

Edit 1099 Information

After posting 1099 transactions, 1099 data might have to be edited. This screen allows to modify 1099 details on vendors and transactions. The screen provides two options to modify 1099 information, namely:

- a. Vendors
- b. Transactions

When the option *Vendors* is selected, only the 1099 information on the *Vendor Master* record of the selected vendors will be updated. You need to select the range of vendors and specify the existing 1099 tax type and 1099 box that needs to be changed and the 1099 tax type and 1099 box values to which it needs to be changed.

When *Transactions* option is selected then you will have to select vendor range, voucher range and date range. Clicking the *Process* button, a grid appears listing vouchers based on the selection criteria. Here you can edit the New 1099 Type, New 1099 Box and New 1099 Amount.

Go To: Accounts Payable → AP Transaction → Edit 1099 Information.

1099 Edit Information Criteria – Add Mode

Click on the *Edit 1099 Information* option from the main menu. The system displays the *Edit Information Criteria* screen.

Edit Information Criteria

Vendor ☒ Voucher ☐ Payment ☐

Vendor Key From: V101

Vendor Key To: V104

1099 Type From: 1

1099 Type To: 3

1099 Box From: 1a

1099 Box To: 6

Voucher No. From:

Voucher No. To:

Voucher Date From: 09/14/20

Vendor Description From: Chemtrade

Vendor Description To: CPS Chemicals

1099 Type Description From: Dividend

1099 Type Description To: Miscellaneous

1099 Box Description From: Total Ordinary Dividends

1099 Box Description To: Medical and health care payments

Voucher Description From:

Voucher Description To:

Voucher Date To: 09/14/20

Vendor Details

Action	Select	Vendor Key	Vendor Name	Old Type Key	Old 1099 Type	Old 1099 Box	Old Box Descr...	New Type Key	New 1099 Type	New 1099 Box	New Box Descr...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	V101	Chemtrade	0	Not a 1099 Vendor			<input type="text"/> <input type="button" value="Q"/>		<input type="text"/> <input type="button" value="Q"/>	

Screen Fields (with Vendor Option)

Edit Information Criteria

Vendor ☒ Voucher ☐ Payment ☐

Vendor Key From: V101 [Q] Vendor Description From: Chemtrade

Vendor Key To: V104 [Q] Vendor Description To: CPS Chemicals

1099 Type From: 1 [Q] 1099 Type Description From: Dividend

1099 Type To: 3 [Q] 1099 Type Description To: Miscellaneous

1099 Box From: 1a [Q] 1099 Box Description From: Total Ordinary Dividends

1099 Box To: 6 [Q] 1099 Box Description To: Medical and health care payments

Voucher No. From: [Q] Voucher Description From: [Q]

Voucher No. To: [Q] Voucher Description To: [Q]

Voucher Date From: 09/14/20 [C] Voucher Date To: 09/14/20 [C]

Vendor Details

Add Line

Action	Select	Vendor Key	Vendor Name	Old Type Key	Old 1099 Type	Old 1099 Box	Old Box Description	New Type Key	New 1099 Type	New 1099 Box	New Box Description
[X]	<input checked="" type="checkbox"/>	V101	Chemtrade	0	Not a 1099 Vendor			[Q]		[Q]	

Process Save Close

Vendor: Selecting this option allows you to update the 1099 information on Vendor Master Records.

Vendor Key From: This field is used to specify the lower limit of the range of vendor key for filtering records to edit 1099 information.

Vendor Description From: This field displays the description of the Vendor Key. This is a read-only field.

Vendor Key To: This field is used to specify the upper limit of the range of vendors key for filtering records to edit 1099 information.

Vendor Description To: This field displays the description of the Vendor Key. This is a read-only field.

1099 Type From: This field is used to specify the lower limit of the range of 1099 type that needs to be edited on Vendor Master Records.

1099 Type Description From: This field displays the description of 1099 type. This is a read-only field.

1099 Type To: This field is used to specify the upper limit of the range of 1099 type that needs to be edited on Vendor Master Records.

