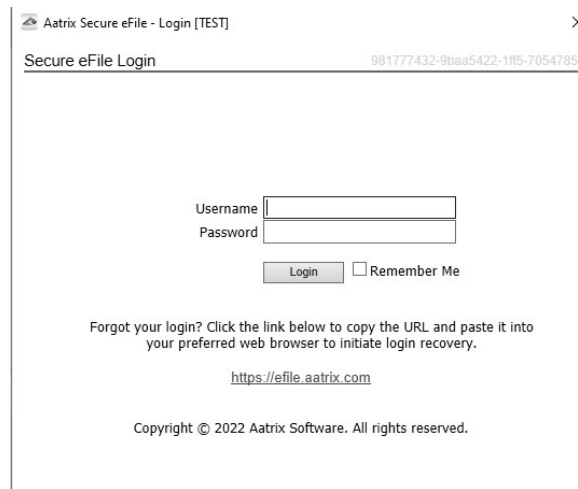
To efile with this Taxpayer EIN complete one of the following steps:

Navigate to the URL below and Enroll this Taxpayer EIN under a new eFile account
or
 Navigate to the URL below and Login to your eFile account to add this new company under the Companies tab.
Once you have completed either of these steps, return to this window and click the Check Enrollment status option to eFile.


To get started, click the link below to copy the URL and paste it into your preferred web browser.

<https://efile.aatrix.com/>

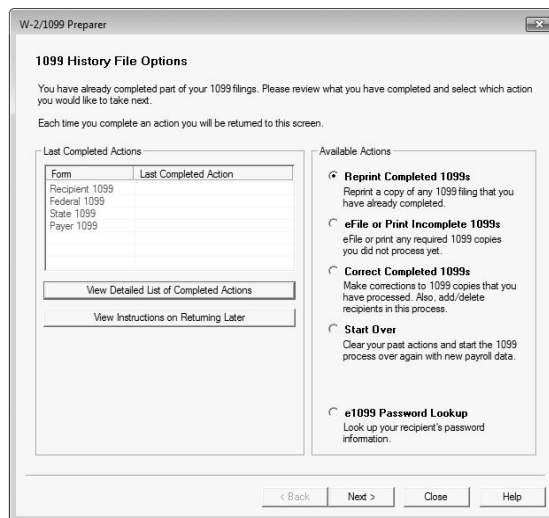
- » If you are not enrolled to eFile with Aatrix, you can do one of the following:
 - » Click the <https://efile.aatrix.com> link to be transferred immediately to the Aatrix website, then click **Enroll** in the upper-right corner to begin the enrollment process. After you are enrolled, close the Browser window and select **I have enrolled and have my Login Id**. Enter your login information and then follow the onscreen instructions to eFile your forms.
 - » Click **Cancel** and enroll each Taxpayer EIN at <http://efile.aatrix.com>. Go back to CenterPoint, select your forms to eFile, **click I have enrolled and have my Login Id**, enter your login information, and then follow the onscreen instructions to eFile your forms.
- » If you are enrolled to eFile with Aatrix, click **I have Enrolled and have my Login ID**, enter your login information, and then follow the on screen instructions to eFile your forms.



- » If you need additional information during the eFile process, [click here](#) or enter <https://www.aatrix.com/support/knowledgebase/windows/> to view answers to common questions.
- » For additional information about eFiling and to view videos about the eFile process, [click here](#) or enter <https://partner.aatrix.com/redwing>
- » When the eFile process is complete, the Complete screen will indicate that your filing was successfully received for processing. A confirmation email will be sent to the email address specified on this screen.
- » The AFID (Aatrix Filing Identifier) is a number assigned to your submission for tracking purposes.

 Note: It is important to write this number down. It will be required when contacting the eFile Center with questions about your submission.

- » If you eFiled your forms, and have questions regarding your filing, contact Aatrix by email at helpme@aatrix.com, on their website at <https://efile.aatrix.com/> by clicking **Login** and entering your Aatrix username and password, or on their website at <https://efile.aatrix.com/> by clicking the **Search our FAQs** button.
20. Upon completion of the 1099 printing process, the **1099 History File Options** screen is displayed. If you are finished printing forms for the time being, select **Close**. This screen will also be displayed if the 1099 printing process is started again.



Frequently Asked Questions

Q: Are there any important changes to the 1099 process for 2023?

