



Sage 500 ERP

1099 Forms Service User Guide

As Of

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1099 Forms Service

Document Change History

12/2024

A new version of the “Sage 500 ERP Tax Forms Service” must be installed for all Sage 500 ERP versions for tax year 2024. This is the install for Aatrix Software that is specifically tailored for Sage 500 ERP. This must be installed on the machine that will process 1099 forms. It is not necessary to install this on any other Sage 500 ERP clients. Please install this prior to running 1099 processing starting in Tax Year 2024.

While not absolutely required, this application performs best if the user is a Windows administrator on the client machine. Depending upon the Windows User Account Control settings, the user may be prompted for multiple administrator login overrides.

Overview

Use 1099 Forms Service to enter settings and company information and to select vendors for submitting 1099 forms to the Sage 500 ERP third-party 1099 vendor.

Note: Use 1099 Forms Service only for tax years 2016 or later.

Use 1099 forms to report miscellaneous income (such as prizes and bonuses), dividend income, interest income paid by your company, and payments made to non-employees. The 1099 amounts for the vendor, year, form, and box are summarized on the forms.

This application will sum up 1099 boxes, and then create an encrypted file that is sent on to the third-party 1099 vendor which will then take control and validate the information and allow you to edit the data if you choose as well as print the 1099s.

When you click the proceed button from on this form, it will initiate a call to the third-party 1099 vendor. There you will have the option to generate test forms for some or all employees before generating the final forms for submission. You can also use it to edit and print information on preprinted 1099 forms as well as add optional valuable services such as e-filing or printing, enveloping and stamping and mailing the 1099s without using any additional labor on your part (for a small charge). When generating 1099s, you can either submit new forms or forms that have changed since the last time you submitted 1099s through the service.

Note: If the number of 1099 forms you are filing exceeds the maximum amount established by the federal government, you are required to file your 1099 form information using electronic filing.

The Sage 1099 Forms Service are the Sage 500 ERP forms used to launch 1099 processing. The Sage 500 ERP Tax Forms Service is a separately installed application from a third-party vendor that actually processes 1099s from data sent by Sage 500 ERP.

Implementation

It is highly recommended that you only use this application on a single client machine and use that same machine each year. There is some local storage used by the third-party 1099

vendor and using the same client machine enables full year-over-year functionality. Also, it is best if you backup this machine before 1099s are started and after they are complete for a tax year.

It is also recommended that the Windows user be an administrator on the client machine. Various updates may take place that require administrator access depending upon your client machines security settings.

Navigation

Select Accounts Payable Insights menu > Report > 1099 Reports > 1099 Forms. Older versions of Sage 500 ERP have a menu path of > Report > 1099 Reports > 1099 Forms (2016+).

Note: To use this report, you must select Track 1099 Information in Set Up AP Options and Sage 500 Tax Service must be installed.

Screens

Setting: (None)

Main | Company | Vendors

1099s

Submit New

View/Edit Existing

Include

1099 Form: NEC

For Tax Year: 2024 (Must be 2016 or later)

Minimum 1099 Amount: 0.00 USD

Remove Previous Error Submission

admin SOA 6/30/2008

1099 Forms Service

Setting (None)

Main Company Vendors

1099s

Submit New

View/Edit Existing

admin SOA 6/30/2008

1099 Forms Service

Setting (None)

Main Company Vendors

Company Information

Name	Systems of America	Federal ID Number	95-3657471
Address	165 Pacific Highway	State Tax ID Number	55884652
		Last Filing Year for Payer	<input type="checkbox"/>
City	Zuma Beach	State	CA
Postal Code	90263-	Country	USA

Payer Is Foreign Entity

admin SOA 6/30/2008

Setting (None)

Main Company **Vendors**

Sort

Field	Sort Order	Subtotal	Page Break
Vendor Name	Ascending	<input type="checkbox"/>	<input type="checkbox"/>

Select

Field	Condition
Vendor	All
Vendor Name	All
V1099 Type	All
Vendor Status	All

admin SOA 6/30/2008

Fields

Setting

Select the name of the setting from the previously saved report, list, register, or task settings. You can adjust the settings before viewing or printing a report, list, or register, or processing a task. To save the current report, list, register, or task settings (if applicable) or to save the current settings under a new name, select Save on the toolbar and enter a (new) setting name. This setting name then appears in the Settings drop-down list when you process the document in the future.

Note: Not all windows allow you to save settings. In such cases, you can save the settings in a related task.

Saving frequently used report, list, register, or task settings, including sort and selection information, helps you produce reports, lists, and registers, and process tasks faster.

