CheckMark 1099

User's Manual



1099

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Chapter 1 Getting Started

CheckMark 1099 helps centralize all your 1099 filing needs. With this program you can print or even e-file all forms needed for filing 1099-MISC, 1099-DIV, 1099-INT, 1099-S, and 1099-R forms. The program has the option to print these forms on a pre-printed 2-up form or a blank sheet.

Before starting the set up of your company and recipients, please read through this manual. It covers general setup and 1099 requirements, as well as how you can receive additional support directly from Checkmark, Inc.

System Requirements

CheckMark 1099 can be installed on a computer running either Macintosh or Windows operating systems. This software is a single-user application and not designed for multiuser access of the data files. DO NOT install the application program on a server. Install the program locally on the user's hard drive even if you save the data on a server.

Users will need to have a computer running an operating system of either Windows 7 or higher including Windows 10, or Macintosh OS X 10.6 or higher including El Capitan.

Along with a compatible printer, the latest version of **Adobe Reader** is also required to properly print certain forms from the program. You can download a free copy of Adobe Reader from Adobe's website at www.Adobe.com.

Whichever operating system you choose, a working knowledge of the operating system is essential. For more information about the basics and navigation of your operating system, see the user manual that came with your computer.

Software and Patch Updates

Each year the program is issued with the latest 1099 Forms as well as added features. Program patches are released as needed throughout the year for the current version of the software. Patches are available online at www.checkmark.com. Hard Copy CDs can be purchased by calling the sales department at 800-444-9922.

Renewal notices are sent out each year, in the fall, announcing the next update. Updates must be purchased each year to receive support and the ability to install patches for changes.

How to Get More Help

This manual covers general set up and reporting. There may be items that are specific to your company that are not addressed here except in general terms. For these times, CheckMark, Inc. offers additional support.

Only registered users can receive technical support so please, take a moment and read the License Agreement, fill out the Registration Card and send it in.

Support is offered via internet submission, E-mail, fax or telephone. Whenever you contact support, have your customer number OR product registration number available. It is important that you are at your computer with CheckMark 1099 running when speaking with support to best resolve your question/problem.

Before Contacting Support/Other resources

Check for latest version

Users with internet access can make sure that they are up-to-date as often as they wish by selecting **Check for Updates** under the **Help** menu in the program. If necessary, download and install the latest update (may require purchase if not using the current year's version).

1099 Manual

Users can access the 1099 program manual from the Help menu while in the CheckMark 1099 program. An updated manual is included with each update.

Online Knowledge Base

Users with internet access can reference the online Knowledge Base for answers to common questions. You can access the Knowledge Base directly from the CheckMark website at www.checkmark.com.

Contacting CheckMark

For questions regarding the 1099 software, you can choose one of the following methods to request technical support:

Online at: http://www.checkmark.com Click on support and select Request Support

By Phone: 970-225-0387

Mail: CheckMark, Inc. 323 West Drake Rd. Suite100 Fort Collins, CO 80526

Chapter 2 Installation and Basic Use

Installing CheckMark 1099

Macintosh Installation

1. Close all programs and disable any anti-virus software.

For CD Installation

- 2. Insert the CheckMark 1099 CD-ROM into your computer's drive.
- 3. When the CD icon appears on the Desktop, open by double-clicking it, then doubleclick the CheckMark 1099 installer.
- 4. Follow the on-screen instructions to complete installation.

For Download Installation

- 5. Click on the link provided to download. After the download is complete, doubleclick the download file.
- 6. Follow the on-screen instructions to complete installation.

The default install location on the hard drive for CheckMark 1099 is: **Macintosh HD\Applications\CheckMark\1099\(year).** The (year) represents the current calendar year.

Install the program on the local drive.

Windows Install

1. Close all programs and disable any anti-virus software.

For CD Install

- 2. Insert the CheckMark 1099 CD-ROM into your computer's drive.
- 3. The Installer will start automatically.

If the installer does not start automatically after a minute, click your **Start** menu and then select **Run**.

Type in the path and filename in the **Run** box. That would be the drive name, colon (:), backslash (\), Filename. For example: **D:\setup**. Then click **Ok**.

4. Follow the on-screen instructions to complete installation.

For Download Install

- 5. Click on the link provided to start the download. After the download is complete, Choose **Run** or **Open**.
- 6. Follow the on-screen instructions to complete installation.

The default install location on the hard drive is C:\ProgramFilees\CheckMark\1099\(year). The (year) represents the current calendar year.

It is recommended to install the program on the local hard drive.

Opening CheckMark 1099: New User

- 1. Open the CheckMark 1099 application. You can use either the shortcut or alias that was created or go to the CheckMark 1099 folder that was installed and dou-ble-click the CheckMark 1099 application file.
- 2. The first time you open the program the welcome screen appears. This screen provides useful information regarding the set up of **Security, Customizing** screens and fonts and accessing the **Manual**.

Click the **Print** button to print out this information.

000	Welcome
C No	elcome to heckMark 1099 for 2017
Thank you for	purchasing CheckMark 1099 for 2017!
Please read the	e information below before continuing.
SECURITY	
manage User A button to enter	k 1099 encourages you to setup a Password to protect your private information. You can Accounts by selecting 'Admin' from the 'Tools' menu in the Main Menu. Click the 'Add User' r a Username and Password. Once you've setup a User Account, you will be prompted for your ion the next time you use CheckMark 1099.
Accounts, Back	Jser Account you setup will be given Administrative privileges, allowing you to manage User cup and Restore your information, and Edit Printing Formats. After you've setup an User Account, you may then setup other User Accounts with or without Administrative
Print Message	Copy Message
	Continue

Important: It is recommended that you set up a password to protect your private information. For information on setting up passwords, See "Setting up Users and Passwords" on page 19.

Opening CheckMark 1099: Upgrading Old Files

The information will be stored in a database that is created the first time you open your previous files. the default location is:

Macintosh: HD\Documents\CheckMark\1099\(year) Windows: C:\Documents\CheckMark\1099\(year)

- 1. Open the CheckMark 1099 application. You can either use the shortcut or alias that was created or go to the CheckMark 1099 folder that was installed and doubleclick the CheckMark 1099 application file.
- 2. If you have a previous 1099 database from a prior year, the program will ask you if you want to import the Company and Recipient information.
- 3. Click **Yes** to continue. Enter the Username and Password from the prior year, if requested.

CheckMark 1099 Los	check Ma 1099 Soft	ark" tvvare
Name	1	
Password	<u></u>	
Execute Log	in	Cancel Login

- 4. A pop up window asks if you want to clear out the prior amounts. Click **Yes** to zero out amounts and continue or **No** to retain the prior year's amount information
- 5. If you clicked **Yes**, you'll be notified once the data is successfully imported.

Database Manager

CheckMark 1099 stores company data in a database. When initially opening CheckMark 1099, a database named CheckMark_1099_Database_[year] is created.

If you complete 1099 forms for only one company, this is probably the only database you will need.

However, if you process forms for more than one company, you will need to choose one of the following options to manage your companies correctly. You can either store all of your company files in the same database, or you can create separate databases and store individual companies in them.

Storing Multiple Company Files in the Same Database

Each database can contain multiple companies. The advantage of storing all of your different company files in one database is that when you Backup Database, Restore DataBase, Close Database, or advance to a new year, all companies stored in that database will be backed up, restored, closed or advanced to a new year at the same time, saving you time.

Storing Company Files in Separate Databases

The advantage of storing each of your company files in separate databases is that you have more control over where your database is stored on your computer, as well as when you want to **Backup Database**, **Restore Database**, **Close Database**, or advance companies to a **New Year**.

Using the Database Manager

Choose Database Manager from the File menu.

			Database Manager			
1099 Year	Database Name				He	lp
* 2017	CheckMark 1	099 Databa	se			
Path /User	s/kristifisher/D	ocuments/Ch	eckMark/1099/2017/Ch	eckMark	1099 Database 2017.db	
* currently of	ppen					
Cre	ate New Database		Add Database to List		Find Databases	
R	ename Database		Move Database		Remove from List	
		Open Datab	ase Close Datab	oase Mana	ger	

Create New Database

This option allows you to create and save a new database in any location you wish. Keep in mind that each database can store multiple companies.

- 1. Click Create New Database.
- 2. Enter a **Database Name** and **Payroll Year.** Click the **Browse** button to select a new location to save the database.

000	Create Database
Database Name	CheckMark 1099 Database (Don't include year in name)
1099 Year	2017
Directory	/Users/kristifisher/Documents/CheckMark/1099/2017/ Choose Directory
Path	/Users/kristifisher/Documents/CheckMark/1099/2017/CheckMark 1099 Database 2017.db
	Cancel Create Database
	h.

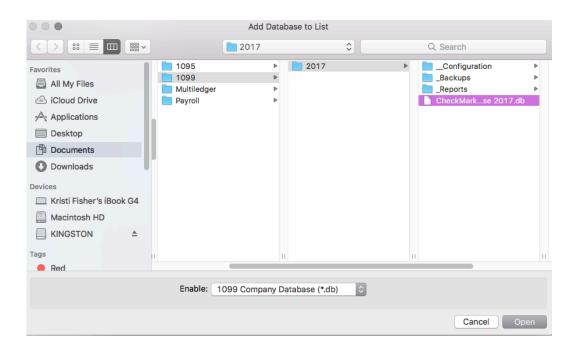
3. Click **Create Database** to save the new database.

