Reporting 1099 Vendor Payments to Yearli

To use the 1099 Vendor Report – Yearli SuiteApp to report vendor payments to Yearli:

1. Go to Customization > SuiteBundler > Search & Install Bundles (Administrator)

2. In the **Keywords** field, enter **1099 Vendor Payment Report**.

3. Click the name of the bundle for the third-party provider and click install
   (Bundle 199464 - 1099 Vendor Payment Report - Yearli)

4. Go to Reports > Saved Searches > 1099 Vendor Payment Report – MISC > Edit
   -or-
   Go to Reports > Saved Searches > 1099 Vendor Payment Report – NEC > Edit

5. In the **Results** tab, do the following:

   a. In the **Formula** column, replace **'Your Company Name'** with the legal name of the company that you are filing for. You must include the quotation marks for the formula to work (for example, 'Wolf Electronics Incorporated'). Replace all other fields that have a formula starting with the words 'Your Company'. You must include the quotation marks for the formula to work.

   b. In the **Custom Label** column, find the following required entries, and in the **Formula** column, enter the correct value. You must include the quotation marks for the formula to work:

   - Payer Name 1
   - Payer Address 1
   - Payer City
   - Payer State
   - Payer Zip
   - Payer Phone
   - Payer Federal Identification Number

   c. In the **Custom Label** column, find the following required entries, and for each, verify that source n the **Field** or **Formula** column is correct. For example, if you normally use the vendor's shipping address to report on the 1099 form, replace Vendor : Address fields with Vendor : Shipping Address fields.

   - Recipient Identification Number
   - Recipient First Name
   - Recipient Last Name
   - Recipient Name If Company
   - Recipient Address 1
   - Recipient City
   - Recipient State
   - Recipient Zip

   d. Depending on the location of the company you are filing for, do one of the following:

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- If the company you are filing for is located outside of the United States:

    - In the **Custom Label column**, find the entry **Payer Foreign Address Indicator**. Replace the formula beside it with **'TRUE'**.

    - In the **Custom Label column**, find the entries **Payer Foreign State Name**, **Payer Foreign Postal Code**, and **Payer Foreign Country Code**, and replace the formulas for those entries with the appropriate information. You must include quotation marks (' ') around the formulas.

- If the company you are filing for is located in the United States, remove the formula fields for the following Custom Label entries:

    - Payer Foreign Address Indicator

    - Payer Foreign State Name

    - Payer Foreign Postal Code

    - Payer Foreign Country Code

> **Note:** If a formula field is not required, you can remove the text in Formula column of that row, or you can remove the row entirely.

6. In the **Search Title** field, enter a new name for the report. From the **Save** dropdown list, click **Save As** so that you save a new copy of the report.

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7. To run the new report, beside the report, click **View**. In the **Filter** section, enter the applicable date range. By default, the date range is set to the previous calendar year. Click **Search**.

8. Export the file to CSV or Excel.