

# Mag-File User Information

Last Modified on 12/20/2023 9:16 am CST

Mag-File is used to create 1099s and W-2s 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-File can create electronic files and guides the user through filing with the federal government and most states. Support for the Mag-File software is provided by SSI.

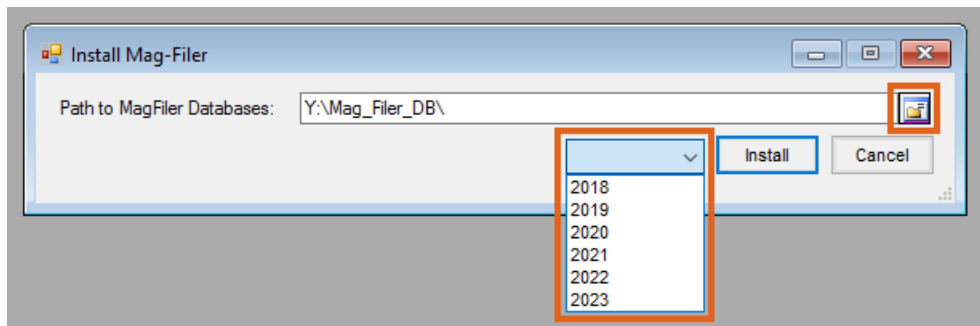
The most recent general release must be installed prior to installing Mag-File. View the most recent Agvance version Update Documentation [here](#). This setup includes an activation process which will require assistance by SSI support.

## Install Mag-File

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

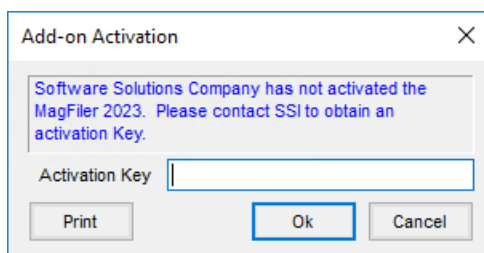
Enter the *Path to MagFile Databases* or select the **Browse** icon to select where the Mag-File database will be created. It is recommended to create a folder where the current data is stored named *MagFile2021*. Select this folder.

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



Select **Install**.

Enter the *Activation Key* provided by SSI Support.



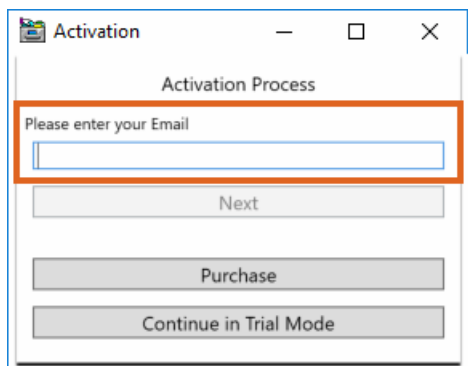
Select **OK** to continue through the installation process.

The first time Mag-File is launched after completing these steps, it must be opened from the *1099* or *W-2* 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**.

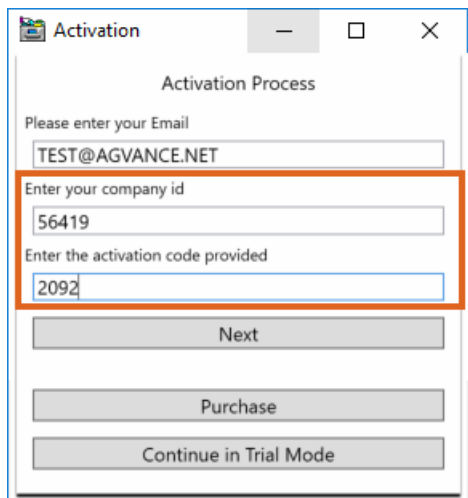


The screenshot shows a window titled "Activation" with the subtitle "Activation Process". It contains a text input field with the placeholder text "Please enter your Email". Below the input field are three buttons: "Next", "Purchase", and "Continue in Trial Mode". The "Next" button is highlighted with a red 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. The "Please enter your Email" field now contains the text "TEST@AGVANCE.NET". Below it are two more text input fields: "Enter your company id" containing "56419" and "Enter the activation code provided" containing "2092". These two fields are highlighted with a red border. The "Next", "Purchase", and "Continue in Trial Mode" buttons are still present below.

