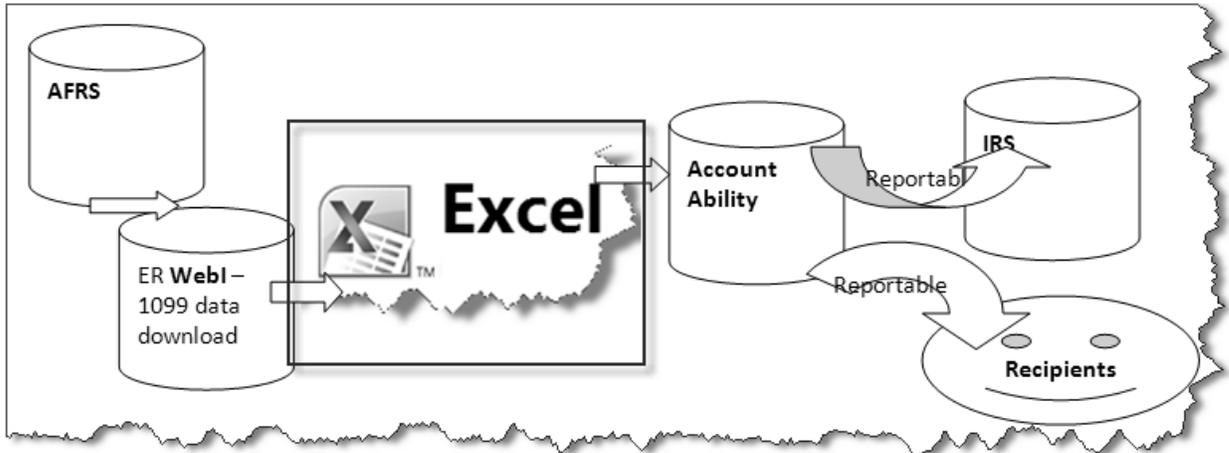
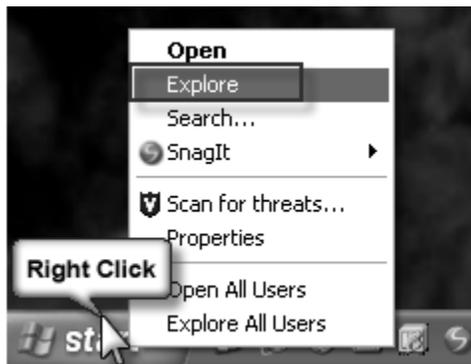


Creating your Tab-delimited 1099-MISC source file, by IRS Box



Please note: The images included in this document is specific to Windows XP, which may be different from the look and feel of your own computer.

1. **Open** your Windows Explorer



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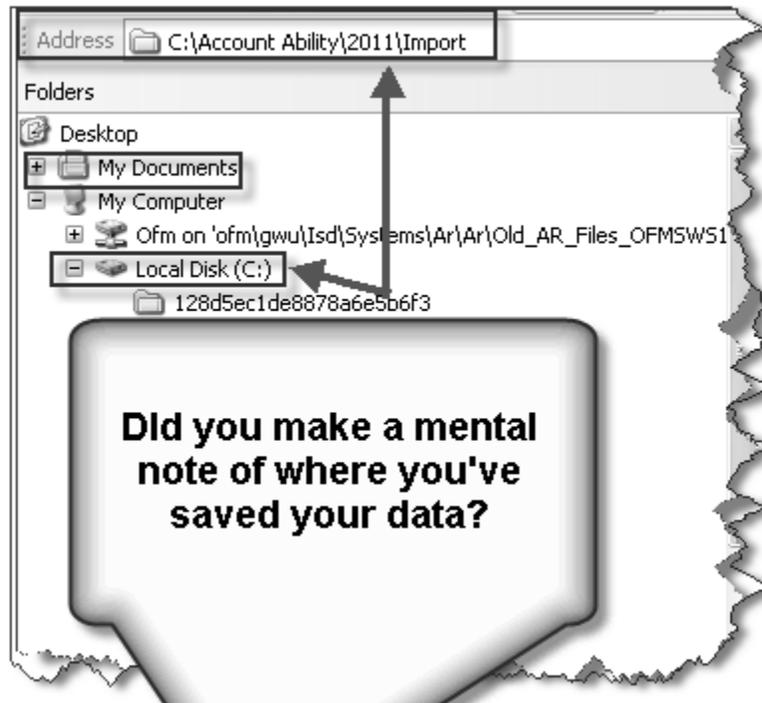
2. **Navigate** to the location where you've saved the exported file (s) from Enterprise Reporting Web Intelligence (ER WebI).

