



2025 ASK A SAGE EXPERT SERIES

The Tax Labyrinth:

A 1099 Filing Adventure



Today's Presenters



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Quest Objectives



01

Tips to review and find updates needed for 1099 reporting.

02

Learn how to update Vendor cards and 1099 transactions via Import template.

03

See how controls and best practices can be built in Intacct to preventing issues in the future.

1099 Reporting

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1099 Reporting



Initial
Consideration:
Determine if filing
a single 1099 or if
forms by separate
entities are
needed

Custom Vendor
view for 1099
Review

1099 Report

1099 Reporting

★ [Home](#) Accounts Payable 🔍 Search

Vendors

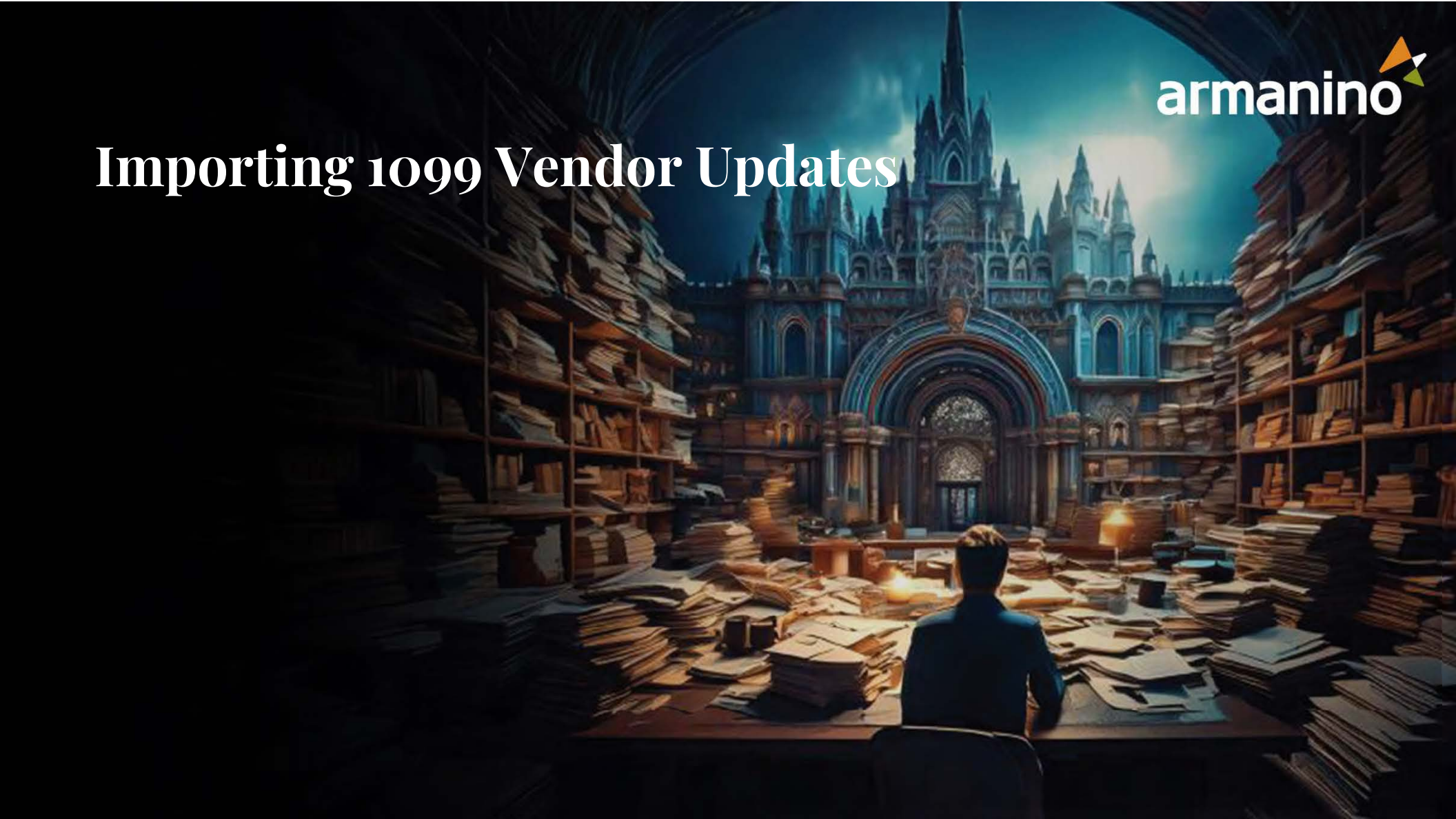
Turn on enhanced list [Add](#) [Delete](#) [Done](#) [Import](#) [Export](#)

