Managing Vendor 1099s

Last Modified on 11/17/2026 5:20 pm EST

This guide explains managing 1099s for vendors. It is intended for advanced users.

aACE provides useful searching and reporting features for vendor 1099s. To work with these features, navigate from Main Menu > CRM & Sales > Companies.

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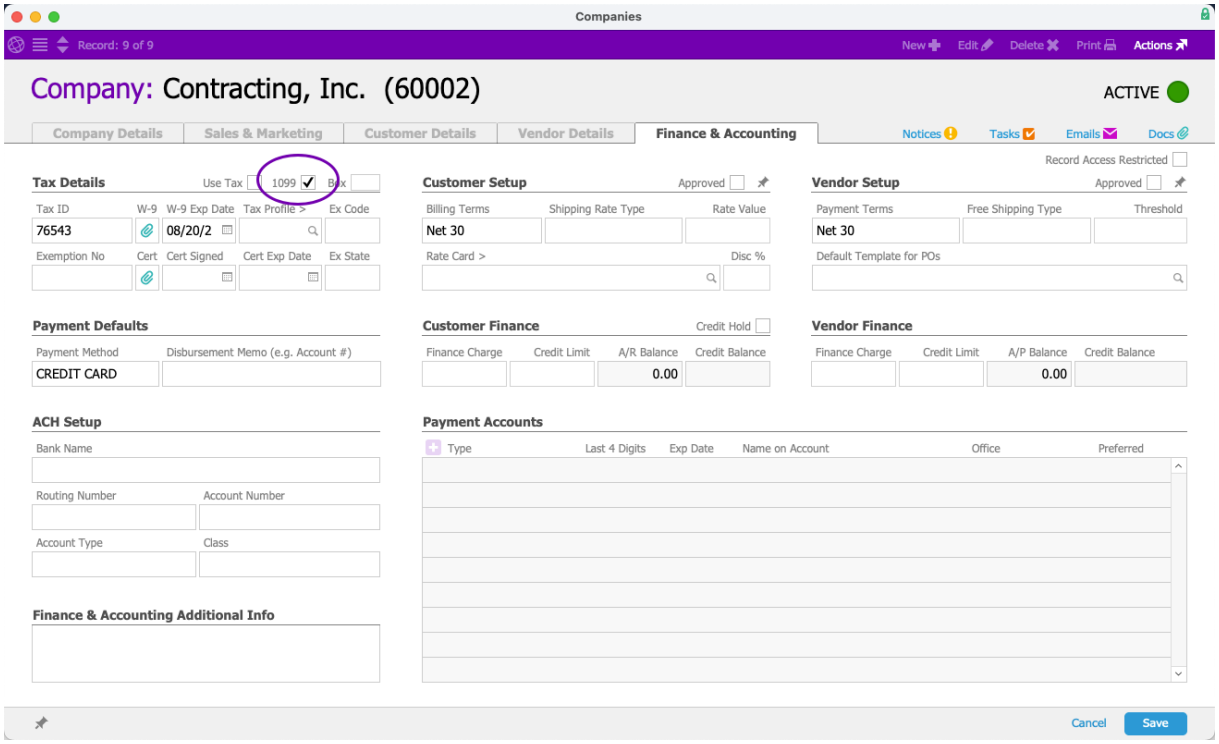
Enabling the 1099 Preference for Company Records

The 1099 preference designates a company record as requiring a 1099 form. This preference is useful for reporting and management of 1099 vendor companies.

Enable a Specific Company

General users with the required access privileges can enable the 1099 preference for specific companies.

1. At the Companies module list view, use the Quick Search (http://aace6.knowledgeowl.com/help/using-the-quick-search-bar) bar to locate the vendor company record.
2. At the vendor company record detail view, select the **Finance & Accounting**, then select **Edit**.
3. In the Tax Details section, enable the preference for 1099.



4. Select **Save**.

Enable Multiple Companies with a Batch Update

System administrators can update 1099 preferences for multiple company records at once from the Companies list view.

