

How to Delete a Duplicate or Un-needed File

- At the main menu, scroll down and click File manager

The screenshot displays the main menu of a tax filing software. At the top, there is a 'MAIN MENU' label, a dropdown for 'Earliest Tax Year' set to '2005', and a button for 'NEC State Requirements'. Below this is a table with columns: FILE NUMBER, TAX YEAR, FILING COMPANY, FORM TYPE, MOVE FILES TO CHECKOUT, E-FILED, and STATUS. A single row is visible with the following data: 169641, 2020, Joans Company 458678942, 1099-NEC, an unchecked checkbox, another unchecked checkbox, and 'Waiting-UnPaid'. Below the table, there is a green link instruction: 'Click the GREEN LINK ABOVE to Add/Edit that Company's forms.' and a note: 'If you have completed a filing company and are ready to checkout, please check the box associated with that company and click Checkout.' At the bottom, there are four teal buttons with icons and text: 'NEW COMPANY' (with a building icon), 'CHECKOUT' (with a shopping cart icon), 'FILE MANAGER' (with a document icon, circled in red), and 'EDIT ACCOUNT' (with a person icon). To the right of these buttons are four grey arrows pointing left, each with a corresponding instruction: 'Start here to setup a NEW company for any Tax Year (more info)', 'Select files above to pay and print for your forms (more info)', 'Click here to View 1096/W-3's, Bring Files Forward and View e-File Confirmations (more info)', and 'Edit or change your login credentials'.

FILE NUMBER	TAX YEAR	FILING COMPANY	FORM TYPE	MOVE FILES TO CHECKOUT	E-FILED	STATUS
169641	2020	Joans Company 458678942	1099-NEC	<input type="checkbox"/>	<input type="checkbox"/>	Waiting-UnPaid

Click the **GREEN LINK ABOVE** to Add/Edit that Company's forms.

If you have completed a filing company and are ready to checkout, please check the box associated with that company and click Checkout.

- NEW COMPANY** ← Start here to setup a NEW company for any Tax Year ([more info](#))
- CHECKOUT** ← Select files above to pay and print for your forms ([more info](#))
- FILE MANAGER** ← Click here to View 1096/W-3's, Bring Files Forward and View e-File Confirmations ([more info](#))
- EDIT ACCOUNT** ← Edit or change your login credentials

- Locate your file and select it by clicking the circle to the right of the name.
- Scroll down and click delete files. This will permanently delete the file.

File Manager

FILE	TAX YEAR	FILING COMPANY	FORM TYPE	SELECT	E-FILED	STATUS
169641	2020	Joans Company 458678942	nec	<input type="radio"/>	<input type="checkbox"/>	UnPaid
169747	2021	Joans Company 458678942	nec	<input type="radio"/>	<input type="checkbox"/>	UnPaid

 MAIN MENU

Go back to the main menu

 VIEW/PRINT TOTALS

Select your file above to view and print 1096/W3 totals and e-filing confirmations.

 BRING FILES FORWARD

Select a file above to move your company data and payees forward for the 2021 tax year. **Warning - Please Read**

 BRING COMPANY FORWARD

Select your file above to copy your company data without Payees. Use this feature when adding a missing Payee from an original file or filing corrections. **Warning - Please Read**



 DELETE FILES

This should only be used to delete unpaid files. If you select a file that has been paid you will lose this data permanently and you will have to redo.