Add Database to List

This button allows you to add an already-existing database to the list. For example, if you copied a database from another computer and the **Database Manager** does not list this database, you can choose **Add Database to List** and browse to that location to update the **Database Manager's** list.

1. Click Add Database.

An Open dialog box appears



- 2. Browse to the location where the database is saved.
- 3. Select the database and click **Open.**

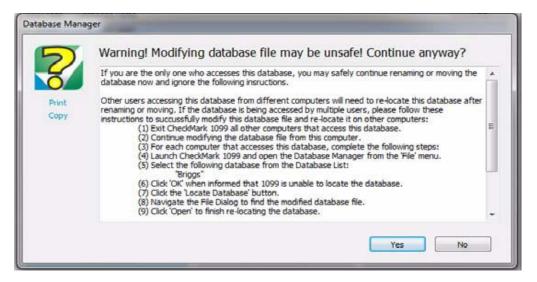
The database is added to the list in the Database Manager.

Rename Database

This option allows you to rename the database. It is recommended that you use only alphanumeric characters.

1. Click **Rename Database.** The

following alert appears:



- 2. Click Yes. Otherwise, if you don't want to rename at this time, click no
- 3. Enter the new name and click **Rename Database** to save.

The Rename Database window appears:

Rename Database		Te	
New Name	Briggs		
		ОК	Cancel

Remove From List

This option allows you to remove a database from the list.

- **Note:** This only removes the listing in the **Database Manager**. It does not delete the database file from the saved location. To delete a database, you will need to manually delete the database (.db) file from your hard drive or saved location.
 - 1. Click **Remove From List.**

A Warning message appears

5	Remove database from list?	
Print	Are you sure you want to remove the selected database from the list?	*
Сору		-

2. Click **Yes** to remove the database from the Database Manager list.

You can add the database again at anytime by using the Add Database command as long as you don't delete the database from the computer.

Open Database

This option allows you to choose a different database and open it up to view all saved companies in that particular database.

1. Select the database you want to open and click **Open Database.**

The new database is now open and all companies stored in this database are now available.

Close Database Manager

This option closes the Database Manager window.

Update Company

This commands allows you to update the currently selected company's information. Once the program is launched, open the database that contains the company you want to update. Highlight the company and click the **Update Company** command. Enter the information you want to change, then click **Update Company** to save the changes.

New Company

This Command allows you to add a new company to the database that is currently open. Once the program is launched open the database you wish save the company in. Click **New Company** then enter the information for this company. Click **Add Company** to save the company to the database.

Delete Company

This command allows you to delete a company from a currently opened database. Once the program is launched open the database that contains the company you want to remove. Click **Delete Company** and a screen will appear to make sure you want to delete the company. Click **Confirm Delete** to complete the deletion process.

Exiting CheckMark 1099

To exit or quit CheckMark 1099:

- Choose Exit from the File menu (Windows)
- Choose Quit from the CheckMark 1099 menu (Mac)

Chapter 3 Creating a New Company

This chapter shows you how to create a new company file and enter basic company information.

Creating a New Company

- On Windows, double click the 1099 shortcut on the desktop or click the Start menu, select Programs, then select CheckMark 1099 from the CheckMark Inc. File.
 On Macintosh, double click on the CheckMark 1099 alias on the dock or on your Desktop, or double click the CheckMark 1099 icon located in the install folder that was installed on your hard drive
- 2. Click the New Company button in the middle of the screen.

• • •	CheckMark 1099 Print 2017
	CheckMark [®] 1099 Software
Companies	Filter
Sample Co	
	Update Company Delete Company Open Database
Recipients 0 of 0	Filter All Forms All Status
Database: CheckMa	Recipient New Recipient Delete Recipients Copy Recipient rk 1099 Database - 1099 Year 2017 stifisher/Documents/CheckMark/1099/2017/CheckMark 1099 Database 2017.db

Note: If the **New Company** button is greyed out that means you need to first open a database or create a database. For **Creating a Database** please see page 9

3. Enter **Payer Information** for all pertaining fields.

		kMark Software
Payer's Name	Payer's Address	Contact Person
Payer's Federal ID	Payer's City	Contact's Phone
	Payer's State	Contact's Email Address
	Payer's ZIP	Contact's Fax Number
	Payer's Phone	Tax ID is Social Security Number
		This is your FINAL RETURN
	Add Company Upda	te Company Cancel

4. Click Add Company button to Save.

Updating an Existing Company

- 1. Highlight the company in the list you wish to update and click the **Update Company** button.
- 2. After all changes have been made to the **Payer Information**, click the **Update Company** button to save the changes

Deleting a Company

You cannot delete a company if there are any recipients created within the company. You must delete the recipients first before deleting a company. For information on deleting recipients see "Deleting a Recipient" on page 32.

- 1. Select the company you wish to delete.
- 2. Click Delete Company
- 3. In the pop-up window, click the **Confirm Delete** button.

elete Company		x
	Check Mark [®] 1099 Software	
Please verify	that you want to delete the following compan	у
	Hauptman Security	
	Confirm Delete Cancel	
		_

If no recipients are associated with this company, the company will be deleted.

Filtering Companies

You can use the **Filter** button to search for certain companies in the list. To find a particular company, enter all or part of the name of the company into the Filter box area at the top of the screen and click the **Filter** button. The Filter will search for any companies that contain those variables.

You can also use an asterisk (*) to help sort groups. For instance, if you enter the first letter and then asterisk, (ex: N*), you will receive all companies that <u>begin</u> with the letter "N".

Sorting Companies

You can sort companies by Ascending or Descending order. To select which type of sort to use, go under the **Sort** menu at the top of the screen and choose either **Sort Companies Ascending** or **Sort Companies Descending**.

File Tools Font Sizes	Sort Window	Help	<i>*</i> U	$\ast \bigcirc$	· 🔽 🔹	,	Mon 9:18 PM
	✓ Sort Companie	•	t 2017				
	Sort Companie	es Descending	_	_			
	✓ Sort Recipients	s Ascending	lark [™]				
	Sort Recipients	s Descending	ftwa	re			
Companies			Filter				
Sample Co							
	Jpdate Company	New Compa	Dela	ete Com	2021		
	opdate Company	New Compa	Iny Dele	ete Com	pany		
		Open Databa	se				
Recipients 0 of 0	Filter		All For	ms	 All 	Status	0
						otatuo	
Update Re	cipient New Be	ecipient Del	ete Recipier	nts (Copy Rec	ipient	
			010 110010101		000,100	pion	
	099 Database - 109		047/01				• -II-
Path: /Users/kristifi	sher/Documents/Cl	1099/1009/1009/1	2017/Check	Mark 109	99 Databa	se 2017	dD.7

Selecting Multiple Companies

You can Select multiple companies if you choose to eFile 1099s using the IRS FIRE system.

Consecutive Selection

Windows: You can select multiple companies by selecting the first company you want while holding down the mouse button and moving the mouse pointer down through the list.

You can also click on the first company, hold down the 'Shift' key on the keyboard, and then click on the last company you want in the list.

Macintosh: Click on the first company you want in the list, hold down the 'Shift' key on the keyboard, and then click on the last company you want in the list.

• •	CheckMark 1099 Print 2017	
	Check Mark [®] 1099 Software	
Companies	Filter	
ABC Company		
Sample Co		
XYZ Co		
	Update Company New Company Delete Company	
	boote company	
	Open Database	
Recipients 0 of 0	Filter All Forms I All Status	0
Update	e Recipient New Recipient Delete Recipients Copy Recipient	
	ark 1099 Database - 1099 Year 2017	db
Path: /Users/kr	ristifisher/Documents/CheckMark/1099/2017/CheckMark 1099 Database 2017	.ub

Non-Consecutive Selection

Windows: To select specific companies as a group, click on the first company you want, hold down the 'Ctrl' key on the keyboard and click on any other companies you want to include.

Macintosh: To select specific companies as a group, click on the first company you want, hold down the 'Command' key (also referred to as the Apple key) on the keyboard and click on any other companies you want to include.

• •	CheckMark 1099 Print 2017
	CheckMark [®] 1099 Software
Companies	Filter
ABC Company Sample Co XYZ Co	
	Update Company New Company Delete Company
	Open Database
Recipients 0 of 0	Filter All Forms Istatus
Update	Recipient New Recipient Delete Recipients Copy Recipient
Database: CheckMar	k 1099 Database - 1099 Year 2017
	tifisher/Documents/CheckMark/1099/2017/CheckMark 1099 Database 2017.db

Chapter 4 Set Up

Setting up Users and Passwords

IMPORTANT: Although not required, it is recommended you set up a password to protect your private information

1. Click on the **Tools** menu in the upper left hand corner of the screen and select **Admin**

File	Tools	Font Sizes	Sort	Window	Help		•1	*	\bigcirc		•	,	Mon 9:23 PM
	Admi	n		Che	ckMark 10	099 Print :	2017						
		up Database ore Database				k Ma		-	1				
	Edit F	Printing Form	ats		099	Sof	twa	re					
Cor	Edit F	Page Setup					Filter						
A	BC Com	pany	_										
	ample C												
	YZ Co												
		l	Jpdate C	Company	New C	Company	Del	ete C	Comp	any]		
					Open D	Database							
Re	cipients	0 of 0	Filter				All Fo	rms		0	All S	tatus	\$
		_											
		Update Rec	pient	New Re	cipient	Delete	Recipie	nts	C	ору	Recip	ient	
Dat	abase:	CheckMark 1	099 Data	abase - 109	9 Year 20	17							
Pat	h:	/Users/kristifis	her/Doc	cuments/Ch	neckMark/	1099/201	7/Check	Mark	(109	9 Dat	abas	e 2017	.db
													1

2. To create a new user click the **Add User** button.

heckMark 1099 Admi	CheckMark [*] 1099 Software	
Mercedes		
Add	Update User Delete User Close	

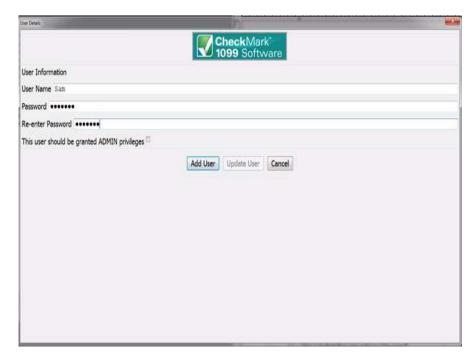
3. Enter the Name and Password.