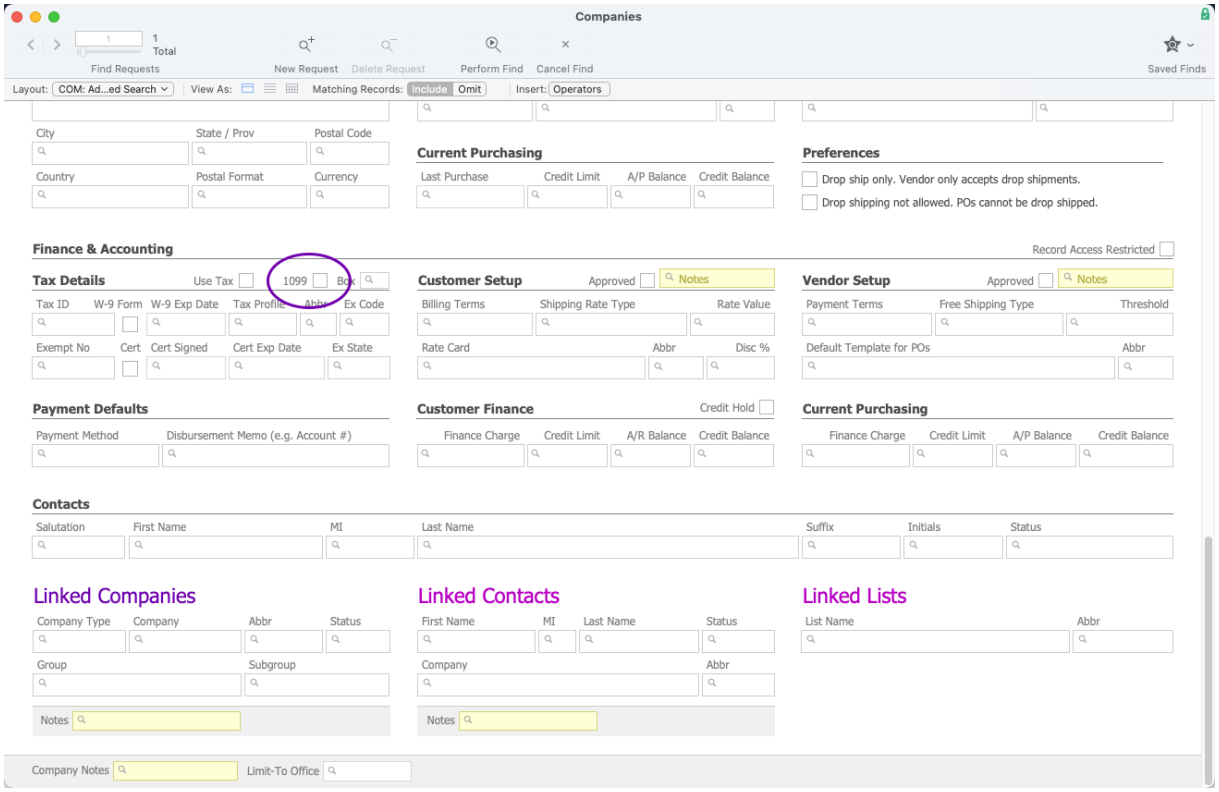
1. Use the Quick Search bar to display a list of companies.
2. Select **Admin Actions** (⚙) > **Update 1099 Setting for List**.
3. Select **Y-True** to enable the preference or **Y-False** to disable the preference for these companies.

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Displaying All 1099 Companies

You can easily list all companies that require 1099s.

1. At the Companies module list view, select **Search Options** (▼) > **Go To Advanced Search.**
2. Locate the Finance & Accounting section.
3. Enable **1099**.
   You can enter additional criteria to constrain your list of 1099 companies further.



4. Select **Perform Find**.

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1099 Data Export Report

Only team members with Finance and Accounting access privileges can run this report.

The 1099 Data Export report summarizes 1099 data and includes information such as the company name, tax ID, and address for the specified tax year. aACE generates results for the companies currently displayed in the list view. If you have not filtered the list to show only 1099 companies, then non-1099 companies might affect the report.