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

## Database Setup

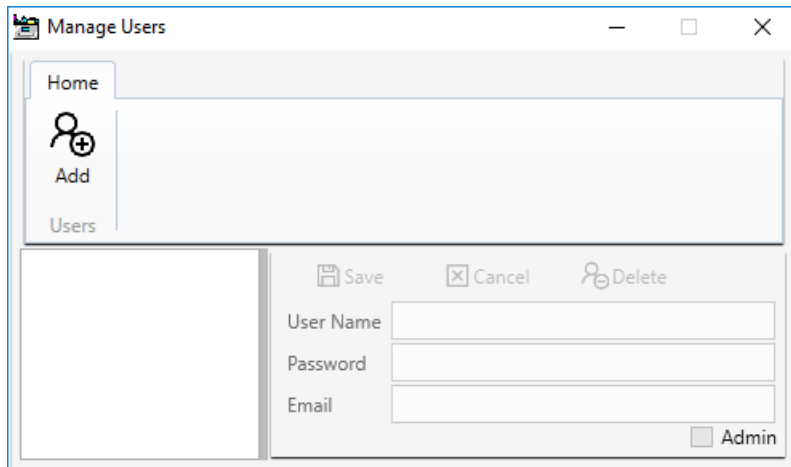
A database is initially set up when the Mag-Filer program is first launched. If necessary, additional Mag-Filer databases can be set up and a path established before importing files. Within Mag-Filer, go to *Utilities / Select Database / Create New Database*. This saves the path where the data will be 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.



The screenshot shows the 'Manage Users' window. It features a sidebar on the left with 'Home', 'Add' (with a person icon and a plus sign), and 'Users'. The main area contains a 'Save' button, a 'Cancel' button, and a 'Delete' button. Below these are three text input fields labeled 'User Name', 'Password', and 'Email'. At the bottom right is an 'Admin' checkbox.

## Creating Files

W-2 and 1099 files must be created from Agvance. This file contains payer and payee information to be imported into the Mag-Filer program.

### Create W-2 files

Within the *Agvance Tax / W-2's* setup, preview and save W-2s.

Go to the *Electronic File* tab of the *Preview/Print W-2/W-3 Forms* window, select the correct *Tax Year*, and enter all necessary information for electronic filing. The output file path determines where the file will be saved. Select **Create File**.

## 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-File.

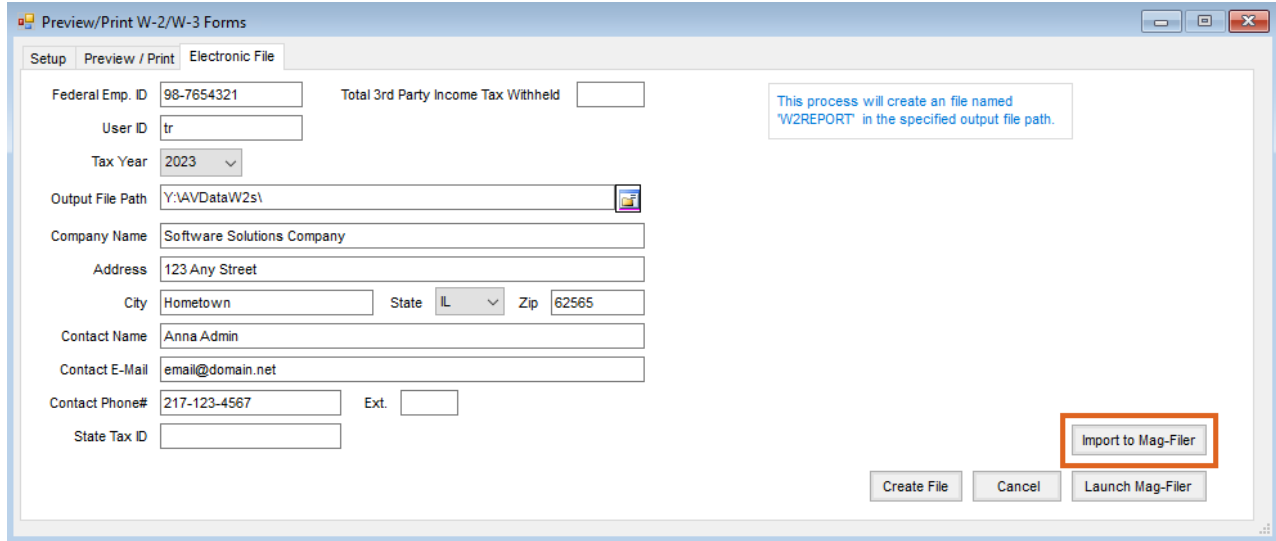
# Importing Files

Payers and payees may be imported into Mag-Filer from an Agvance-created file for both W-2s and 1099s.