You can include a user ID on reports, lists, or registers by selecting the Print User ID on Reports check box in Maintain Site and selecting the Print Report Settings check box on the report, list, or register window.

Main Tab

1099s

Select an option.

- Select Submit New to generate new 1099 forms. When you click Proceed, the 1099 Forms Service Launcher will appear and then the Sage 500 Tax Service 1099 Setup Wizard will start.
- Select View/Edit Existing to view or edit 1099 forms that were previously generated. When you click Proceed, the 1099 Forms Service Launcher will appear and then the Sage 500 Tax Service Open Report window will open so that you can select existing 1099 forms.

1099 Form

Select the type of 1099 to print:

- Select Misc to print a miscellaneous 1099 form.
- Select Dividend to print 1099 information for dividends.
- Select Interest to print 1099 information for interest.
- Select NEC to print 1099 NEC form for non-employee compensation.

For Tax Year

Type the tax year for which you want to print 1099s. You must enter 2016 or later.

Minimum 1099 Amount

Type the minimum payment made to the company during the year.

Remove Previous Error Submission

Be extremely careful when using this button, If a submitting user accidentally removes a submission that was actually not an error, a database restore would be necessary to get it back.

After a submission is sent to the third-party 1099 service provider, the user making the submission is asked if the submission was completed successfully. If the submitting user answers yes, then Sage 500 ERP will assume that the submission was valid within the 1099 service provider's system and will mark the submission within Sage 500 ERP. Sage 500 ERP has no way to confirm with the 1099 service provider itself that everything was valid and actually submitted, requiring this manual affirmation within Sage 500 ERP.

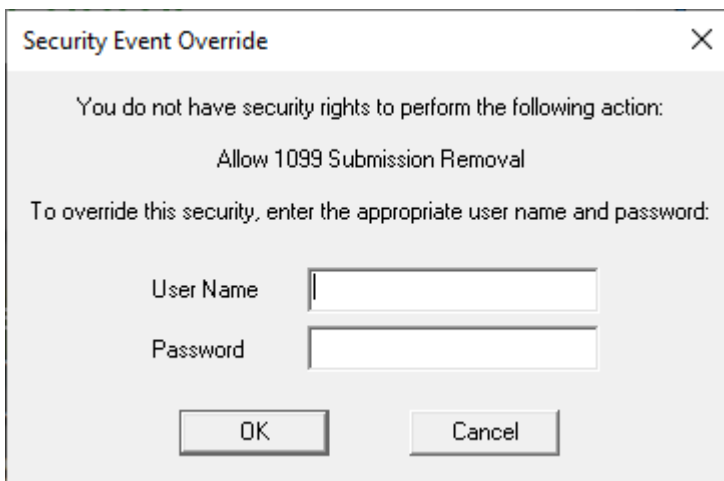
If the submitting user answered yes in error, when they really meant no, then there is a problem. Perhaps it was an errant mouse click. Maybe they were testing the system rather than making a production submission and accidentally clicked yes when they should have clicked no. Perhaps they mistakenly entered the wrong tax year and realized this when inside of the 1099 tax service provider's system and did not actually process the submission and

accidentally marked the submission as valid when asked by Sage 500 ERP. Regardless, leaving a submission that was flagged as being successfully completed within the 1099 service provider's system when it was not is a problem.

Use this button to remove a previous submission for the Year/Form that was made in error or was made as part of a test and was flagged as being successful after calling the 1099 tax service vendor. Leaving a submission behind that was really created for testing will appear on history reports as the system does not know it was for test. It also may possibly block vendor payment processing if the mistake was related to entering the wrong tax year. An example of this could be when processing a submission for tax year 2021 and the user is making the actual submission in January of 2022, and they enter 2022 for the tax year by mistake.

Several validations will take place after clicking this button. Included is a validation that the submitting user has permission to do this. **There is an AP security event called "Allow 1099 Submission Removal" that is required to complete the button's actions. By default, no user in the system has this permission and it must be explicitly assigned to security group.**

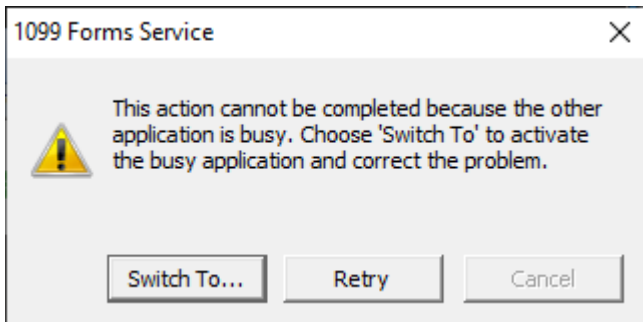
If the submitting user does not have the permission, a security override message is shown.



