

1099 Database Tutorial

The SVdP Council is required to send out 1099 forms for individual landlords if the total paid is greater than \$600 for a calendar year. Since a landlord could own properties that span conferences, each conference needs to provide the payment information for each individual landlord for the Council to accomplish the 1099 task. A database and a smart form have been created to make this as easy as possible for the Council as well as the treasurers and presidents of conferences.

In general, the conferences treasurers fill out a form for each payment that generates records of data in the 1099 database. The Council then uses this data to generate the information needed for the 1099 forms.

There are 5 types of records in the 1099 database:

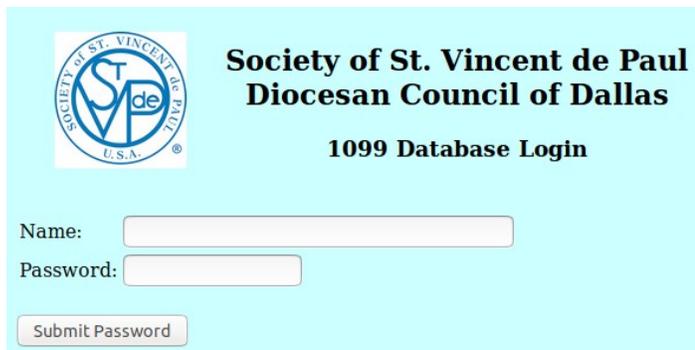
1. Landlord
2. Conference
3. Treasurer
4. President
5. Staff

There is also a payment type record. Multiple payment records can be associated with a single landlord record.

The only people who have access to all the data in the database are the Staff who have records defined in the database.

The only people who have access to the form that generates records are people who are defined as treasurers, presidents, or staff.

The first time you use the database, you are asked to log in. Your login information consists of your name and a password; both are case sensitive. You only have to login once unless you delete the cookie or use a different device. The following image is the login screen. Enter your name and password, then click on the Submit Password button.



 **Society of St. Vincent de Paul
Diocesan Council of Dallas**

1099 Database Login

Name:

Password:

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When you enter your name and password, then click on the Submit Password button, you will see the Display All screen which contains a Welcome message, the functions of the database, and a display of all of the current records. A partial image is shown below.

Welcome Russ Keenan.

Global search

| Name | Rec Type | Conference | Email Address | Cell Phone | Address | City | ZIP | State | Record |
|-----------------------------------|------------|------------|---------------|------------|---------|------|-----|-------|--------|
| All Saints-Dallas | Conference | | | | | | | TX | 1 |

The Global search field is used to search all records for a string of characters. It returns a table of all records where any field matched the string.

Add New Rec. is used to add a new record to the database. It is important to keep the list of conferences up to date, as the records defined as conferences determine the list of conferences in the form used to enter payments.

Find is used to find a record by partial Name, Phone number, or by Record number.

Reports is used to run a specific report.

Display all displays all the records sorted by name. Note that you can click on the title to sort the data by that column.

Functions is a drop down that is used to select a different function.

- Delete Cookie
- Help
- Search Payments
- Search / Email
- Undelete record

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Clicking on a name causes the associated record to be displayed. What is displayed depends on the type of record. The first is a landlord record; the second is a staff, treasurer, or president record.

Record Functions:

Record: 2 generated: 03/06/2019 last update: 05/09/2019

Name *

W-9 Name Record Type

Address City State Zip

W-9 Address W-9 City W-9 State W-9 Zip

Cell Phone Home Phone Work Phone

W-9 Phone

Tax ID Box 3 Email Address

Comments

Note that the W-9 name and address may be different than the conference name and address. It is important for the Council staff not to change the conference name and address.

Record Functions:

Record: 1 generated: 03/06/2019 last update: 03/26/2019

Name * Record Type Conference

Address City State Zip

Cell Phone Home Phone Work Phone

Password

Email Address

Comments

The Save button is used to save the record to the database. **If changes are made to the record and the Save button is not used, the changes are not transferred to the database.**

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Attach file is used to attach a file to the record. To avoid paper, include an image of the W-9 form into a document, password protect the document which encrypts the form, then attach the document to a landlord record.

Delete Record can be used to mark a record as deleted.

Print will print the record.

Prev Rec. is used to display the previous record.

Next Rec. is used to display the next record.

The conference record display is shown below:

Record Functions:

Record: 81 generated: last update:

Name * Record Type

Address City State Zip

Cell Phone Work Phone

Password

Email Address

Comments

Note that there is a password function in the conference record. If a password is defined, then the treasurer or president of that conference must use that password to log into the smart form.

