

Updated January 2023

Obtaining Form W-9 Information from Your Vendors for QuickBooks Online Users

QuickBooks Online provides a faster and more secure way for your vendors to fill out their name, address and identification number themselves. Here are the steps:

1. Click Workers on the left navigation panel, choose Contractors tab on the top and Click the Add a contractor button.

Overview NEW	Employees Contrac	tors			
Dashboard	0				
Banking	Contractors	Active 🔻		Prepare 1099s	Add a contractor
Sales					
Expenses	T The Dental	Group LLC			Write check V
Workers	Employees				
Reports	Contractors		Privacy		
Taxes					
Accounting					
My Accountant					

2. A new pop up window will show to add a contractor. All you need to fill out is the contractor Name and Email address and Click **Add contractor** button.

Name *	
mail *	
	s contractor to complete their profile. They'll get their own to safely share their personal details.
Preview	

3. QuickBooks will send an invite via email to the contractor with a safe link to Add your details now.

Craig's Design and Landscaping Services	xs.
Craig's Design and Landscaping Services needs a few details for your 1099 Add your details now	Intuit Intuit Intuit account to Share info with your client
Hello, "Craig's Design and Landscaping Services" uses QuickBooks to run their business. The IRS requires them to collect key info from you now so they can send you a 1099 at tax time. Create a free Intuit account and add your name, address, and tax ID. It is simple and only takes a minute or two. "Craig's Design and Landscaping Services" will have the info they need, and so will you come tax time.	You can use this account for all Intuit products Already have an account? Sign In Email address tim@example.com
If respects your privacy. To learn more, read our Privacy Statement .	Password
6 Security to find out more. 2015 Inutal Inc., All rights reserved. Trademarks. 10 El: Commerce Center Place, Tucson, AZ 85706 //Il only be charged if you decide to apgrade to premium Reduces.	Remember me
	By clicking to create an account you agree to Intuit's License Agreement and Privacy Statement Why do I need to create an account?

4. Once they create a free Intuit account, they will be prompted to answer a series of questions in a substitute W-9 form (their name, address and identification number). Once done, they click **Finish** and the information is saved and submitted to your QuickBooks Online company file.

/elcome! First things first— get you set up, we'll need to know what							
		Tuickbooks.					
Individual I file taxes using a Social Security number(most common).	Businoss I file taxes using an Employer Identification Number(EIN)	Complete your to Just answer a few quest What's your name?	tions and yo	ur 1099 will be rea	1	ne.	
		Pirst		Middle	Last		
		What's your address?					
		Street					
		City		State	•	21P	
		What's your SSN?					
		3000-30000					

5. This is how it will look on your QuickBooks Online company file.

Details				
Personal det	tails			
Contractor type Individual	_{Name} Tim Example	Display name Tim	Social Security number XXXX22-4444	
Email tim@example.com		Address 123 Main Street Anytown, CA 56789		

Another benefit for using this method is your contractors will have online access to the Forms 1099s that you prepare for no additional charge. They won't have to wait for the printed copy, or just in case they couldn't find the printed copy, they can always access the copy online. They simply need to click "yes" as shown in the screen below.

y contractors online access to their 1099s through their own Intuit account. Learn more iver printed 1099s to all of my contractors.	
liver printed 1099s to my contractors. Inish up by January 27 so we can deliver them on time.)	
Set up contractors for online access to their 1099s	
Online access to 1099s is no extra charge to you or your contractors. And we'll still mail them a printed	сору.
Contractors	
Add any missing addresses here and we'll save them to your QuickBooks account. Need to fix an address? Update it in QuickBooks before you file.	
Name Email for delivery	
Acme Corporation acme@corporation.com John Doe	
Download a copy of each 1099 for your records	Continue

If you need to fix a contractor's email address, you make the changes in QuickBooks Online before you file.

For more details about Forms 1099 E-File Service, please check out the Intuit website at https://quickbooks.intuit.com/payroll/1099-efile/