A: Yes, there are two noteworthy changes to the 1099 process for 2023:

1. On February 21, 2023, the IRS and the Department of the Treasury changed the Federal eFile threshold for 2023 from 250 to 10. Click [here](#) for more information. For specific 1099 series information, click [here](#).
2. **All** of your 1099 copies will be printed on plain paper, including the Copy A (often called the “red copy”) and your 1096. CenterPoint/Aatrix received IRS approval to print all copies of the 1099 on plain paper. Click [here](#) to view the 1099 Approval Letter.

Perforated paper and envelopes can be purchased from Computer Forms, Inc. at https://redwing.computerforms.biz/c/tax_forms, by calling 800-458-0158, or by clicking the **Order Checks and Forms** icon on the Red Wing Software website. All orders are 25% off until December 31, 2023 (use promotion code RWCFITD when ordering).

Q: Why are my Recipient Last Name, Recipient First Name, and Recipient Middle Name columns blank on my 1099 grid in Aatrix for names (individuals) entered in CenterPoint with a SSN or ITIN?

A: Due to Internal Revenue Service filing specification changes for filing year 2023, the export to Aatrix tax forms for individuals was updated to export as First, Middle, Last instead of Full Name with CenterPoint version 18.8. Please download and install the version 18.8 update before processing and filing your 2023 1099 tax forms to automatically fill in the required Recipient Last Name, First Name, and Middle Name in the Aatrix grid. Note: The final version of the 2023 1099 forms will be in the Aatrix 4th quarter update, which typically is available in the December 20th time frame.

Q. Where do I enter the employer identification number (EIN) that is required when running Federal tax forms?

A. Select **Setup > Companies**. Edit each company and go to the **Additional Detail** tab to verify/enter the **Federal Tax Id**.

Q. I do not see the 1099 form I need on my User-Defined Reports list. How can I display the correct 1099 form in the list?

A. All 1099 tax form types that you are required to print need to be added to the list. Select **Setup > User-defined/Tax Reports**. Click the **Tax Reports** button. Select a **1099 form** and click **OK**. The form is added to the list. Select the form and click the **Detail** tab. Click the **Account Assignment** tab to review accounts/account categories assigned to the 1099 form. After all accounts/account categories are assigned to the 1099 form, click **Save**.

Q. My 1099 statement is missing a vendor, how can I be sure the vendor receives a 1099?

A. There are three factors to check.

1. The vendor that requires a 1099 must have the **Issue 1099 for this Vendor** check box selected in **Setup > Vendors**. Select the vendor and click **Edit**. Select the **Issue 1099 for this Vendor** check box.
2. In order for the payment to be included on the 1099, the account used to pay the vendor must be assigned to the 1099 User-Defined report. Select **Setup > User-defined/Tax Reports**. Select the **1099** form. Select the **Account Assignment** tab. On the left side, select the appropriate **1099** row. On the right side of the screen, right-click and select **Expand All**. Select the **account** or **account category**. Click **Assign**. Click **Save**.
3. The total amount paid to the vendor must exceed the minimum amount for the 1099.

Q: My 1099 statement is missing a payment for a vendor, how can I correct the 1099?

A: To verify what account the payment for a vendor was entered to and verify that the vendor is marked as a 1099 vendor:

1. Select **Reporting Tools > Transaction Search**.
2. In the **Transaction Name** box, select the **vendor** and in the **Date Selection** select the appropriate date range.
3. Click **Search**.
4. Right-click the **payment/purchase** in question and select **Edit** to view the transaction. Right-click on the vendor and then click **Edit**. Verify that the **Issue 1099 for this Vendor** check box is selected and then click **Save**. Take note of the Account(s) entered on the transaction and then click **Close**.
5. In order for the vendor to receive a 1099, the total amount paid to the vendor must exceed the minimum amount for the 1099 and the account used to pay the vendor in step 4 must be assigned to the 1099 User-Defined report. Select **Setup > User-defined/Tax Reports**. Select the **1099** form. Select the **Account Assignment** tab. On the left side, select the appropriate **1099** row. On the right side of the screen, right-click and select **Expand All**. Select the **account** or **account category**. Click **Assign**. Click **Save**.

Q: Which report can I use to verify accounts used to pay 1099 vendors?

A: Select **Reports > Reports > Transaction Reports > Purchases & Accounts Payable > Purchases by Vendor & Account**. Under Report Selections, select the appropriate **Transaction Date**. Click the down-arrow in the **Vendor** box, click the down-arrow in the **Click Here to Filter List** box, select **1099 Vendor**, and then click **OK**. Click **Preview** or **Print**.

Q: Which report can I use to verify the accounts assigned to the rows of the 1099?

