## CheckMark Forms 1099

## **User's Manual**



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# Chapter 1 Installation and Startup

## Installing CheckMark 1099

### Macintosh Install

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

#### \*\*For CD Install\*\*

- 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 doubleclicking on it and double-click the CheckMark 1099 installer.
- 4 Follow the on-screen instructions to complete installation.

#### \*\*For Download Install\*\*

- 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.

#### \*\*For CD Install\*\*

- 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 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:** 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.

CheckMark 1099 Lo	<sup>gin</sup> <b>×</b> CheckMark <sup>™</sup> 1099 Software
Name	[
Password	
Execute Log	cancel Login

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**.

•	kMark(TM) 1099 Version 1.1.0	
Со	Admin Backup Database Restore Database Edit Printing Formats	CheckMark <sup>*</sup> 1099 Software Filter
CK	n's Brewery & Pub Pizza LLC g's Peak Golf Course Update	Company New Company Delete Company
	cipients 1 of l Filte	r All Forms • All Status •
	Update Recipient	New Recipient Delete Recipients Copy Recipient

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

eckMark 10	099 Admin CheckMark <sup>™</sup> 1099 Softvvare	x
Brian Gretchen		

3 Enter the Name and Password.

Note: The Name and Password are case sensitive.

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.

User Details	x
CheckMark <sup>**</sup> 1099 Software	
User Information	
User Name Gretchen	
Password	Ĵ.
This user should be granted ADMIN privileges 🖉	
Add User Update User Cancel	

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.

Delete User	x
	CheckMark <sup>®</sup> 1099 Software
Please v	erify that you want to delete the following user
	Mikki
	Confirm Delete Cancel

**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.

File Tools	k(TM) 1099 Version 1.1.0 Font Sizes Sort Help	
Compan	Smallest Font Small Font Medium Font Large Font Largest Font	CheckMark 1099 Software Filter
	Brewery & Pub	
CK Pizz	eak Golf Course	
	<b>TT</b>	Company New Company Delete Company
Recipie	ents 1 of 1 Filte	r All Forms
Recipie: McClane	1 110.	r All Forms • All Status •
-	1 110.	r All Forms • All Status •       New Recipient     Delete Recipients     Copy Recipient

## **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.

Company Details		×
	eckMark <sup>™</sup> 9 Softwa	re
	Company I	nformation
Payer's Name Brewery & Pub	Payer's Address 123 Main St	Contact Per ≡
Payer's Federal ID 444-55-6666	Payer's City Fort Collins	Contact's P
	Payer's State	Contact's E
	Payer's ZIP 80525	Contact's F
۰ ( m		
Add Company	Update Company	Cancel

# **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.

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

 Available Fields	_	Selected Fields	Employees
Last Name		Last Name	Craw ford, Alex
First Name		First Name	Dickens,Chuck
Address 1		Address 1	Griffin,Marj
Address 2		Address 2	Hill,Allison
City	Copy>>	City	Morrison,Leila
State	copy //	State	
Zip		Zip	
SS#	<remove< td=""><td>SS#</td><td></td></remove<>	SS#	
Phone#			
Birthdate	Karana and A		
Salary	Copy All>		
Hour Rate 1			
Hour Rate 2			
Hour Rate 3			
Comments			
Employee #	Export to 1099		
Hour Rate 4			
liredate	1. A		
Termdate	100		
Raisedate	Export		
Raisedate Department	Export		
TD Earnings			

- 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...

MultiLedger Version 7.3.0					
le Edit Set Up Transactions	Reports	Window	v Help		
New Company C	Ctrl+N				
Open Company C	Ctrl+O	Trop	actions	Po	ports
Open Recent Company	۰.	stomer	Item	Account	Trial
Close Company		oices	Purchases	Reports	Balance
Backup Company		ales	Pavables	Transaction	General
Restore Backup		urnal	Journal	Journals	Ledger
Rebuild Files					
Rename Files		stomer ments	Vendor Payments	Balance Sheet	Income Statement
Find Company					
Renumber Accounts		ceipts iurnal	Disbursement Journal	Cash Flow	Financial Snapshot
Close Year		eneral	Adjust	Customer	Vendor
Format		urnal	Inventory	Reports	Reports
Print Font		ance	Bank	Item	Job
Export		arges	Reconciliation	Reports	Reports
Import		Print	Recurring	Sales Tax	Salesperson
Preferences				Report	Report
User Settings		Numb	erofUsers: 1		
Exit C	Ctrl+Q	struction	Sample\Const-Partner	MLO	

