CheckMark Forms 1099

User's Manual

CheckMark™

1099

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Chapter 1 Installation and Startup

Installing CheckMark 1099

Macintosh Install

1 Close all programs and disable any anti-virus software.

<u>**For CD Install**</u>

2 If you received a CD, insert the CheckMark 1099 CD-ROM into your computer's drive.

3 When the CD icon appears on the Desktop, open by double-clicking on it and double-click the CheckMark 1099 installer.

4 Follow the on-screen instructions to complete installation.

<u>**For Download Install**</u>

5 Click on the link provided to download. After the download is complete, double-click the download file.

6 Follow the on-screen instructions to complete installation.

The default install location on the hard drive for CheckMark 1099 is: **Macintosh HD\Applications\CheckMark\1099\(year)**. The (year) represents the current calendar year.

It is recommended to install the program on the local drive.

Windows Install

1 Close all programs and disable any anti-virus software.

<u>**For CD Install**</u>

2 Insert the CheckMark 1099 CD-ROM into your computer's drive.

3 The installer will start automatically.

If the installer does not start automatically after a minute, click your **Start** menu and then select **Run**.

Type in the path and filename in the **Run** box. That would be the drive name, colon (:), backslash(\), filename. For example: **D:\setup**. Then click **OK**.

4 Follow the on-screen instructions to complete installation.

For Download Install

5 Click on the link provided to start the download. After the download is complete, Choose **Run** or **Open**.

6 Follow the on-screen instructions to complete installation.

The default install location on the hard drive is **C:/Program Files/ CheckMark/1099/(year)**. The (year) represents the current calendar year.

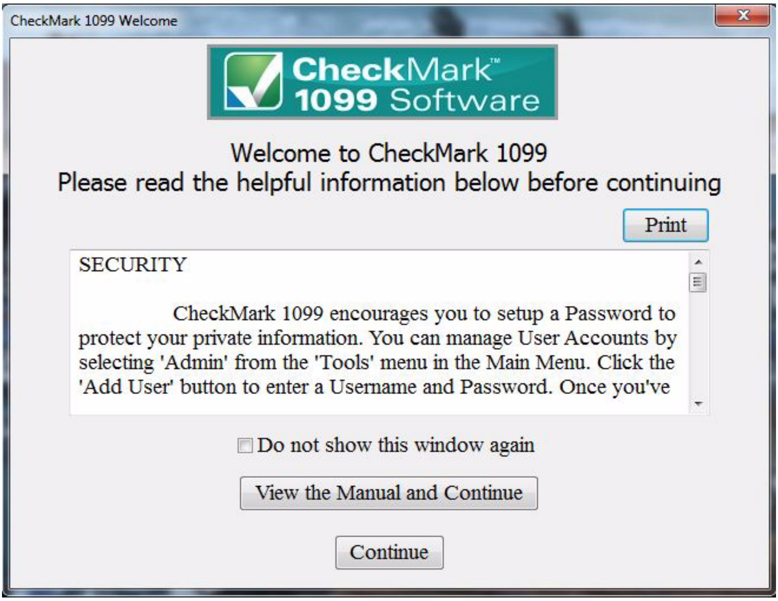
It is recommended to install the program on the local hard drive.

Opening CheckMark 1099: New User

1 Open the CheckMark 1099 application. You can use either the shortcut or alias that was created or go to the CheckMark 1099 folder that was installed and double-click the CheckMark 1099 application file.

2 The Welcome screen appears. This screen provides useful information regarding the set up of **Security**, **Customizing** screens and fonts and accessing the **Manual**.

Click the **Print** button to print out this information.



3 Click V**iew the Manual and Continue** if you want the .pdf manual to open or just click **Continue** to access the main window.

You can select the box for **Do not show this window again** if you wish to not have the Welcome screen popup again next time you log in.

Important: It is recommended you set up a password to protect your private information. For information on setting up passwords, See “Setting up Users and Passwords” on page 7.

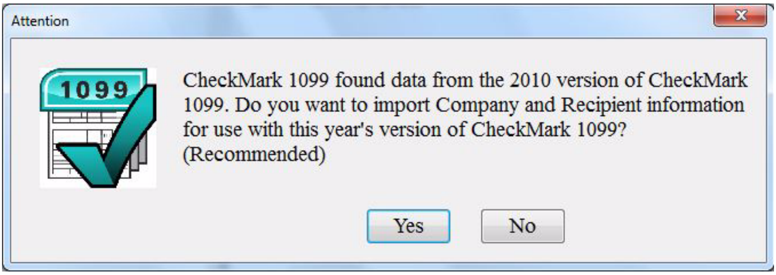
Opening CheckMark 1099: Upgrading Old Files

The information will be stored in a database that is created the first time you open your prior files. The default location is:

Macintosh: HD\CheckMark\1099\(year)
Windows: C:/CheckMark/1099/(year)

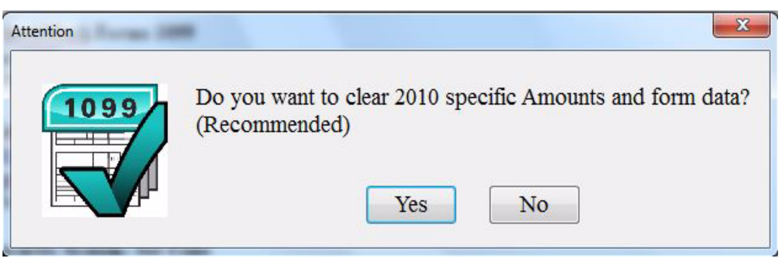
1. Open the CheckMark 1099 application. You can use either the shortcut or alias that was created or go to the CheckMark 1099 folder that was installed and double-click the CheckMark 1099 application file.

2. If you have a previous 1099 database from a prior year, the program will ask you if you want to import the Company and Receipient information.

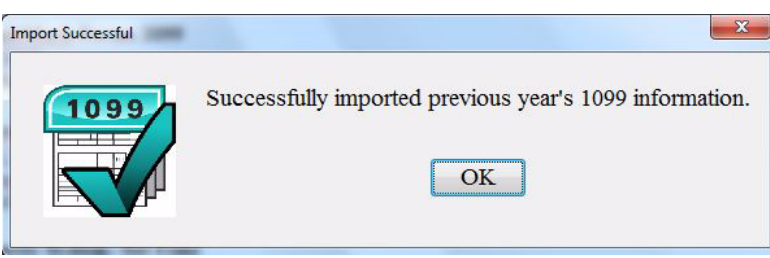


3. Click **Yes** to continue. Enter the Username and Password from the prior year.

4 A pop up window asks if you want to clear out the prior amounts. Click **Yes** to continue or **No** to retain the prior year's amount information.

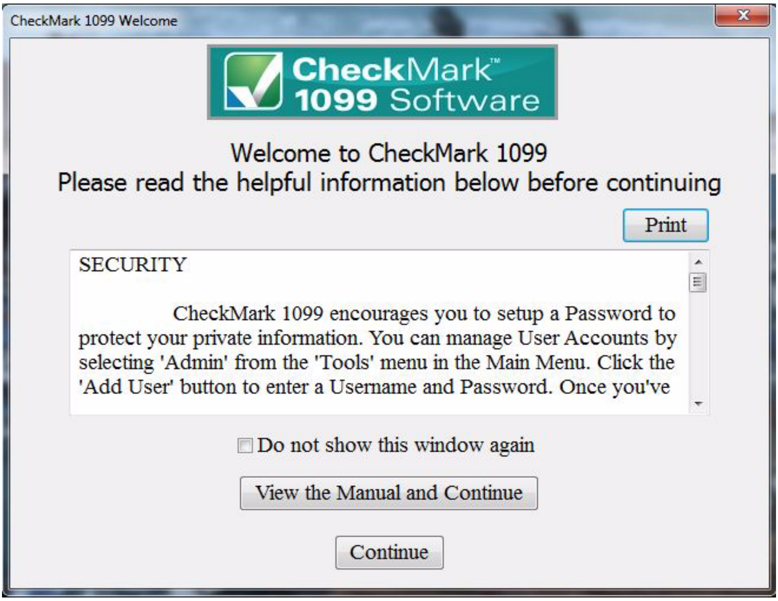


5 If you clicked **Yes**, you'll be notified once the data is successfully imported.



6 The Welcome screen appears. This screen provides useful information regarding the set up of **Security**, **Customizing** screens and fonts and accessing the **Manual**.

Click the **Print** button to print out this information.



7 Click **View the Manual and Continue** if you want the .pdf manual to open or just click **Continue** to access the main window.

You can select the box for **Do not show this window again** if you wish to not have the Welcome screen popup again next time you log in.

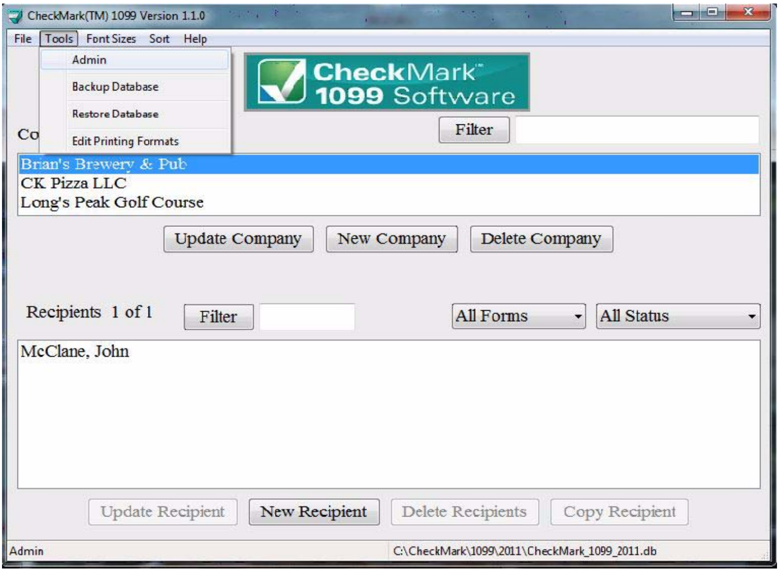
IMPORTANT: Once the information has been updated to the new version, the password from the prior year is cleared. It is recommended you set up a new password to protect your private information. For information on setting up passwords, See “Setting up Users and Passwords” on page 7.

Chapter 2 Set up

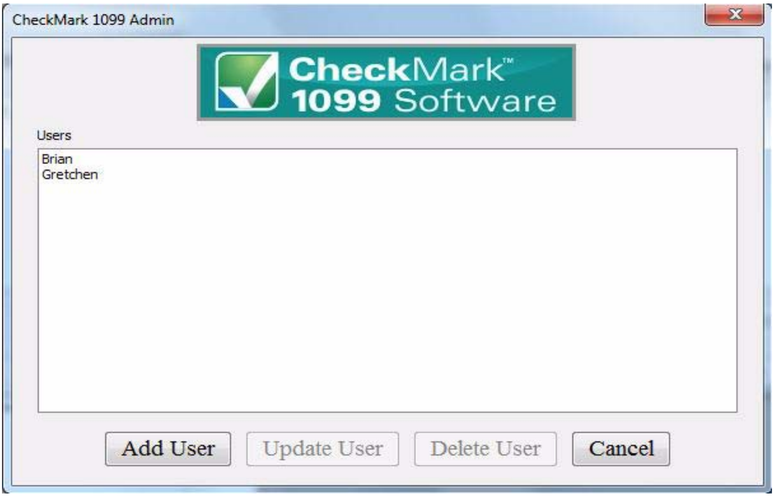
Setting up Users and Passwords

IMPORTANT: Although not required, it is recommend you set up a password to protect you private information.

1 Click on the **Tools** menu in the upper left hand corner of the screen and select **Admin**.



2 To create a new user click the **Add User** button.



3 Enter the **Name** and **Password.**

Note: The Name and Password are case sensitive.

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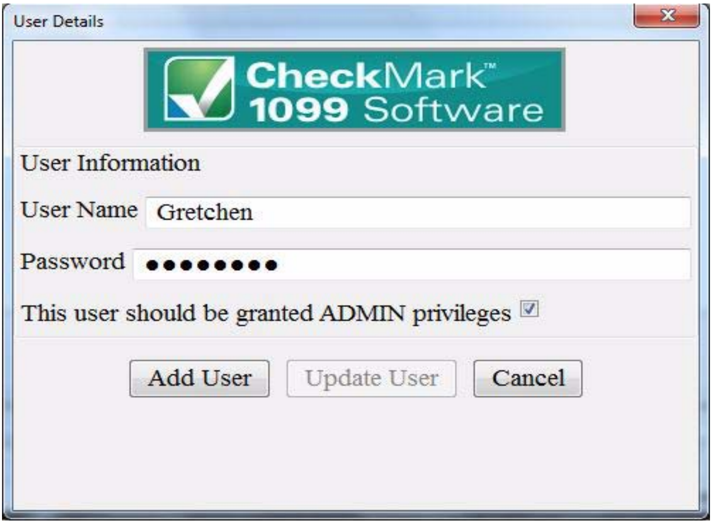
4 Click the checkbox for **This user should be granted ADMIN privileges** if you want this user to be able to add, update or delete other users.