1099 Type Description To: This field displays the description of 1099 type. This is a read-only field.

1099 Box From: This field is used to specify the lower limit of the range of 1099 Box value that needs to be edited on Vendor Master Records.

1099 Box Description From: This field displays the description of 1099 Box. This is a read-only field.

1099 Box To: This field is used to specify the upper limit of the range of 1099 Box value that needs to be edited on Vendor Master Records.

1099 Box Description To: This field displays the description of 1099 Box. This is a read-only field.

Voucher No. From: This field remains disabled in case Vendor option is selected.

Voucher Description From: This field remains disabled in case Vendor option is selected.

Voucher No To: This field remains disabled in case Vendor option is selected.

Voucher Description To: This field remains disabled in case Vendor option is selected.

Voucher Date From: This field remains disabled in case Vendor option is selected.

Voucher Date To: This field remains disabled in case Vendor option is selected.

Grid Fields:

Vendor Details											
Add Line											
Action	Select	Vendor Key	Vendor Name	Old Type Key	Old 1099 Type	Old 1099 Box	Old Box Description	New Type Key	New 1099 Type	New 1099 Box	New Box Desc...
	<input type="checkbox"/>	#100	American	1	Dividend And	01a	Total Ordinary Dividends	10	<input type="text" value="Anillesh 1099"/>	AS2	<input type="text" value="AS Box2"/>

Add Line: Clicking this button displays a lookup listing all the vendor records. Select the desired vendor record to add in the grid for editing 1099 information.

Vendor Lookup						
<input type="text" value="Search"/> <input type="checkbox"/> Show Column Filter						
Drag a column header and drop it here to group by that column						
Vendor_Key	Vendor_Name	Vendor Class Loo...	TypeKey1099	Type1099	Box1099	BoxDesa
#100	American	GLOBAL	1	Dividend And	01a	Total Ordin
101		RPC	0	Not a 1099 Vendor		
2345	Global Suppliers	MAC D	0	Not a 1099 Vendor		
A1		GLOBAL	0	Not a 1099 Vendor		
A100	A100	ASSA	0	Not a 1099 Vendor		
A200	A200	SHREE	0	Not a 1099 Vendor		
ABC	Global Suppliers	GLOBAL	0	Not a 1099 Vendor		
AMERICAN TOURIS	American Touristor	USA	0	Not a 1099 Vendor		
AS	SAS	GLOBAL	0	Not a 1099 Vendor		
AS1	1SAS	POPO	0	Not a 1099 Vendor		
<div> 10 items per page 1 - 10 of 48 items</div>						

Action : Click this button to delete the selected line.

Select: Mark or unmark the vendor lines for editing the 1099 information.

Vendor Key: Displays the vendor key of the vendor.

Vendor Name: Displays the vendor name.

Old Type: Displays the 1099 Type Key associated with the vendor that needs to be edited.

Old 1099 Type Key: Displays the 1099 Type associated with the 1099 Type Key that needs to be edited.

Old 1099 Box: Displays the 1099 Box associated with vendor.

Old Box Description: Displays the 1099 Box Description associated with the vendor and needs to be edited.

New Type Key: This field is used to specify the new 1099 Type Key to be entered for the vendor. It defaults from the filter criteria screen and can be changed.

New 1099 Type: Displays the 1099 Type associated with New Type key specified in the above field.

New 1099 Box: This field is used to specify the new 1099 Box value that is to be entered on the vendor.

New 1099 Box Description: Displays the 1099 box description of the 1099 Box specified in the above field.

