





Bringing Company Forward

- To bring a Company forward from a previous year, begin at the *Main Menu*. Scroll down and click on *File Manager*.

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

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

- Once at the *File Manager* page, select the desired file by clicking the circle then scroll down, and click on *Bring Company Forward*. (This will bring only the Company information forward to the *Main Menu* but not all the people in the file)

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 the new file with the Company information only will be there, letters in green. To enter payees to the file, click on the green letters to be taken to the Payee Display page. Click Add Payee to begin.