A: Select **Reports > Reports > Setup Lists > General > User Defined Report Account Assignments**. Click the down-arrow in the **Report** box, move the **1099** user-defined report under **Selected**, and then click **OK**. Click **Preview** or **Print**.

Q. When is the 2023 filing deadline for 1099 forms?

A. The Internal Revenue Service filing deadline for 1099 forms can be located by using the Search feature on the Internal Revenue Service website at www.irs.gov. In the Search box on the IRS website, enter the specific form name, for example, 1099-MISC, 1099-NEC, etc., to locate the specific form instructions and deadlines.

Q: I've decided to eFile my 1099 forms and want more information about signing up to eFile and the eFile process, where can I get more information about eFiling?

A: You can obtain additional information about eFiling at <https://partner.aatrix.com/redwingsoftware>.

Q. What are the 2023 eFiling deadlines for 1099 Forms?

A. Efiling deadlines can be located from this link: <https://efile.aatrix.com/pages/public/FilingDeadlinesPublic.aspx?v=ATX000>

Q: I want to send my vendors' 1099 forms electronically to be viewed online with Aatrix. How do I set up my vendors to receive electronic copies?

A: Select **Setup > Vendors > General** tab, select the **Consent To Electronic 1099** check box, and then enter the vendor's **Email**. If this box is selected, a signed consent form must be on file. Additional charges apply for eFiling with Aatrix.

Q. Do I need to order 1099 forms, or can I print them on plain paper?

A. All of your 1099 copies will be printed on plain paper, including the Copy A (often called the “red copy”) and your 1096. CenterPoint/Aatrix received IRS approval to print all copies of the 1099 on plain paper. Click [here](#) to view the 1099 Approval Letter.

Perforated paper and envelopes can be purchased from Computer Forms, Inc. at https://redwing.computerforms.biz/c/tax_forms, by calling 800-458-0158, or by clicking the **Order Checks and Forms** icon on the Red Wing Software website. All orders are 25% off until December 31, 2023 (use promotion code RWCFITD when ordering).

 **Note:** If you choose to use the Complete 1099 eFiling Service through Aatrix, you do not need to print any 1099 forms.

Q. I'm trying to process my 1099s, but I keep getting the message “Would you like to register now, or evaluate?”

A. You will need to manually register your Federal/State Tax Forms (Aatrix) software.


1. Call Red Wing Software at 1-800-732-9464 and request an Aatrix Registration code.
2. Open **CenterPoint**
3. Select **Help > Product Registration > Federal/State Tax Forms Registration**.
4. In the **Aatrix Registration Key** box, enter the key you were given by Red Wing Software (do not enter the dashes).
5. Click **Submit**.
6. At the **Registration Successful** message, click **OK**.
7. Click **Close**.
8. Your Aatrix software is registered through the last day of the month of your Customer Care Plan anniversary date.

Q. Why am I getting a “forms update” or “mandatory update” message when I try to process my 1099s and what do I need to do?

A. At least once a quarter, including at year end, updates are created for the Federal/State Tax Forms (Aatrix) software. When you receive either of those messages, it means that Aatrix has an update available that you should install prior to continuing. Please refer to the Forms Update section of this document for step-by-step instructions on how to proceed.

Q. Can I change the figures on my Federal reports if they are incorrect?

A. Yes, once the data is in Aatrix Federal/State Tax Forms, you can change any figure on the reports that are highlighted blue. Any figure that is highlighted red must be changed before you can print the report. Any figure that is white cannot be changed, but it is a calculated number, so it can be changed by adjusting the fields around the white field.

 **Note:** Changing the figures on this screen will only change the printed Federal reports, it will not change the data in CenterPoint.

Q. I'm trying to eFile my 1099s and I can't remember my Aatrix eFile username and/or password, how can I get it?

A. We recommend you contact Aatrix by calling 800-426-0854.

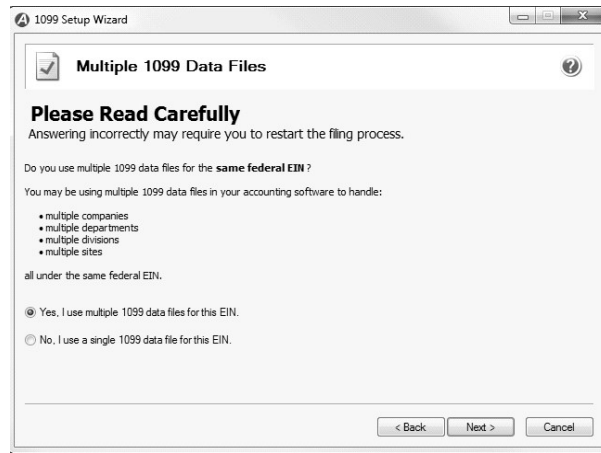
Q: I eFiled my 1099 forms, and I have questions regarding my filing, how do I contact Aatrix ?