Note: The Name and Password are case sensitive.

4. Click the checkbox for **This user should be granted ADMIN privileges** if you want this user to be able to add, update or delete other users.

IMPORTANT: The first user set up will have **Admin** privileges. You cannot delete or change this user's **ADMIN** privileges until another user with Admin privileges is created.

Users with **ADMIN** privileges can add/delete/update other users, Backup and Restore the database and Check for updates.



5. Click the **Add User** button to save.

Updating Users

- 1. Click on the **Tools** menu in the upper left hand corner of the screen and select **Admin.**
- 2. Highlight the user you want to update from the list.
- 3. Click the **Update User** button.
- 4. Make the necessary changes and click the **Update User** button to save.

Deleting Users

- 1. Click on the **Tools** menu in the upper left hand corner of the screen and select **Admin.**
- 2. Highlight the user you want to delete from the list.
- 3. Click the **Delete User** button.
- 4. In the popup window, verify that the correct user name is selected and click the **Confirm Delete** button.

	CheckMark [®] 1099 Software
Please	verify that you want to delete the following user
	Sam
	Confirm Delete Cancel

Note: If you delete all users, the software will not prompt for a password upon launching the program.

Setting Screen Font Size

This setting allows you to customize how big or small you want the font on the screen in the program. There are five settings to choose from: **Smallest Font, Small Font, Medium Font, Large Font, Largest Font.**

Selecting Font Size

- 1. Click on the **Font Sizes** menu at the top of the screen.
- 2. Select which font you want to use. You can choose any font at anytime from the main screen window

File	Tools	Font Sizes	Sort	Window	Help			0	*	\bigcirc			D	Mon 9:24 PM	Kristi Fish
	•	Smallest F			Chec	ckMark 1	1099 Pri	nt 20	017						
		Small Font									_				
		✓ Medium For Large Font				hec	ck∿	1a	rk						
		Largest Fo			1	099) Sc	ft۱	\sim	are	e				
Cor	npanies								Filt	er					
	BC Con	nany						_	_	_	_	_			
	ample (
	YZ Co														
															_
			Upd	ate Comp	any	New C	Compar	ıy	D	elete	e Co	mpar	iy		
						0	Databa								
						Open I	Databa	se							
Re	cipient	5 0 of 0	Filter							All F	orm	s	\$	All Status	\$
		Update	Recipie	ent N	w Reci	ipient	Dele	ete R	lecip	ient	5	Cor	ov Red	ipient	
		CheckMark 1						201	-			. 1.00			
Patl	n:	/Users/krist	insner/	Documen	ts/Che	ckmark	/1099/	201	1/C	песк	mari	C 105	9 Dat	abase 2017.db	

1

Adjusting Screen Size

You can adjust the size of each screen to maximize or minimize your viewing area.

To increase or decrease the size of any screen, simply click and hold the mouse button on the lower right hand corner of any screen and drag the corner to the desired position.

	Company I	nformation
Payer's Name	Payer's Address	Contact Per
Mercy's Garag	123 Canal D	Mercedes
Payer's Federal ID	Payer's City	Contact's Ph
11-1234567	Kennewick	123-234-
	Payer's State	Contact's Er
	WA	Mercy@me
	Daver's 7TD	Contrat's Er

Chapter 5 Setting Up Recipients

This chapter explains how to setup new Recipients for each company.

Creating New Recipient

- 1. Open the Database that contains the company to which you want to add recipients. If no Database exists you must first create one. See "Create New Database" on page 9.
- 2. Select a Company from the list. If no Companies are listed, you must first set up a company before adding recipients. For information on setting up a new company, see "Creating a New Company" on page 15.
- 3. Click the **New Recipient** button.

Companies	CheckMark [™] 1099 Software Filter
ABC Company Sample Co XYZ Co	Ur CheckMark 1099 Recipient Type
Recipients 0 of 0	Please select the type of 1099 Recipient to create Filt MISC DIV INT R S All Status
	OK Cancel

The list of fields for the new recipient corresponds to the same fields found on the 1099 forms

4. Choose which type of 1099 form this recipient should receive and click **OK**.

SONG MESC			-	
			neckMark [*] 199 Software	
Payer Info Marrock 123 Keene Rd Kennewick, WA 12345 1	11-234-1234		1 Rents 5 2 Royalties 5 3 Other Income 5	OMB No. 1545-0115 2015 Form 1099-MISC 4 Federal income tax withheld
Payer Federal ID 33-1234567		Recipient's ID	5 Fishing boat proceeds \$	6 Medical and health care payments \$
Recipient Information	Address not in US	Territory 🖺	7 Nonemployee compensation \$	8 Substitute payments in lieu of dividends or Interest \$
Company or Last Name	First Name (if appli	cable)	9 Payer made direct sales of \$5,000 or more of consumer products to a buyer(recipient) for resale	10 Crop insurance proceeds \$
City State	ZIP Co	untry	н.	
Account Number (see instr	uctions) FATCA filing r	equirement 2nd TIN not.	13 Excess golden parachute payments \$	14 Gross proceeds paid to an attorney \$
	Previo	us Recipient	Update Recipient Cancel Ne	xt Recipient

- 5. Enter the **Recipient's ID** along with the **Recipient's Information.**
- 6. Fill in any fields that are applicable for the recipient.
- 7. Click the **Add Recipient** button to Save the information.

If any information is invalid, a popup window will open explaining which fields have errors.

		Check N 1099 Sc		
	The fo	llowing errors we	re discovered:	
State: Mus	st be a valid U.S	and 40 character 5. state or territor XX or XXXXX-XX	y (name or abb	reviation).
		ontinue Anyway	Cancel	

Press **cancel** to go back to the set up screen to correct any errors, or **Continue Anyway** to Save the recipient information

NOTE: If any field has an invalid entry, once you return to the Recipient set up screen, that field name will show up in "**Red**". In addition, some fields will not save the invalid information and remain empty. For more information on validated information, see "Validated Status" on page 37.

Updating an Existing Recipient

- 1. Select the company that contains the recipient(s) you wish to update.
- 2. Highlight the recipient in the list you wish to update and click **Update Recipient** but-ton.
- 3. After all changes have been made to the **Recipient Information**, click **Update Recipient** button to save changes.

		heckMark 199 Software	
Peyer Info Nercy's Garage 123 Ganal Dr Kennevick, WA 12345 123-234-4500	0.44	ID CORRECTED I Dents I Dents 2 Royattes 5 2.00 3 Other income 5 3.00	CMIR No. 1545-0115 2015 Form 1099-MISC 4 Foderal income tax withheld \$ 4.00
Payer Federal ID 11-1234567	Recipient's ID 111-22-3333	5 Fishing boat proceeds \$ 5.00	6 Medical and health care payments \$ 6,00
Recipient Information Address not in US Terri	tory 🗉	7 Nonemployee compensation \$ 7,00	8 Substitute payments in lieu of dividends or interest \$ 8,00
Company or Last Name First Name (if applicable Corrnick Charles	1	9 Payer made direct sales of \$5,000 or more of consumer products to a buyer(recipient) for resale	10 Crop insurance proceeds \$ 10.00
123 Summit View Dr Oly State ZIP Country Kennewick WA 12345 US		u.	u.
Account Number (see instructions) FATCA filing requir 125456	ement 2nd TIN not.	13 Excess golden parachute payments \$ 13.00	14 Gross proceeds paid to an attorney \$ 14.00

If any information is incorrect, a popup window will open explaining which fields have errors.



Press **cancel** to go back to the set up screen to correct any errors, or **Continue Anyway** to Save the recipient information.

NOTE: If any field has an invalid entry, once you return to the Recipient set up screen, that field name will show up in "**Red**". In addition, some fields will not save the invalid information and remain empty. For more information on validated information, see "Validated Status" on page 37.

Voided Recipient

If a 1099 is incorrectly filed, or included in a filing, that was incorrectly filed, you can resubmit the 1099 as a Voided copy to void the original 1099 to the IRS. Please read the IRS Instructions on how to file this.

- 1. Select the recipient from the list and click Update Recipient button
- 2. Click the **Void** check box at the top of the screen.

If the recipient's Status is already considered **Printed** and/or **Completed**, you'll receive a pop up window asking if you would like to change the status back to Not Printed and/or Not Completed. For information on what the different Statuses mean, see "Status" on page 36.



3. Mark the corresponding checkbox next to "NOT Printed' and/or "NOT Complete" if you want to change the status and click the Save and Continue button. If you do not want to change the status, click the Cancel button. If you do not select either checkbox, you can still click the Save and Continue button to save any updated recipient information without changing their status.