1099 Vendor Detail Manage views Group filters Nothing selected Include private [Advanced filters](#) [Clear all filters](#)

(1 - 13 of 13)

Select	Vendor ID	Vendor name	Vendor type ID	1099 name	Form 1099 type	Form 1099 box	Delete
<input type="checkbox"/>							<input type="checkbox"/>
<input type="checkbox"/> Edit View	20013	Kaufman & Langer LLP	Subcontractors	Kaufman & Langer LLP	NEC	1	Pay <input type="checkbox"/>
<input type="checkbox"/> Edit View	20014	Kristofferson Consulting	Subcontractors	Kristofferson Consulting	NEC	1	Pay <input type="checkbox"/>
<input type="checkbox"/> Edit View	20015	HC Equipment Repair	Subcontractors		NEC	1	Pay <input type="checkbox"/>
<input type="checkbox"/> Edit View	20021	Linda Hicks	Subcontractors		NEC	1	Pay <input type="checkbox"/>
<input type="checkbox"/> Edit View	20022	Lee Thomas	Subcontractors				Pay <input type="checkbox"/>

Importing 1099 Vendor Updates



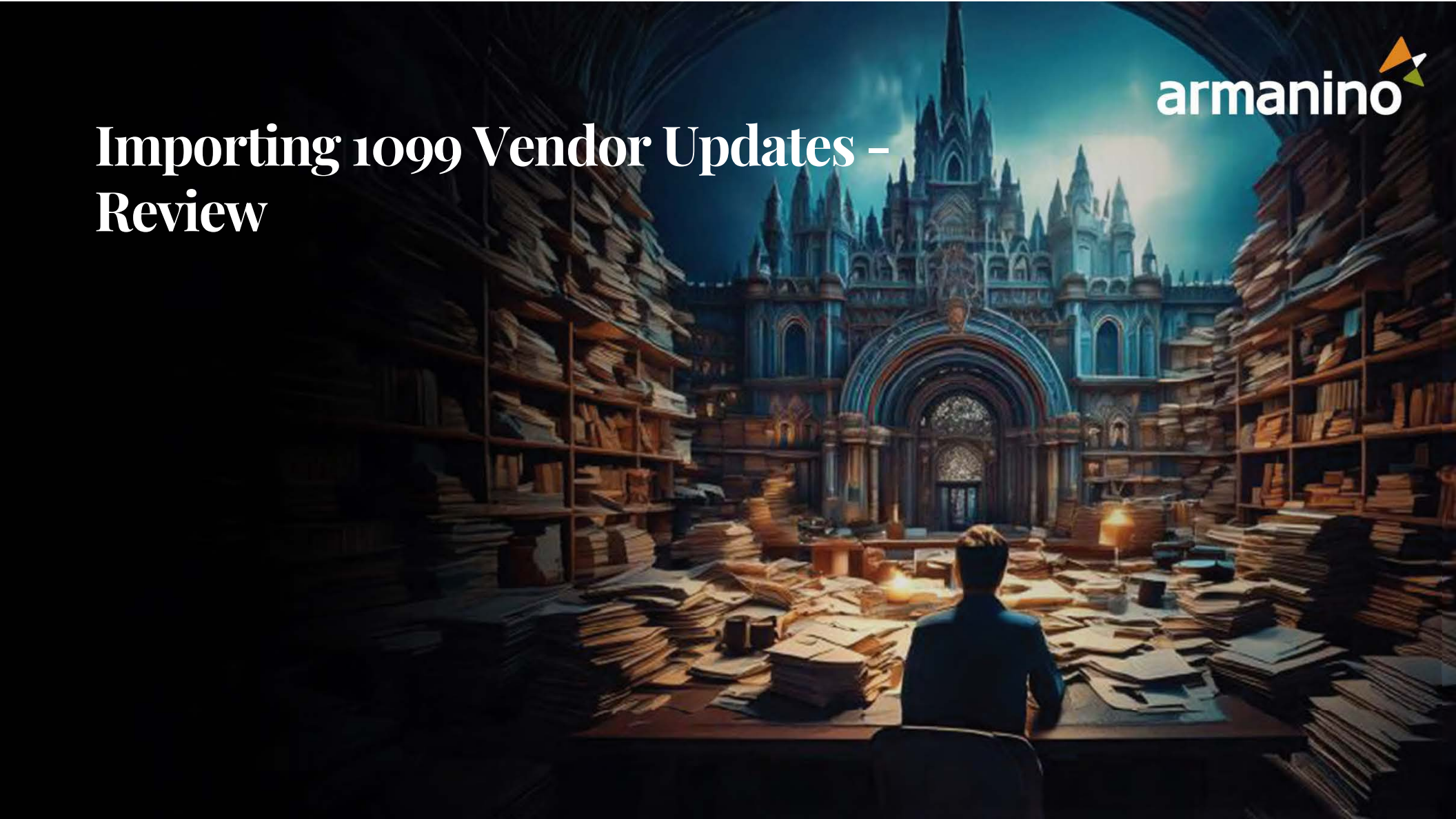
Importing 1099 Vendor Updates

- ✓ Review and update Vendor 1099 detail
- ✓ Determine transaction update method
- ✓ Import template
- ✓ Review 1099 Reporting
- ✓ If filing manually, print 1099 file

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Importing 1099 Vendor Updates – Review



Platform Customizations to Assist in 1099



Custom Field and Smart Rule to ensure all 1099 Vendors are set up