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

1st Bank	Vendors •	F	Separate City/State/Zip
BBC Building Center Bank Bi-State Propane Blue Cross Blue Cross CP Bradley's Heating & Plumbing CA Dept of Labor CA Dept of Revenue CO Dept of Revenue CO Dept of Revenue	Disbursements Receipts General Payables Sales Purchases Invoices PDs Quotes Customers	p All	Export To 1099 Export Export Export List
CheckMark Software	Vendors		
City Tribune City of Denver D. Massey Drywall	Items Accounts Jobs Salespeople		
Dizzie's Dump Trucks EDD EDD-STT EDD-SDI Ellof's Excavating Financial Group Financial Group - 5 Financial Group - 6 Financial Group - 7 Financial Group - 7 Financial Group - 7	Phone Tax ID Fax Default Acct Default Acnt Due Days Credit Limit Email Web		

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

1st Bank	Vendors	and the second	eparate City/State/Zip
BBC Building Center Bank	November 08 💌	0	Export To 1099
Bi-State Propane Blue Cross		Copy All	Export
Blue Cross-CP Bradley's Heating & Plumbing		Сору	Remove
CA Dept of Labor CA Dept of Revenue CO Dept of Labor CO Dept of Revenue CheckMark Software City Tribune City Tribune City of Denver D. Massey Drywall Dizzle's Dump Trucks EDD EDD-ETT EDD-SDI Elliot's Excavating Financial Group Financial Group - 5 Financial Group - 5 Financial Group - 7 Financial Group - 7 Financial Group - 7 Financial Co	Field List Name Code Contact Address City/State/Zip Notes/Ref# Add1 Notes Phone Tax ID Fax Default Acct Default Acct Default Acct Default Acct Default Acct Enail Web		Export List

- 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.

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

File) Tools Font Sizes Sart Help	
E File	CheckMark"
	1099 Software
Print Forms for Recipient Print Forms for Filing	Filter
-	1 HOA
Exit CK Pizza LLC	
ong's Peak Golf Course	
(	
Undate Company	V New Company Delete Company
Update Company	New Company         Delete Company
Update Compan	y New Company Delete Company
· · ·	
· · ·	y     New Company     Delete Company       All Forms     -     All Status
Recipients 1 of 1 Filter	
Recipients 1 of 1 Filter	All Forms - All Status
Recipients 1 of 1 Filter	

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

CheckMark 1099 Recipient Type					
<b>Check</b> Mark <sup>®</sup> <b>1099</b> Software					
Please select	t the type o	of 1099 Red	cipients yo	ou are impo	rting
MISC	© DIV	© INT	©R	© S	
OK Cancel					

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

	Import from Payroll or Multil	
wailable Fields		Selected Fields
Company/Last Name (Required) "irst Name Address Line 1 Address Line 2 City State ZIP Code Country Address not in U.S Checkbox Recipient's ID Account Number and TIN not Checkbox Void - Checkbox Corrected - Checkbox	Add Field> Add All Fields> Add All Fields> < Remove Field < Remove All Fields <	Company/Last Name (Required) First Name Address Line 1 Address Line 2 City State ZIP Code Recipient's ID

- 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.

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

CheckMark(TM) 1099 Version 1.1.0 File Tools Font Sizes Sort Help	
Import	CheckMark"
E File	1099 Software
Print Forms for Recipient	
Print Forms for Filing	Filter
Exit	
CK Pizza LLC Long's Peak Golf Course	
Recipients 1 of 1 Filte	r All Forms - All Status -
McClane, John	
Update Recipient	New Recipient Delete Recipients Copy Recipient

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

CheckMark 1099 Re	1 21	heck	∕lark <sup>™</sup>		
Please selec	Western Barry Street Barry	heck <b>999</b> So of 1099 Re			rting
MISC	© DIV	© INT	© R	© S	
OK Cancel					

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**.

Terry	<b>1099</b> Softwa	
Available Fields	port nom Payton of MuluLe	Selected Fields
Account Number 2nd TIN not Checkbox Void - Checkbox Corrected - Checkbox	Add Field>	Company/Last Name (Required) First Name Address Line 1
Box 1: Rents Box 2: Royalties Box 3: Other income	Add All Fields>	Address Line 2 City State ZIP Code
Box 4: Federal income tax withheld Box 5: Fishing boat proceeds	< Remove Field	Recipient's ID Box 3: Other income
Box 6: Medical and health care paymet Box 7: Nonemployee compensation Box 8: Substitute payment in lieu of di Box 9 - Checkbox Box 10: Crop insurance proceeds	< Remove All Fields	

- 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.