For the purpose of training, it would be

LOCATION: your **computer's Local Disk (C :)**
/Users/st3670-##/Documents/1099MISC_Class

NAME of file: _____

Creating your Tab-delimited 1099-MISC source file, by IRS Box



3. *Open* up Excel spreadsheet - **Clean up**

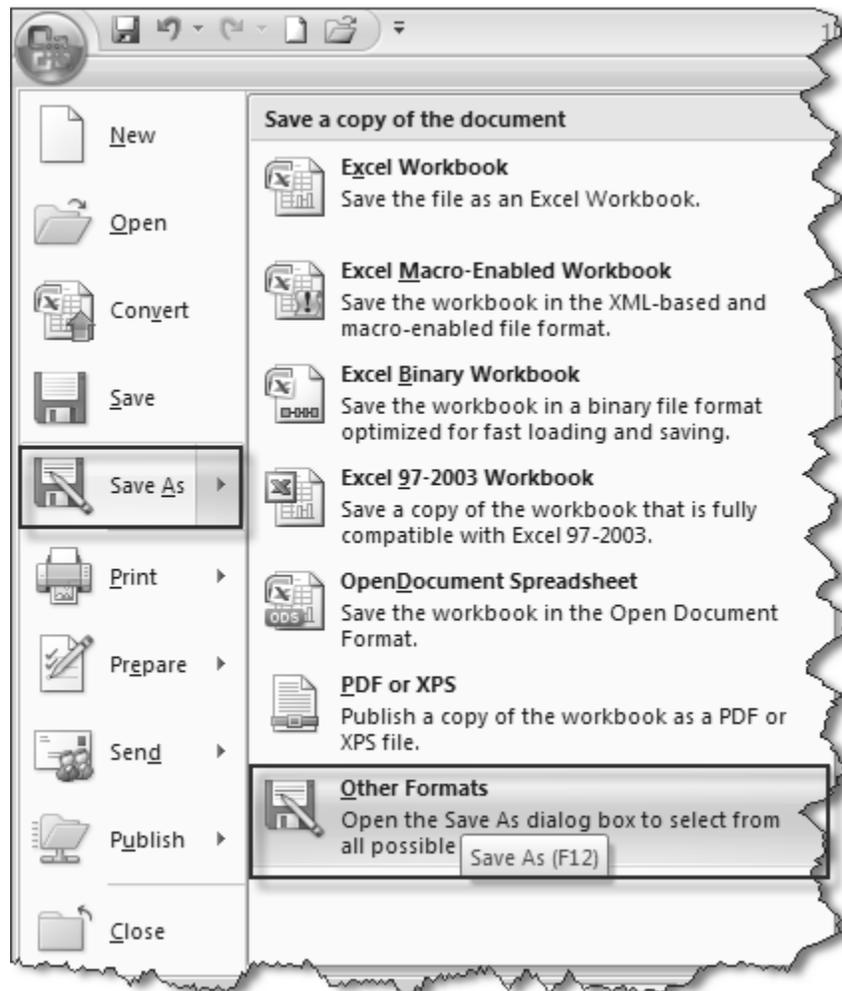
Name of the file you've downloaded from ER Web:

Creating your Tab-delimited 1099-MISC source file, by IRS Box

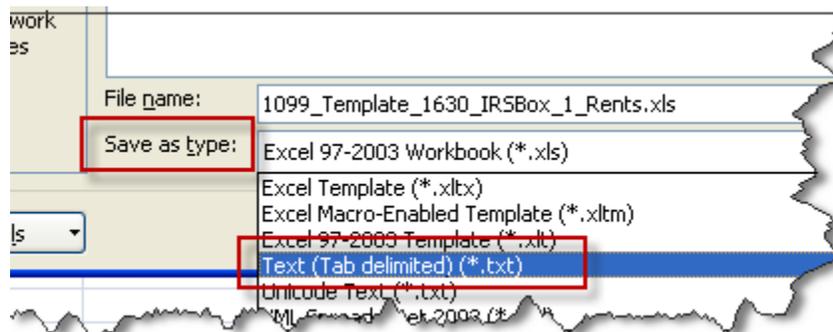
- 1) **Open** the "1099_MISC_Only" worksheet tab
- 2) **Delete** column A and row 1
- 3) **Review your data**
 - A. **Taxpayer Identification Number (TIN)** – Please review your TIN information for validity.
 - Cannot be blank
 - Must be 9 characters
 - At least one address must be available
 - Check for valid zip codes
 - B. **Review Amount** – negative amounts represent the payments.
4. **Delete "Agency AFRS Transaction Details"** report, if not already done so during the ER Webl download process.
5. **Create Text Tab delimited text file**
 - A. From new report, *select* **File**
 - B. Save As "**Text (Tab delimited)**" format

Please note: Steps may be different due to different version of Microsoft Office used. These images are from MS 2007

Creating your Tab-delimited 1099-MISC source file, by IRS Box



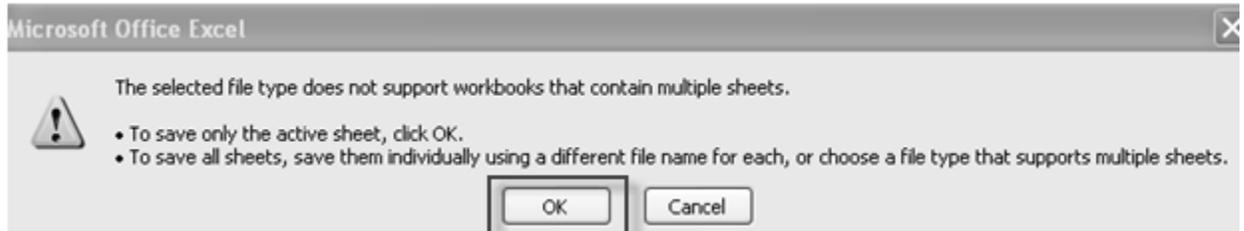
C. In the “**Save as type**” list, select “**Text (Tab delimited) (*.txt)**”



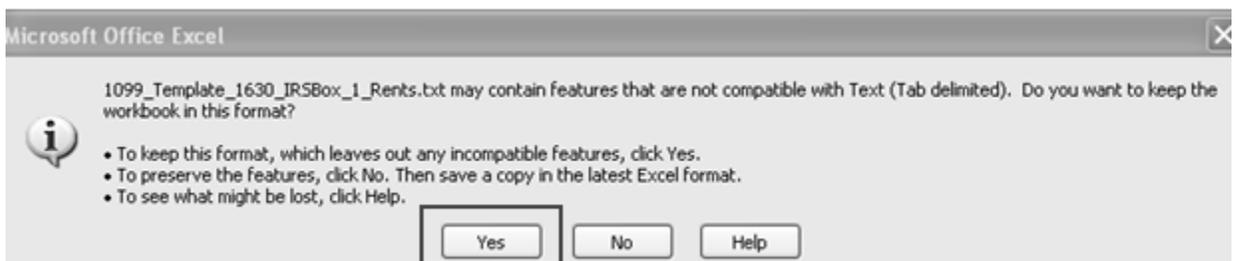
Location: My **Computer** Local Disk\Users\ST3670-##\Document\1099MISC_Class

Creating your Tab-delimited 1099-MISC source file, by IRS Box

- D. Saving the selection – Click **[OK]** to “Do you want to keep the workbook in this format”



- E. Save – Click **[Yes]** to “Do you want to keep the workbook in this format”



6. Click **[CLOSE]** – For the purpose of training, please *Delete* Excel spreadsheet.
7. *Repeat* the format conversion steps for each Excel spreadsheet (each IRS Box file).

For the purpose of training ONLY – please **DELETE** the Excel and Text file from the training room’s computer.