Screen Fields (with Voucher Option)

Edit Information Criteria

Vendor Voucher Payment

Vendor Key From: #100 Vendor Description From: American

Vendor Key To: Vendor Description To:

1099 Type From: 1 1099 Type Description From: Dividend And

1099 Type To: 10 1099 Type Description To: Anilesh 1099

1099 Box From: 01a 1099 Box Description From: Total Ordinary Dividends

1099 Box To: AS2 1099 Box Description To: AS Box2

Voucher No. From: Voucher Description From:

Voucher No. To: Voucher Description To:

Voucher Date From: 09/14/2020 Voucher Date To: 09/14/2020

Voucher Details

Add Line

Action	Select	Vendor Key	Vendor Name	Voucher No.	Voucher Date	Voucher Amount	Old Type Key	Old 1099 Type	Old 1099 Box	Old Box Description	Old 1099 Amount	New Type Key	New 1099 Type	New 1099 Box
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	DEEPAK	deepak	10002	1/5/2018	160.00								

Process Save Close

Voucher: Selecting this option allows you to update the 1099 information on voucher records.

Vendor Key From: This field is used to specify the lower limit of the range of vendor key for filtering records to edit 1099 information.

Vendor Description From: This field displays the description of the Vendor Key. This is a read-only field.

Vendor Key To: This field is used to specify the upper limit of the range of vendors key for filtering records to edit 1099 information.

Vendor Description To: This field displays the description of the Vendor Key. This is a read-only field.

1099 Type From: This field is used to specify the lower limit of the range of 1099 type that needs to be edited on Vendor Master Records.

1099 Type Description From: This field displays the description of 1099 type. This is a read-only field.

1099 Type To: This field is used to specify the upper limit of the range of 1099 type that needs to be edited on Vendor Master Records.

1099 Type Description To: This field displays the description of 1099 type. This is a read-only field.

1099 Box From: This field is used to specify the lower limit of the range of 1099 Box value that needs to be edited on Vendor Master Records.

1099 Box Description From: This field displays the description of 1099 Box. This is a read-only field.

1099 Box To: This field is used to specify the upper limit of the range of 1099 Box value that needs to be edited on Vendor Master Records.

1099 Box Description To: This field displays the description of 1099 Box. This is a read-only field.

Voucher No. From: The lower limit of the voucher number range used to filter voucher details for editing the 1099 information.

Voucher Description From: This field displays the description of Voucher Number selected in above field. This is a read-only field.

Voucher No To: The upper limit of the voucher number range used to filter voucher details for editing the 1099 information.

Voucher Description To: This field displays the description of Voucher Number selected in above field. This is a read-only field.

Voucher Date From: This field displays the lower date range used to filter voucher details for editing the 1099 information.

Voucher Date To: This field displays the upper date range used to filter voucher details for editing the 1099 information.

Grid Fields:

Voucher Details														
Add Line														
Action	Select	Vendor Key	Vendor Name	Voucher No.	Voucher Date	Voucher Amount	Old Type Key	Old 1099 Type	Old 1099 Box	Old Box Description	Old 1099 Amount	New Type Key	New 1099 Type	New 1099 Bo
	<input checked="" type="checkbox"/>	DEEPAK	deepak	10002	1/5/2018	160.00	0				0			

Add Line: Clicking this button displays a lookup listing all the Voucher records. Select the desired voucher record to add in the grid for editing 1099 information.

Voucher Lookup

Search

Show Column Filter


Drag a column header and drop it here to group by that column

VoucherNo	TransactionNo	VendorKey	VendorName	City	VoucherDate	Voucher
10002	10002	DEEPAK	deepak		2018-01-05T00:00:00	160
1100067	1100067	V1			2017-12-28T00:00:00	1
1100071	1100071	V1			2017-12-28T00:00:00	1
1100072	1100072	V1			2017-12-29T00:00:00	5
1100102	1100102	DEEPAK	deepak		2018-01-11T00:00:00	1200
1100110	1100110	SHREE	Shree Enterprises	Indore	2018-01-12T00:00:00	1290
1100142	1100142	REAL FOOD	Real Food Industries	Gurgaon	2018-01-24T00:00:00	500
1100143	1100143	REAL FOOD	Real Food Industries	Gurgaon	2018-01-24T00:00:00	610
CMVMAR16001	27	MAC D	Mac Donald		2016-03-29T00:00:00	125
CMVMAR16002	36	MAC D	Mac Donald		2016-03-30T00:00:00	300

10

 items per page

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Action : Click this button to delete the selected line.