CheckMark(TM) 1099 Version 1.1.0	
File Tools Font Sizes Sort Help	<b>€ Check</b> Mark <sup>®</sup> 1099 Software
Companies	Filter
Brian's Brewery & Pub CK Pizza LLC Long's Peak Golf Course	
Update Con Recipients 1 of 1 Filter	npany     New Company     Delete Company       All Forms     All Status
McClane, John	
Update Recipient	New Recipient         Delete Recipients         Copy Recipient
	C:\CheckMark\1099\2011\CheckMark_1099_2011.db

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

Company Details						
CheckMark <sup>™</sup> 1099 Software Company Information						
Payer's Name	Payer's Address	Contact Person				
Payer's Federal ID	Payer's City	Contact's Phone				
	Payer's State	Contact's Email Address				
	Payer's ZIP	Contact's Fax Number				
	Payer's Phone	Tax ID is Social Security Number $\square$				
This is your FINAL RETURN						
Add Company     Update Company     Cancel						

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**.

CheckMark(TM) 1099	Version 1.1.0	
File Tools Font Sizes	Sort Help	
Companies	✓         Sort Companies Ascending           Sort Companies Descending           ✓         Sort Recipients Ascending           Sort Recipients Descending	ckMark" ) Software Filter
Brian's Brewery CK Pizza LLC Long's Peak Go		
Recipients 0 of		Company     Delete Company       All Forms     Istatus
Upda	te Recipient New Recipient	Delete Recipients Copy Recipient
ort Companies Ascendir	g	C:\CheckMark\1099\2011\CheckMark_1099_2011.db

### **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.

CheckMark(TM) 1099 Ver	rsion 1.1.0	• X
File Tools Font Sizes So	ort Help	
	<b>Check</b> Mark <sup>®</sup> <b>1099</b> Software	
Companies	Filter	
Brian's Brewery & CK Pizza LLC	Pub	
Long's Peak Golf C	Course	
	Update Company         New Company         Delete Company	
Recipients 2 of 2	Filter         All Forms         Image: All Status	•
McClane, John Power, Max		
Update	Recipient     New Recipient     Copy Recipient	
	C:\CheckMark\1099\2011\CheckMark_1099_2011.db	

#### 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.

CheckMark(TM) 1099 Version 1.1.0	
File Tools Font Sizes Sort Help	
	heckMark <sup>™</sup> D99 Software
Companies	Filter
Brian's Brewery & Pub	
CK Pizza LLC	
Long's Peak Golf Course	
Update Company	New Company Delete Company
Recipients 2 of 2 Filter	All Forms
Cage, Rusty McClane, John	
Update Recipient New Recip	oient Delete Recipient Copy Recipient
	C:\CheckMark\1099\2011\CheckMark_1099_2011.db

## 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**.

CheckMark(TM) 1099 Versior	11.0
File Tools Font Sizes Sort	Help CheckMark <sup>®</sup> 1099 Software
Companies	Filter
Brian's Brewery & Pu CK Pizza LLC Long's Peak Golf Co Recipients 1 of 1 McClane, John	CheckMark 1099 Recipient Type
Update Re	ccipient New Recipient Delete Recipients Copy Recipient
	C:\CheckMark\1099\2011\CheckMark_1099_2011.db

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

4	Enter the Recipients II	along	with the	Recipient	Information.
---	-------------------------	-------	----------	-----------	--------------

		1	VOID CORRECTED		
Paret Info Brain Brevery & Rub 13 Mar St For Collins: CO: 80525: 970-222-2222		1 Rents \$ 2 Royaltes \$	OMB No. 1545-0115 2011 Form 1099-MISC		
			3 Other Income \$	4 Federal income tax withhel \$	đ
Payer Federal ID 411-55-6666	Recipient's ID		5 Fishing Beat proceeds 5	6 Medical and health care par \$	ymenta
Address not in US Territory		7 Nonemployee conpensation \$	8 Substitute payment in lieu of dividends or interest \$		
Company or Last Name First Name (If applicable)		9 Payer made cirect usies of \$5,000 or more of consume products to a buver(recipient) for resole	10. Crop insurance proceeds §		
Oty State	ΖP	Country	11	12	
Account Number (see instruction	c) 2nd T2N not.	5	13 Excess golden parachute payments 8	14. Gross proceeds paid to an \$	attorney
15a Section 4034 defemals \$	15b. Section 409A income \$		15 State Tax Withheld	17. State/Payer's state no.	18 State Income 5

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.