The image shows a dialog box titled "Security Event Override" with a close button (X) in the top right corner. The text inside the dialog reads: "You do not have security rights to perform the following action: Allow 1099 Submission Removal. To override this security, enter the appropriate user name and password:". Below this text are two input fields: "User Name" and "Password". At the bottom of the dialog are two buttons: "OK" and "Cancel".

The user must obtain permission from another user to continue. If no other user is known to have the permission, click cancel and the process will halt without completing.

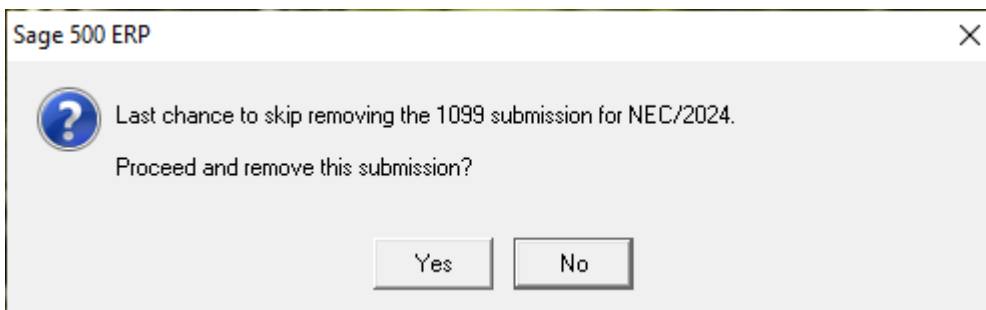
It is possible that a submitting user will run into an issue with the Security Event Override message where it pops but does not come to the foreground. Should this happen and clicking on the main form causes a



Then the user will need to minimize other applications covering the center of the screen and then click the <Switch To ...> button.

Be extremely careful when using this button, If a submitting user accidentally removes a submission that was actually not an error, a database restore would be necessary to get it back.

Right before the actual removal process, a message box will be displayed asking for final verification:



Click yes will delete the submission. Clicking no will exit without deleting the submission and no data will be changed.

Company Tab

Name

Type the company's name.

Address

Type up to four lines of street address information if there is not an associated department, warehouse, or drop ship. Some vendors have one primary address and several purchase-from and remit-to addresses. Enter and maintain the primary address here and click Other Addresses, if available, to enter alternate addresses (do not use Other Addresses to enter primary addresses). Click the Map button to view a map of this location in your Web browser.

Depending on the commission payment method you select, the address information can only be viewed. Selecting a method of Vendor displays the address defined for the salesperson in the Accounts Payable module and disables the ability to edit the address information within Maintain Salespersons. You can edit the address in the Accounts Payable module or edit the address information by selecting a commission payment method of Manual.

City

Type the city in which the address you are entering is located. If you have set up postal codes in the Common Information module, the city and state display automatically when you select a postal code. You can change the city if needed.

Postal Code

Select a postal code for the address you are entering or click the Lookup button to list all defined postal codes. You can define postal codes in Set Up Postal Codes in the Common Information module. If you select a postal code, the state and city display automatically.

State

Select the abbreviation for the state or province in which the address you are entering is located. You can define states and provinces in Set Up Countries and States in the Common Information module. If you have set up postal codes, the state or province and city is entered for you if you select a postal code associated with the state or province.

Country

Select the country in which the address you are entering is located. You can define countries in Set Up Countries and States in the Common Information module. If you selected a default country in Set Up CI Options the country defaults in this and other windows that require a country after you enter a task ID. For example, in Maintain Customers (in the Accounts Receivable module), after you enter a customer ID and move to the next field, the default country displays in the Country field. You can change the country, if needed.

Payer Is Foreign Entity

Select this check box if the payer is a foreign entity paying income to a US resident. Clear this check box if the payer is not a foreign entity.

Federal ID Number

Type the company's Federal Tax ID number.

State Tax ID Number

Type the company's State Tax ID number.

Last Filing Year for Payer

Select this check box if the payer will not be filing information returns under this payer name either electronically or on paper. Clear this check box if filing information returns under this payer name. This field is only used for electronic filing processing.

Vendors Tab

Sort Grid

Use this grid to select options for sorting and displaying the 1099 forms.

Field (Sort)

Select a field to sort by.

Sort Order

Select the sort order to use for the 1099 forms.

Subtotal

Select this check box to display subtotals on the 1099 form report. Clear this check box if you do not want to display subtotals.