If you initially printed the form, reprint another 1099 with the updated **Void** status and submit that form to the IRS with a new 1096 form. for instructions on printing 1099 forms, see "Printing 1099s for Recipients" on page 57.

If you initially e-filed, create a new .txt file with that recipient and updated **Void** information and submit it to the IRS. For information on e-Filing, see "Creating a file to eFile" on page 64.

Corrected Recipient

If a 1099 is filed, or included in a filing, with incorrect information, a **Corrected** 1099 must be filed with the IRS.

- 1. Select the recipient from the list and click the **Update Recipient** button.
- 2. Click the **Corrected** check box at the top of the screen, update any information and click the **Update Recipient** button to Save.

If the recipient's Status is already considered **Printed** and/or **Completed**, you'll receive a pop up window asking if you would like to change the status back to **Not Printed** and/or **Not Completed**. For information on what the different Statuses mean, see "Status" on page 36.

Change Recipient Status	×
	CheckMark" 1099 Software
The Recipient I	nformation you are updating has already been 'Printed'. Change status to 'NOT Printed' 🖾
	Save and Continue Cancel

3. Mark the corresponding checkbox next to "**NOT Printed**' and/or "**NOT Complete**" if you want to change the status and click the **Save and Continue** button. If you do not want to change the status, click the **Cancel** button. If you do not select either checkbox, you can still click the **Save and Continue** button to save any updated recipient information without changing their status.

If you initially printed the form, reprint another 1099 with the updated **Corrected** status and submit that form to the IRS with a new 1096. for instructions on printing 1099 forms, see "Printing 1099s for Recipients" on page 57.

If you initially e-Filed, create a new .txt file with that recipient and updated Corrected information and submit it to the IRS. For information on eFiling, see "Creating a file to eFile" on page 64.

Deleting a Recipient

- 1. Select the company that contains the recipient(s) you wish to delete
- 2. Highlight the recipient in the list you wish to Delete.

If you want to delete more than one recipient, you can highlight multiple recipients at once. See "Selecting Multiple Recipients" on page 38.

- 3. Click **Delete Recipient** button.
- 4. A pop-up window appears to confirm that these are the recipients you want to delete.

Delete Recipient(s)	
	CheckMark [®] 1099 Software
Please verif	y that you want to delete the following recipients:
Corrnick, S	amuel
	Confirm Delete Cancel

5. Click **Confirm Delete** to complete the process.

Copy Recipient

If you have a recipient that needs to be included in multiple companies or requires different types of 1099 forms, you can easily copy that person's set up information and add them either under a new company and/or with a different type of 1099 form.

- 1. Select the company that contains the recipient(s) you wish to copy.
- 2. Highlight the recipient in the list you wish to copy.
- 3. Click the **Copy Recipient** button.

4. A pop-up window appears. Select which company and which type of 1099 form this recipient should be copied as.

CheckMark 1099 Recipient Copy	
Check Mark [®] 1099 Softwa	re
Please select the Company and 1099 Type to co Company Mercy's Garage	py Samuel Corrnick to.
MISC ODIV OINT OR OK Cancel	© S

5. Click **OK** to copy the recipient.

Filtering Recipients

You can use the **Filter** button to search for certain recipients in the list. To find a particular recipient, enter all or part of the name into the **Filter** box area above the recipients section and click the **Filter** button. The Filter will search for any recipients that contain those variables.

You can also use an asterisk(*) to help sort groups. For instance, if you enter the first letter and then an asterisk, ex: N*, you will receive all recipients that <u>start</u> with the letter "N".

IMPORTANT: When filtering, make sure you choose the appropriate form you want to search in. If filtering from **All Forms**, recipients will be searched from the entire company. If however, you choose **DIV Forms** for example and filter certain variables, only those recipients set up as receiving a **1099-DIV** will be displayed in the results.

Sort Recipients

You can sort recipients by Ascending or Descending order. To select which type of sort to use, go under the **Sort** menu at the top of the screen and choose either **Sort Recipients Ascending** or **Sort Recipients Descending**.

File Tools Font Siz	es Sort Window Help	€ \$	$\bigcirc \blacksquare \blacksquare$	Mon 9:18 PM
	✓ Sort Companies Ascendi			
	Sort Companies Descend			
	✓ Sort Recipients Ascendin			
	Sort Recipients Descendi	ng ftware		
Companies		Filter		
Sample Co				
			0	
	Update Company New Co	Delete	Company	
	Open Da	tabase		
Recipients 0 of 0	Filter	All Forms		Status
	Filler	Airroinis		Status
Update	Recipient New Recipient	Delete Recipients	Copy Reci	pient
Database: CheckMa	k 1099 Database - 1099 Year 201	7		
Path: /Users/kri	stifisher/Documents/CheckMark/1	099/2017/CheckMar	k 1099 Databa	
				1

Status

The **Status** drop down menu has certain statuses that are categorized based upon their setup and completion of being printed. You can sort using the different options to see which employees or vendors have been **Printed**, **Completed**, **Validated**, **Voided**, or **Corrected**.

Recipients can be in multiple statuses at the same time, however you can only sort by one status at a time.

NOTE: Before choosing a **Status**, you should first select one or more companies in the list. For information on selecting multiple companies see "Selecting Multiple Companies" on page 19.

	CheckMark 1099 Print 2017
Companies	Filter
ABC Company Sample Co XYZ Co	
	Update Company New Company Delete Company
	Open Database
Recipients 1 of 1	Filter MISC forms
Dylan, Robert	Printed
	NOT Completed
	NOT Volded NOT Volded
Updat	NOT Validated Validated

Printed Status

You can easily sort using this status to see which recipients still need the form 1099 printed.

You can select either **Printed** or **Not Printed** status to sort for recipients by whether or not you have printed a 1099 for them. Once you select the **Print Forms for Recipient** command from the **File** menu, that recipient will automatically be moved to the **Printed** status from the **NOT Printed** status.

Completed Status

You can use the **Completed** status to indicate which recipients have or have not been printed or e-Filed this form 1099 for employer related copies.

Once you select the **Print forms for Filing** option under the **File** menu, recipients listed under **NOT Completed** will be moved to the **Completed** status.

Validated Status

Sorting by **Validated or NOT Validated** helps you easily determine if there is any recipient that is not set up correctly. In the recipient screen, certain fields require specific characters, numbers, etc. to be accepted upon filing.

Select **Validated** to see which recipients are ready to be filed. Select **NOT Validated** to see any recipients that have set up criteria which is incorrect for filing purposes. Once you have sorted by **NOT Validated**, select a recipient and click on the **Update Recipient** button to view the set up and make necessary changes. Fields marked in "**RED**" do not meet the requirements for filing and corrections should be made.

Voided Status

In the Recipient set up screen, there is a checkbox at the top of the screen for **Void**. If you filed a 1099 for a recipient that was unintended, you can mark **Void** to resent the 1099 for that recipient as a void status.

Choosing a Voided status will list all recipients marked Void in the Recipient set up screen. All other recipients that are not marked Void in the recipient set up screen are listed as NOT Voided for a status.

Corrected Status

In the Recipient set up screen, there is a checkbox at the top of the screen for **Corrected.** If you filed an incorrect 1099 and need to resubmit a new 1099 with updated information, select the **Corrected** checkbox in the recipients set up screen before submitting the new 1099 information.

The **Corrected** status indicates all recipients who are marked as **Corrected** in the recipient set up screen. All other recipients will be listed as **Not Corrected**.

Selecting Multiple Recipients

Consecutive Selection

Windows: You can select multiple recipients by clicking the first recipient while holding down the mouse and moving the mouse down through the list

You can also click the first recipient, hold down the 'SHIFT' key on the keyboard and then click on the last recipient you want in the list.

Macintosh: Click on the first recipient you want in the list, hold down the 'SHIFT' key on the keyboard and then click on the last recipient you want in the list

•••	CheckMark 1099 Print 2017	
	CheckMark [®] 1099 Software	
Companies	Filter	
ABC Company Sample Co XYZ Co		
	Update Company New Company Delete Company Open Database	
Recipients 3 of 3	Filter MISC forms 💿 All Status	٥
_Dylan, Robert _Jagger, Mick Jett, Joan		
	Recipient New Recipient Delete Recipients Copy Recipient	
	fisher/Documents/CheckMark/1099/2017/CheckMark 1099 Database 2017.db	

Non-Consecutive Selection

Windows: To select specific recipients as a group, click on the first recipient you want, hold down the 'CTRL' key on the keyboard and click on any other recipients you want to include.

Macintosh: To select specific recipients as a group, click on the first recipient you want, hold down the 'COMMAND' key on the keyboard (also known as the Apple key) and click any other recipients you want to include.

•••	Che	ckMark 1099 Print 201	7	
Companies		heck Mar 099 Softw	k™ vare	
ABC Company				
Sample Co XYZ Co				
	Update Company	New Company Open Database	Delete Company	
Recipients 3 of 3	Filter		MISC forms	All Status
Dylan, Robert Jagger, Mick Jett, Joan				
Update F	Recipient New Rec	ipient Delete Re	cipients Copy Reci	pient
Database: CheckMark 10 Path: /Users/kristif			/CheckMark 1099 Data	base 2017.db

Chapter 6 Exporting and Importing

This chapter explains how to export employees and companies from CheckMark Payroll as well as vendors from CheckMark MultiLedger and how to import this information from CheckMark Payroll, MultiLedger or tab-delimited text file.