Select: Mark or unmark the Voucher lines for editing the 1099 information.

Vendor Key: This field displays the vendor key of the vendor as per the voucher details. This is a read only field.

Vendor Name: This field displays the vendor name as per the voucher details. This is a read only field.

Voucher No.: This field displays the voucher number against the selected vendor. This is a read only field.

Voucher Date: This field displays the voucher date. This is a read only field.

Voucher Amount: This field displays the voucher amount. This is an editable field so you can enter the amount for editing.

Old Type Key: Displays the 1099 Type Key associated with the vendor that needs to be edited.

Old 1099 Type: Displays the 1099 Type associated with the 1099 Type Key that needs to be edited.

Old 1099 Box: Displays the 1099 Box associated with vendor.

Old Box Description: Displays the 1099 Box Description associated with the vendor and needs to be edited.

New Type Key: This field is used to specify the new 1099 Type Key to be entered for the vendor. It defaults from the filter criteria screen and can be changed.

New 1099 Type: Displays the 1099 Type associated with New Type key specified in the above field.

New 1099 Box: This field is used to specify the new 1099 Box value that is to be entered on the vendor.

New 1099 Box Description: Displays the 1099 box description of the 1099 Box specified in the above field.

New 1099 Amount: This field is used to specify the new 1099 amount to be entered for the voucher.

Screen Fields (with Payment Option)

Edit Information Criteria

Vendor Voucher **Payment**

Vendor Key From: #100 Vendor Description From: American

Vendor Key To: Vendor Description To:

1099 Type From: 1 1099 Type Description From: Dividend And

1099 Type To: 10 1099 Type Description To: Anilesh 1099

1099 Box From: 01a 1099 Box Description From: Total Ordinary Dividends

1099 Box To: AS2 1099 Box Description To: AS Box2

Payment No. From: Payment Description From:

Payment No. To: Payment Description To:

Payment Date From: 09/14/2020 Payment Date To: 09/14/2020

Payment Details

[Add Line](#)

Action	Select	Vendor Key	Vendor Name	Payment No.	Payment Date	Payment Amount	Old Type Key	Old 1099 Type	Old 1099 Box	Old Box Description	Old 1099 Amount	New Type Key	New 1099 Type	New 1099 Amount
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	GLOBAL SUP	Global Suppliers	1	5/14/2015	50.00	0				0.00			

[Process](#) [Save](#) [Close](#)

Payment: Selecting this option allows you to update the 1099 information on payment entry.

Vendor Key From: This field is used to specify the lower limit of the range of vendor key for filtering records to edit 1099 information.

Vendor Description From: This field displays the description of the Vendor Key. This is a read-only field.

Vendor Key To: This field is used to specify the upper limit of the range of vendors key for filtering records to edit 1099 information.

Vendor Description To: This field displays the description of the Vendor Key. This is a read-only field.


1099 Type From: This field is used to specify the lower limit of the range of 1099 type that needs to be edited on Vendor Master Records.

1099 Type Description From: This field displays the description of 1099 type. This is a read-only field.

1099 Type To: This field is used to specify the upper limit of the range of 1099 type that needs to be edited on Vendor Master Records.

1099 Type Description To: This field displays the description of 1099 type. This is a read-only field.

1099 Box From: This field is used to specify the lower limit of the range of 1099 Box value that needs to be edited on Vendor Master Records.

Action : Click this button to delete the selected line.

Select: Mark or unmark the Payment lines for editing the 1099 information.

Vendor Key: Displays the vendor key of the vendor.

Vendor Name: Displays the vendor name.

Payment No.: This field displays the payment number against the selected vendor. This is a read only field.

Payment Date: This field displays the payment date. This is a read only field.

Payment Amount: This field displays the payment amount. This is an editable field so you can enter the amount for editing.

Old Type Key: Displays the 1099 Type Key associated with the vendor that needs to be edited.

Old 1099 Type: Displays the 1099 Type associated with the 1099 Type Key that needs to be edited.