Page Break

Select this check box to insert page breaks between 1099 forms.

Select Grid

Use this grid to select the records to include when generating the 1099 forms.

Condition

Select a condition to limit your selection to a particular value or range of values. After you select a condition, enter the value or values for the condition at the adjoining field located to the right of the Condition field. If several criteria are needed to identify the records, insert a row for each selection criteria.

Note: To speed up your searches, use the "Is equal to" or the "Begins with" condition instead of "Contains."

The following conditions are available:

Condition	Function
All	Selects all information for the Select Field.
Is equal to	Selects only the information for the Select Field that is equal to the value entered at the field located to the right of the Condition field.
Is not equal to	Selects only the information for the Select Field that is not equal to the value entered at the field located to the right of the Condition field.
Is between	Selects only the information between the value at the Select Field and the value entered at the field located to the right of the Condition field.
Is not between	Selects only the information that is not between the value at the Select Field and the value entered at the field located to the right of the Condition field.

Condition	Function
Is greater than	Selects only the information for the Select Field that is greater than the value entered at the field located to the right of the Condition field.
Is less than	Selects only the information for the Select Field that is less than the value entered at the field located to the right of the Condition field.
Is greater than or equal to	Selects only the information for the Select Field that is greater than or equal to the value entered at the field located to the right of the Condition field.
Is less than or equal to	Selects only the information for the Select Field that is less than or equal to the value entered at the field located to the right of the Condition field.
Begins with	Selects only the information for the Select Field that begins with the value entered at the field located to the right of the Condition field.
Does not begin with	Selects only the information for the Select Field that does not begin with the value entered at the field located to the right of the Condition field.
Ends with	Selects only the information for the Select Field that ends with the value entered at the field located to the right of the Condition field.
Does not end with	Selects only the information for the Select Field that does not end with the value entered at the field located to the right of the Condition field.
Contains	Selects only the information for the Select Field that contains the value entered at the field located to the right of the Condition field.

Sage 500 ERP Tax Forms Service





This application must be installed on the Sage 500 ERP client that is running the 1099 forms processing. It is not necessary to install this application on any other workstations. All 1099 processing should be done on the same machine as Aatrix stores history files on a machine and not in the cloud.

Depending upon your system settings, administrator access may be required to install or uninstall the Sage 500 ERP Tax Forms Service. To install the service, you may need to right-click the install file name and click the option to run as administrator.

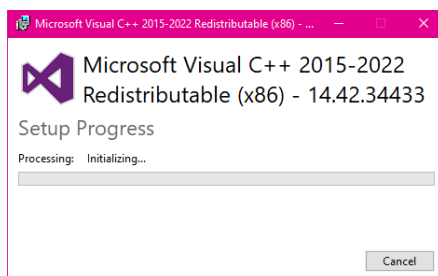
The original version that has been used since 2016 is no longer valid. Please get the newer version from the portal and install it prior to doing your 1099 processing for TY 2024. This change is driven by Aatrix Software needs.

The newer version of this application should have an Apps & Features signature greater than or equal to:

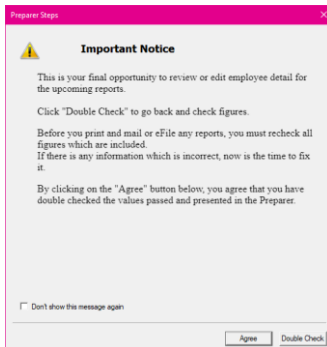
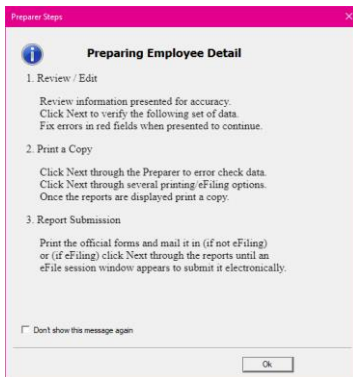
Apps & features

		11/25/2024
	Sage 500 ERP 2024 Database Utilities	0.98 GB 6/10/2024
	Sage 500 ERP 2024 Server Update	1.91 MB 11/11/2024
	Sage 500 ERP Tax Forms Service	201 MB 12/4/2024
	24.3.10	
<input type="button" value="Modify"/> <input type="button" value="Uninstall"/>		

Starting in TY 2024 you may also see some additional screens or pop-ups when processing 1099 forms. These are actually Aatrix Software driven screens. Some examples might include:



This above screen may appear if the VC++ runtime is not installed on your machine.



Note that these screens may or may not appear, and that they were noticed for TY 2024, and may not occur in future tax years.