IMPORTANT: The first user set up will have **Admin** privileges. You cannot delete or change this users **ADMIN** privileges until another user with Admin privileges is created**.**

Users with **ADMIN** privileges can add/delete/update other users, Backup and Restore the database and Check For Updates.



5 Click the **Add User** button to save.

Updating Users

1 Click on the **Tools** menu in the upper left hand corner of the screen and select **Admin**.

2 Highlight the user you want to update from the list.

3 Click the **Update User** button**.**

4 Make the necessary changes and click the **Update User** button to save.

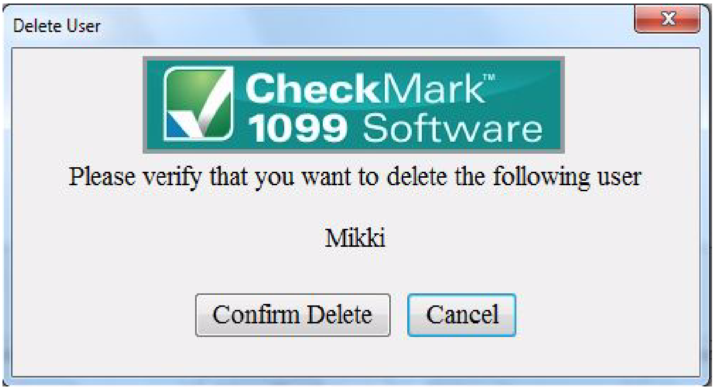
Deleting Users

1 Click on the **Tools** menu in the upper left hand corner of the screen and select **Admin**.

2 Highlight the user you want to delete from the list.

3 Click the **Delete User** button**.**

4 In the popup window, verify the correct user name is selected and click the **Confirm Delete** button.



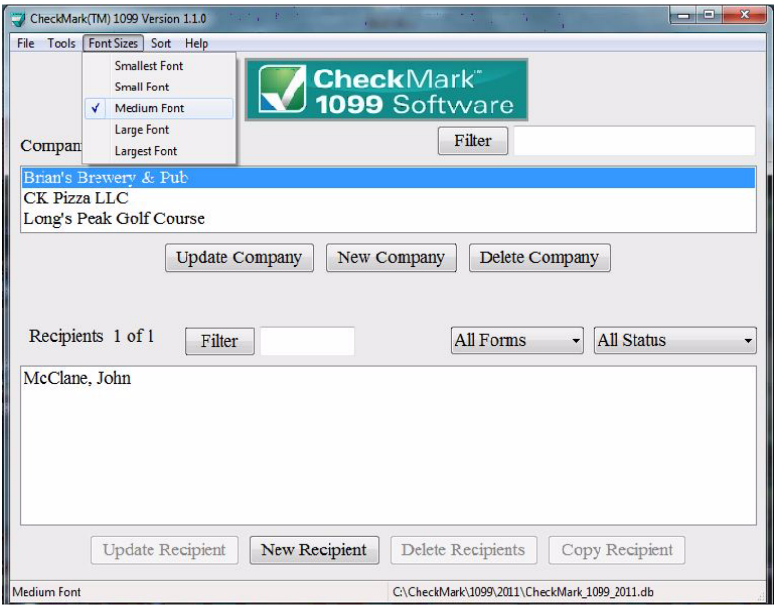
Note: If you delete all users, the software will not prompt for a password upon launching the program.

Setting Screen Font Size

This setting allows you to customize how big or small you want the font on the screen in the program. There are five settings to choose from: **Smallest Font**, **Small Font**, **Medium Font**, **Large Font**, **Largest Font**.

Selecting Font Size:

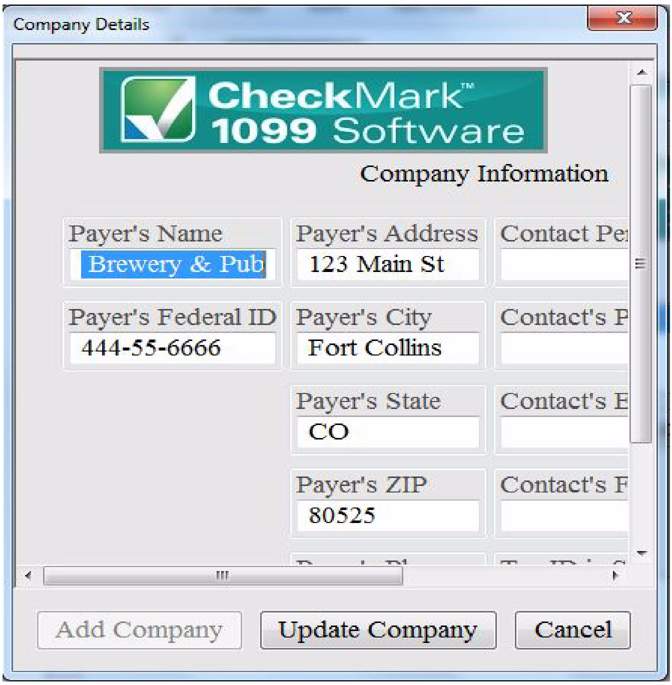
1. Click on the **Font Sizes** menu at the top of the screen.
2. Select which font you want to use. You can choose any font at anytime from the main screen window.



Adjusting Screen Size

You can adjust the size of each screen to maximize or minimize your viewing area.

To increase or decrease the size of any screen, simply click and hold the mouse button on the lower right hand corner of any screen and drag the corner to the desired position.



Chapter 3 Import Recipients

This chapter explains how to import recipient information from CheckMark Payroll, MultiLedger or a tab-delimited text file.

Exporting Recipients from CheckMark Payroll

1. Open up CheckMark Payroll, go under the **File** menu and choose **Export...**

2. Hightlight which recipients you want to export from the list.

Note: If the recipients to be imported are using different types of 1099 forms, you should create multiple export files for each type of form. Example, one export file for 1099 MISC, one file for 1099 INT, etc.

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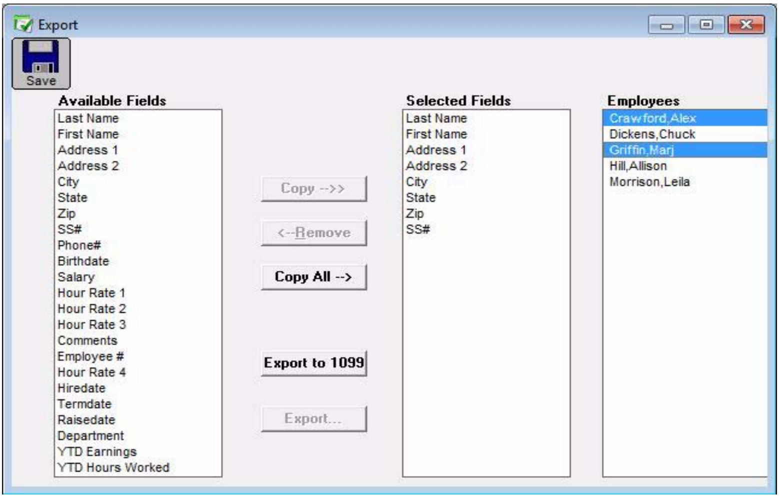
3. Click the **Export 1099** button. The **Selected Field** list will automatically populate with the correct available fields to import into the 1099 software.

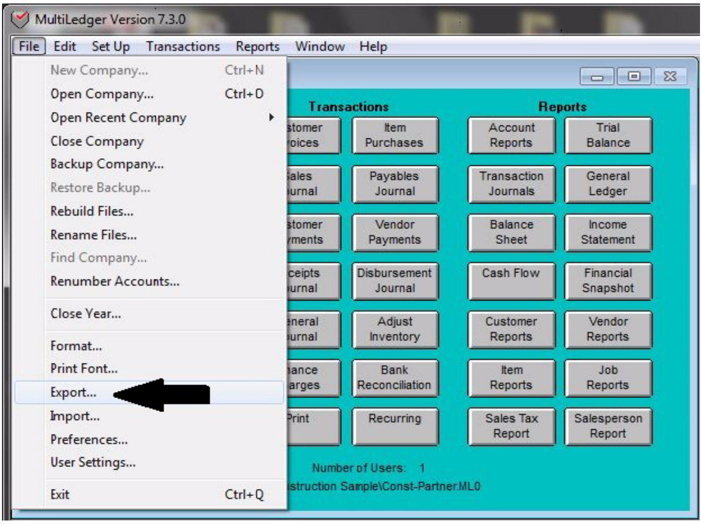


4. A **Save** dialogue box appears. In the **File** name field, give the file a name if needed and choose a convenient location to save the file to, an example would be your Desktop.

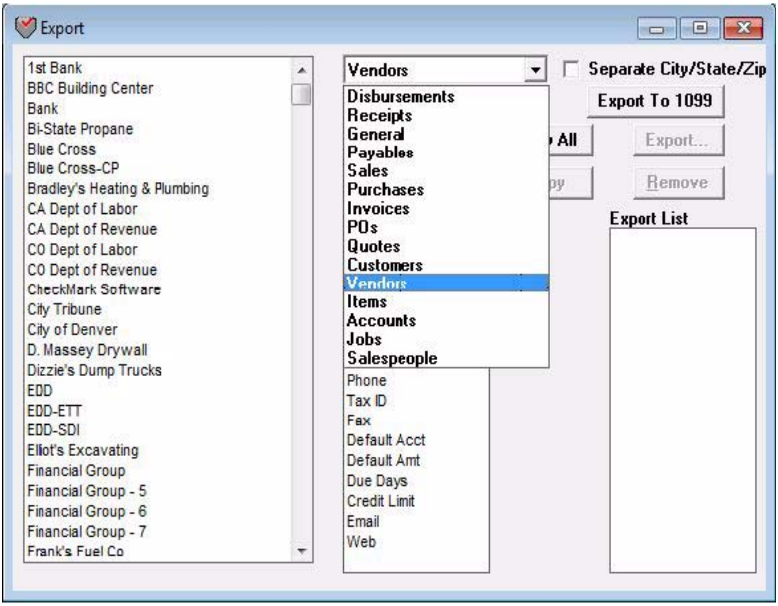
5. Click **Save**.

Exporting Recipients from MultiLedger

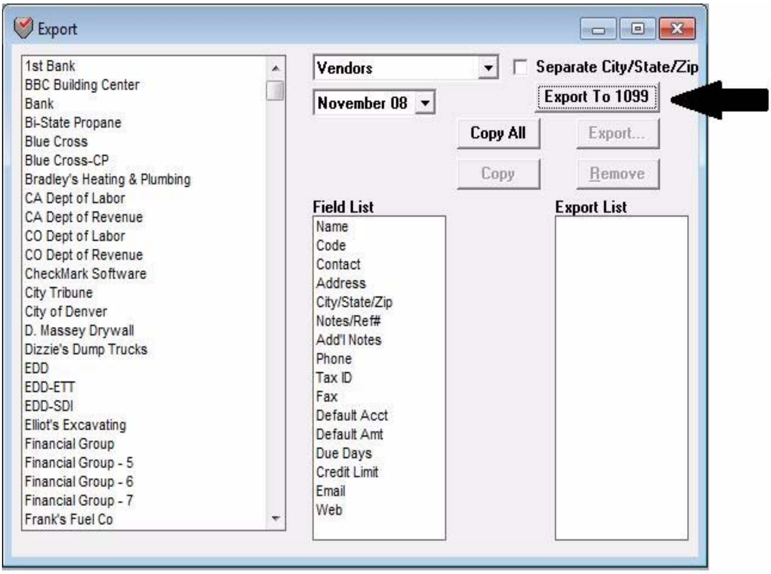
1 Open up the MultiLedger program, go under the File menu and choose Export...



2 Select Vendors from the drop down menu at the top.



3 Make sure you have the correct period you want and click the Export to 1099 button.



4 A **Save** dialogue box appears. In the **File** name field, give the file a name if needed and choose a convenient location to save the file to, an example would be your Desktop.

5 Click **Save**.

Importing from CheckMark Payroll and MultiLedger

1 Open up the CheckMark 1099 application.

2 Select the company you want to import recipients to from the **Companies** list.

Note: If the company does not exist that you want to import recipients to, you will need to create a new company before importing. For information on setting up a company, see “Creating a New Company” on page 21.