Require Attachments for 1099 Vendors via a Platform Trigger

Require 1099 Vendor Detail – Custom Field

☰ Custom field

Step 1 Choose object to extend

Object
Vendor

☰ Custom field

Step 2 Choose field data type

Data type
Checkbox

☰ Custom field

Step 3 Choose checkbox field characteristics

Label
Non 1099 Vendor

Default value
Unchecked

Field ID
NON_1099_VENDOR

Description
Custom Field for use in Vendor 1099 Check Smart Rule.

☰ Custom field

Step 4 Choose deployment options

Field is required
False

Field is hidden
False

Field is inactive
False

Section where field appears
Vendor details

Tab where field appears
Additional information

Vendor **Additional information** Contact list Payment information

Vendor details

Type ID

[Subcontractors](#)

Parent

--

GL group

--

DATEV ID

--

1099 name

Kaufman & Langer LLP

Form 1099

Form: 1099 - NEC

1099 box

1 - Nonemployee compensation

Attachment

--

Non 1099 Vendor

Require 1099 Vendor Detail – Smart Rule

☰ Smart rules

Step 1 Choose object to extend

Owner object
Vendor

☰ Smart rules

Step 2 Select rule properties

Type
Error

Events
Add
Set

Condition

{!VENDOR.FORM1099TYPE!} != '' xor (!VENDOR.NON_1099_VENDOR!) == 'true'

Error message

Please denote Vendor 1099 detail on the Additional Info tab, or select Non 1099 Vendor.