This allows each conference to have a separate password. It is also possible to assign a password to each individual.

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The Search / Email allows you to select main records with three different criteria. Once the records are selected, it is possible to send email to the people whose records are selected as long as they have email addresses in their records. It is easy to send treasurers or presidents such an email. This is very handy when sending the initial login instructions since there is only one email sent per record.

Global search Functions

Search records for a string of characters.
Enter record selection criteria, then click on Select Records button.

Field 1 Comparison 1 Value 1

Field 2 Comparison 2 Value 2

Field 3 Comparison 3 Value 3

Notes: Assume values are case sensitive.
To select all records, use values: "Last Name", "Contains", "."
Format for date is mm/dd/yyyy

Normal use would be the following:

A conference would submit a form which defines a landlord record and adds a payment record. The W-9 would be sent to the landlord. The Landlord would fill out the W-9 form and return it to the Council. The Council would enter the Tax ID and Box 3 information into the landlord record. Then scan the W-9 form, insert it into a document, password protect the document, then attach the document to the landlord file.

At the beginning of the year, pull a report to determine who has to be sent 1099 forms.

The following reports are available:

- 1099 Report
- Payments Report
- Conference List
- Conference Report
- Landlord Report

Sample reports are shown at the end of this document.

The Search function can be used to select a specific set of payment records.

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To see the payment records use the Function drop down to select Search Payments.

Select Date for the first field.
Select > for the operator
Enter 01/01/2019 to select records for this year.

In 2020 to select payments for 2019, you will need to:

Select Date for the first field
Select > for the operator
Enter 01/01/2019 in the value field
Select Date for the second field
Select < for the operator
Enter 01/01/2020 for the value.
This will give you the payment records for 2019.

option for the second field
Select <=
Enter 12/31/2019 for the value.
Whatever you feel more comfortable with.

The selected records can be easily transferred to Excel by selecting the table, do a copy, then bring up Excel and do a paste.

If you want to try out the database, log into the Demo database with the name “Treasurer” and the password “Demo”.

https://parishplus.com/cgi-bin/DB_1099.cgi?P=Demo

Getting Started:

A designated staff person needs to provide information that will be used to establish a database. The heading, cookie names, and passwords, will be used in setting up the database. There can be one password for the council, one for each conference, or one for each person.

The Council needs to provide a list of the conferences as well as the names and email addresses of the treasurers, presidents, and staff members. This data is used to generate records in the database so each treasurer or president can use the smart form and staff can access the database.

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1099 Report:

Only the landlords who have received more than \$600 in a calendar year are listed. The name and address are the values entered from the W-9 data fields.



Society of St. Vincent de Paul Demo Database

1099 Report From 01/01/2019 to 12/31/2019

Global search Functions ▼

| Record | Landlord | Tax ID | Box 3 | Address | City | State | ZIP | Total Amount |
|-------------------|---------------|--------|-------|-----------------|---------|-------|-------|--------------|
| 2 | Good Landlord | | None | 123 Street Name | Plano | TX | 75075 | 900 |
| 3 | Bad Landlord | | None | w9 addr | w9 city | AL | 12345 | 700 |

Total number of landlords is 4.
Number of 1099 forms required 2.
Total number of payment records is 9.
Total payment amount is \$ 2450.
Total payments requiring 1099 forms is \$ 1600.

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A partial Payments report:



**Society of St. Vincent de Paul
Demo Database**

**Payment Report
From 01/01/2019 to 12/31/2019**

Global search Functions

Number of records: 8

| Conference | Added By | Landlord Name | Address | City | State | ZIP | Tax ID | Type | Payment Date | Amount | Comments | W-9 Name | W-9 Address | W-9 City | W-9 State | W-9 ZIP | W-9 Phone |
|--------------------------------|----------------|-------------------------------|--------------------------|--------|-------|-------|-------------|---------------|--------------|--------|----------|---------------|-----------------|----------|-----------|---------|--------------|
| St. Elizabeth Ann Seton-Plano | Russ Keenan | Good Landlord | 123 Street Name | Plano | TX | 75025 | | None | 01/30/2019 | 350.00 | | Good Landlord | 123 Street Name | Plano | TX | 75075 | |
| St. Elizabeth Ann Seton-Plano | Russ Keenan | Bad Landlord | Some dark place | Plano | TX | 75025 | | None | 01/30/2019 | 400.00 | | Bad Landlord | w9 addr | w9 city | AL | 12345 | 111-222-3333 |
| St. Elizabeth Ann Seton-Plano | Russ Keenan | Shouldbe Rich | some rich street address | Dallas | TX | 75220 | 111-22-3333 | C Corporation | 02/02/2019 | 200.00 | | Shouldbe Rich | 0 | 0 | 0 | | |
| St. Elizabeth Ann Seton-Plano | Russ Keenan | Good Landlord | 123 Street Name | Plano | TX | 75025 | | None | 02/20/2019 | 250.00 | | Good Landlord | 123 Street Name | Plano | TX | 75075 | |
| St. Elizabeth Ann Seton-Plano | Russ Keenan | Shouldbe Rich | some rich street address | Dallas | TX | 75220 | 111-22-3333 | C Corporation | 02/20/2019 | 300.00 | | Shouldbe Rich | 0 | 0 | 0 | | |
| St. Elizabeth Ann Seton-Plano | Russ Keenan | New One | 1234 Some Street | Plano | TX | 75023 | | | 04/27/2019 | 350.00 | | New One | 0 | 0 | 0 | | |
| Holy Family of Nazareth-Irving | Good Treasurer | Bad Landlord | Some dark place | Plano | TX | 75025 | | None | 05/02/2019 | 100.00 | | Bad Landlord | w9 addr | w9 city | AL | 12345 | 111-222-3333 |

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Sample conference report:



Society of St. Vincent de Paul Demo Database Conference Report

Global search ▼

| Conference | Treasurer | Payment Date | Amount (sum) | Comments |
|--------------------------------|----------------|--------------|---------------|--------------------|
| Holy Family of Nazareth-Irving | Good Treasurer | 05/02/2019 | 100.00 (100) | test database fix |
| St. Elizabeth Ann Seton-Plano | Russ Keenan | 01/30/2019 | 350.00 (450) | check # 1553 |
| | Russ Keenan | 01/30/2019 | 400.00 (850) | Check # 1556 |
| | Russ Keenan | 02/20/2019 | 250.00 (1100) | check # 1555 |
| | Russ Keenan | 02/02/2019 | 200.00 (1300) | 2345 |
| | Russ Keenan | 02/20/2019 | 300.00 (1600) | 1235 |
| | Russ Keenan | 04/27/2019 | 350.00 (1950) | did this one work? |
| | Good Treasurer | 05/02/2019 | 200.00 (2150) | test fix effort 2 |

Number of conferences with at least one payment record is 2.
Number of active conferences is 35.
Number of payment records is 8.
Total payment amount is \$ 2150.

Note that the sum shows how much a conference has paid to landlords.

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Sample Landlord report.



Society of St. Vincent de Paul Demo Database

Landlord Report From 01/01/2019 to 12/31/2019

Global search Functions

| Landlord | Conference | Treasurer | Payment Date | Amount (sum) | Comments |
|-------------------------------|---------------------------------|----------------|--------------|--------------|--------------------|
| Bad Landlord | St. Elizabeth Ann Seton-Plano | Russ Keenan | 01/30/2019 | 400.00 (400) | Check # 1556 |
| | Holy Family of Nazareth-Irving | Good Treasurer | 05/02/2019 | 100.00 (500) | test database fix |
| | St. Elizabeth Ann Seton-Plano | Good Treasurer | 05/02/2019 | 200.00 (700) | test fix effort 2 |
| Good Landlord | St. Elizabeth Ann Seton-Plano | Russ Keenan | 01/30/2019 | 350.00 (350) | check # 1553 |
| | St. Elizabeth Ann Seton-Plano | Russ Keenan | 02/20/2019 | 250.00 (600) | check # 1555 |
| | St. Elizabeth Ann Seton - Plano | Russ Keenan | 12/20/2018 | 300.00 (900) | # 2334 |
| New One | St. Elizabeth Ann Seton-Plano | Russ Keenan | 04/27/2019 | 350.00 (350) | did this one work? |
| Shouldbe Rich | St. Elizabeth Ann Seton-Plano | Russ Keenan | 02/02/2019 | 200.00 (200) | 2345 |
| | St. Elizabeth Ann Seton-Plano | Russ Keenan | 02/20/2019 | 300.00 (500) | 1235 |

Number of landlords is 4.

Number of payment records is 9.

Total payment amount is \$ 2450.

Number of received W-9 forms is 1.