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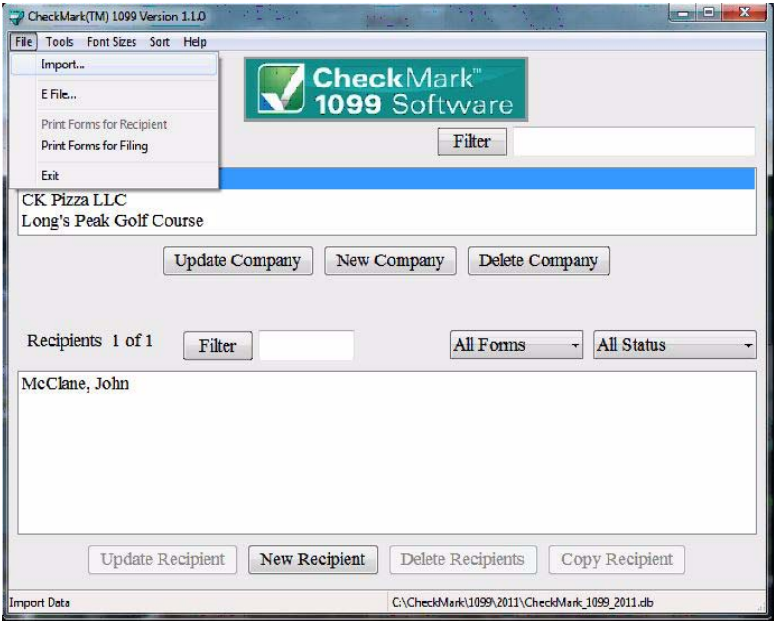
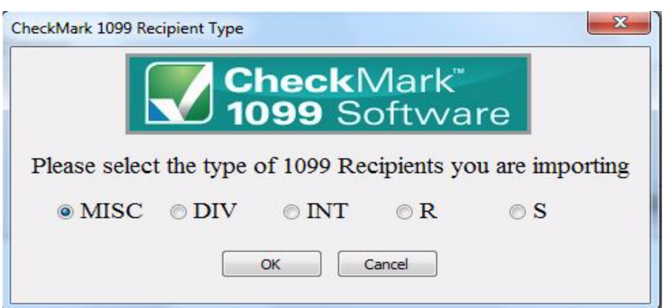
3 Go under the **File** menu and select **Import...**

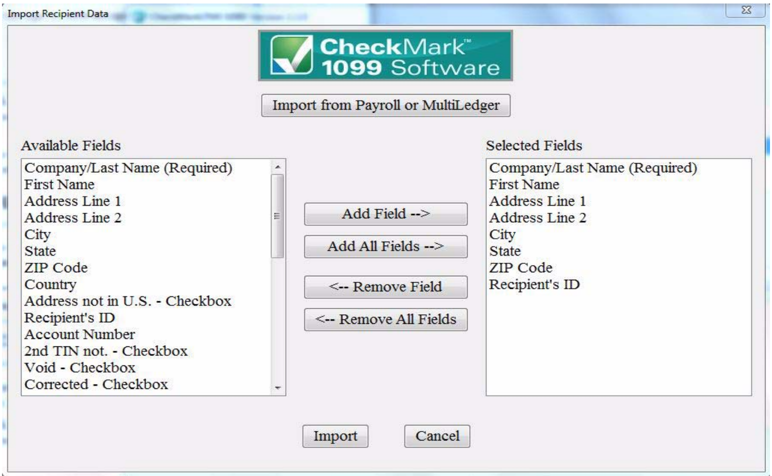


4 In the popup window, select which type of 1099 recipients you are importing: **MISC**, **DIV**, **INT**, **R** or **S**.



5 Click **OK**.

6 Click the **Import from Payroll or MultiLedger** button. The appropriate fields will automatically fill in for you.



7 A **Look in** screen appears allowing you to browse to the location where you saved your text file from CheckMark Payroll or MultiLedger.

8 Select the text file and click **Open**. All recipients will be imported into the selected company.

Importing using a tab-delimited text file

1 Open the CheckMark 1099 Forms Application.

2 Select the company you want to import recipients to from the **Companies** list.

Note: If the company doesn't exist that you want to import recipients to, you will need to create a new company before importing. For information on creating a new company, see "Creating a New Company" on page 21.

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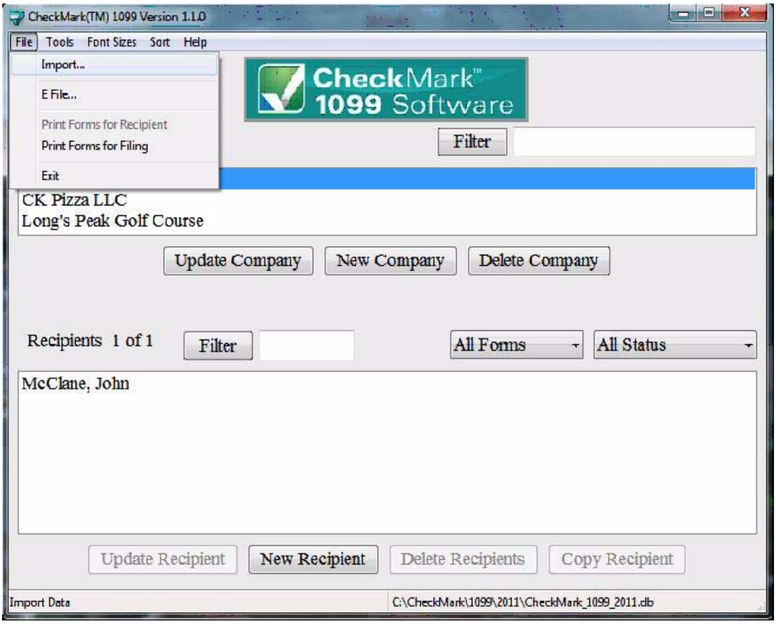
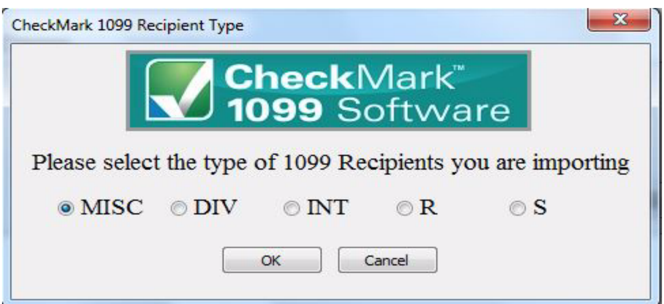
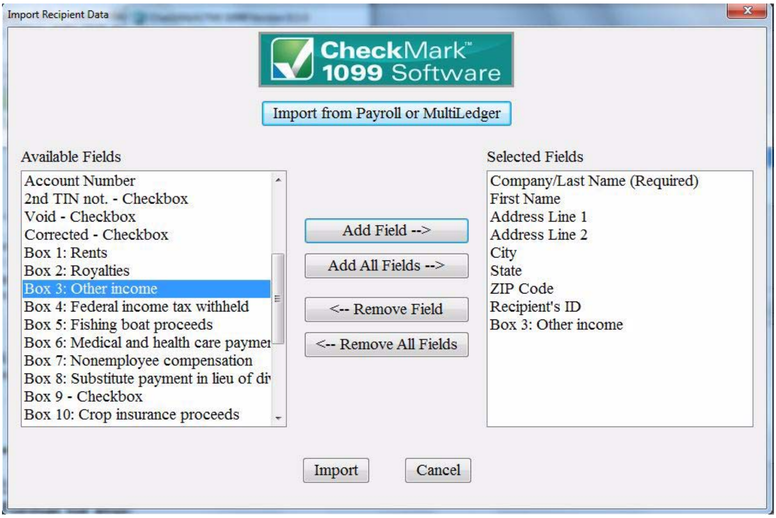
3 Go under the **File** menu and select **Import...**



4 In the popup window, select which type of 1099 recipients you are importing: **MISC**, **DIV**, **INT**, **R** or **S**. Click **OK** to continue.



5 The import screen allows you to select which fields are being imported. Choose the fields in the same order as the text file you're importing. Click the **Import** button after you have added all fields to the **Selected Field list**.



6 A **Look in** screen appears allowing you to browse to the location where you saved your text file.

7 Select the text file and click **Open**. All recipients will be imported into the selected company.

Text File Format for Importing

CheckMark Forms 1099 uses a tab-delimited .txt file for importing recipients.

Each field is separated by a **Tab** with a **Return** at the end of the line before starting the next recipient. An example of a text file to be imported is below contain the **Selected Fields:** *Company Name/Last Name (required), First Name, Address 1, Address 2, City, State, Zip, Recipients ID.*

Power[tab]Max[tab]44 Main St[tab]Ste 101[tab]Fort Collins[tab]CO[tab]80525[tab]123-45-6789[return]

- If any fields are not applicable, for instance the Address 2 field, a space can be used as a place holder. For example:

Power[tab]Max[tab]44 Main St[tab]**"space"**[tab]Fort Collins[tab]CO[tab]80525[tab]123-45-6789[return]

- If no space is included, two consecutive [tabs] will also work. Example:

Power[tab]Max[tab]44 Main St[tab][tab]Fort Collins[tab]CO[tab]80525[tab]123-45-6789[return]

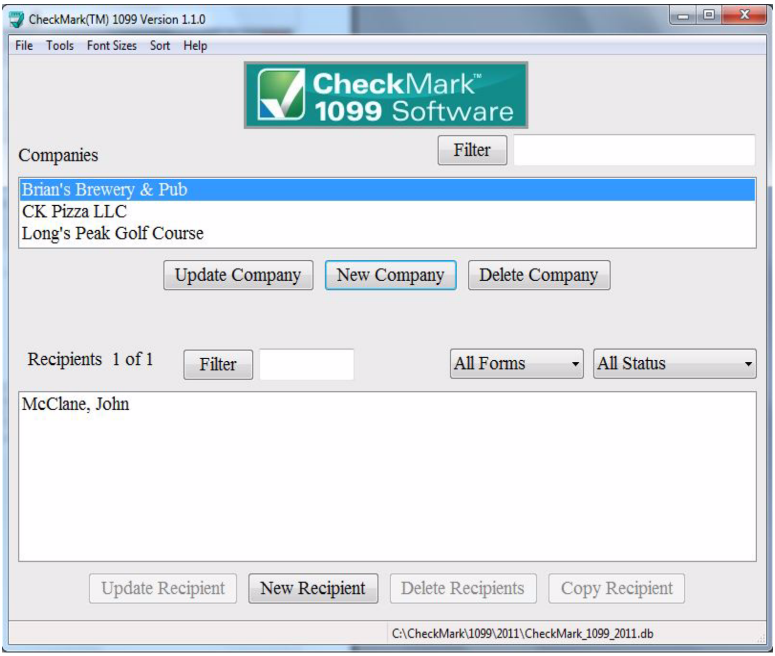
IMPORTANT: Make sure the items in the **Selected Fields** list are in the exact same order as the items in the text file being imported to ensure that all fields are imported into the correct field.

Chapter 4 Creating a New Company

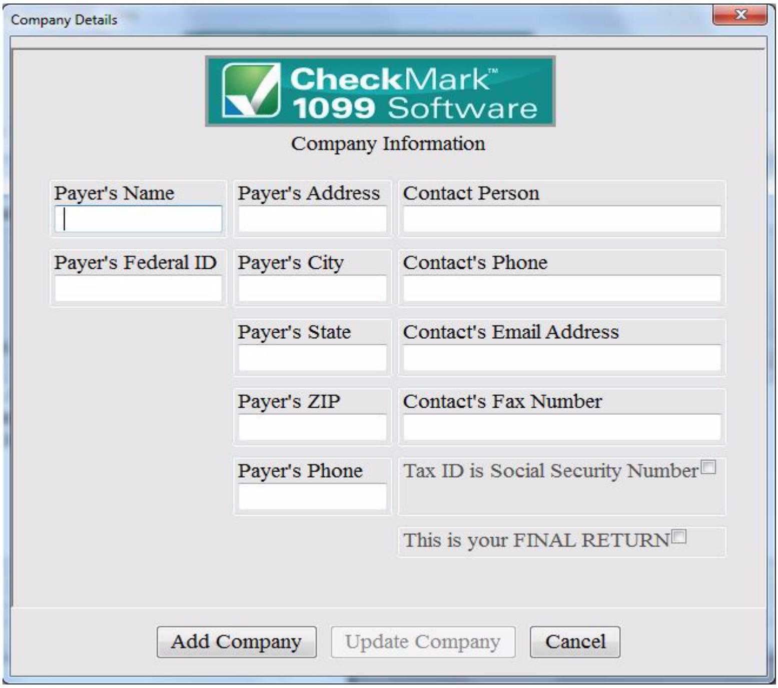
This chapter shows you how to create a new company and enter basic company information.

Creating a New Company

1 Click the **New Company** button in the middle of the screen.



2 Enter **Payer Information** for all pertaining fields:



3 Click the **Add Company** button to **Save**.

Updating an Existing Company

1 Highlight the company in the list you wish to update and click the **Update Company** button.

2 After all changes have been made to the **Payer Information**, click the **Update Company** button to save the changes.

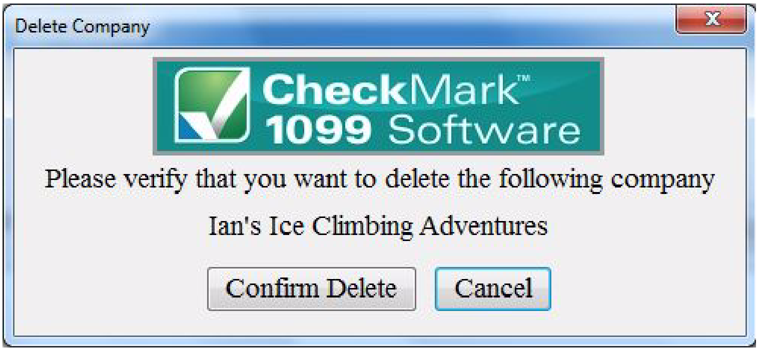
Deleting a Company

You cannot delete a company if there are any recipients created within the company. You must delete the recipients first before deleting a company. For information on deleting recipients, see “Deleting a Recipient” on page 33.

