

Mag-Filer User Information

Last Modified on 12/05/2025 10:44 am CST

Mag-Filer is used to create 1099s and print substitute 1099 forms, which print on white paper instead of pre-printed forms. Recipient copies of the 1099-MISC forms may optionally be emailed. Mag-Filer can create electronic files and guides the user through filing with the federal government and most states. Support for the Mag-Filer software is provided by SSI.

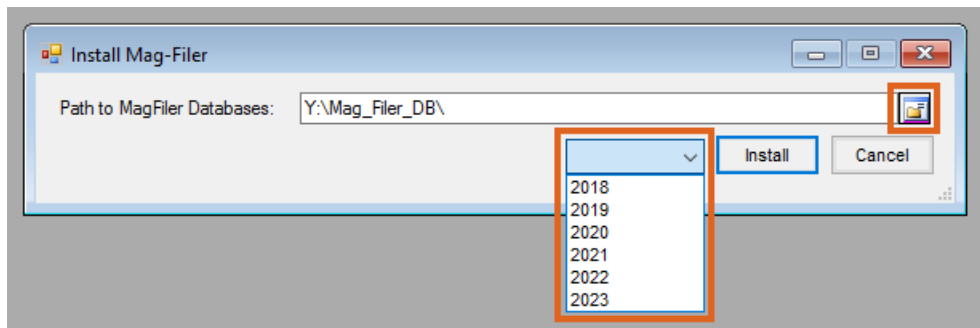
The most recent general release must be installed prior to installing Mag-Filer. View the most recent Agvance version Update Documentation [here](#). This setup includes an activation process which will require assistance by SSI support.

Install Mag-Filer

The Mag-Filer program is installed directly from within Agvance. Go to *Accounting / End of Periods / Print EOY Tax Forms / Setup*.

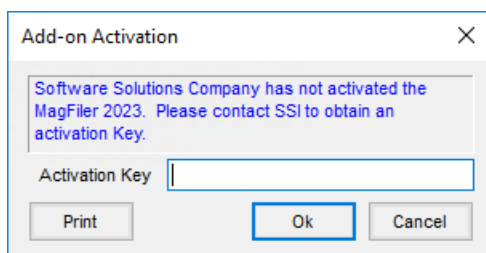
Enter the *Path to MagFiler Databases* or select the **Browse** icon to select where the Mag-Filer database will be created. It is recommended to create a folder where the current data is stored named *MagFiler2021*. Select this folder.

Select the version of Mag-Filer to be installed from the drop-down.



Select **Install**.

Enter the *Activation Key* provided by SSI Support.



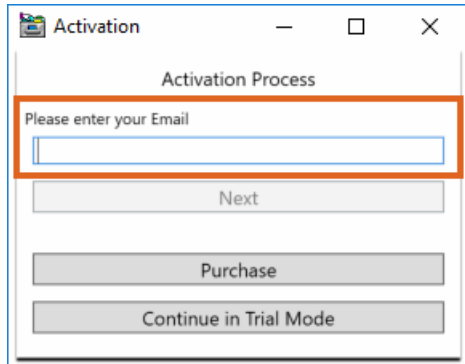
Select **OK** to continue through the installation process.

The first time Mag-Filer is launched after completing these steps, it must be opened from the 1099 menu, NOT

from the **Mag-Filer** icon on the desktop. This ensures the desktop icon points to the correct Mag-Filer database.

Using Mag-Filer

To launch Mag-Filer, double-click on the new **Mag-Filer** icon on the desktop. On the initial launch of Mag-Filer, activation is required. Enter the main user's email address and select **Next**.

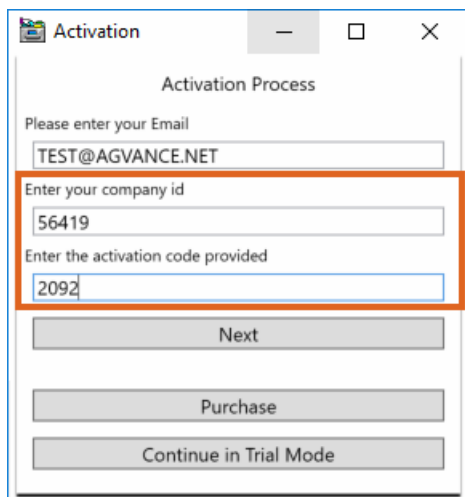


The screenshot shows a window titled "Activation" with a subtitle "Activation Process". It contains a text input field with the placeholder text "Please enter your Email". Below the input field are three buttons: "Next", "Purchase", and "Continue in Trial Mode". The "Next" button is highlighted with an orange border.