		<b>Check</b> Mar 1099 Softw	k <sup>™</sup> vare	
	The follow	ving errors were dis	covered:	
City: Must be State: Must be	be between 1 and 40 c between 1 and 40 c a valid U.S. state c of form XXXXX or	haracters. or territory (name or	abbreviation).	
c.	6	nue Anyway Ca	ncel	

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.

		2	U VOID [[] CORRECTED		
			1 Rents \$ 2 Royalties	OHE Ho. 1545-0115 2011 Form 1099-MISC	
			\$ 3 Other Income	4 Federal ncome tax withhel	4
	pient's ID 55-55-8888		5 Fishing Boat proceeds	6 Medical and health care parts	vments
ecpient Information	Address not in L	6 Territory	7 hionemployee compensation \$	8 Substitute payment in lieu o S	of dividends or interest
onpany or Last Name McClane ddress	First Name (if app John	skable)	9 Payer made direct sales of \$5,000 E or more of consumer products to a buyer (recipioni) for resole	10. Orsp insurance proceeds \$	
44 West St			11	12	
Fort Collins CO	21P 80525	Country USA			
ccount Number (see instructions)	2nd T3N not.	8	13 Excess golden parachute payments 5	14. Gross proceeds paid to an S	attorney
Sa Sector 409A deferrals 196 \$	Section 405A income		16. State Tax Withed 5	17 State,Payer's state no.	18 State Income \$
			5		5

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

	<b>Check</b> Mark <sup>®</sup> <b>1099</b> Software	
	The following errors were discovered:	
City: Must be a State: Must be	be between 1 and 40 characters. between 1 and 40 characters. a valid U.S. state or territory (name or abbreviation). of form XXXXX or XXXXX-XXXX.	
	Continue Anyway Cancel	

**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.

	CHECK MARK <sup>™</sup>
The Recipier	t Information you are updating has already been 'Printed' Change status to 'NOT Printed'
The Recipient	Information you are updating has already been 'Complete Change status to 'NOT Completed'
	Save and Continue Cancel

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

Change Recipient Stat	CHECK MARK <sup>TM</sup> FORMS 1099
The Recipien	t Information you are updating has already been 'Printed'. Change status to 'NOT Printed'
The Recipient	Information you are updating has already been 'Completed' Change status to 'NOT Completed'
	Save and Continue Cancel

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.

De	elete Recipient(s)	×			
	CheckMark <sup>**</sup> 1099 Software				
	Please verify that you want to delete the following recipients:				
	Jackson, Dr				
	Confirm Delete Cancel	_			

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.

CheckMark 1099 Recipient Copy
CheckMark <sup>**</sup> 1099 Software
Please select the Company and 1099 Type to copy John McClane to.
Company CK Pizza LLC
$\textcircled{\ o MISC \ } \bigcirc DIV \ \ \bigcirc INT \ \ \bigcirc R \ \ \bigcirc S$
OK Cancel

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 <u>start</u> 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**.

CheckMark(TM) 1099	Version 1.1.0	
File Tools Font Sizes	Sort Help	
Companies	<ul> <li>✓ Sort Companies Ascending Sort Companies Descending</li> <li>✓ Sort Recipients Ascending Sort Recipients Descending</li> </ul>	<b>ck</b> Mark 9 Software Filter
Brian's Brewery CK Pizza LLC Long's Peak Gol		
Recipients 0 of		All Forms  All Status
Upda	te Recipient ] [ New Recipien	
		C:\CheckMark\1099\2011\CheckMark_1099_2011.db

### 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.

File Tools Font Sizes Sort Help	
	CheckMark <sup>®</sup> 1099 Software
Companies	Filter
Brian's Brewery & Pub	
CK Pizza LLC	
Update Compan	y New Company Delete Company
Recipients 2 of 2 Filter	All Forms - All Status -
McLane, John	All Status NOT Printed
McLane, John Power, Max	All Status NOT Printed Printed
	NOT Printed
	NOT Printed Printed NOT Completed Completed
	NOT Printed Printed NOT Completed Completed NOT Validated
	NOT Printed Printed NOT Completed Completed NOT Validated Validated
	NOT Printed Printed NOT Completed Completed NOT Validated
Power, Max	NOT Printed Printed NOT Completed Completed NOT Validated Validated NOT Voided
Power, Max	NOT Printed Printed NOT Completed Completed NOT Validated Validated NOT Voided Voided