1 Select the company you wish to delete.

2 Click **Delete Company**.

3 In the pop up window, click the **Confirm Delete** button.



If no recipients are associated with this company, the company will be deleted.

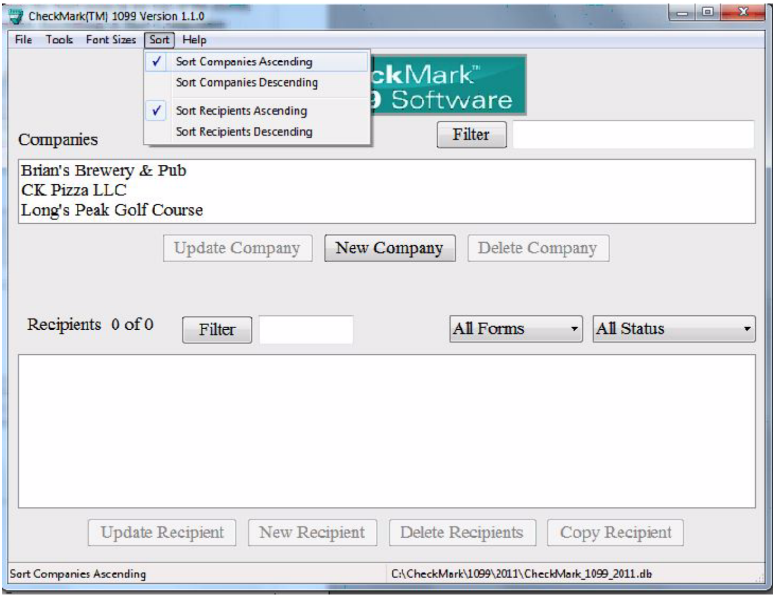
Filtering Companies

You can use the **Filter** button to search for certain companies in the list. To find a particular company, enter all or part of the name of the company into the Filter box area at the top of the screen and click the **Filter** button. The Filter will search for any companies that contain those variables.

You can also use an asterisk (*) to help sort groups. For instance, if you enter the first letter and then asterisk, (ex: N*), you will receive all companies that <u>start</u> with the letter “N”.

Sorting Companies

You can sort companies by Ascending or Descending order. To select which type of sort to use, go under the **Sort** menu at the top of the screen and choose either **Sort Companies Ascending** or **Sort Companies Descending**.



Selecting Multiple Companies

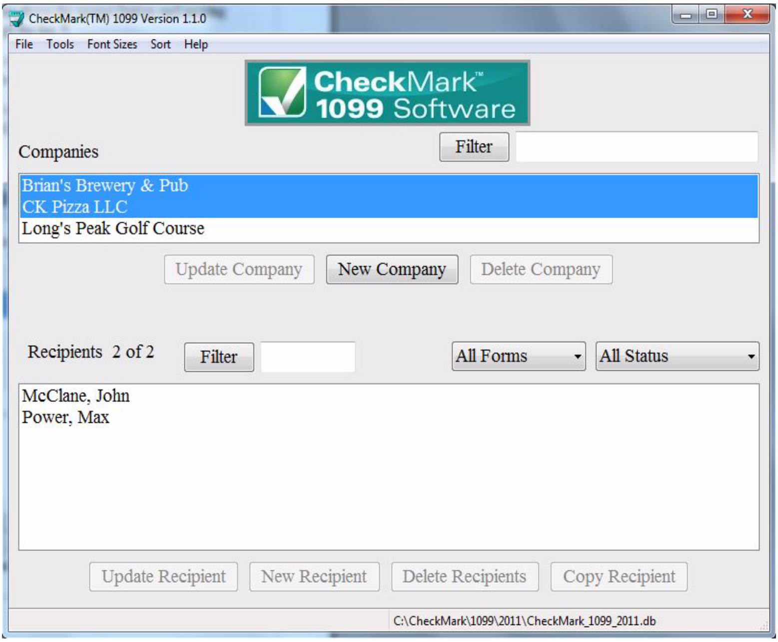
You can select multiple companies if you choose to eFile 1099s using the IRS FIRE system.

Consecutive Selection

Windows: You can select multiple companies by selecting the first company you want while holding down the mouse button and moving the mouse pointer down through the list.

You can also click on the first company, hold down the ‘Shift’ key on the keyboard, and then click on the last company you want in the list.

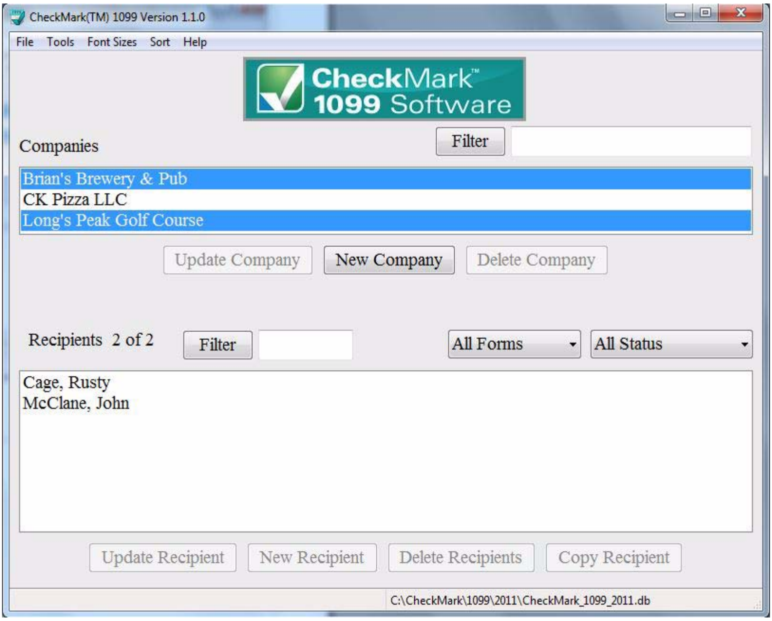
Macintosh: Click on the first company you want in the list, hold down the ‘Shift’ key on the keyboard, and then click on the last company you want in the list.



Non-Consective Selection

Windows: To select specific companies as a group, click on the first company you want, hold down the ‘Ctrl’ key on the key board and click on any other companies you want to include.

Macintosh: To select specific companies as a group, click on the first company you want, hold down the ‘Command’ key (also referred to as the Apple key) on the key board and click on any other companies you want to include.



Chapter 5 Setting up Recipients

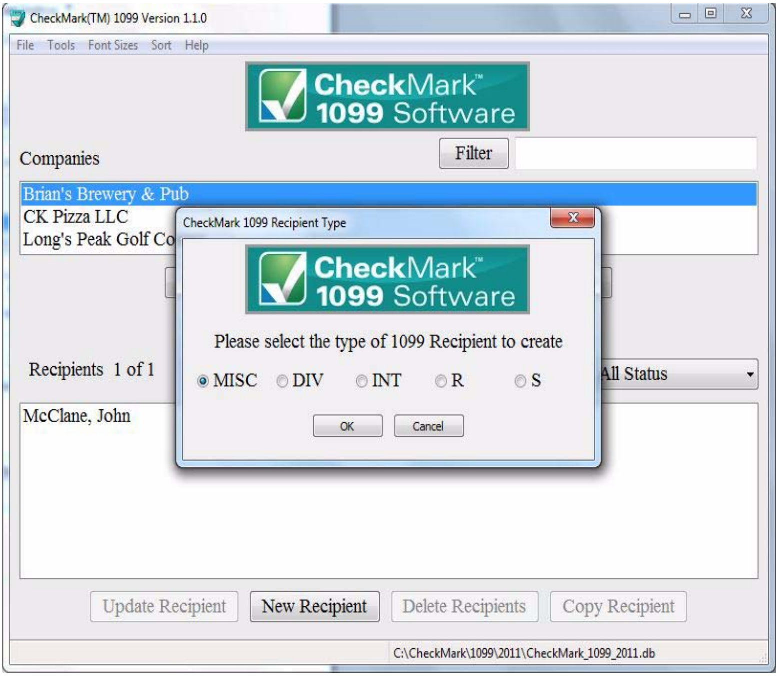
This chapter shows you how to setup new Recipients for each company.

Creating New Recipient

1 Select a Company from the list. If no companies are listed, you must first set up a company before adding recipients. For information on setting up a new company, see “Creating a New Company” on page 21.

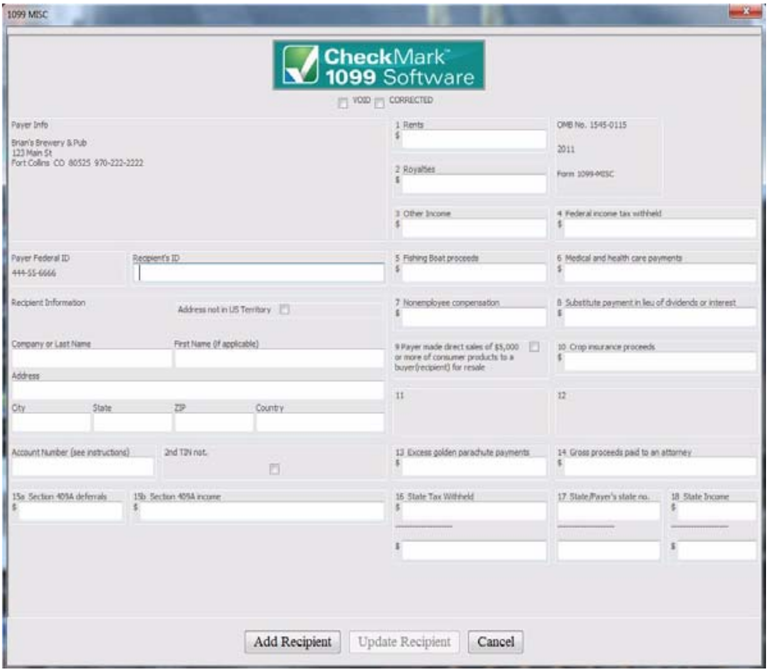
2 Click the **New Recipient** button.

3 Choose which type of 1099 form this recipient should receive and click **OK**.



The list of fields for the new recipient corresponds to the same fields found on the 1099 forms.

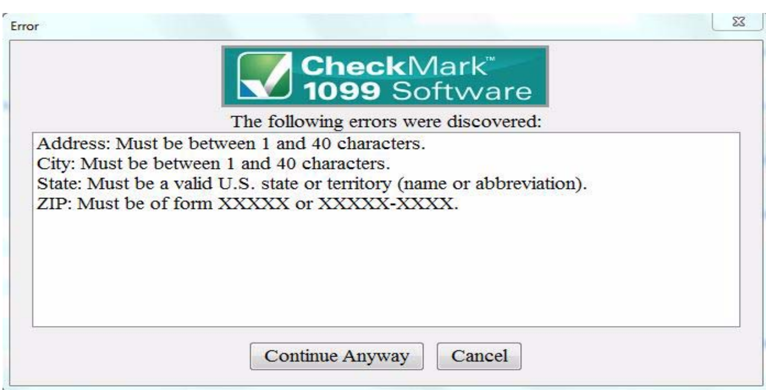
4 Enter the **Recipients ID** along with the **Recipient Information**.



5 Fill in any fields that are applicable for the recipient.

6 Click the **Add Recipient** button to Save the information.

If any information is incorrect, a pop up window will open explaining which fields have errors.



Press **Cancel** to go back to the set up screen to correct any errors, or **Continue Anyway** to Save the recipient information.

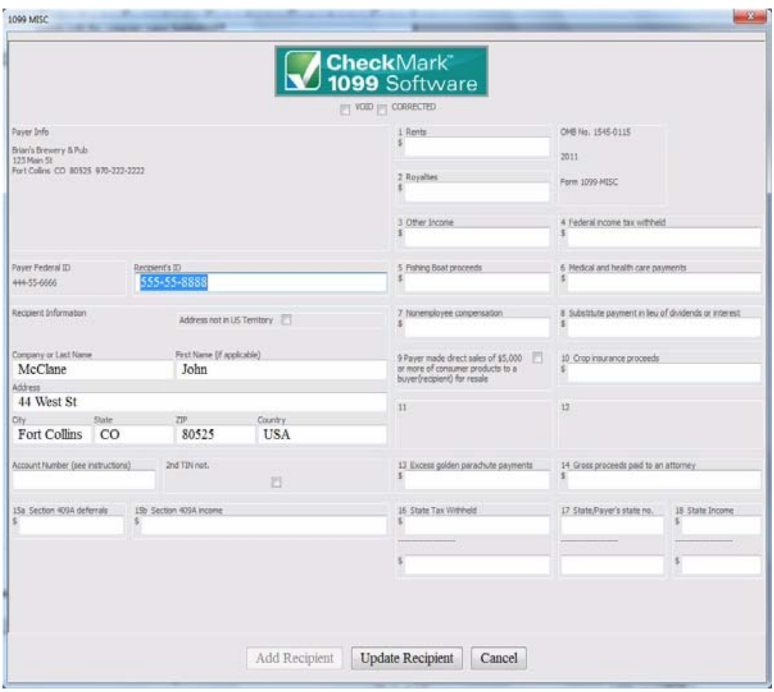
NOTE: If any field is not filled in correctly, once you return to the Recipient set up screen, that field name will show up in “**Red**”. In addition, some fields will not save the incorrect information and remain empty. For more information on Validated Information, see “Validated Status” on page 37.