Exporting Recipients from CheckMark Payroll

- 1. Open up CheckMark Payroll, go under File menu and choose Export Employees
- 2. Highlight which recipients you want to export from the list.

Note: If the recipients to be imported are using different types of 1099 forms, you should create multiple export files for each type of form. Example, one export file for 1099 MISC, one file for 1099 INT, etc.

3. Click the **Export 1099** button. The **Selected Field** list will automatically populate with the correct available fields to import into the 1099 software.

t View Window			
Save Available Fields		Selected Fields	Employees
Last Name First Name	Copy->	Last Name First Name	Crawfield, Catherine Dalton, Leila
Address Line 1	<- Remove	Address Line 1	Mathers, Crispin
Address Line 2	E C Kennye	Address Line 2	
City State	Copy Al ->	State	
Zip		Zip	
Social Security #	<- Remove Al	Social Security #	
Phone Number	- and the second s	- C	
Birth Date Employee #	Export	1	
Department Choice	Export To 1099	1	
Direct Deposit Checkbox Prenote Checkbox	Kantokkenderskender	2 × 1	
Routing # 1			
Account # 1 Account 1 Type Choice			
Routing # 2			
Account # 2 Account 2 Type Choice			
Account 2 Amount			
Routing # 3			

- 4. A **Save** dialogue box appears in the **File** name field, give the file a name if needed and choose a location to save the file to, an example would be your Desktop.
- 5. Click Save.

Exporting Companys From CheckMark Payroll

- 1. Open CheckMark Payroll, then open the Company you wish to export.
- 2. Under the File menu select Export Company to 1099.
- 3. A **Save** dialogue box appears. In the **File** name field, give the file a name if needed and choose a location to save the file to, an example would be your Desktop.

Organize • New fold	er					三• 6
Favorites	Documents li	brary			Arrange by:	Folder *
Downloads	Name	*	Date modified	Type	See	
1 Recent Places	Misc Employees		9/22/2015 8:27 AM	Text Document		KB
Libraries E						
Documents						
A Music						
Videos						
Videos						
Computer						
Local Disk (C:)						
👷 cms_shares (\\na						
parts De l'Alle						
Wetwork						
H BACKUP						
F CHRISHOLZWAD						
- Charle -						
File name: Elos	, ja 1					
Save as type: Text !	(ile (* tot)					

4. Click Save.

Exporting Recipients from MultiLedger

1. Open the MultiLedger program, under the File menu select **Export...**

MultiLedger	File Edit Setup New Company	Transactions %N	Reports /ersion 7.9.	Window Help 4	Ð		
Setup	Open Company Open Recent Comp	₩O		Reports			
Company Information	Close Company Backup Company Restore Backup	· ·	tem chases	Account Reports	Trial Balance		
Interface Accounts	Rebuild Files Rename Files		yables ournal	Transaction Journals	General Ledger		
Financial Statements	Find Company Renumber Account	s	endor /ments	Balance Sheet	Income Statement		
Customer Setup	Format Page Setup		ursement ournal	Cash Flow	Financial Snapshot		
Item Setup	Select Print Font Export Import	-	djust entory	Customer Reports	Vendor Reports		
Sales Tax S Setup	Preferences User Settings Export Company		3ank nciliation	ltem Reports	Job Reports		
Customer Terms	Snip via Pi	та ке	curring	Sales Tax Report	Salesperson Report		

2. Select **Vendors** from the drop-down menu at the top.

	1.00	
	Quotes	
	Customers	
1st Bank	✓ Vendors	Separate City/State/Zip
AIC Advertising	Items	
BTS Distribution Supply Bank		Export To 1099
Blue Cross	Accounts	
Blue Cross-CP	Jobs	
CA Dept of Labor	Salespeople	Export TXT Export CSV
CA Dept of Revenue	Salespeople	
CO Dept of Labor	Copy	Remove
CO Dept of Revenue		
CheckMark Software City Dept of Rev	Field List	Export List
City of Denver		
Credit Card Company	Name Code	Name Code
EDD	Contact	Contact
EDD-ETT	Address	Address
EDD-SD1	City/State/Zip	City/State/Zip
El Paso Steak House	Notes/Ref#	Notes/Bef#
Financial Group	Add'L Notes	Add'L Notes
Financial Group - 5	Phone	Phone
IRS	Tax ID	Tax ID
Labor Union	Fax	Fax
Magnolia Rental Properties	Default Acct	Default Acct
Office Mart	Default Amt	Default Amt
Postmaster	Due Days	Due Days
Principal Financial	Credit Limit	Credit Limit
Sample Co	Email	
State Dept of Rev	Web	
Terry's Supply Store		

3. Make sure you select the correct period and click the **Export to 1099** button.

	Export	
1st Bank AIC Advertising BTS Distribution Supply Bank Blue Cross Blue Cross-CP CA Dept of Labor CA Dept of Labor CA Dept of Labor		Separate City/State/Zip Export To 1099 port TXT Export CSV
C0 Dept of Revenue CheckMark Software City Dept of Rev City of Derver Credit Card Company EDD EDD-ETT EDD-SDI EL Paso Steak House Financial Group Financial Group - 5 IRS	Copy Field List Name Code Contact Address City/State/Zip Notes/Ref# Add'i Notes Phone	Remove Export List Code Contact Address City/State/Zip Notes/Ref# Add'i Notes Phone
The Labor Union Magnolia Rental Properties Office Mart Poincipal Financial Sample Co State Dept of Rev Terry's Supply Store Town Recorder	Tax ID Fax Default Acct Default Amt Due Days Credit Limit Email Web	Tax ID Fax Default Rcct Default Amt Due Days Credit Limit

- 4. A **Save** dialogue box appears. In the **File** name field, give the file a name if needed and choose a location to save the file to, an example would be your desktop.
- 5. Click Save.

Importing Recipients from CheckMark Payroll and Multiledger.

- 1. Open the CheckMark 1099 application.
- 2. Open the Database which contains the company you want to import into.

Note: If the company you want to import recipients to does not exist, you will need to create a new company or import a company before importing recipients. For information on creating a new company or importing a company, see "Creating a New Company" on page 15 or "Importing a Company" on page 47.

3. Under the File menu select Import...

nt	ile Tool	s Font Size	s Sort	Window	Help		•U	*	\bigcirc	.		۲.	Mon 9:40 PM	Kristi I
	Create D	atabase		(CheckMark	1099 Print	2017							
c	Import Import Pr Open Dat Database Close Da E File	abase Manager			Che 1099	ck Ma 9 Sof	ark tvv _{Filt}	ar	e					
			ent											
R	ecipients	3 of 3	Filter	Company		Company Database			e Co C for		¢	All	Status	٥
	Dylan, Rol lagger, Mi lett, Joan													
	tabaca: (Update F	Recipient		Recipient	Delete	e Recip	pient	ts	Cop	oy Re	cipie	nt	
Pa		Users/kristif	000 Duit				017/C	heck	kMarl	< 109	9 Da	ataba	se 2017.db	1

4. Select **Recipient** in the popup window.

CheckMark 1099 Import Type
CheckMark [®] 1099 Software
Please select the type of 1099 import you are importing
Company Recipient
OK Cancel

i

5. In the popup window select which type of 1099 recipient(s) you are importing: **MISC**, **DIV**, **INT**, **R** or **S** and which company you want to import the recipients to.

CheckMark 1099 Recipient Type		
	CheckMark 1099 Softw	
Please select the ty	pe of 1099 Recipients	you are importing
	Select Companies	
	Hauptman Secur Marrock Mercy's Garage	
● MISC O	DIV INT R	© S

6. Click **OK**

7. Click the **Import from Payroll or MultiLedger** button. The appropriate fields will automatically populate for you.

	CheckMark [®] 1099 Softwa	re	
	Import from Payroll or MultiLe	dger	
Available Fields		Selected Fields	
Company/Last Name (Required) First Name Address Line 1 Address Line 2 City State ZIP Code Country Address not in U.S Checkbox	 Add Field> Add All Fields> 	Company/Last Name (Required) First Name Address Line 1 City State ZIP Code Recipient's ID	
Recipient's ID Account Number	< Remove Field		
FATCA - Checkbox 2nd TIN not Checkbox Void - Checkbox Corrected - Checkbox Box 1: Rents Box 2: Royalties Box 3: Other income Box 4: Federal income tax withheld	< Remove All Fields		

- 8. A **Look in** screen for Windows or choose the file to Import screen for Macintosh appears allowing you to browse to the location where you saved your text file from CheckMark Payroll or MultiLedger.
- 9. Select the text file and click **Open.** All recipients will be imported into the selected company.

Importing a Company from CheckMark Payroll

- 1. Open the CheckMark 1099 application.
- 2. Open the Database you want to imprt the company into.

Note: If the database that you want to import recipients to does not exist, you will need to create a new database before importing. For information on creating a new database see "Creating a New Database" on page 9.

