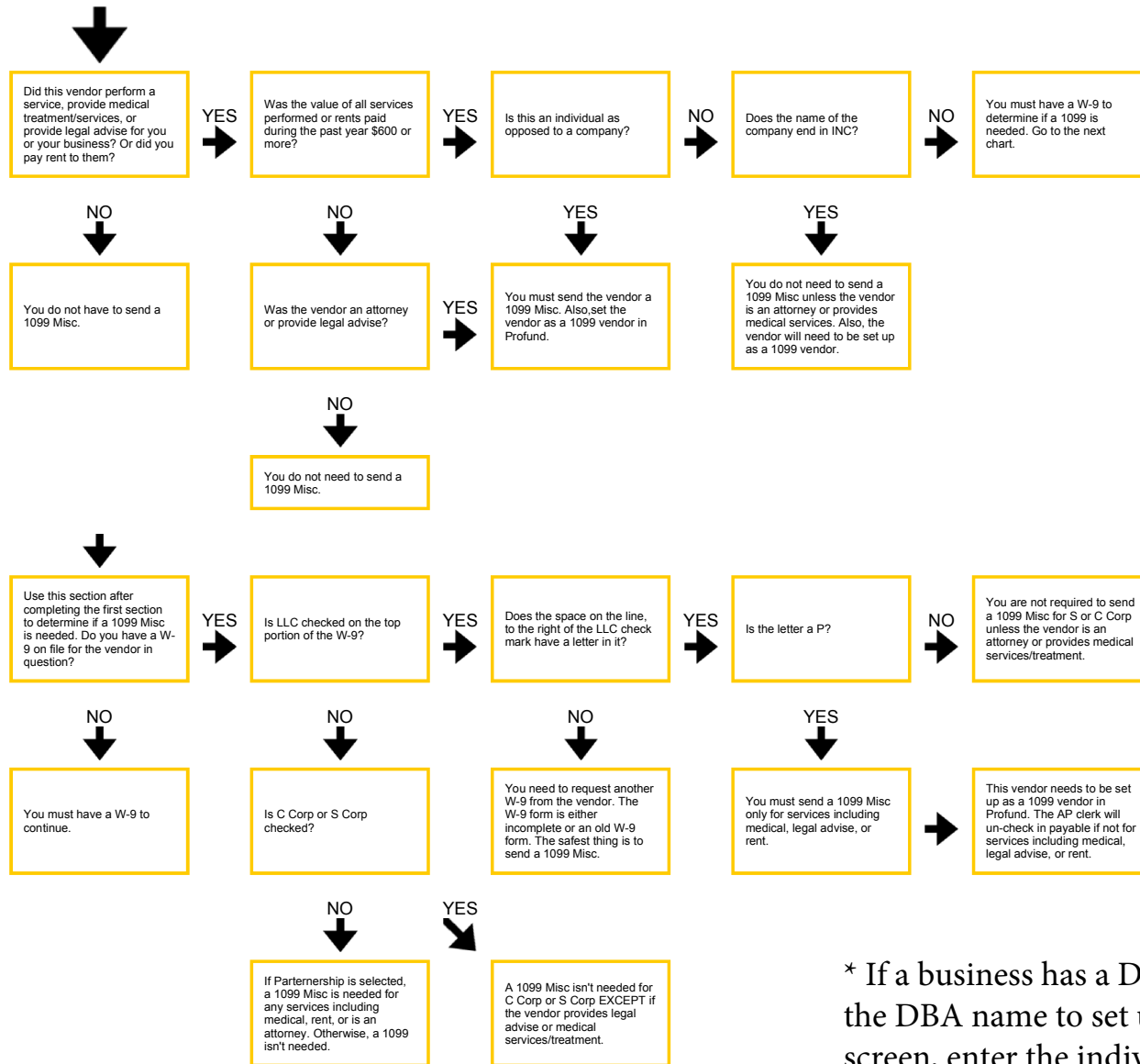


1099 Help Chart

This flowchart will help to determine when a 1099 Misc form is needed for a vendor.

P= check 1099 box
I= check 1099 box



1099 Codes

(A) Attorney Fees

(M) Medical/Health-for medical/health services

(N) Non-Employment Comp-for independent contractors and/or individuals that are not employees

(O) Other Income-for any other payments for services not listed above including rent.

* If a business has a DBA name listed on the second line of the W-9, use the DBA name to set up the vendor and under the Contact Information screen, enter the individual's name as the Company Name and list the DBA name in the DBA box and list the address as shown on the W-9. You will also need to add an Address 1 and list the DBA name in the Company name column so that address can be used for check payments. See following pages for screenshots of vendor setup.

**Request for Taxpayer
 Identification Number and Cert**

Go to www.irs.gov/FormW9 for instructions and the

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, b

1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter entity's name on line 2.)
 Matthew Shy

2 Business name/disregarded entity name, if different from above.
 Bristol Gardens and Grill

3a Check the appropriate box for federal tax classification of the entity/individual whose name is on only one of the following seven boxes.

Individual/sole proprietor C corporation S corporation Partnership

LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) .
 Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) and the classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the box for the tax classification of its owner.