The new recipient should now appear in the recipient list on the main screen with the company name highlighted.

Updating an Existing Recipient

1. Highlight the recipient in the list you wish to update and click the **Update Recipient** button.

2. After all changes have been made to the **Recipient Information,** click the **Update Recipient** button to save the changes.



If any information is incorrect, a pop up window will open explaining which fields have errors.

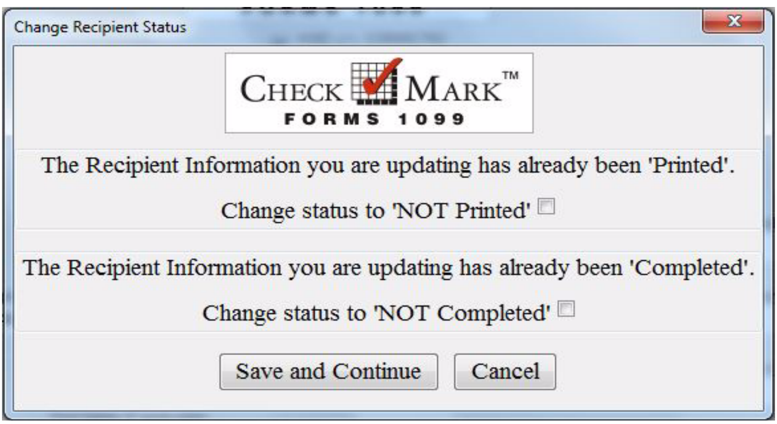
NOTE: If any field is not filled in correctly, once you return to the Recipient set up screen, that field name will show up in “**Red**”. In addition, some fields will not save the incorrect information and remain empty. For more information on Validated Information, see “Validated Status” on page 37.

Voided Recipient

If a 1099 is filed, or included in a filing, that was not meant to be filed, you can resubmit the 1099 as a Voided copy to null the 1099 to the IRS.

1. Select the recipient from the list and click the **Update Recipient** button.
2. Click the **Void** check box at the top of the screen.

If the recipient's Status is already considered **Printed** and/or **Completed**, you'll receive a pop up window asking if you would like to change the status back to Not Printed and/or Not Completed. For Information on what the different Status' mean, see "Status" on page 36.



3. Mark the corresponding checkbox next to **'NOT Printed'** and/or **'NOT Completed'** if you want to change the status and click the **Save and Continue button**. If you do not want to change the status, click the **Cancel** button. If you do not select either checkbox, you can still click the **Save and Continue** button to save any updated recipient information without changing their status.

If you initially printed the form, reprint another 1099 with the updated **Void** status and submit that form to the IRS with a new 1096. For instructions on printing 1099 forms, see "Printing 1099s for Recipients" on page 44.

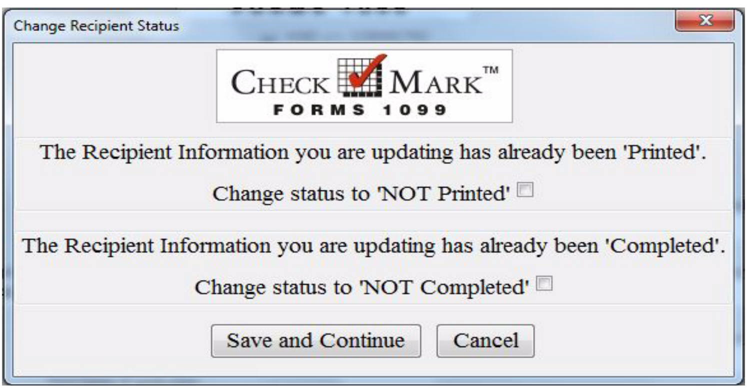
If you initially eFiled, create a new .txt file with that recipient and updated **Void** information and submit it to the IRS. For information on eFiling, see "Creating a file ready to eFile" on page 51.

Corrected Recipient

If a 1099 is filed, or included in a filing, with incorrect information, a **Corrected** 1099 must be filed with the IRS.

1. Select the recipient from the list and click the **Update Recipient** button.
2. Click the **Corrected** check box at the top of the screen, update any information and click the **Update Recipient** button to Save.

If the recipient's Status is already considered **Printed** and/or **Completed**, you'll receive a pop up window asking if you would like to change the status back to Not Printed and/or Not Completed. For Information on what the different Status' mean, see "Status" on page 36



3. Mark the corresponding checkbox next to **'NOT Printed'** and/or **'NOT Completed'** if you want to change the status and click the **Save and Continue button**. If you do not want to change the status, click the **Cancel** button. If you do not select either checkbox, you can still click the **Save and Continue** button to save any updated recipient information without changing their status.

If you initially printed the form, reprint another 1099 with the updated **Corrected** status and submit that form to the IRS with a new 1096. For instructions on printing 1099 forms, see "Printing 1099s for Recipients" on page 44.

If you initially eFiled, create a new .txt file with that recipient and updated **Corrected** information and submit it to the IRS. For information on eFiling, see "Creating a file ready to eFile" on page 51.

Deleting a Recipient

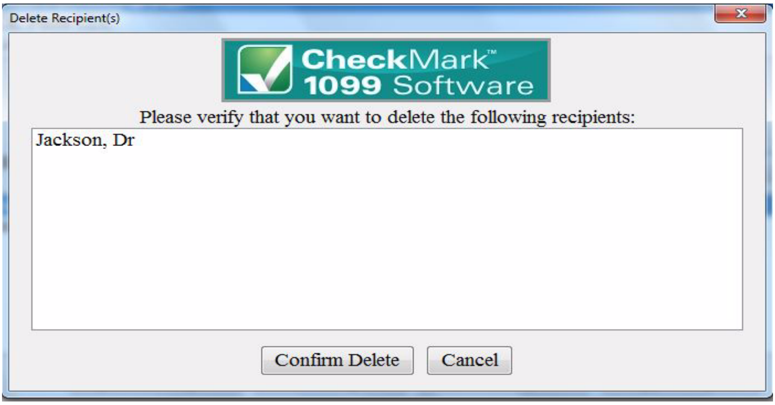
1 Select the company that contains the recipient(s) you wish to delete.

2 Highlight the recipient name from the list.

If you want to delete more than one recipient, you can highlight more than one recipient. See, “Selecting Multiple Recipients” on page 38.

3 Click the **Delete Recipient** button.

4 A pop up window appears. Confirm these are the employees you want to delete.



5 Click **Confirm Delete** to complete the process.

Copy Recipient

If you have a recipient that needs to be included in multiple companies or requires different types of 1099 forms, you can easily copy that person’s set up information and add them either under a new company and/or with a different type of 1099 form.

1 Select the company that contains the recipient(s) you wish to copy.

2 Highlight the recipient name from the list.

3 Click the **Copy Recipient** button.

4 In the pop up window, select which company and which type of 1099 form this recipient should be copied as.

5 Click **OK** to copy the recipient.

Filtering Recipients

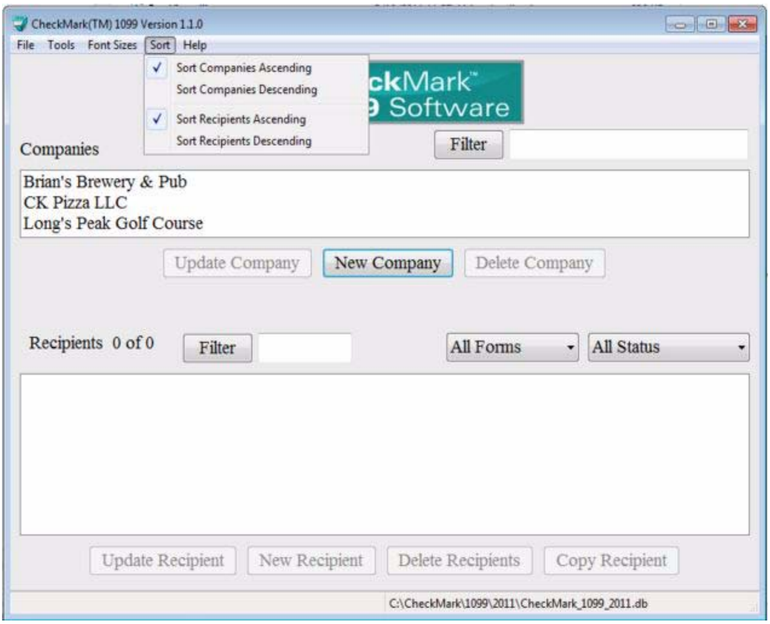
You can use the **Filter** button to search for certain recipients in the list. To find a particular recipient, enter all or part of the name into the **Filter** box area at the top of the screen and click the **Filter** button. The Filter will search for any recipients that contain those variables.

You can also use an asterisk (*) to help sort groups. For instance, if you enter the first letter and then asterisk, (ex: N*), you will receive all recipients that start with the letter “N”.

IMPORTANT: When filtering, make sure you choose the appropriate form you want to search on. If filtering on **All Forms**, recipients will be searched from the entire company. If however, you choose **DIV forms** for example, and filter on certain variables, only those recipients set up as receiving a **1099 DIV** will be displayed in the results.

Sort Recipients

You can sort recipients by Ascending or Descending order. To select which type of sort to use, go under the **Sort** menu at the top of the screen and choose either **Sort Recipients Ascending** or **Sort Recipients Descending**.

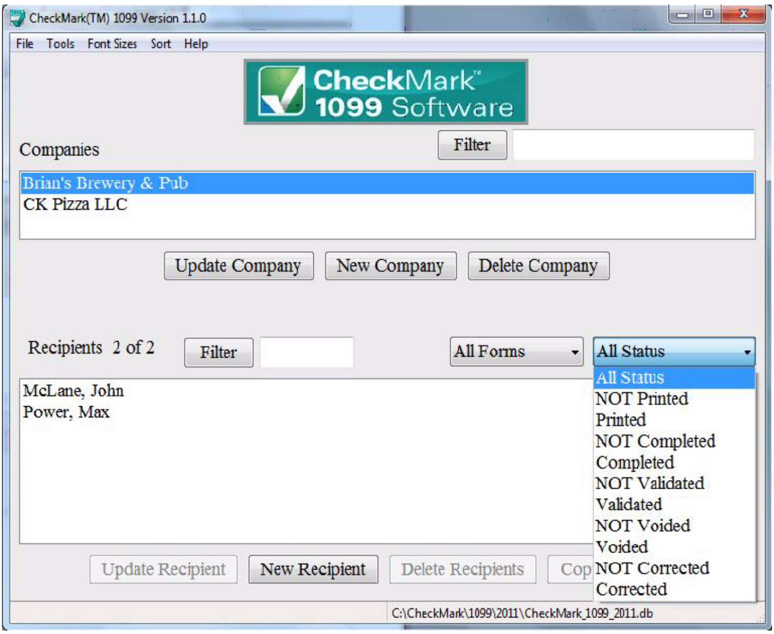


Status

The **Status** drop down menu has certain states recipients are categorized in based upon their setup and completion of being printed. You can sort using the different options to see which employees have been **Printed**, **Completed**, **Validated**, **Voided** or **Corrected**.

Recipients can be in multiple states at the same time, however you can only sort on one status at a time.

NOTE: Before choosing a **Status**, you should first select one or multiple companies in the list. For information on selecting multiple companies, see “Selecting Multiple Companies” on page 25.



Printed Status

You can easily sort using this status to see which recipients you still need to print 1099s for regarding the recipient copies.

You can select either **Printed** or **NOT Printed** status to sort recipients on whether or not you have printed a 1099 for them. Once you select the **Print Forms for Recipient** command from the **File** menu, that recipient will automatically be moved to the **Printed** status from the **NOT Printed** status.

Completed Status

You can use the **Completed** status to determine which recipients you have, or have not, printed or eFiled forms that are related to the company copies.

Once you select the **Print Forms for Filing** option under the **File** menu, recipients listed under **NOT Completed** will be moved to the **Completed** mode.

Validated Status

Sorting by **Validated** or **NOT Validated** helps you easily determine if there is any recipient that is not set up correctly. In the recipient screen, certain fields require specific characters, numbers, etc. to be accepted upon filing.

Choose **Validated** to see which recipients are ready to be filed. Choose **NOT Validated** to see any recipients that may have some set up criteria that is incorrect for filing purposes. Once you have sorted on **NOT Validated**, select a recipient and click on the **Update Recipient** button to view the set up and make necessary changes. Fields marked in “**Red**”, do not meet the requirements for filing on that particular field. Corrections should be made.

Voided Status

In the Recipient set up screen, there is a checkbox at the top of the screen for **Void**. If you filed a 1099 for a recipient that was unintended, you can mark **Void** to resend the 1099 for that recipient as a zero status.

Choosing a **Voided** status will list all recipients marked **Void** in the Recipient set up screen. All other recipients that are not marked **Void** in the recipient set up screen, are listed as **Not Voided** for a status.