☰ Smart rules

Step 3 Select deployment options

Smart rule ID
VENDOR1099CHECK

Description

Status
Active

Require Vendor W9 – Platform Trigger

Platform Services > Objects > View

Component list shortcuts: [Fields \(106\)](#) | [Relationships \(3\)](#) | [Pages \(4\)](#) | [Views \(1\)](#) | [Custom views \(3\)](#) | [Email templates](#) | [Platform document templates](#) | [Smart links](#) | [Smart rules \(4\)](#) | [Smart events \(1\)](#) | [Triggers](#) | [Data maps](#) |

Object definition: Vendor Edit properties & attributes

Object properties

Is managed <input checked="" type="checkbox"/> Only the application publisher can modify this object	Audit trail enabled <input checked="" type="checkbox"/>
Singular name Vendor	Flagging enabled <input type="checkbox"/>
Plural name Vendors	Viewed/unviewed tracking <input type="checkbox"/>
Record name Vendor name	GL dimension <input checked="" type="checkbox"/>
Name template {VENDOR.VENDORID}	Deployed <input checked="" type="checkbox"/>
Integration name VENDOR	Is custom object <input type="checkbox"/>
Default process Not applicable	Is restricted <input type="checkbox"/>
Description List of vendors.	Enforce balancing in the General Ledger <input type="checkbox"/>
Object icon	Autofill related objects <input type="checkbox"/>

Triggers | [New trigger](#) | [Reorder](#) | [Debug](#) | [View log](#)

No triggers defined.

Require Vendor W9 – Platform Trigger

Platform Services > Objects > Vendor > Trigger

Vendor: New trigger Next > Cancel

Trigger type

Select the type of action to perform when this trigger is activated.

Trigger type	Type	Description
<input checked="" type="radio"/>	Validation	Formula-based data validation
<input type="radio"/>	Update field value	Update the value of a field in this record or a related record
<input type="radio"/>	Create new record	Create at least one conversion map before using this event type.
<input type="radio"/>	Attach related record	Attach this record to a related record (establish a relationship between two records)
<input type="radio"/>	Run triggers on related records	Run triggers on related records based on selected relationships. Note: Other trigger types do not invoke triggers on related records.
<input type="radio"/>	Send email	Send an email based on an email template
<input type="radio"/>	HTTP post	Send a request to an external system using HTTP POST
<input type="radio"/>	Intacct API	Send a request to the Intacct API
<input type="radio"/>	Event queue	Queue payloads in a temporary storage for later consumption. You will be able to poll the payloads.
<input type="radio"/>	Intacct REST API	Send a request to the Intacct REST API

Next > Cancel

Require Vendor W9 – Platform Trigger

Deployment status

This trigger is deployed

General properties

Trigger Before create Before update Before delete
 After create After update After delete

Type Validation

Trigger name 1099 Attachment Required

For triggers set to activate after updates: You can set trigger activation to occur when a specified field's value changes by selecting the field here.

On field change Any update

Trigger type properties

Use the formula editor to specify a formula that returns a **null** upon successful validation. For a validation failure, have the formula return the **error string** you want to display to the user. The record will not be saved if validation fails.

Available merge fields

Select field type	Select field	Copy merge field token	SUM token	Select field value
Vendor	Nothing selected			