3. Under the File menu select Import...

int	File Tools Font Sizes Se	ort Window	Help	•0	$\ast \leq$	> 🗖 ı	•	Mon 9:40 PM	Kristi I
•	Create Database	C	heckMark 10	99 Print 2017					
	Import					_			
	Import Prior Year		Chec	k Mark					
	Open Database Database Manager		1099	Softw	are				
	Close Database		1000	Filt	2.1				
0		_		FI	er				
1	E File								
	Summary Report								
	Mailing Labels								
	Print Forms for Recipient								
	Print Forms for Filing	6				-			
	Opt	ate Company	New Co	mpany L	Jelete (Compan	y		
			Open Da	tabase					
			Open De	ttabase					
	Recipients 3 of 3 Filte	r)			MISC f	orms	I Al	Status	\$
	Dylan, Robert								
	Jagger, Mick								
	Jett, Joan								
l	Update Recipi	ient New F	Recipient	Delete Reci	pients	Сор	y Recipi	ent	
[pients	Сор	oy Recipi	ent	
-	Update Recipi Database: CheckMark 1099 E Path: /Users/kristifisher	Database - 109	99 Year 2017	7					

4. Select **Company** in the popup window.

CheckMark 1099 Import Type
CheckMark [®] 1099 Software
Please select the type of 1099 import you are importing
Company Recipient
OK Cancel

- 5. Click **OK**
- 6. Click the **Import from Payroll or MultiLedger** button. The appropriate fields will automatically populate for you.

G	Import from Payroll or MultiLe	dger
vailable Fields		Selected Fields
Payer's Name Payer's Federal ID Address City State ZIP Phone	Add Field> Add All Fields> < Remove Field < Remove All Fields	Payer's Name Payer's Federal ID Address City State ZIP Phone

- 7. A **Look in** screen for Windows or choose the file to Import screen for Macintosh appears allowing you to browse to the location where you saved your text file from CheckMark Payroll.
- 8. Select the text file and click **Open.** All recipients will be imported into the selected company.

Importing using a tab-delimited text file.

- 1. Open up the CheckMark 1099 application.
- 2. Open the Database which contains the company you want to import into.

Note: If the company you want to import recipients to does not exist, you will need to create a new company or import a company before importing recipients. For information on creating a new company or importing a company, see "Creating a New Company" on page 15 or "Importing a Company" on page 47.

3. Go under the **File** menu and select **Import...**

int	File	Tools	Font Sizes	Sort	Window	Help		Ð	∦	\bigcirc		•	_ ,	Mon 9:40 PM	Kristi I
•	Cre	ate Data	abase		C	heckMark	1099 Print	t 2017							
		ort								_					
		ort Prio				Che	ck M	ark	TM						
		en Datak abase M	lanager			109	9 Sof	ft v	ar	e					
		se Datal						Filt		1					
(E E	le													
	EFI	ie													
		nmary R													
		ling Lab	els for Recipient												
l			for Filing												
				opuate	Company	New	Company	/ [Dele	te Co	mpa	ıny			
						Open	Database								
	Recip	ients 3	of 3 F	ilter					MIS	C fo	rms	\$	All	Status	٥
												_			
		n, Robe													
	Jagge	er, Mick													
	Jell,	JUan													
			Update Ree	cipient	New I	Recipient	Delet	e Reci	pien	ts	Co	opy R	Recipie	ent	
ſ	Databa	se: Ch	eckMark 109	9 Data	base – 10	99 Year 2	017								
	Path:		sers/kristifis					017/0	hec	kMar	'k 10	99 F	Databa	ise 2017.db	
		, 0.						/							1

4. Select **Recipient** or **Company** in the popup window.

CheckMark 1099 Import Type
CheckMark [®] 1099 Software
Please select the type of 1099 import you are importing
Company Recipient
OK Cancel

5. In the popup window select which type of 1099 recipient(s) you are importing: **MISC**, **DIV**, **INT**, **R** or **S** and which company you want to import the recipients to.

	CheckMark [®] 1099 Software	
Please select the	type of 1099 Recipients you are import	ing
	Select Companies	
	Hauptman Secur Marrock Mercy's Garage	
MISC	DIV OINT OR OS	
	OK Cancel	

6. The import screen allows you to select which fields are being imported. Select the fields in the same order as the text file you're importing. Click the **Import** button after you have added all fields to the **Selected Field list**.

	CheckMark [®] 1099 Softwa		
	Import from Payroll or MultiLe	dger	
Available Fields		Selected Fields	
Company/Last Name (Required) First Name Address Line 1 Address Line 2 City		Company/Last Name (Required) First Name Address Line 1 City State	
State ZIP Code	Add Field>	ZIP Code Recipient's ID	
Country Address not in U.S Checkbox	Add All Fields>	Redpiencs 10	
Recipient's ID Account Number	< Remove Field		
FATCA - Checkbox 2nd TIN not Checkbox Void - Checkbox Corrected - Checkbox	< Remove All Fields		
Box 1: Rents Box 2: Royalbles Box 3: Other income Box 4: Federal income tax withheld			

7. A **Look in** screen for Windows or choose the file to Import screen for Macintosh screen appears allowing you to browse to the location where you saved your text file.

8. Select the text file and click **Open.** All recipients will be imported into the selected company.

Text File Format for Importing

CheckMark 1099 program uses a tab-delimited .txt file for importing Companies and the Recipients.

Each field is separated by a **Tab** with **Return** at the end of the record before starting the next recipient. An example of a text file to be imported is shown below and contains the **Selected Fields:** *Company Name/Last Name (required), First Name, Address 1, Address 2, City, State, Zip, Recipients ID.*

Power[tab]Max[tab]44 Main St[tab]Ste 101[tab]Fort Collins[tab]CO[tab]80525[tab]123-45-6789[return]

• If any fields are not applicable, for instance the address 2 field, a space can be used as a place holder. For example:

Power[tab]Max[tab]44 Main ST[tab]"**space**"[tab]Fort Collins[tab]CO[tab]80525[tab]123-45-6789[return]

• If no space is included, two consecutive [tabs] will also work. For example:

Power[tab]Max[tab]44 Main St[tab][tab]FortCollins[tab]CO[tab]80525[tab]123-45-6789[return]

IMPORTANT: Make sure the items in the **Selected Fields** list are in the same order as the items in the text file being imported to ensure that all values are imported into the correct fields.

Chapter 7 Printing 1099 Forms

This chapter explains how to print 1099 forms for the company and each recipient.

While CheckMark Inc. attempts to maintain up-to-date and accurate tax and form information, we cannot be responsible for changes or discrepancies in tax values and forms that are filed incorrectly.

IMPORTANT: You must install the latest version of Adobe Reader to print 1099 and 1096 forms properly. Go to www.adobe.com to download the latest update.

Summary Report

The 1099 Summary Report summarizes recipient payments by 1099 type. These totals can be compared to Box 5 on Form 1096. Use this report to verify the accuracy of your information before printing.

1. Go under File, select Summary Report. Click Print.

nt	File	Tools	Font Sizes	Sort	Window	Help		* U	*	\bigcirc	-		,	Mon 9:45 PM	Kristi F
	Cre	ate Data	abase		C	heckMark	1099 Prir	nt 2017							
		ort													
		ort Prio				Che	ckⅣ	lark	TM						
		en Datal	lanager			109	9 So	ft	ar	<u>م</u>					
		se Data				100	000	-	ter	Ĩ					
0				_					lei						
	EFI	ile													
	Sur	nmary R	leport												
		iling Lab													
			for Recipient	t											
	Prir	it Forms	for Filing	upuate	Company	New	Compan	v T	Dele	te Co	ompa	anv			
	Recip	ients 3	of 3 F	ilter		Oper	n Databas	e (MIS	SC fo	rms	\$	A	Status	0
	Dyla	n, Robe	rt												
		er, Mick													
		Joan													
			Update Re	cipient	New	Recipient	Dele	te Reci	pien	ts	C	opy F	Recipi	ent	
	Databa		eckMark 109	0.0-4-	h 100	00 V 2	017								
	Jataba Path:		eckmark 109 sers/kristifis	5 Duite				2017/0	hor	-	-1 10	000	Datab	aca 2017 dh	
'	raun:	/0	sers/kristinsi	ner/Do	cuments/	LITECKIVIAI	K/1099/	2017/0	_nec	.Kivia	IK 10	1991	Jalaba	ase 2017.0D	

Print 1099 Forms and 1096 Form for Each Company

- 1. Select the company you wish to print 1099s and a 1096 form.
- 2. Select which type of 1099 form you want to print from the Forms drop down menu: MISC, DIV, INT, R, S.
- 3. Select which recipient(s) in the list you would like to print forms for. If no recipients are selected, all recipients will be included.

Note: You can sort the recipients by using the Status drop down menu to group recipients by **Printed**, **Completed**, **Validated**, **Corrected**, and **Void**. For more information on using the Status drop down menu and what each Status means, see "Status" on page 36.