Corrected Status

In the Recipient set up screen, there is a checkbox at the top of the screen for **Corrected**. If you have filed an incorrect 1099 and need to resubmit a new 1099 with updated information, mark the **Corrected** checkbox in the recipients set up screen before sub mitting the new 1099 information.

The **Corrected** status will list all recipients who are marked **Corrected** in the recipient set up screen. All other recipients that are not marked **Corrected**, will be listed as **Not Corrected**.

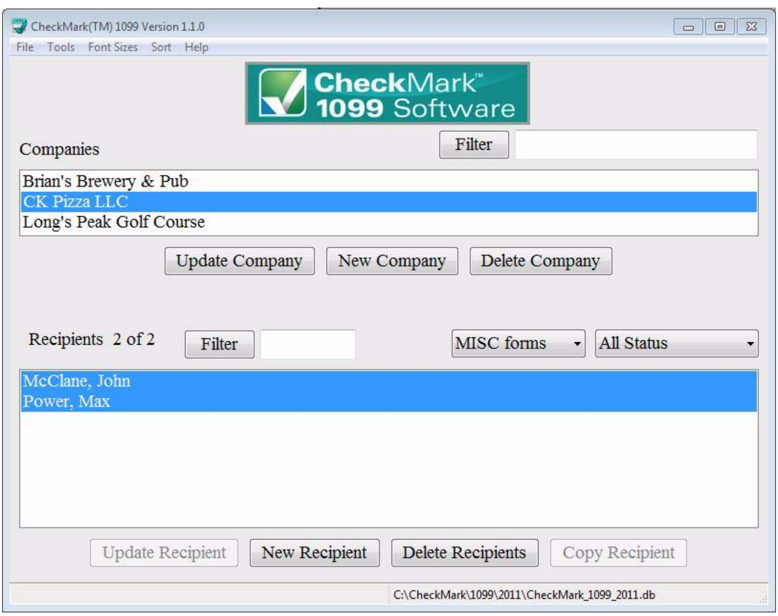
Selecting Multiple Recipients

Consecutive Selection

Windows: You can select multiple recipients by clicking the first recipient while holding down the mouse button and moving the mouse pointer down through the list.

You can also click on the first recipient, hold down the ‘Shift’ key on the keyboard, and then click on the last recipient you want in the list.

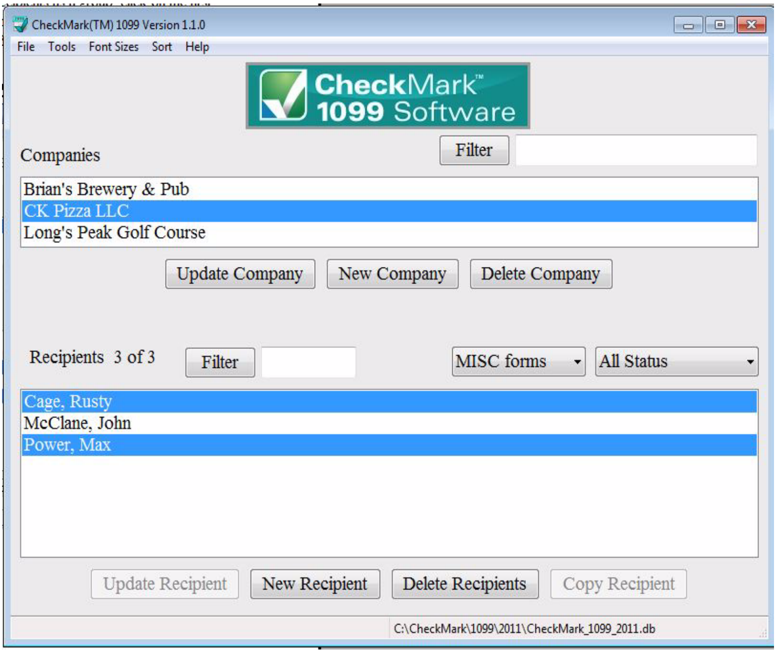
Macintosh: Click on the first recipient you want in the list, hold down the ‘Shift’ key on the keyboard, and then click on the last recipient you want in the list.



Non-Consective Selection

Windows: To select specific recipients as a group, click on the first recipient you want, hold down the 'Ctrl' key on the key board and click on any other recipients you want to include.

Macintosh: To select specific recipients as a group, click on the first recipient you want, hold down the 'Command' key (also referred to as the Apple key) on the key board and click on any other recipients you want to include.



Chapter 6 Printing 1099s

This chapter shows you how to print 1099s for the company and each recipient.

While CheckMark Inc attempts to maintain up-to-date and accurate tax and form information, we cannot be responsible for changes or discrepancies in tax values and forms that are filed incorrectly.

IMPORTANT: You must install the latest version of Adobe Reader to print the 1099 and 1096 forms properly. Go to www.adobe.com to download the latest update.

Print 1099s and 1096 for Each Company

1. Select the company you wish to print 1099s and a 1096 for.
2. Select which type of 1099 form you want to print from the Forms drop down menu; **MISC**, **DIV**, **INT**, **R**, **S**.
3. Select which recipient(s) in the list you would like to print forms for. If no recipients are selected, all recipients will be included.

Note: you can sort the recipients by Status drop down menu to group recipients as **Printed**, **Completed**, **Validated**, **Corrected** and **Void**. For more information on using the Status drop down menu and what each Status means, see “Status” on page 36

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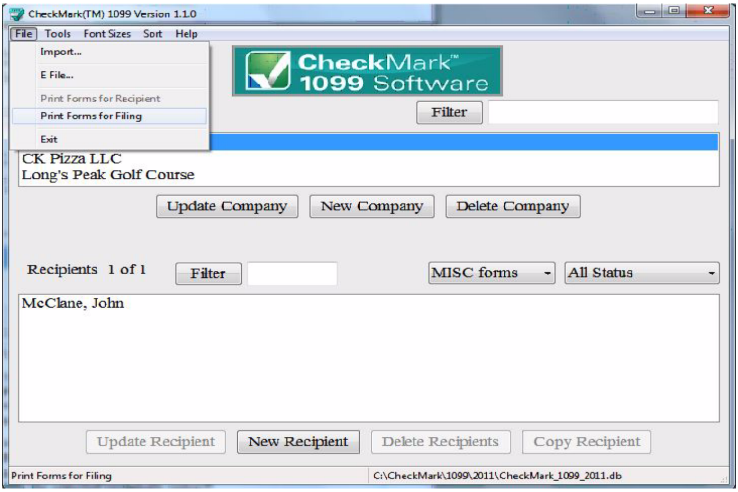
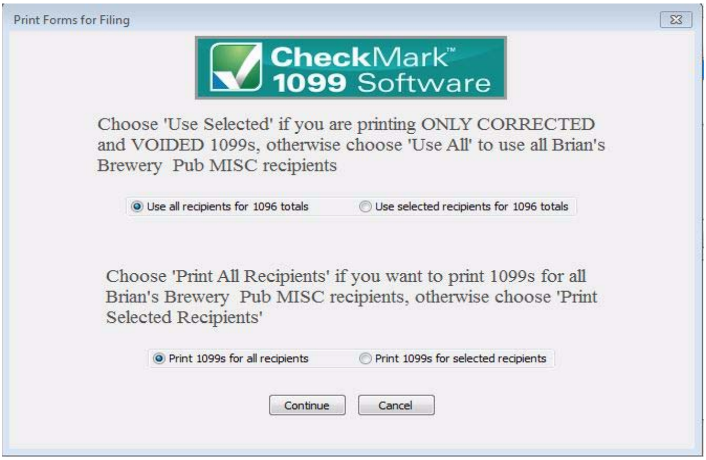
4 Under the **File** menu, select the **Print Forms for Filing** option**.**



5 A pop up window appears.

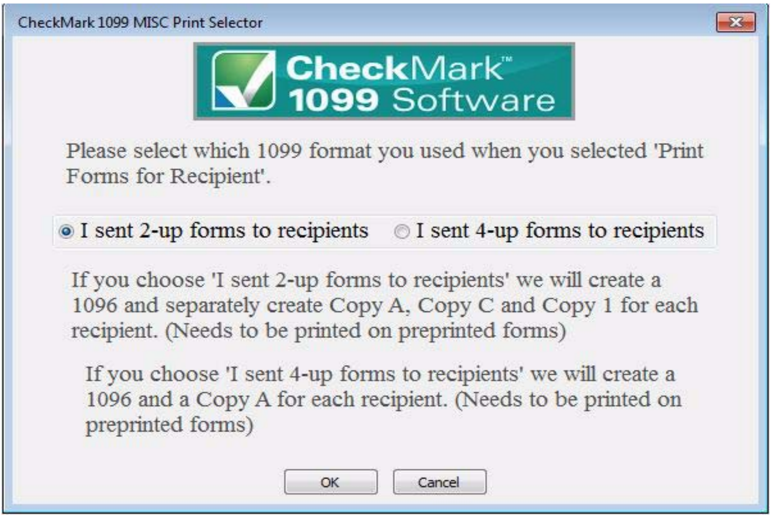
The first part deals with 1096 information. The default choice is to **Use all recipients for 1096 totals** for the company selected. If you are filing Corrected or Voided 1099s, then choose the **Use selected recipients for 1096 totals** option.

The second half of the screen asks about 1099s. The default choice is to **Print 1099s for all recipients**. If you are filing Corrected or Voided 1099s and only want the selected recipients to be included, choose the **Print 1099s for selected recipients** option.



<u>If printing 1099 MISC Only**</u>**

If you are printing **1099 MISC forms**, you'll be prompted to choose **I Sent 2-up forms to recipients** or **I sent 4-up forms to recipients**. Choose the **I Sent 2-up forms to recipients** option if you plan on using 2-up pre-printed forms for all copies of 1099 MISC. If you plan on printing Copy B, Copy 2 and Copy C for the recipient on blank paper, you can select **I sent 4-up forms to recipients**. After making your selection, click **OK.**



NOTE: If you have not selected any recipients for the company selected, all recipients will be printed.

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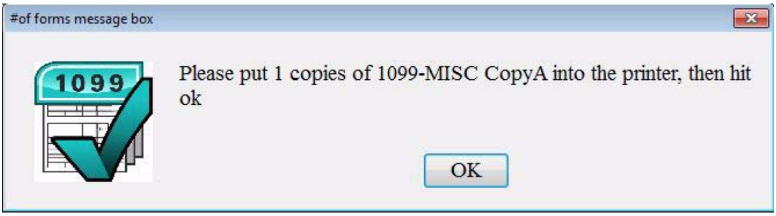
6 A message box will open telling which form to load in the printer and how many. Click **OK** after you have loaded the correct forms in your printer. Do this for each message box that appears.



Printing 1099s for Recipients

1 Select the company you wish to print 1099 forms for.

2 Select which type of 1099 form you wish to print from the Forms drop down menu; **MISC**, **DIV**, **INT**, **R**, or **S**.

Note: Recipients shown will be for which type of 1099 form is selected. You can choose **SHOW ALL** to show all recipients, but you must select a specific 1099 form from the drop down list to be able to print.

---

3 Select which recipient(s) in the list you wish to print 1099s for.

Note: you can sort the recipients by Status drop down menu to group recipients as Printed, Completed, Validated, Corrected and Void. For more information on using the Status drop down menu and what each Status means, see “Status” on page 36

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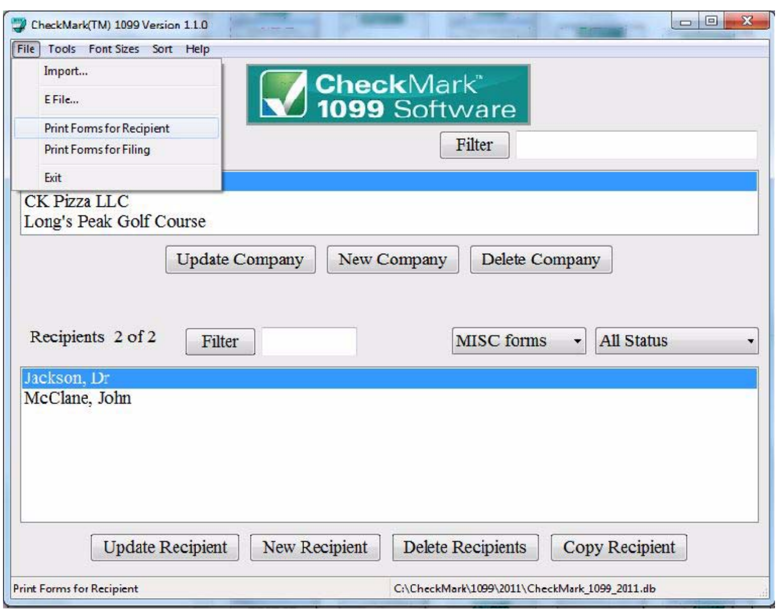
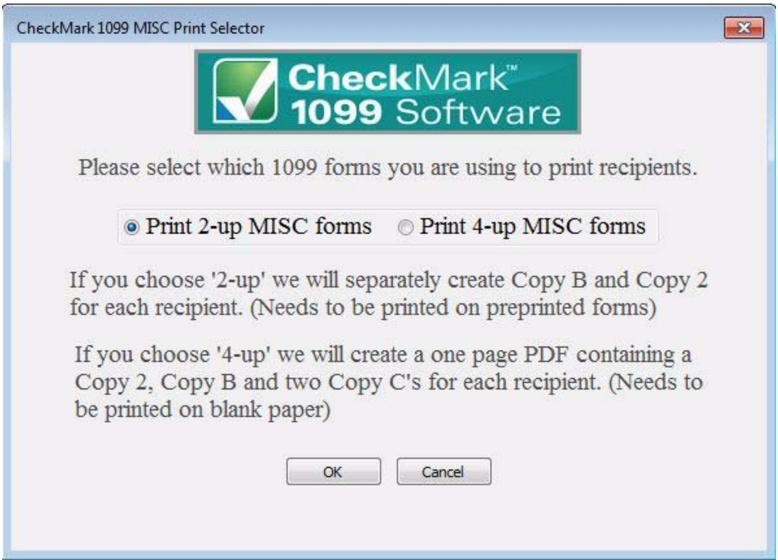
4 Under the **File** menu, select the **Print Forms for Recipient** option.