Other (see instructions)

3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as if you are providing this form to a partnership, trust, or estate in which you have an ownership interest, enter the name of the partnership, trust, or estate in which you have an ownership interest. See instructions

5 Address (number, street, and apt. or suite no.). See instructions.
 285 Vance Street

6 City, state, and ZIP code
 Bristol, VA 24201

7 List account number(s) here (optional)

This line is for the DBA name

Print or type.
 See Specific Instructions on page 3.

In Munis, go to Vendor and click Add and enter the following information:

General Vendor Information

Vendor * 1365 Entity * 1

Alpha * BRISTOL GARDEN AND G Type 02 - SCHOOL ACTIVITY

Status * ACTIVE Reason

The Type can also be 1. This vendor was entered for School Activity.

Main General Miscellaneous E-Procurement / E-Invoicing Settings C

Contact Information

Company name * MATTHEW SHY

DBA BRISTOL GARDENS AND GRILL

Address 285 VANCE STREET

Zip code 24201

City BRISTOL

State VA Virginia

Make sure to scroll down and enter either the Social Security or the Employer Identification # that is listed on the W-9. For this example, the EIN number was entered.

Identification

SSN

FID

DUNS

Independent contractor

Verified TIN

Click on the General tab and enter the following information:

Make sure that you select both the 1099 vendor box and the W-9 received box at the bottom of the screen.

The screenshot shows a software interface with several tabs: Main, General (selected), Miscellaneous, E-Procurement / E-Invoicing Settings, Contacts, User Defined, Certifications, Insurances, and Withholding. The 'General' tab is active, displaying various settings sections:

- Terms:** Discount percent (.000), Days to discount, Minimum order (.00), Days to net, Freight term/meth, Freight percent (.000).
- Default Tax Information:** Use tax vendor, Use tax group (0.000%), Sales tax group (0.000%).
- AP Retainage:** Status options: Always retain, Never retain (selected), Retain on threshold values.
- IRS Information:** 1099 vendor (checked), W-9 sent, W-9 received (checked), 1099 withholding. Default dropdown: N - NONEMPLOYEE COMPENSAT.
- Payment Receipt:** Method: Printed check (selected), Electronic fund transfer, Active card integration, Direct disbursement. Pre-note: None. ACH Override: ID Number, Name.
- Purchasing Delivery Method:** Print (selected), Fax, E-Mail, E-Procurement.
- Payables Delivery Method:** Print (selected), Fax, E-Mail.

Two red arrows point to the '1099 vendor' and 'W-9 received' checkboxes in the 'IRS Information' section.

Here are the 1099 boxes codes that you will need to select depending on what service the vendor will provide:

- (A) Attorney fees
- (M) Medical/Health payments
- (N) Non-Employee Compensation-for independent contractors and/or individuals payments that are not employees
- (O) Other Income-for any other payments not listed above including rent

Main **General** Miscellaneous E-Procurement / E-Invoicing Settings Contacts User Defined Certifications Insurances Withholding

Terms

Discount percent Days to discount

Minimum order Days to net

Freight term/meth Freight percent

Payment Receipt

Method Printed check
 Electronic fund transfer
 Active card integration
 Direct disbursement

Pre-note

ACH Override

ID Number

Name

Default Tax Information

Use tax vendor Use tax group 0.000%

Sales tax group 0.000%

Purchasing Delivery Method

Print
 Fax
 E-Mail
 E-Procurement

AP Retainage

Status Always retain
 Never retain
 Retain on threshold values

IRS Information

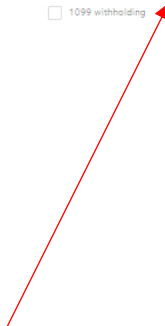
1099 vendor W-9 sent

Default W-9 received

1099 withholding

Payables Delivery Method

Print
 Fax
 E-Mail



This is the dropdown menu where you will need to enter either A, M, N, or O for the 1099 vendor type.

To add Address 1 click on the Addresses folder:  **Addresses (0)**

Vendor Addresses

Back | Search | Browse

Vendor Inquiry [Bristol Virginia Public Schools - PROD] > Vendor Addresses

Remit Address		Purchasing Delivery Method	Payables Delivery
Address number	1	<input checked="" type="checkbox"/> Print	<input checked="" type="checkbox"/> Print
Type *	GENERAL - General Addresses	<input type="checkbox"/> Fax	<input type="checkbox"/> Fax
Alpha *	BRISTOL GARDEN AND G	<input type="checkbox"/> E-Mail	<input type="checkbox"/> Email
Company Name	BRISTOL GARDENS AND GRILL	<input type="checkbox"/> E-Procurement	
DBA			
Address	285 VANCE STREET		
Zip code	24201		
City/State	BRISTOL VA Virginia		
Country			
Fax			
Email			
DUNS			
	<input checked="" type="checkbox"/> Active		

Contacts (0)

Purchasing Delivery Method

Payment Information

Payment rec't method

Printed Check
 Electronic fund transfer
 Active Card Integration
 Direct Disbursement

Prenote None

Put the DBA name as the Company Name and enter the address in the box shown above. This ensures that the check is made out to the company, not the individual, in this example Bristol Gardens and Grill.