Additional fields display prompting for a *Company ID* and *Activation Code*. Enter the following in the appropriate fields.

Company ID: 56419

Activation Code: 2092



The screenshot shows the same "Activation" window, but now with two additional input fields. The first field is labeled "Enter your company id" and contains the text "56419". The second field is labeled "Enter the activation code provided" and contains the text "2092". Both input fields are highlighted with an orange border. The "Next" button remains highlighted.

Select **Next** to continue and launch the Mag-Filer program.

Database Setup

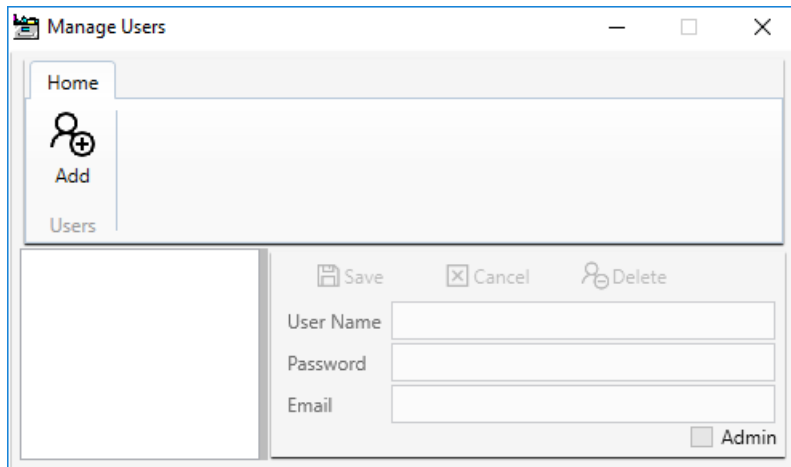
A database is initially set up when the Mag-Filer program is first launched. If necessary, additional Mag-Filer databases can be set up and a path established before importing files. Within Mag-Filer, go to *Utilities / Select Database / Create New Database*. This saves the path where the data will be stored. SSI recommends the data be stored in the same location as the Agvance database (i.e. *C:\Agvance Databases\Avdata*). This ensures the data is regularly backed up and is properly stored on the server.

Note: If an additional database is set up, tax files will not be imported into the program when utilizing the *Import to Mag-Filer* feature from within Agvance. Any tax files to be imported into additional Mag-Filer databases will need to be imported manually from within the Mag-Filer program.

User Security

Users and database security are established at *Utilities / Security / Enable Database Security*. Once database security is enabled, all users launching Mag-Filer are prompted for a *User name* and *Password*.

Users are set up by selecting **Add**. At least one user with Admin rights is required.



Creating Files

1099 files must be created from Agvance. This file contains payer and payee information to be imported into the Mag-Filer program.

Create 1099 files

Within *Agvance Tax / 1099's*, select the 1099 type to be created.

Choose the *File* option under *Output To* section. Enter the appropriate *Tax Year* and all necessary information for electronic filing. The *Media Output Path* determines where this file will be saved.

Select **Write** to create the 1099 file.

Note: When selecting *Rent/Misc/Gross* as the *1099 Type*, two files will be created. One file (IRSTAXNEC.csv) is created for nonemployee compensation, which is no longer reported on the 1099 Misc form. The second file (IRSTAX.csv) is created for rent and gross, which is reported on the 1099 Misc form. Both files should be imported into Mag-Filer.

Print 1099s

1099 Type: Rent/Misc/Gross

Get 1099 info from where: ☒ A/P Vendors ☐ Patronage

Select Vendors: All

Location: All

Federal Payer ID#: 98-7654321

Minimum Qualifying Amount: 0.01

State Payer ID: 1234567

Print Account ID: ☐ as Account number (optional)

File Output: ☐ ☐ ☐

Media Output Path: Y:\AVData\1099s\

File Type: Original

Contact Name: Anna Admin

Contact Phone: 555-555-5555

Contact Email: email@domain.net

Tax Year: 2023

Prior Year Data Indicator: ☐

Transmitter Control Code: 12345

Payer Name Control: SSIAG

Print Address: ☒ Address 1 ☒ Address 2 ☐ Address 3

☐ Specified Coop

☐ Specified Service or Trade Business

Importing Files

Payers and payees may be imported into Mag-Filer from an Agvance-created file for 1099s.

Importing 1099 files

Once the file has been created, it may be imported into Mag-Filer including both Payer and Payee information. This may be done directly from Agvance or manually from within the Mag-Filer program.

To import the file directly from Agvance, select the **Import to Mag-Filer** button.