If printing 1099 MISC Only

If you are printing **1099 MISC forms**, you'll be prompted to choose **Print 2-up MISC forms** or **Print 4-up MISC forms**. Choose the **Print 2-up MISC forms** option if you plan on using 2-up pre-printed forms for all copies of 1099 MISC. If you plan on printing Copy B, Copy 2 and Copy C for the recipient on blank paper, you can select **Print 4-up MISC forms**. After making your selection, click **OK**.



NOTE: Using the 4-up sheet method will produce two Copy Cs instead of one Copy 1.

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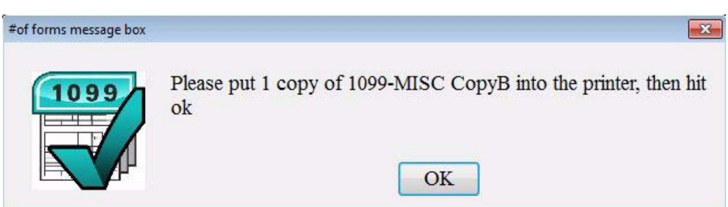
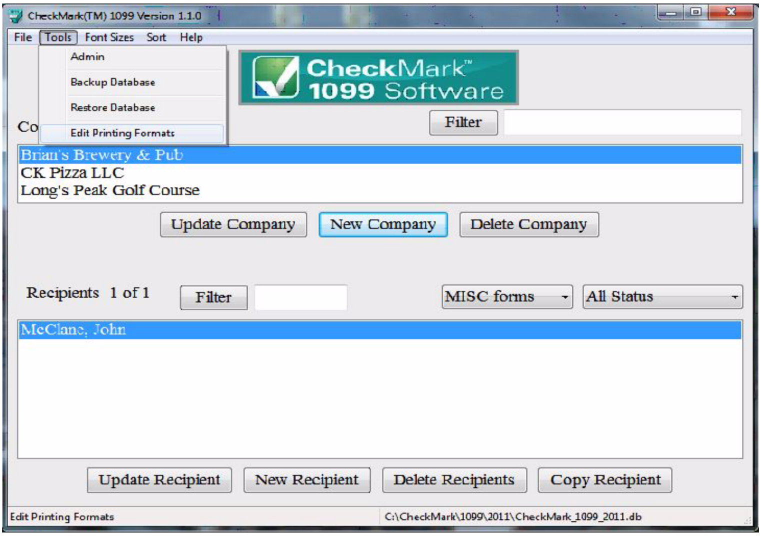
5 If printing 2-up on pre-printed forms, a message box will open telling which form to load in the printer and how many. Click **OK** after you have loaded the correct forms in your printer. Do this for each message box that appears.



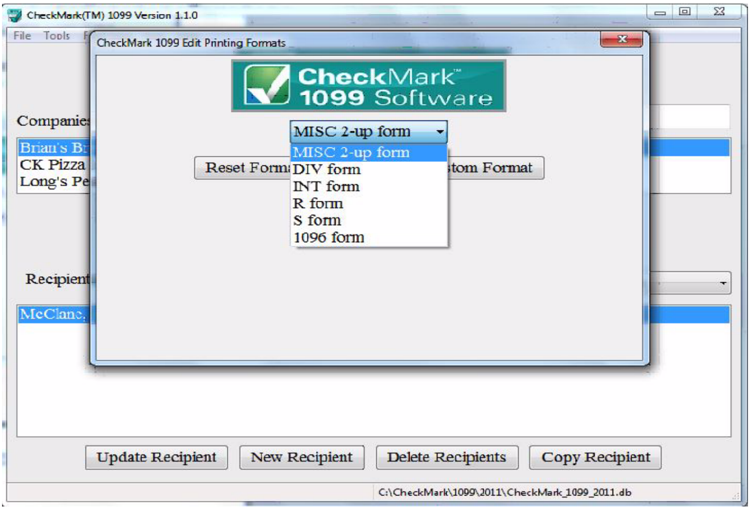
Edit Printing Formats

You can adjust each individual print field if printing on pre-printed forms.

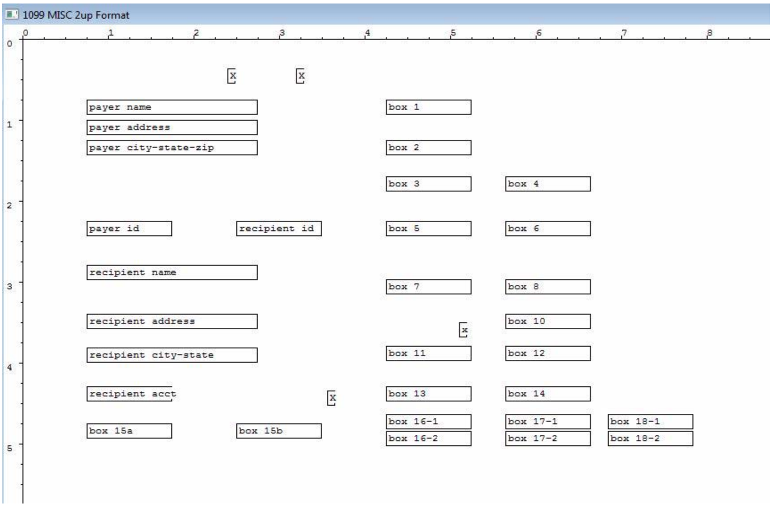
1 Choose **Edit Printing Formats** located under the **Tools** menu.



2 Select which forms you want to modify from the drop down: **MISC 2-up form**, **DIV form**, **INT form**, **R form**, **S form**, **1096 form**.



3 Click **Edit Current Custom Format**. A window showing all print fields on the selected form opens.



You can adjust any field by dragging the field with the mouse. Or click on any field to highlight and use the arrow keys on the keyboard.

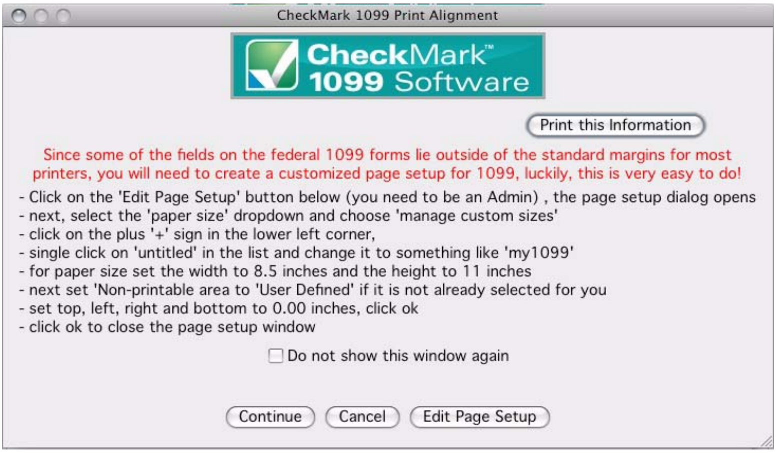
Double-click any field will turn the text from 'black' to 'red' or vice versa. Any field label in 'red', will not print.

4 To set the format back to the default, click the **Reset Format** button.

Edit Page Format (Mac Only)

If using a Macintosh computer, you must set the printing preferences the first time you print to correctly format the page.

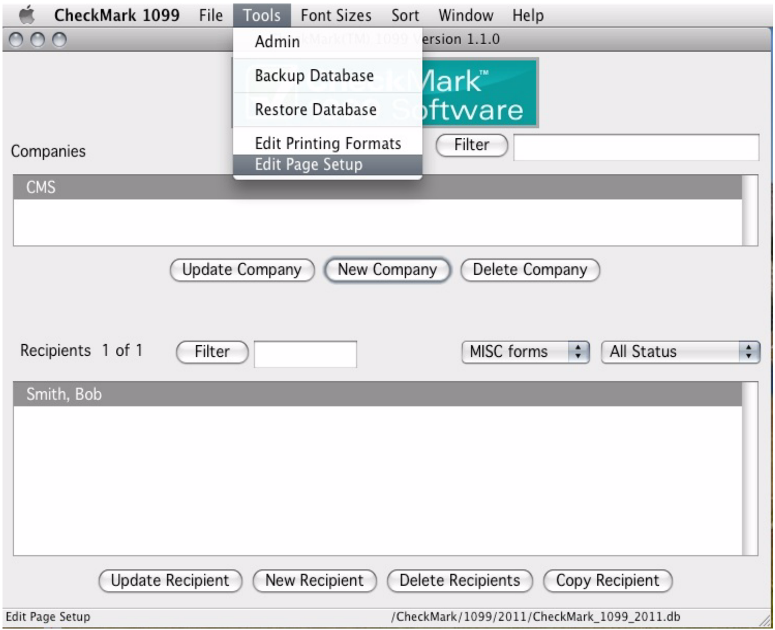
A warning message will show the first time you try and print.



You can access the **Edit Page Setup** by clicking the **Edit Page Setup** button.

You can also access the **Edit Page Setup** from the **Tools** menu.

1 Click **Edit Page Setup** under the **Tools** menu.



2 Follow the instructions in the warning message. You can also print out the instructions to follow along.

Chapter 7 eFile

This chapter shows you how to eFile 1099s using the IRS Filing Information Returns Electronically (FIRE) System. If you have never eFiled 1099s in the past, you'll need to visit the IRS' website at www.irs.gov to sign up for a FIRE system account and receive a Transmitter Control Code (TCC).

While CheckMark Inc attempts to maintain up-to-date and accurate tax and form information, we cannot be responsible for changes or discrepancies in tax values and forms that are filed incorrectly.

Note: The ability to eFile is only available to customers who have purchased the 1099 eFile version. If you need to upgrade from the printed version, visit CheckMark's website at www.checkmark.com.

Creating a file ready to eFile

1 Select the company you want to eFile for. You can select multiple companies if you wish. For information on selecting multiple companies, see "Selecting Multiple Companies" on page 25.

2 Select the recipients you wish to include. You can sort using the different forms or choose **All Forms** from the drop down menu to select all recipients. For information on selecting muliple recipients, see "Selecting Multiple Recipients" on page 38.

Note: You must choose at least one company, but if you do not choose any recipients, all recipients will be included in the eFile.