A: For specific questions regarding your filing, you can contact Aatrix by email at helpme@aatrix.com, on their website at <https://efile.aatrix.com/> by clicking **Login** and entering your Aatrix username and password, or on their website at <https://efile.aatrix.com/> by clicking the **Search our FAQs** button.

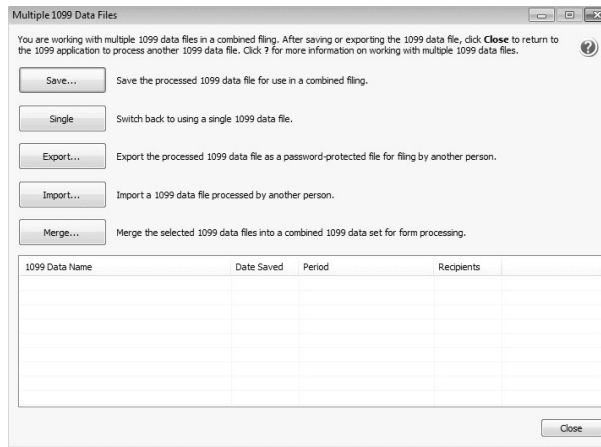
Q: I have multiple databases for one EIN; how do I merge the databases so I get one set of 1099s?

A: Follow the steps below to merge multiple databases into one set of 1099s:

1. Start the 1099 process and continue until the Multiple Payroll Data Files screen displays. On the **Multiple 1099 Data Files** screen, select **Yes, I use multiple 1099 data files for the EIN** and click **Next** to continue



2. The next **Multiple 1099 Data Files** screen displays, click **Save**, enter a name for the data file, and click **Close**.



3. Open the other database(s) and repeat steps 1-2 above for all databases you want to merge. When all data files are saved, continue to step 4.
4. At the bottom of the **Multiple Payroll Data Files** screen, select each database to be merged and then click **Merge**.
5. On the Multiple 1099 Data File Merge screen, click **Yes**.
6. On the **Multiple 1099 Data Files** screen, click **Continue** to continue processing 1099s.

Q. I'm attempting to log in to the Red Wing Software website, but it does not recognize my Email and/or Password? What should I do?

A. Follow the instructions below for information about the Red Wing Software website.

To log in to the Red Wing Software website:

1. In your web browser, enter **www.redwingsoftware.com**, and press Enter.
2. In the upper-right of the Red Wing Software home page, click **Log in**.
3. Enter your **Email Address** and your **Password**.
4. Click **Log in**.


To register on the Red Wing Software website:

If you have not previously registered or logged in on the Red Wing Software website, please follow the steps below:

1. In your web browser, enter **www.redwingsoftware.com**, and press Enter.
2. In the upper-right of the Red Wing Software home page, click **Log in**.
3. Click **Register**.
4. In the **Account Number** box, enter your company **Account Number**. Your Account Number can be located in a few different places:

- a. From within CenterPoint by selecting **Help > About**.
 - b. On the Support Certificate that you receive upon renewing Customer Care Membership.
 - c. Red Wing Software sends customers a renewal form for Customer Care Membership. This renewal form contains your account number.
 - d. Invoices you've received from Red Wing Software contain your account number.
 - e. If others at your company have already registered, they can sign into their account and find your company's account number at www.redwingsoftware.com/home/myaccount.
5. Continue entering your **Title, First and Last Name, Email Address** (which is your login) and a **Password**.
 6. Enter the displayed **Security Verification** code, and then click **Submit**.

To retrieve a forgotten password:

1. In your web browser, enter **www.redwingsoftware.com**, and press Enter.
2. In the upper-right of the Red Wing Software home page, click **Log in**.
3. Click the  **Forgot** link.
4. Enter/verify your **Email Address**, click **Send**, and then click **Close**.
5. Wait until you receive an email that includes instructions to reset your password.
6. Click the link in the email that you received from Red Wing Software.
7. Enter the **Validation Code** which was included in the email. If you enter the code and it is not recognized, copy and paste the code from the email. The Validation Code expires in 24 hours.
8. Enter a **New Password** and then **Re-enter the New Password**.
9. Click **Submit**.
10. Click **OK**.

To log out of the Red Wing Software website:

1. At the top of the Red Wing Software home page, click **Welcome, (Your Name)**.
2. In the displayed menu, select **Log out**.