4. Under the File menu, select the Print Forms for Filing option.

nt	File Tools Font Sizes	Sort	Window		+0	v v	-		Mon 9:46 PM	Kristi I
	Create Database		C	CheckMark 109	9 Print 2017					
	Import									
	Import Prior Year Open Database			Check	<mark< th=""><th>TM.</th><th></th><th></th><th></th><th></th></mark<>	TM.				
	Database Manager			1099 3	Softwa	are				
	Close Database				Filt	er				
	E File									
	Summary Report									
	Mailing Labels									
	Print Forms for Recipient									
	Print Forms for Filing									
			Company			alata C				
		opuate	Company	New Con	npany D	elete C	ompan	y		
		opuate	Company			elete C	ompan	у		
		υμυαίε	Company	New Con		elete C	ompan	у		
		upuate ilter	Company		tabase	elete C MISC fo			ll Status	٥
	Recipients 3 of 3 F		Company		tabase				ll Status	0
	Recipients 3 of 3 F		Company		tabase				ll Status	
	Recipients 3 of 3 F Dylan, Robert Jagger, Mick		Company		tabase				Il Status	0
	Recipients 3 of 3 F		Company		tabase				Il Status	
	Recipients 3 of 3 F Dylan, Robert Jagger, Mick		Company		tabase				ll Status	0
	Recipients 3 of 3 F Dylan, Robert Jagger, Mick		Company		tabase				il Status	•
	Recipients 3 of 3 F Dylan, Robert Jagger, Mick	ilter		Open Dat	tabase	MISC fo	orms			
	Recipients 3 of 3 F Dylan, Robert Jagger, Mick Jett, Joan Update Rec	ilter	New F	Open Dat	tabase	MISC fo	orms			
	Recipients 3 of 3 F Dylan, Robert Jagger, Mick Jett, Joan	ilter	New F	Open Dat	tabase	MISC fo	orms			0
	Recipients 3 of 3 F Dylan, Robert Jagger, Mick Jett, Joan Update Rec	ilter cipient 9 Data	New F base - 109	Open Dat	tabase	MISC fo	Cop	• A	ient	

5. A popup window appears.

The first section pertains to 1096 information. The default choice is to Use all recipients for 1096 totals for the selected company. If you are filing Corrected or Voided 1099s, then choose the Use selected recipients for 1096 totals option.

The second section of the screen pertains to 1099s. The default choice is to **Print 1099s for all recipients**. If you are filing Corrected or Voided 1099s and only want selected recipients to be included, choose the **Print 1099s for selected recipients** options.

Choose 'Use Selected' if you are printing ONLY CORRECTED and VOIDED 1099s, otherwise choose 'Use All' to use all Mercy's Garage MISC recipients Use all recipients for 1096 totals Use selected recipients for 1096 totals	Print Forms fo	or Filing	*
and VOIDED 1099s, otherwise choose 'Use All' to use all Mercy's Garage MISC recipients Use all recipients for 1096 totals Use all recipients for 1096 totals Choose 'Print All Recipients' if you want to print 1099s for		CheckMark [®] 1099 Software	
Choose 'Print All Recipients' if you want to print 1099s for	a	and VOIDED 1099s, otherwise choose 'Use All' to use all	
		Use all recipients for 1096 totals Use selected recipients for 1096 totals	
all Mercy's Garage MISC recipients, otherwise choose 'Print Selected Recipients'	36	all Mercy's Garage MISC recipients, otherwise choose 'Print	
Print 1099s for all recipients Print 1099s for selected recipients	0	Print 1099s for all recipients O Print 1099s for selected recipients	
Continue Cancel		Continue Cancel	

****If printing 1099 MISC or INT Only****

If you are printing **1099 MISC or INT forms**, you'll be prompted to choose **I Sent 2-up forms to recipients** or **I sent 4-up forms to recipients**. Choose the **I sent 2-up forms to recipients** option if you plan on using 2-up pre-printed forms for all copies of 1099-MISC. If you plan on printing Copy B, Copy 2 and Copy C for the recipient on blank paper, you can select **I sent 4-up forms to recipients**. After making your selection, click **OK**.

CheckMark [®] 1099 Software
Choose 'Use Selected' if you are printing ONLY CORRECTED and VOIDED 1099s, otherwise choose 'Use All' to use all Mercy's Garage MISC recipients
Use all recipients for 1096 totals Use selected recipients for 1096 totals
Choose 'Print All Recipients' if you want to print 1099s for all Mercy's Garage MISC recipients, otherwise choose 'Print Selected Recipients'
Print 1099s for all recipients O Print 1099s for selected recipients
Continue

NOTE: If you have not selected any recipients for the company selected, all recipients will be printed.

6. A message box will open telling which form to load in the printer and how many. Click **OK** after you have loaded the correct forms in your printer. Do this for each message box that appears.



Printing 1099s for Recipients

- 1. Select the company you wish to print 1099 forms for.
- 2. Select which type of 1099 form you wish to print from the Forms drop down menu: MISC, DIV, INT, R, or S.

NOTE: Recipients shown will be for the type of 1099 form that is selected. You can choose **SHOW ALL** to show all recipients, but you must select a specific 1099 form from the drop down list to be able to print.

3. Select which recipient(s) in the list you wish to print 1099s for.

NOTE: You can sort the recipients by Status drop down menu to group recipients as **Printed, Completed, Validated, Corrected and Void**. For more information on using the Status drop down menu and what each Status means, see "Status" on page 35.

4. Under the File menu, select the Print Forms for Recipient option.

int	File	Tools	Font Sizes	Sort	Window	Help		÷()	*	\bigcirc	_	•	•	Mon 9:47 PM	Kristi I
	Cre	ate Data	abase		C	heckMark	1099 Print	t 2017							
		ort													
		o <mark>ort Prio</mark> en Datab				Che	ckM	ark	TM						
			lanager			109	9 Sof	ftw	ar	e					
		se Datal						Filt		1					
	EF	ile													
		nmary R													
		iling Lab		_											
			for Recipient												
	FIII	it i orina		upuate	Company	New	Company	/	Dele	te Co	mpa	iny			
						Oper	n Database								
	Recip	ients 3	of 3 F	ilter					М	SC fo	rms	0		Status	0
	neerp			inter								~		Status	~
	Dyla	n, Robe	rt												
	Jagg	er, Mick													
	Jett,	Joan													
			Update Re	cipient	New F	Recipient	Delet	e Reci	pien	ts	С	opy R	lecipie	ent	
	Databa	se Ch	eckMark 109	0 Data	hase - 100	Q Vear 2	017								
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	aun.	70.	ici si kiistiiis		cuments/v	SHEEKIMAI	K/1099/2	01770	met	Rina	K IU	551	ataba	GC 2017.00	

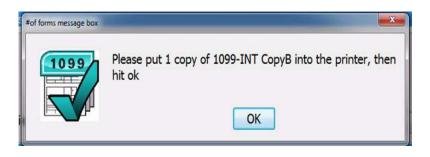
If Printing 1099-MISC and 1099-INT only

If you are printing **1099 MISC forms** or **1099 INT forms**, you'll be prompted to choose **Print 2-up MISC** or **INT forms** or **Print 4-up MISC** or **INT forms**. Choose **Print 2-up MISC forms** option if you plan on using 2-up pre-printed forms for all copies of 1099 MISC. If you plan on printing Copy B, Copy 2, and Copy C for the recipient on blank paper, you can select **Print 4-up MISC Forms**. After making your selection, click **OK**.

CheckMark 1099 Software
Please select which 1099 forms you are using to print recipients.
Print 2-up MISC forms OPrint 4-up MISC forms
If you choose '2-up' we will separately create Copy B and Copy 2 for each recipient. (Needs to be printed on preprinted forms)
If you choose '4-up' we will create a one page PDF containing a Copy 2, Copy B, Copy 1 and Copy C's for each recipient. (Needs to be printed on blank paper)
OK Cancel

NOTE: Using the 4-up sheet method will produce two Copy Cs instead of one Copy 1

5. If printing 2-up on pre-printed forms, a message box will open telling you which form to load in the printer and how many. Click **OK** after you have loaded the correct forms in your printer. Do this for each message box that appears for each form.



Edit Printing Formats

You can adjust each individual print field if printing on pre-printed forms.

1. Choose **Edit Printing Formats** located under the **Tools** menu.

int	File	Tools	Font Sizes	Sort	Window	Help	ť.) *	\bigcirc			•	Mon 9:49 PM	Kristi I
۲		Admi	n		C	heckMark 1	1099 Print 20	17						
	Backup Database Restore Database Edit Printing Formats Compa Edit Page Setup Filter													
	ABC	Compar	ηγ											
	Sam	ple Co												
	XYZ	Co												
	Update Company New Company Delete Company													
						Open	Database							
	Recip	ients 3	of 3 F	ilter				M	SC for	rms	٢	All	Status	0
	Dyla	n, Rober	rt											
		er, Mick												
	Jett,	Joan												
			Update Re	cipient	New F	Recipient	Delete R	cipier	nts	Co	py R	ecipie	ent	
	Databa	car Ch	eckMark 109		hasa 100	0 Veer 20	17							
	Databa Path:						/1099/2017	Che	ckMar	·k 10		ataba	se 2017 db	
	raul.	705	iers/ kristilis	ner/D0	cuments/C	LITECKIVIALK	1059/2011	/ che	crivial	K 10	590	atdDa	ise 2017.00	4

2. Select which forms you want to modify from the drop down menu: MISC 2-up form, DIV form, INT form, R form, S form, 1096 form.

CheckMark 1099 Edit Printing Formats	Check Mark	<
Reset Forma		tom Format
	INT form R form S form 1096 form	

0	1 2		<u>A. 5</u>		
	8	8			
1	payer name		bax 1		
	payer address payer city-state-zip	-			
1	payer phone	3	bax 2		
1	Vaysi pilons		box 3	box 4	
	payer id	ecipient id	box 5	box 6	
1	engalite in the	scopeting to	NORO_3	Mag. M.	
ŧ	recipient name				
			box 7	box 8	
1	recipient address				
1			8	box 10	
1	recipient city state zip cour	ntry	box 11	box 12	
1		. 8	North L	600.00	
1	recipient acct	8 0	box 13	box 14	
1			box 16-1	box 17-1	box 18-1
	box 15a	oox 15b	box 16-2	box 17-2	box 18-2

3. Click **Edit Current Custom Format**. A window showing all print fields on the selected form opens.

You can adjust any field by dragging it with the mouse. Or click on any field to highlight and use arrow keys on the keyboards.