### **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.

CheckMark(TM) 1099 Version 1.1.0	
File Tools Font Sizes Sort Help	
Che 109	<b>ck</b> Mark <sup>®</sup> 9 Software
Companies	Filter
Brian's Brewery & Pub	
CK Pizza LLC	
Long's Peak Golf Course	
Update Company New	Company Delete Company
Recipients 2 of 2 Filter	MISC forms
McClane, John Power, Max	
Update Recipient New Recipient	Delete Recipients Copy Recipient
	C:\CheckMark\1099\2011\CheckMark_1099_2011.db

#### 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.

CheckMark(TM) 1099 Version 1.1.0	
File Tools Font Sizes Sort Help	
Cheo 1099	c <b>k</b> Mark <sup>≋</sup> Software
Companies	Filter
Brian's Brewery & Pub	
CK Pizza LLC	
Long's Peak Golf Course	
Lindeta Company	Company Dalata Company
Update Company New	Company Delete Company
Recipients 3 of 3 Filter	MISC forms
Filter	MISCIONIIS + All Status +
Cage, Rusty	
McClane, John	
Power, Max	
Update Recipient New Recipient	Delete Recipients Copy Recipient
	C:\CheckMark\1099\2011\CheckMark_1099_2011.db

# 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

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

CheckMark(TM) 1099 Version 1.1.0	
File Tools Font Sizes Sort Help	
Import	
E File	CheckMark <sup>™</sup> 1099 Software
Print Forms for Recipient	
Print Forms for Filing	Filter
Exit	
CK Pizza LLC Long's Peak Golf Course	
Recipients 1 of 1 Filter McClane, John Update Recipient New Rec	MISC forms - All Status -
Print Forms for Filing	C:\CheckMark\1099\2011\CheckMark_1099_2011.db

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.

	, otherwise	re printing ONLY CORRECTED choose 'Use All' to use all Brian's
	recipients	
Ouse all recipients for 1	.096 totals	O Use selected recipients for 1096 totals
ian's Brewery Pu	ib MISC re	f you want to print 1099s for all ecipients, otherwise choose 'Print
Print 1099s for all	recipients	Print 1099s for selected recipients
1	hoose 'Print All R rian's Brewery Pu elected Recipients	

#### \*\*If printing 1099 MISC Only\*\*

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.

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

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

CheckMark(TM) 1099 Version 1.1.0	
File Tools Font Sizes Sort Help	
Import	Check Mark"
E File	CheckMark <sup>®</sup> 1099 Software
Print Forms for Recipient	
Print Forms for Filing	Filter
Exit	
Recipients 2 of 2 Filter	pany New Company Delete Company MISC forms  All Status
Update Recipient N	Vew Recipient Delete Recipient Copy Recipient
Print Forms for Recipient	C:\CheckMark\1099\2011\CheckMark_1099_2011.db

\*\*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**.

CheckMark 1099 MISC Print Selector	×
<b>Check</b> Mark <sup>®</sup> <b>1099</b> Software	
Please select which 1099 forms you are using to print recipients.	
● Print 2-up MISC forms ○ Print 4-up MISC forms	
If you choose '2-up' we will separately create Copy B and Copy 2 for each recipient. (Needs to be printed on preprinted forms)	
If you choose '4-up' we will create a one page PDF containing a Copy 2, Copy B and two Copy C's for each recipient. (Needs to be printed on blank paper)	
OK Cancel	

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

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.

-	kMark(TM) 1099 Version 1.1.0	
	Admin Backup Database Restore Database	CheckMark" 1099 Software
Co	Edit Printing Formats	Filter
		Company New Company Delete Company
	ipients 1 of 1 Filte	MISC forms - All Status -
MeC	Cane, John	
	Update Recipient	New Recipient         Delete Recipients         Copy Recipient
Edit Print	ting Formats	C:\CheckMark\1099\2011\CheckMark_1099_2011.db

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.

