

## Preparing IRS form 1099 & 1096

The screenshot displays the QuickBooks Pro 2015 interface. The top menu bar includes 'File', 'Edit', 'View', 'Lists', 'Favorites', 'Company', 'Customers', 'Vendors', 'Employees', 'Banking', 'Reports', 'Window', 'Help', and 'Special Offers'. The 'Vendors' menu is open, showing options: 'Enter Bills', 'Pay Bills', 'Print/E-file 1099s...', and 'Item List'. The 'Print/E-file 1099s...' option is highlighted, and a sub-menu is visible with the following items: '1099 Wizard', 'Review 1099 Vendors', '1099 Summary Report', '1099 Detail Report', and 'Order 1099 Forms'. The main workspace is divided into three horizontal sections: 'VENDORS', 'CUSTOMERS', and 'EMPLOYEES'. The 'VENDORS' section contains 'Enter Bills', 'Pay Bills', and 'See Funding Options'. The 'CUSTOMERS' section contains 'Estimates', 'Create Invoices', 'Accept Credit Cards', 'Create Sales Receipts', 'Receive Payments', 'Statement Charges', 'Statements', and 'Refunds & Credits'. The 'EMPLOYEES' section contains 'Enter Time' and 'Turn On Payroll'. On the right side, there are three vertical panels: 'COMPANY' (Chart of Accounts, Items & Services, QuickBooks Mobile, Order Checks, Calendar), 'BANKING' (Record Deposits, Reconcile, Write Checks, Check Register), and 'Print Checks'. A left sidebar contains 'Open Windows' (Home), 'My Shortcuts' (View Balances, Run Favorite Reports, Open Windows), and an 'Important Notice' about service changes on 5/31.

To use the 1099 Wizard, click Vendors & then Print/E-File 1099 and then 1099 Wizard.

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The screenshot shows the QuickBooks Pro 2015 interface with the 'QuickBooks 1099 Wizard' window open. The window title is 'QuickBooks 1099 Wizard'. The main content area is titled 'To prepare and file your 1099-MISC/1096 forms' and features a list of six steps:

- 1 Select your 1099 vendors**  
Select vendors to receive 1099-MISC forms.
- 2 Verify vendor information**  
Review and edit information for selected vendors.
- 3 Map your accounts**  
Choose which payments to report in each box on Form 1099-MISC.
- 4 Review vendor payments**  
Select debit, gift card and PayPal transactions to exclude from 1099-MISC forms.
- 5 Confirm 1099-MISC entries**  
Review the amounts to be reported on each vendor's Form 1099-MISC.
- 6 Choose a filing method**
  - **Print** 1099s and 1096 on preprinted forms to file by mail.
  - **E-file** 1099s electronically with the IRS using the 1099 E-File Service. You can also print copies on plain paper.

Below the steps, there is a link: [Learn more about these options](#). To the right of the steps is a small image of a 1099 form and a button labeled 'Order forms'. At the bottom right of the wizard is a large blue button labeled 'Get Started'.

In the bottom left corner of the QuickBooks interface, there is an 'Important Notice' box with a warning icon. The text reads: 'On 5/31, services like Support and Online Backup will no longer work with your QuickBooks.' Below this notice is a blue button labeled 'Act Now'.

This screen will appear after you select the 1099 Wizard on the previous page. Above is a list of steps that you will go through to complete your 1099(s). 1099's are actually very easy. Make sure you check the IRS website for 1099 threshold which is usually \$600.