Double-clicking any field will turn the text from 'black' or 'red' or vice versa. Any field labeled in 'red', will not print.

4. To reset the back to the default format, click the **Reset Format** button

Edit Page Format (Mac Only)

If using a Macintosh computer, you must set the printing preferences the first time you print to correctly format the page.

A warning message will appear the first time you try to print.

You can access the Edit Page Setup screen by clicking the Edit Page Setup button.

You can also access the Edit Page Setup screen under the Tools menu.

- 1. Click Edit Page Setup under the Tools menu.
- 2. Follow the instructions in the warning message. You can also print out the instructions to follow along.

Chapter 8 eFile

This chapter shows you how to eFile 1099 forms using the IRS Filing Information Returns Electronically (FIRE) System. If you have never eFiled 1099s in the past, You will need to visit the IRS website at www.irs.gov to sign up for a FIRE system account and receive a Transmitter Control Code (TCC), You should do this 45-60 days before the filing deadline.

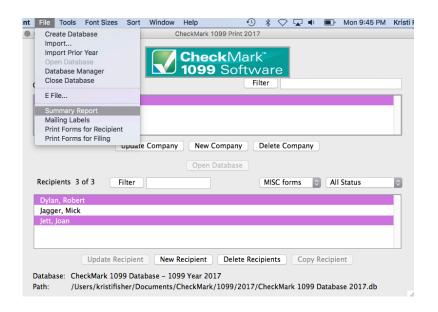
While CheckMark Inc. attempts to maintain up-to-date and accurate tax and for information, we cannot be held responsible for changes or discrepancies in tax values and forms that are filed incorrectly.

NOTE: The ability to eFile is only is only available to customers who have purchased the 1099 eFile version. If you need to upgrade from the printed version, visit the CheckMark website at www.checkmark.com.

Summary Report

The 1099 Summary Report Summarizes vendor payments by 1099 type. These totals can be compared to Box 5 on Form 1096. Utilize this report to verify the accuracy of your values before printing.

1. Under File, select Summary Report. Click Print.



Creating a file to eFile

- 1. Select the company you want to eFile for. You can select multiple companies if you wish. For information on selecting multiple companies, see "Selecting Multiple Com-panies" on page 19.
- 2. Select the recipients you wish to include. You can sort using the different forms or choose **All Forms** from the drop down menu to select all recipients. For information on selecting multiple recipients, see "Selecting Multiple Recipients" on page 38.
- **NOTE**: You must choose at least one company, but if you do not choose any recipients, all recipients will be included in the eFile.

You can sort the recipients by the Status drop down menu to group recipients as **Printed, Completed, Validated, Corrected** and **Void**. For more information on using the Status drop down menu and what Status means, see "Status" on page 36.

3. From the File menu, choose eFile...

-File File Tools Font Sizes Sort Window Help
Create Database CheckMark 1099 E-File 2017
Import Import Prior Year
Database Manager Close Database
Co
E File
Summary Report Mailing Labels
Print Forms for Recipient
Print Forms for Filing
Open Database
Recipients 10 of 10 Filter MISC forms C All Status
Bower, Sammie
Comfort Climates
Evan's Pics
Free Range Chickens Hill Mags
Update Recipient New Recipient Delete Recipients Copy Recipient
Database: CheckMark 1099 Database - 1099 Year 2017
Path: /CheckMark/1099/2017/CheckMark 1099 Database 2017.db

4. In the pop-up window. Fill in all applicable fields.

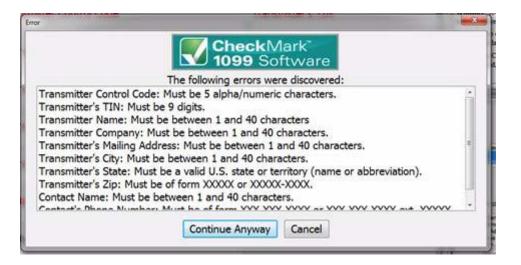
	eckMark 99 Software
Transmitter Control Code	Transmitter's TIN
1	
Transmitter Name	Transmitting Company
Transmitter's Mailing Address	
Transmitter's City	
Transmitter's State	Transmitter's Zip
Contact Name	Contact's Phone Number
Contact's E-mail Address	
	This is a TEST file

5. *Optional*: If you need more information on how to set up an E-file account, Click the **How to E-file button**. A pop-up window with important links on how to first apply, create a FIRE system account.



6. Once all the information is filled in, click the Create E-File Now button.

7. If there are any errors in the transmitter information window, you will see a pop-up window explaining what errors occurred.



- 8. Click **Cancel** to go back to the transmitter information window to correct any set up errors. Or click **Continue Anyway** to proceed with saving the .txt file.
- 9. A Save as dialog box opens.

Organize • New fok	ler					田• (
🚖 Favorites	Documents library				Arrange by	Folder •
Downloads	Name	Date modified	Туре	Size		
Computer Co	Configuration Beckups Freports	9/22/2015 3:08 9:4 9/22/2015 3:08 9:4 9/11/2015 8:03 AM	File folder File folder File folder			
File name: 1007	XEO TO					

10. Enter a name for the file or use the default name if one is given. Save the file to a location that is easy to find. The Desktop is an easy location to save the file to and find it there later when you are ready to submit the file to the IRS FIRE system. Click **Save.**

Chapter 9 Backup and Restore

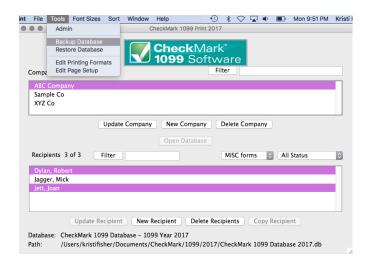
Making backups is critical to protecting your data. You should always keep current backups. CheckMark 1099 allows you to easily backup your data to any external source for safekeeping.

Backing Up Using the Backup Database Command

Using the **Backup Database** command within the program allows you to backup a duplicate copy of the database. You can restore this database in case of computer failure or to revert back to a previous database in case of an error in your current database. It is recommended that you make current backup databases anytime you modify information.

NOTE: Only users with **Admin privileges** can backup and restore a database. For more information on setting up Admin privileges, see "Setting up Users and Passwords" on page 21.

1. Click on the **Tools** menu in the upper left hand corner of the screen and select **Backup Database.**



2. A **Save In** dialog box appears. Choose a destination you would like to save the backup database to.

3. A default name of **backup (with the current date).db** is given. Change the name of the backup if you wish and leave the .db extension.

$\bigcirc \bigcirc \bigcirc$		Create a Da	atabase Backup (All C	ompanies in Databas	se)	
		Save As: Ch Tags:	eckMark 1099 Datab	ase 2017 Backu 🔨]	
			Auto_Backups	٢		Q Search
Favorites Coloud Drive A pplications Desktop Documents O Downloads Devices	CheckMark ChkkkBal.pdf ChkkkBal.pdf classqulicts.doc Coddington.docx Comcast12-12 Comparssay.doc Costa Riure.doc Costa Riure.doc Costa Riure.doc Costa Risay.doc Costa Risay.doc	1095 1099 Multiledge Payroll) 201	7 •	Configuration	Auto_Backups
☐ Kristi Fisher's iBook G4		Format: 10	099 Database Backup	o (*.db)		
New Folder						Cancel Save

4. Click Save.

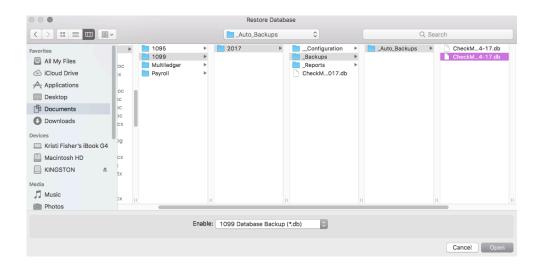
Restoring Database using Restore Database Command

In case of computer failure, corruption or if you made a mistake and would like to revert back to a previous database, the **Restore Database** command will open any previous backups you have saved. You must have a Database created before you can restore a backup.

1. Click on the **Tools** menu in the upper left hand corner of the screen and select **Restore Database.**

nt	File	Tools	Font Sizes	Sort	Window	Help		•1	*	\bigcirc		a ()	۱.	Mon 9:52 PM	Krist
	••	Admi	in		(CheckMark	1099 Prir	it 2017							
	Compa	Resto	up Database ore Database Printing Form Page Setup				eckIV 9 So	ftvv		e					
	ABC	Compa	ny												
		ole Co													
	XYZ	Со													
	Recip	ients 3		Update	Company		v Compan n Databas			te Co SC for		ny	All	Status	0
	Dyla	n, Robe	rt												
		er, Mick													
	Jett,	Joan													
			Update Re	cipient	New	Recipient	Dele	te Reci	pien	its	Со	py R	ecipie	ent	
	Databa Path:		eckMark 109 sers/kristifis					2017/0	Chec	:kMar	k 10	99 C	ataba	se 2017.db	

2. A Look in screen for Windows or Restore Database screen for Macintosh opens. Browse to the location of the Backup Database file.



3. Select the file and click **Open.**

Important: Restoring a database file will **overwrite the existing .db file**. Restoring a database file is used in cases of the current file becoming damaged or information being entered incorrectly into the current database. Restoring from a previous database is faster than manually updating the incorrect information.

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