Print 1099's

1099 Type: Rent/Misc/Gross

Get 1099 info from where: ☒ A/P Vendors ☐ Patronage

Select Vendors: All Select

Location: All

Federal Payer ID#: 98-7654321

Minimum Qualifying Amount: 0.01

State Payer ID: 1234567

Print Account ID ☐ as Account number (optional)

File Output

Media Output Path: Y:\AVData\1099s\

File Type: Original

Contact Name: Anna Admin

Contact Phone: 555-555-5555

Contact Email: email@domain.net

Tax Year: 2023

Prior Year Data Indicator: ☐

Transmitter Control Code: 12345

Payer Name Control: SSIAG

Print Address

☒ Address 1

☒ Address 2

☐ Address 3

☐ Specified Coop

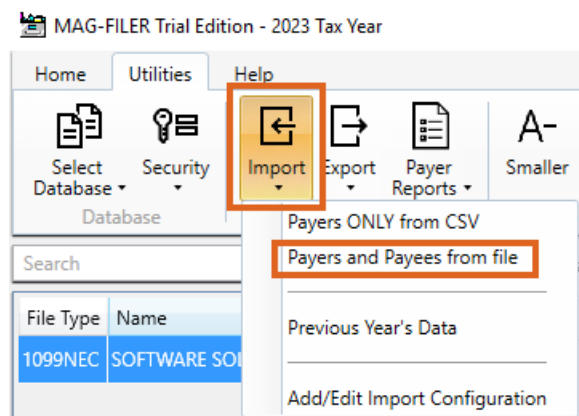
☐ Specified Service or Trade Business

Import to Mag-File Launch Mag-File Write Cancel

Agvance locates the file titled *IRSTAX.csv* and imports it into the Mag-File program, which launches after the file is imported. If a username and password were created for the Mag-File database, there will be a prompt to enter User Login credentials. The *IRSTaxNEC* file should be imported into Mag-File using the manual import option.

Manually Importing Files

In Mag-File, go to *Utilities / Import / Payers and Payees from File*.

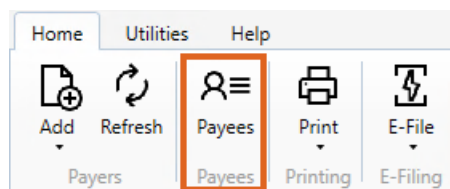


Select the file created from Agvance. Once the file is imported into Mag-File, the imported data should be reviewed, changes (if necessary) made, and forms printed and/or electronically filed.

Reviewing imported file information

On the *Home* tab within Mag-File, select the payer to be reviewed.

With the correct payer selected, choose the **Payees** button at the top of the window to review Payee information.

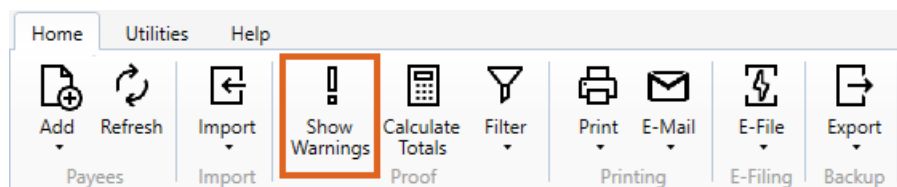


Select the **Calculate Totals** button at the top of the *Payee Information* window to review or print a totals report.

The screenshot shows a window titled 'Totals' with a close button (X) in the top right corner. At the top, there are three radio buttons: 'Original' (selected), 'Corrected', and '2nd'. To the right of these are two buttons: 'Print Totals' and 'Run Report'. Below the buttons, it says 'Total Payees: 27'. The main part of the window is a table with three columns: 'Description', 'Amount', and 'Selected'.

Description	Amount	Selected
Box 1: Wages, tips, other compensation	\$99,648.72	<input checked="" type="checkbox"/>
Box 2: Federal income tax withheld	\$5,752.83	<input checked="" type="checkbox"/>
Box 3: Soc sec wages	\$102,420.81	<input checked="" type="checkbox"/>
Box 4: Soc sec taxes	\$6,350.28	<input checked="" type="checkbox"/>
Box 5: Medicare wages	\$102,420.81	<input checked="" type="checkbox"/>
Box 6: Medicare taxes	\$1,485.06	<input checked="" type="checkbox"/>
Box 12: Code DD	\$1,017.00	<input checked="" type="checkbox"/>
Box 12: Code W	\$2,772.09	<input checked="" type="checkbox"/>
Box 12: Code Z	\$1,620.00	<input checked="" type="checkbox"/>
Box 16: State wage	\$99,648.72	<input checked="" type="checkbox"/>
Box 17: State tax	\$2,626.05	<input checked="" type="checkbox"/>
Box 16: State wage - ILLINOIS	\$99,648.72	<input checked="" type="checkbox"/>
Box 17: State tax - ILLINOIS	\$2,626.05	<input checked="" type="checkbox"/>

After reviewing totals and closing out of this report, select the **Show Warnings** button at the top of the *Payee Information* window.