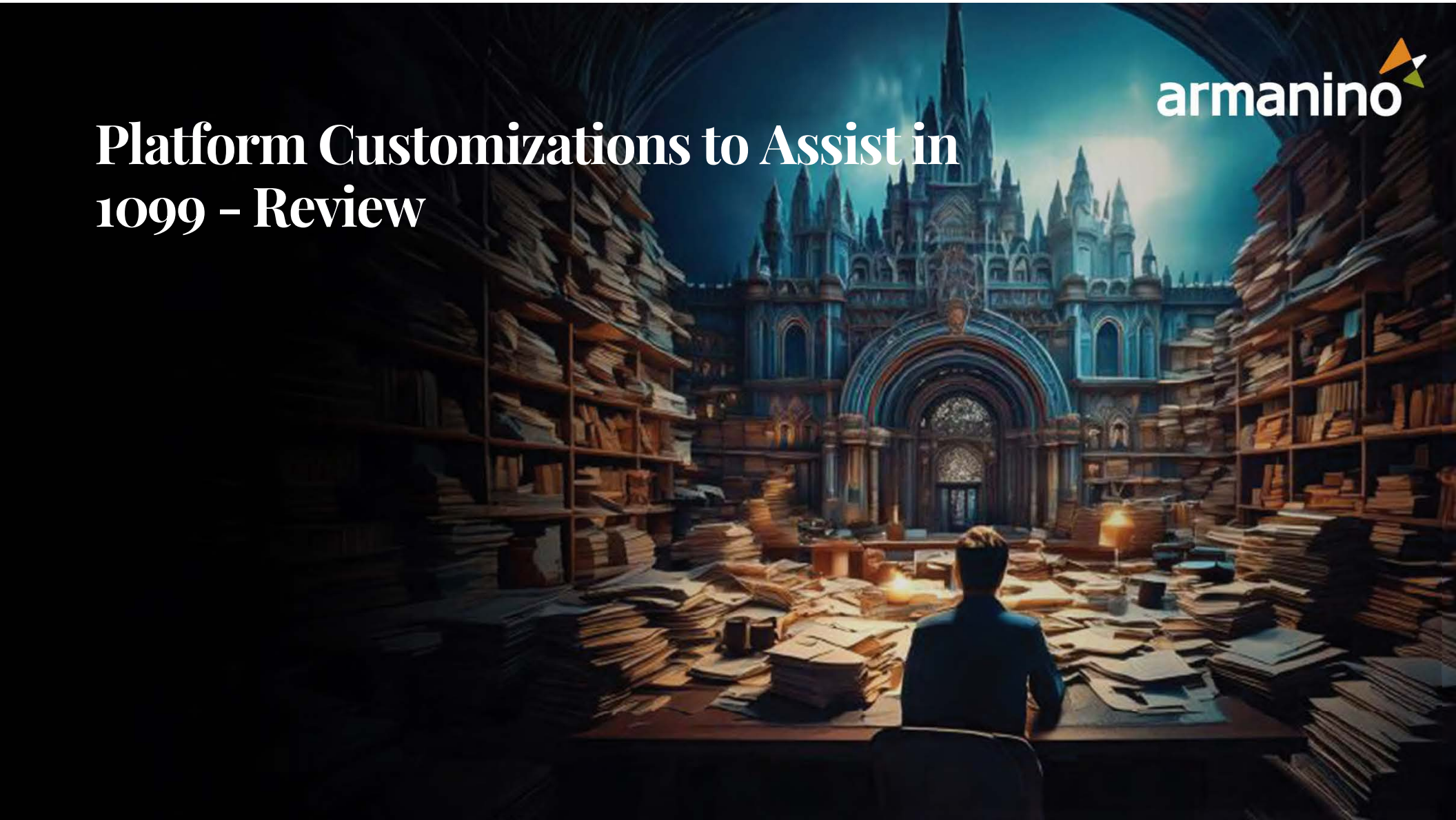
Validate syntax: Enter your formula and check it for errors.

Debug: To debug your formula select a Vendor.

```
1 var ATT = "{!VENDOR.SUPDOCID!}";
2 var VENTYPE = "{!VENDOR.NON_1099_VENDOR!}";
3
4 if (ATT == '' && VENTYPE == '')
5
6 {return 'Please attach W2 to this Vendor, or confirm 1099 settings.'}
7 else
8 {return null}
```

Platform Customizations to Assist in 1099 – Review

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Additional Considerations

1 File Electronically with TaxBandits.

2 If filing manually, be sure to order the latest forms for the upcoming season! Test your printer alignment prior and make any adjustments necessary before your run.

3 Enable 1099 Override if necessary.

4 Consider Vendor Approvals to prevent errors before they occur.

5 Additional Tracking can occur with the Custom Report Writer.



Thank You

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