You can sort the recipients by Status drop down menu to group recipients as Printed, Completed, Validated, Corrected and Void. For more information on using the Status drop down menu and what each Status means, see "Status" on page 36

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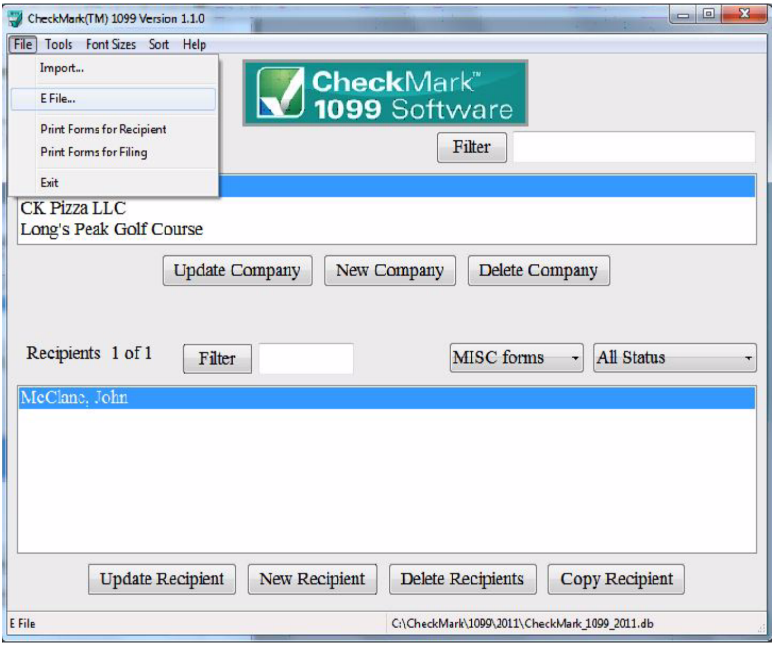
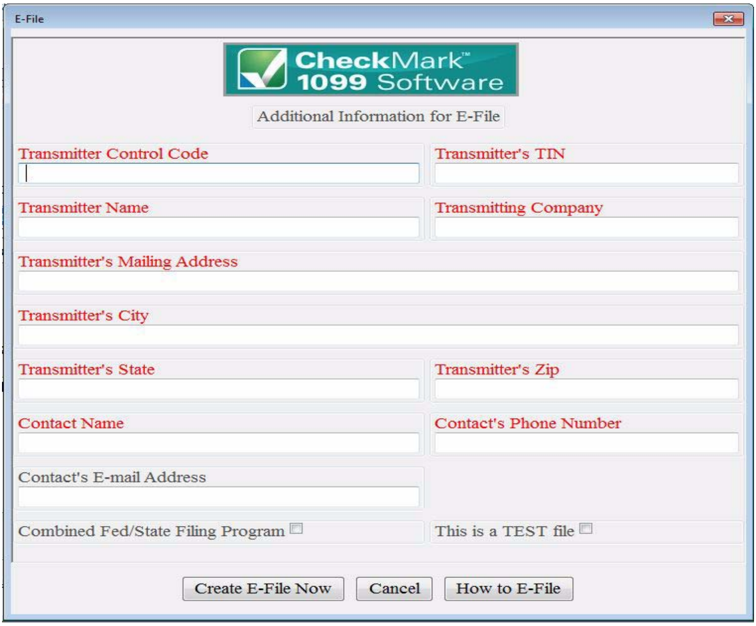
3 From the **File** menu, choose **E File...**



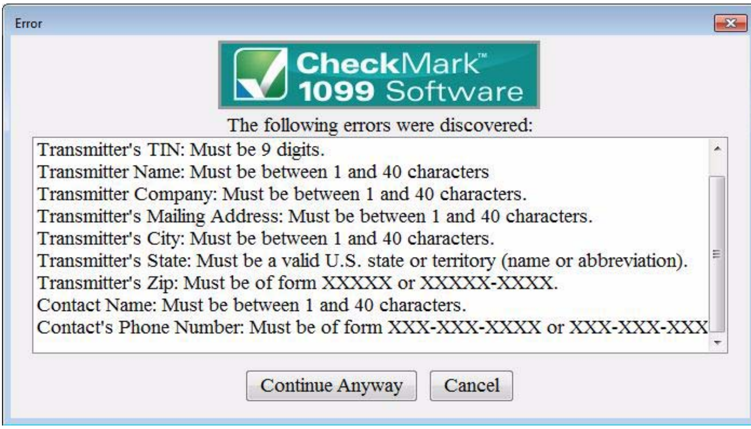
4 In the pop up window, fill in all corresponding fields



5 *Optional*: If you need more information on how to set up an E-File account, click the How to **E-File button**. A pop up window gives you important links on how to first apply, create a FIRE account, Verify that account and the Login screen. Click the **Close** button to close the window.

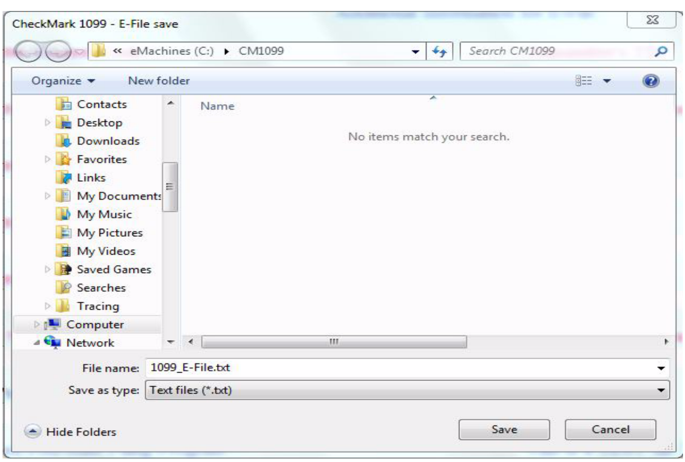
6 Once all the information is filled in, click the **Create E-File Now** button.

7 If there are any errors in the transmitter information window, you will receive a pop up window explaining what errors occured.



8 Click **Cancel** to go back to the transmitter information window to correct any set up errors. Or click **Continue Anyway** to proceed with saving the .txt file.

9 A **Save as** dialog box opens.



10 Enter a name for the file or use the default name if one is given. Save the file to a location that is easy to find. The Desktop is an easy location to save the file to and find it later when you are ready to submit the file to the IRS FIRE system. Click **Save**.

Chapter 8 Backup and Restore

Making backups is critical in protecting your data. You should always keep current backups. CheckMark 1099 allows you to easily backup your data to any external source for safekeeping.

Backing Up Using the Backup Database Command

Using the **Backup Database** command within the program allows you to backup a duplicate copy of the database. You can restore this database in case of computer failure or to revert back to a prior database in case of error in your current database. It is recommend you make current backup databases anytime you modify information.

NOTE: Only users set with **Admin privileges** can backup and restore a database. For more information on setting up Admin privileges, see “Setting up Users and Passwords” on page 7

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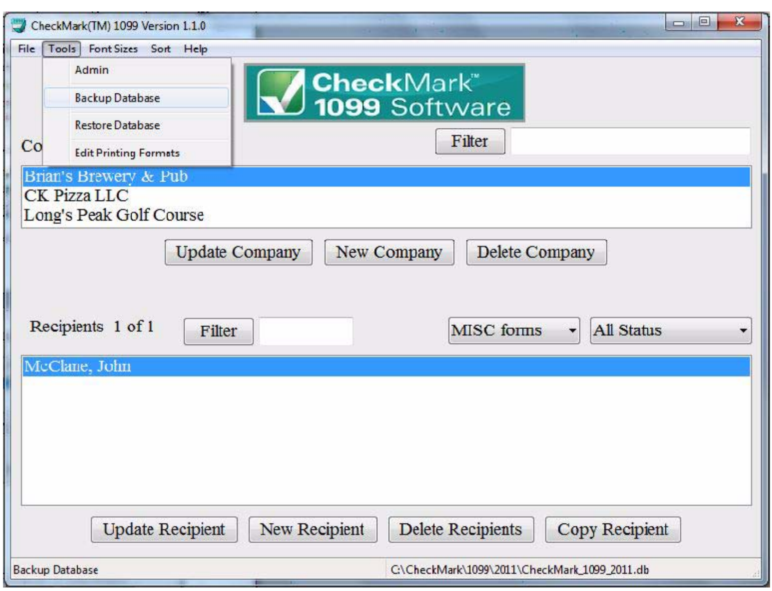
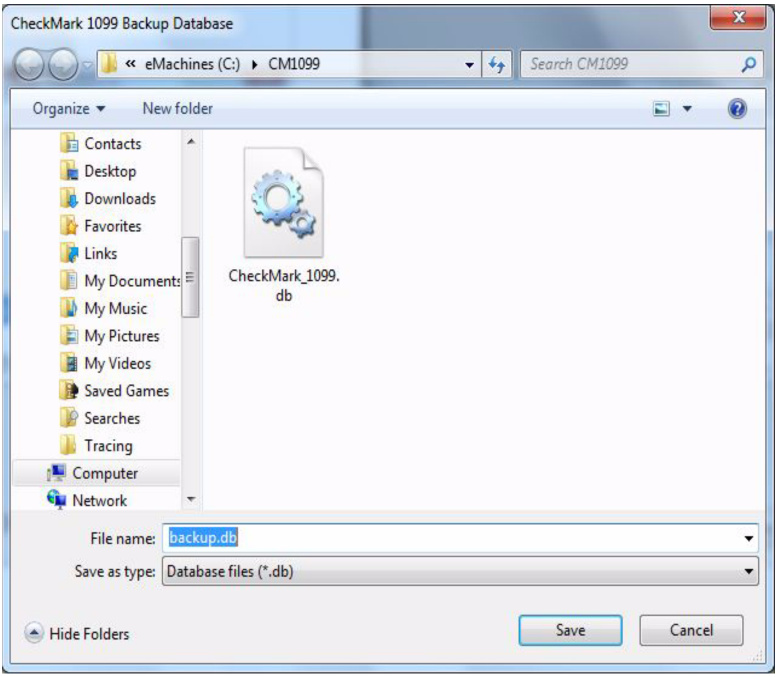
1 Click on the **Tools** menu in the upper left hand corner of the screen and select **Backup Database**.



2 A **Save In** dialog box opens. Choose a destination you would like to save the backup database too.

3 A default name is given of **backup.db**. Change the name of the backup if you wish.

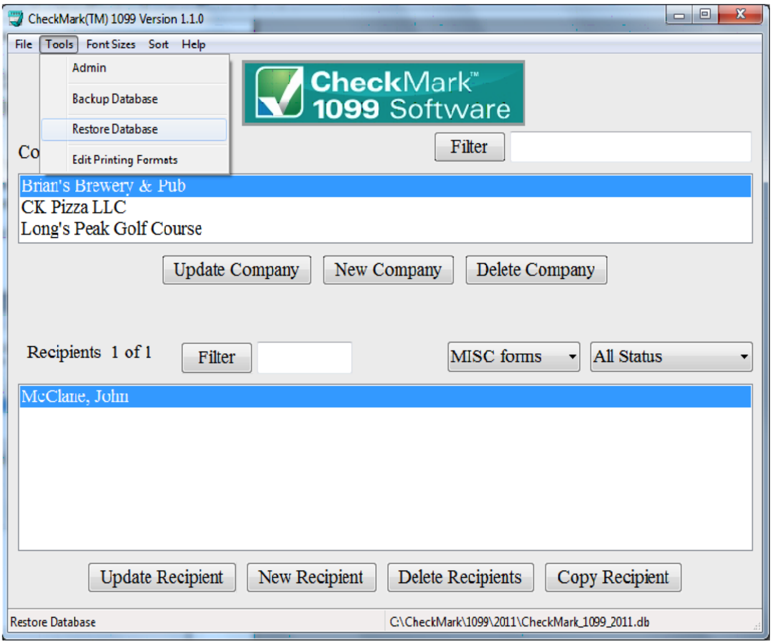


4 Click **Save.**

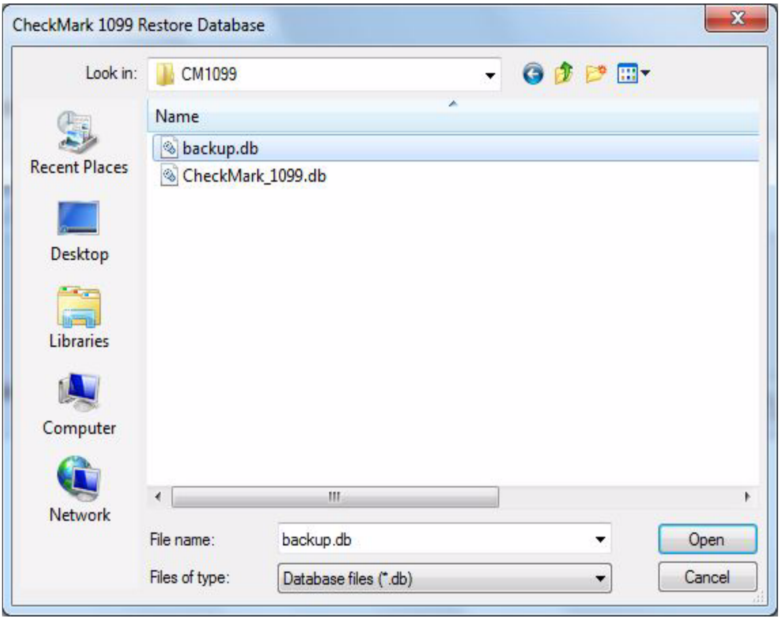
Restoring Database using Restore Database Command

In case of computer failure, corruption or if you made a mistake and would like to revert back to an previous database, the **Restore Database** command will open up any prior backups you have saved.

1 Click on the **Tools** menu in the upper left hand corner of the screen and select **Restore Database**.



2 A **Look in** dialog box opens. Browse to the location of your Backup Database file.



3 Select the file and click **Open.**

Important: Restoring a database file will **overwrite the existing .db file**. Restoring a database file is used in cases of the current file becoming damaged or the wrong information being entered into the current database and restoring from a prior database is faster than manually updating the incorrect information.

Backing up the Entire Folder

Making a copy of the entire folder is a quick and easy way to backup up both the data and application files when you complete filing 1099s for the calendar year. It is recommended you copy the entire folder off the hard drive of your computer onto a flash drive or CD for safe keeping.

1 Find the location on your hard drive where the CheckMark Forms 1099 program was installed. For more information on installation, see "Installing CheckMark 1099" on page 1.

2 Make a *duplicate copy* of this entire folder or *Copy and Paste* this folder to a new location. It's best to save on to a flash drive, CD-ROM or any external drive in case of computer failure. Refer to your operating system's manual on instruction on how to duplicate/copy and paste.

3 A good practice is to rename the backup folder with *today's date* or *finished year* so you know how current the backup is. Make sure to rename the **Folder Only. Do not rename any files inside the folder itself.**

4 If you ever need to access the backup, simply copy the entire folder from your backup source, to your computer, open up the folder and open up the application by double-click the CheckMark Forms 1099 icon.

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