Only payees with errors display in the payee list to the left. Go through each payee to view errors. Fields containing errors are outlined in red.

The screenshot shows the 'MAG-FILER Payee Information - Form W2: SOFTWARE SOLUTIONS COMPANY' window. The top toolbar includes buttons for Home, Utilities, Help, Add, Refresh, Import, Show Warnings (highlighted), Calculate Totals, Filter, Print, E-File, and Export. Below the toolbar is a search bar and a list of payees. The selected payee, 'BONKERS, ELMER', has the following information displayed:

- Name:** BONKERS, ELMER
- Address:** RR 1 BOX 33
- City:** SHELBYVILLE
- State:** IL
- Zip:** 62565
- TIN #:** [Redacted]
- Control #:** [Redacted]

The tax information section shows the following amounts:

Wages, tips...	Fed inc tax w/h	Soc sec wages	Soc sec tax w/h	Medicare wages	Medicare tax
\$3,153.75	\$10.61	\$3,153.75	\$195.54	\$3,153.75	\$32.76

Additional checkboxes include 'Statutory employee', 'Retirement plan', and 'Third-party sick pay'. The bottom section shows a summary of wages and taxes by state and locality.

After making necessary corrections, select the **Show Warnings** option again to display all payees.

Make any other necessary changes to payee information or amounts in Mag-Filer.

For any 1099-MISC payees who request the Recipient Copy be emailed, enter an email address to email the forms instead of printing. The program marks the *Emailed* checkbox after the email is sent. When the recipient confirms they received their 1099-MISC copy, select the *Confirmed* box. If the recipient no longer wants to receive the Recipient Copy via email but wants the form printed and sent, choose the *Opt-Out of Email* option.

Printing Forms

Select **Print Forms** on the *Payee Information* window and select payees to receive printed forms from the drop-down menu option to display the *Print* window.

The screenshot shows the 'Print' window with the following settings:

- Format:** SUBSTITUTE
- Year:** 2023
- ☐ Mask TIN #'s
- ☐ Pre-Printed forms
- ☐ Print 2 digit year
- Margins:**
 - Top Margin: 0
 - Left Margin: 0
 - 2nd Form Adv: 0
 - 3rd Form Adv: 0

Buttons for 'Cancel' and 'Preview' are located at the bottom right.

From the *Format* drop-down, select *Substitute* for 1099s when printing the Recipient Copy on white paper or *Copy C* for the 1099 payer copy.

Select the correct tax year from the *Year* drop-down. Optionally select to *Mask TIN #'s*. Choose **Preview** to preview the documents before printing.

These forms can be folded to fit in a #9 or #10 window envelope. As window envelopes vary from different manufacturers, it is recommended to test folding one form to ensure the name and address display properly.

Any or all forms may be reprinted at any time.

Creating E-Files

Choose the **E-File** button on the *Mag-File Payee Information* window. Select **Create New E-File**.

The screenshot shows the 'E-File' window. On the left is a list of payees with columns for 'Name' and 'Address'. The first entry, 'SOFTWARE SOLUTIONS COMPANY' with address '123 ANY STREET', is selected. The main area on the right is titled 'Transmitter Information' and contains the following fields:

- Company: SOFTWARE SOLUTIONS COMPANY
- Address: 123 ANY STREET
- City: HOMETOWN, State: IL, Zip: 62565
- Country: US-UNITED STATES
- Contact: ANNA ADMIN, Phone: () - , EIN: 98-7654321
- E-Mail:
- TCC#: 12A34, This TCC is for the: IRS's FIRE Site

Below these fields is a link: [Having a problem with or getting your TCC#? MAG-FILER can help!](#)

The 'What to File' section contains the following options:

- ☒ Original, ☐ Corrected/2nd, ☐ Extension, ☐ Replacement, ☐ Test
- Tax Year to File: 2023, ☐ Last Filing Year, Specific State:

At the bottom right are 'Cancel' and 'E-File' buttons.

In the *What to File* area, select the appropriate *Tax Year to File*.

Complete the information on the screen. When filing 1099 forms, the *TCC#* and contact information must be completed. The most commonly used option will be *Self Prepared*, but one of the other options may be used. Choose the option appropriate for the specific situation. Select **E-File**.

Summary information is displayed, which may be saved and/or printed. Close the summary report. The *Online Filing* window displays.

Choose **Continue** to be linked directly with the IRS site to submit the electronic file.