Old 1099 Box: Displays the 1099 Box associated with vendor.

Old Box Description: Displays the 1099 Box Description associated with the vendor and needs to be edited.

New Type Key: This field is used to specify the new 1099 Type Key to be entered for the vendor. It defaults from the filter criteria screen and can be changed.

New 1099 Type: Displays the 1099 Type associated with New Type key specified in the above field.

New 1099 Box: This field is used to specify the new 1099 Box value that is to be entered on the vendor.

New 1099 Box Description: Displays the 1099 box description of the 1099 Box specified in the above field.

New 1099 Amount: This field is used to specify the new 1099 amount to be entered for the payment.

Editing 1099 Information

1. Open the Edit 1099 Information screen
2. Select the option as one of *Vendor*:
 - a. When the option *Vendors* is selected, only the 1099 information on *Vendor Master* Record of the selected vendors will be updated.

- b. Specify the range of vendors in the respective fields for filtering data for editing 1099 information of vendor records.
 - c. Specify the range of 1099 Type in the respective fields for filtering data for editing 1099 information of vendor records.
 - d. Specify the range of 1099 Box in the respective fields for filtering data for editing 1099 information of vendor records.
 - e. Click on the Process button to obtain the vendor records satisfying the filter criteria.
 - f. Click on the *Add line* button to open the *Vendor Lookup* window and select the record.
 - g. A grid appear listing records based on the selection criteria.
 - h. The existing 1099 details of the listed vendors and the proposed new 1099 details gets listed
 - i. If required modify the new 1099 type key and box, if needed.
 - j. Select the vendor lines that needs to be processed using the *Select* option.
 - k. Finally click on the *Save* button to update the vendor records with new values.
3. Select the option as one of *Voucher*:
- a. When the option *Voucher* is selected, only the 1099 information on *Voucher Master* Record of the selected Vouchers will be updated.
 - b. Specify the range of vendors in the respective fields for filtering data for editing 1099 information of vendor records.
 - c. Specify the range of 1099 Type in the respective fields for filtering data for editing 1099 information of vendor records.
 - d. Specify the range of 1099 Box in the respective fields for filtering data for editing 1099 information of vendor records.
 - e. Specify the range of Voucher No in the respective fields for filtering data for editing 1099 information of vendor records.
 - f. Specify the range of Voucher Date in the respective fields for filtering data for editing 1099 information of vendor records.
 - g. Click on the Process button to obtain the voucher records satisfying the filter criteria.
 - h. A grid appear listing records based on the selection criteria.
 - i. The existing 1099 details of the listed Vouchers and the proposed new 1099 details gets listed
 - j. If required modify the new type key and New 1099 box, if needed.
 - k. Select the voucher lines that needs to be processed using the *Select* option.

- I. Finally click on the *Save* button to update the voucher records with new values.
4. Select the option as one of *Payment*:
 - a. When the option *Payment* is selected, only the 1099 information on *Payment Master* Record of the selected Payment records will be updated.
 - b. Specify the range of vendors in the respective fields for filtering data for editing 1099 information of vendor records.
 - c. Specify the range of 1099 Type in the respective fields for filtering data for editing 1099 information of vendor records.
 - d. Specify the range of 1099 Box in the respective fields for filtering data for editing 1099 information of vendor records.
 - e. Specify the range of Payment No in the respective fields for filtering data for editing 1099 information of vendor records.
 - f. Specify the range of Payment Date in the respective fields for filtering data for editing 1099 information of vendor records.
 - g. Click on the *Process* button to obtain the payment records satisfying the filter criteria.
 - h. Click on the *Add line* button to open the *Payment Lookup* window and select the record.
 - i. A grid appear listing records based on the selection criteria.
 - j. The existing 1099 details of the listed payments and the proposed new 1099 details gets listed.
 - k. If required modify the new type key and New 1099 box, if needed.
 - l. Select the payment lines that needs to be processed using the *Select* option.
 - m. Finally click on the *Save* button to update the payment records with new values.