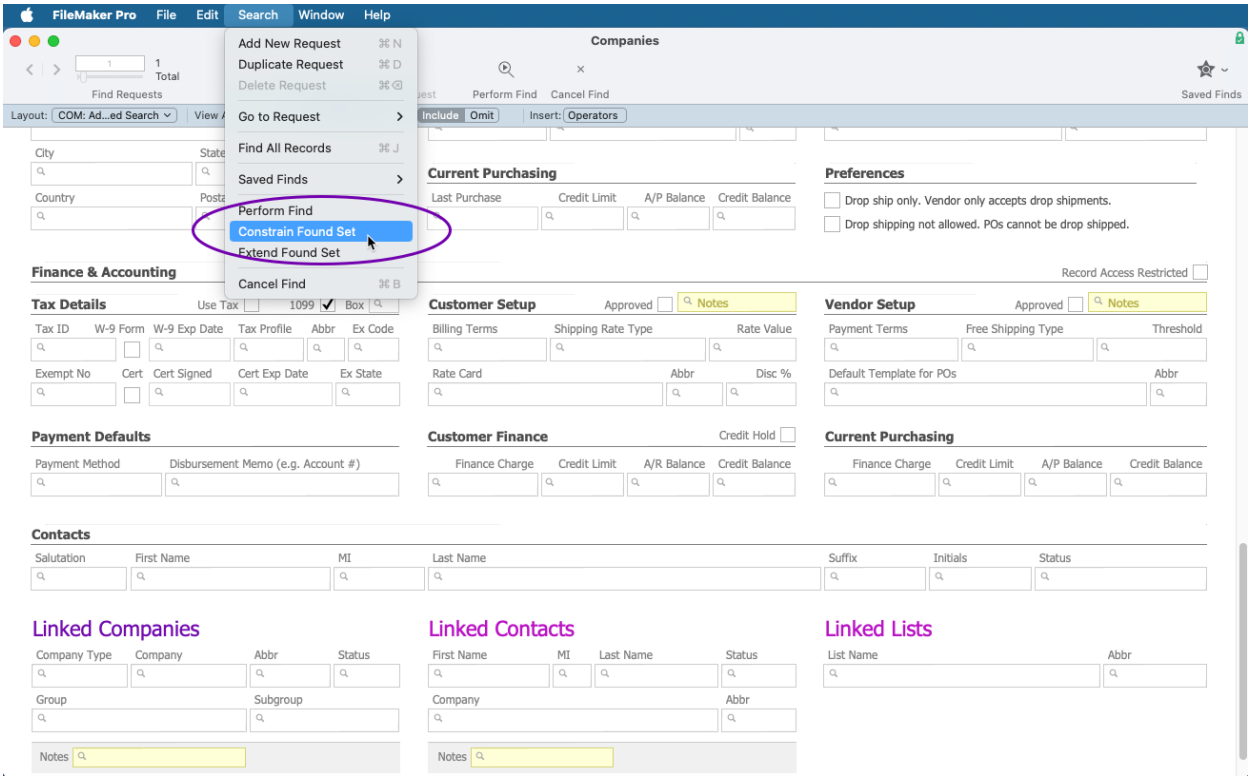
The 1099 data export report is based on the specific office you are currently logged in to. To open the report for a different office, you must switch offices (https://aace6.knowledgeowl.com/help/switching-between-offices).

Find Companies with x Disbursement Volume

To help prepare the list of companies to include in the 1099 report, you can search for vendors based on their disbursement volume. At the Companies module list view footer, select Find Companies with x Disbursement Volume. Enter a tax year, a minimum target disbursement volume, and an office if necessary, then select OK. aACE reviews the

disbursement data for the selected tax year, then provides a list of companies that have a total disbursement volume equal to or exceeding the target disbursement volume.

This search does not itself limit your list to companies flagged as 1099. You might need to further constrain the list to display only 1099 companies using Advanced Search by entering the Advanced Search details, then selecting the FileMaker Search > Constrain Found Set.



Open the 1099 Report

Create your list of vendor companies using the Advanced Search or Quick Links, then open the 1099 report.

1. At the Companies module list view, select **Print** > **Open Report Selector**.
2. Select **1099 Data Export**.
3. Enter the year for the data, then select **OK**.
4. Enter the file name, download location, and file type.
5. Select **Save**.

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Filing 1099s

There are many qualified companies who can assist you with filing 1099s. We

recommend eFile360 (https://efile360.com/).