	CheckMark" 1099 Software	
Companie		
Brian's Br CK Pizza Long's Pe	Reset Form DIV form tom Format	
Recipient		
	Update Recipient New Recipient Delete Recipients Copy Recipient	

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

55 m	ISC 2up Format			
	· · · · · · · · · · · · · · · · · · ·	4		<sup>7</sup> <sup>8</sup>
	x x			
	payer name	box 1		
	payer address			
	payer city-state-zip	box 2		
		box 3	вож 4	]
	payer id recipient id	box 5	box 6	1
			2 <del>1</del>	-
	recipient name			
		box 7	box 8	]
	recipient address	×	box 10	1
	recipient city-state	box 11	box 12	]
	Salar and Salar and Salar and Salar and Salar			
	recipient acct	box 13	box 14	]
	L	box 16-1	box 17-1	box 18-1
	box 15a box 15b	box 16-2	box 17-2	box 18-2

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.

000	CheckMark 1099 Print Alignment
	CheckMark <sup>®</sup> 1099 Software
	Print this Information
	elds on the federal 1099 forms lie outside of the standard margins for most d to create a customized page setup for 1099, luckily, this is very easy to do!
<ul> <li>next, select the 'pape</li> <li>click on the plus '+' si</li> <li>single click on 'untitle</li> <li>for paper size set the</li> <li>next set 'Non-printab</li> </ul>	e Setup' button below (you need to be an Admin), the page setup dialog opens r size' dropdown and choose 'manage custom sizes' gn in the lower left corner, d' in the list and change it to something like 'my1099' width to 8.5 inches and the height to 11 inches le area to 'User Defined' if it is not already selected for you d bottom to 0.00 inches, click ok bage setup window
	Do not show this window again
	Continue Cancel Edit Page Setup

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.

CheckMark 1099 File	Tools Font Sizes Sort Window Help
000	Admin <sup>104</sup> 0000010000 ersion 1.1.0
	Backup Database /ark <sup>™</sup> Restore Database oftware
Companies	Edit Printing Formats Edit Page Setup
CMS Update Recipients 1 of 1 Filter Smith, Bob	Company New Company Delete Company MISC forms  All Status
Update Recipient	New Recipient Delete Recipients Copy Recipient

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

CheckMark(TM) 1099 Version 1.1.0	
File Tools Font Sizes Sort Help Import	<b>Check</b> Mark <sup>™</sup>
E File	CheckMark" 1099 Software
Print Forms for Recipient Print Forms for Filing	Filter
Exit	
CK Pizza LLC Long's Peak Golf Course	
Recipients 1 of 1 Filter	Company New Company Delete Company r MISC forms  All Status
Update Recipient	New Recipient         Delete Recipients         Copy Recipient
E File	C:\CheckMark\1099\2011\CheckMark_1099_2011.db

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

E-File	
Check 1099	<b>∢</b> Mark <sup>®</sup> Software
Additional Information	mation for E-File
Transmitter Control Code	Transmitter's TIN
Transmitter Name	Transmitting Company
Transmitter's Mailing Address	
Transmitter's City	
Transmitter's State	Transmitter's Zip
Contact Name	Contact's Phone Number
Contact's E-mail Address	
Combined Fed/State Filing Program	This is a TEST file 🗖
Create E-File Now C	Cancel How to E-File

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.

	<b>Check</b> Mark <sup>®</sup> <b>1099</b> Software
	Follow these simple steps for E-Filing
1)	Get Form 4419 - Application for Filing Information Returns Electronically (FIRE)
2)	Create FIRE System Account
3)	Verify you are ready to Login to your FIRE Account
4)	Login to your FIRE Account
5)	Send a TEST file!

- 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.

