

Bringing Files Forward

- To bring a file forward with all the names from a previous year, begin at the *Main Menu*. Scroll down and click on *File Manager*, the *File Manager* page will appear.

MAIN MENU Earliest Tax Year: 2005 ▾ NEC State Requirements

Logged in as: 1099Express Destinie Pearson, destinie@1099express.com CustID: 33689

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


- Select the desired file by click on the circle next to the file name and scroll down, click *Bring File Forward*.


File Manager
Logged in as: 1099Express, Destinie Pearson, destinie@1099express.com


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.

- Return to the Main Menu and your file for the current tax season should be listed in **green** letters. Remember, this file has all the data from the previous year, which will need to be updated.

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
169747	2021	Joans Company 458678942	1099-NEC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Waiting-UnPaid

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➤ Click on the **green** letters, at the Payee page you will see all the names of the recipients from the previous year.

DISPLAY PAYEES FOR:
1099-NEC

Joans Company Ext=nec FileIndex=169641

TaxID: 458678942 Tax Year: 2020

 ADD PAYEE
 MAIN MENU
 CHECKOUT
 VIEW / CHANGE FILER

No.	Tax ID Number	Payee Name
1	568974123	Smith Plumbing
2	321587541	Georgies Cleaning

- Click on each name and update any changes, then click save. If you have a recipient listed from the previous year that did not get paid in the current tax year, you can delete or void them from the list.