



BOOKS

Payees

Track who you pay and who pays you. Default categories, merging duplicates, 1099 reporting.

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A Payee is anyone you pay or anyone who pays you — vendors, clients, employees, contractors, the IRS. Tracking payees consistently lets you answer "how much did I spend at this vendor this year?" without manually grouping transactions.

Creating Payees

- **Manually** — go to **Payees** → **Add Payee** and enter the name and optional details (email, 1099 status, default category).
- **On-the-fly** — when entering a transaction, type a new payee name and Books offers to create it.
- **From a transaction** — open any transaction, click the payee field, type the new name, and create-on-save.

Payee Fields

- **Name** — display name (required)
- **Default category** — Books will auto-suggest this category for future transactions with this payee
- **Email** — for invoicing or contact reference
- **Address** — for 1099 generation and printed checks
- **Tax ID** — EIN or SSN, needed for 1099 reporting
- **1099 vendor** — check if this payee should appear on year-end 1099-NEC reports

Merging Duplicate Payees

It's easy to end up with "AT&T", "AT&T Mobility", "ATT" all as separate payees. To merge:

1. Go to **Payees** and search for the variants.
2. Open one of the duplicates, click **Merge**, and pick the payee to merge INTO.
3. Books reassigns all transactions to the winning payee and deletes the merged one.

1099 Reporting

At year-end, Books generates a 1099 report for all payees flagged as 1099-eligible (typically contractors paid \$600 or more during the year). The report includes:

- Total amount paid to each 1099 payee
- Their tax ID and address
- A list of qualifying transactions

Books does not file 1099s with the IRS for you — it generates the data you (or your accountant) need to file. Most agencies file via a third-party 1099 e-file service or have their CPA handle it.