The following errors were discovered: Transmitter's TIN: Must be 9 digits. Transmitter Name: Must be between 1 and 40 characters. Transmitter's Mailing Address: Must be between 1 and 40 characters. Transmitter's City: Must be between 1 and 40 characters. Transmitter's State: Must be a valid U.S. state or territory (name or abbreviation). Transmitter's Zip: Must be of form XXXXX or XXXX-XXXX. Contact Name: Must be between 1 and 40 characters. Contact's Phone Number: Must be of form XXX-XXX-XXXX or XXX-XXXX. Contact Name: Must be of form XXX-XXX-XXX or XXX-XXX. Contact's Phone Number: Must be of form XXX-XXX-XXX or XXX-XXX. Contact's Phone Number: Must be of form XXX-XXX-XXX or XXX-XXX. Contact's Phone Number: Must be of form XXX-XXX-XXX or XXX-XXX-XXX	CheckMark <sup>™</sup> 1099 Software
Transmitter Name: Must be between 1 and 40 characters Transmitter Company: Must be between 1 and 40 characters. Transmitter's Mailing Address: Must be between 1 and 40 characters. Transmitter's City: Must be between 1 and 40 characters. Transmitter's State: Must be a valid U.S. state or territory (name or abbreviation). Transmitter's Zip: Must be of form XXXXX or XXXXX-XXXX. Contact Name: Must be between 1 and 40 characters. Contact's Phone Number: Must be of form XXXX-XXXX or XXX-XXXX or XXX-XXXX.	
Transmitter Company: Must be between 1 and 40 characters. Transmitter's Mailing Address: Must be between 1 and 40 characters. Transmitter's City: Must be between 1 and 40 characters. Transmitter's State: Must be a valid U.S. state or territory (name or abbreviation). Transmitter's Zip: Must be of form XXXXX or XXXXX-XXXX. Contact Name: Must be between 1 and 40 characters. Contact's Phone Number: Must be of form XXX-XXX-XXXX or XXX-XXXX or XXX-XXXX.	ransmitter's TIN: Must be 9 digits.
Transmitter's Mailing Address: Must be between 1 and 40 characters. Transmitter's City: Must be between 1 and 40 characters. Transmitter's State: Must be a valid U.S. state or territory (name or abbreviation). Transmitter's Zip: Must be of form XXXXX or XXXXX-XXXX. Contact Name: Must be between 1 and 40 characters. Contact's Phone Number: Must be of form XXX-XXX-XXXX or XXX-XXXX or XXX-XXX.	ransmitter Name: Must be between 1 and 40 characters
Transmitter's City: Must be between 1 and 40 characters. Transmitter's State: Must be a valid U.S. state or territory (name or abbreviation). Transmitter's Zip: Must be of form XXXXX or XXXXX-XXXX. Contact Name: Must be between 1 and 40 characters. Contact's Phone Number: Must be of form XXX-XXX-XXXX or XXX-XXXX or XXX-XXX.	ransmitter Company: Must be between 1 and 40 characters.
Transmitter's State: Must be a valid U.S. state or territory (name or abbreviation). Transmitter's Zip: Must be of form XXXXX or XXXXX-XXXX. Contact Name: Must be between 1 and 40 characters. Contact's Phone Number: Must be of form XXX-XXX-XXXX or XXX-XXXX or XXX-XXX.	ransmitter's Mailing Address: Must be between 1 and 40 characters.
Transmitter's State: Must be a valid U.S. state or territory (name or abbreviation). Transmitter's Zip: Must be of form XXXXX or XXXXX-XXXX. Contact Name: Must be between 1 and 40 characters. Contact's Phone Number: Must be of form XXX-XXX-XXXX or XXX-XXXX or XXX-XXX.	ransmitter's City: Must be between 1 and 40 characters.
Contact Name: Must be between 1 and 40 characters. Contact's Phone Number: Must be of form XXX-XXX-XXXX or XXX-XXX-	ransmitter's State: Must be a valid U.S. state or territory (name or abbreviation).
Contact Name: Must be between 1 and 40 characters. Contact's Phone Number: Must be of form XXX-XXX-XXXX or XXX-XXX-	ransmitter's Zip: Must be of form XXXXX or XXXXX-XXXX.
Continue Anyway Cancel	Contact's Phone Number: Must be of form XXX-XXX-XXXX or XXX-XXX-XXX
Continue Anyway Cancel	
Continue Anyway Cancel	
	Continue Anyway Cancel

- 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

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

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	Admin	Check Mark
	Backup Database	CheckMark <sup>®</sup> 1099 Software
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Co	Edit Printing Formets	Filler
	's Brewery & Pub Pizza LLC	
	g's Peak Golf Course	
	cipients 1 of 1 Filter	MISC forms  All Status
	Update Recipient	New Recipient Delete Recipients Copy Recipient

- 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**.

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		Admin	Chook Mark
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M	cCla	me, John	
		Update Recipient	New Recipient         Delete Recipients         Copy Recipient
Resto	re Dat	tabase	C:\CheckMark\1099\2011\CheckMark_1099_2011.db

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

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	•	Ш				,
Network	File name:	backup. <mark>d</mark> b			- [	Open
	Files of type:	Database files (*.db)			-	Cancel

**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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