## Importing W-2 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.

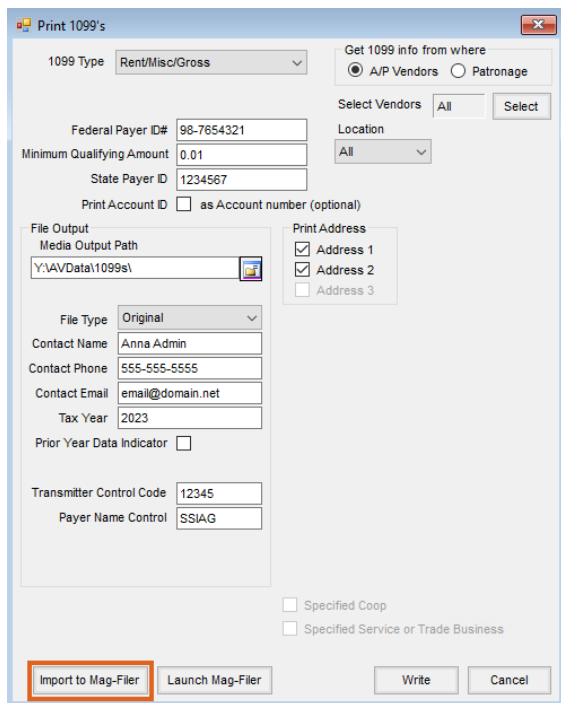


Agvance locates the file titled W2REPORT.csv and imports it into the Mag-Filer program, which launches after the file is imported. If a username and password were created for the Mag-Filer database, there will be a prompt to enter User Login credentials.

## 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.

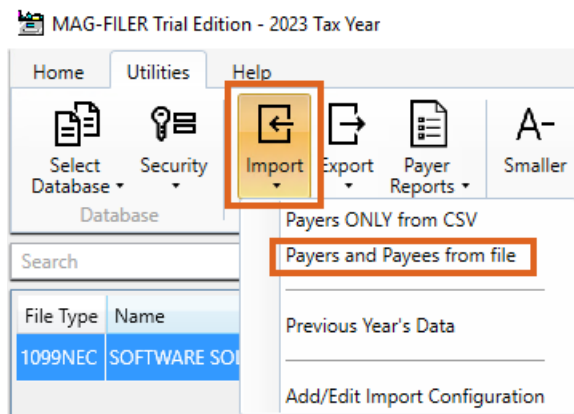
To import the file directly from Agvance, select the **Import to Mag-Filer** button.



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*.

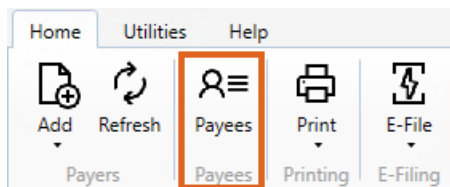


Select the file created from Agvance. Once the file is imported into Mag-File, the imported data should be reviewed, changes (if necessary) made, and forms printed and/or electronically filed.

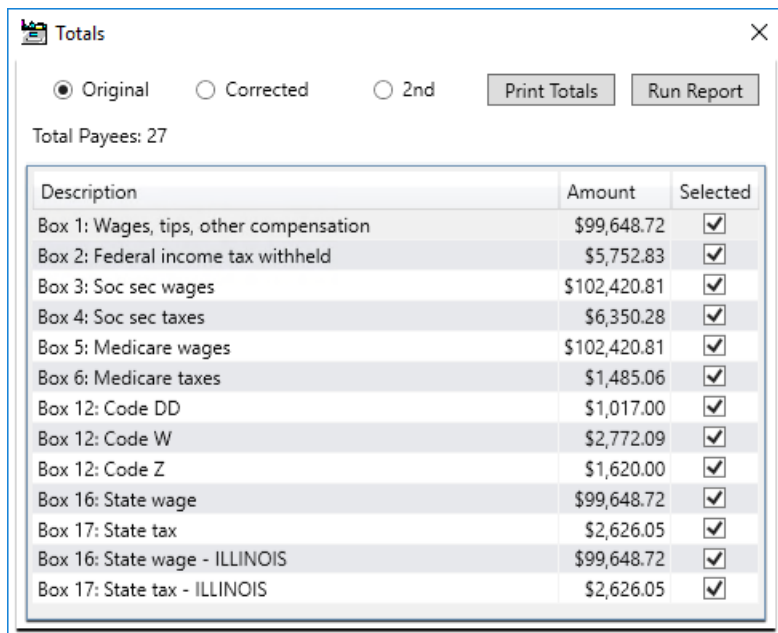
## Reviewing imported file information

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

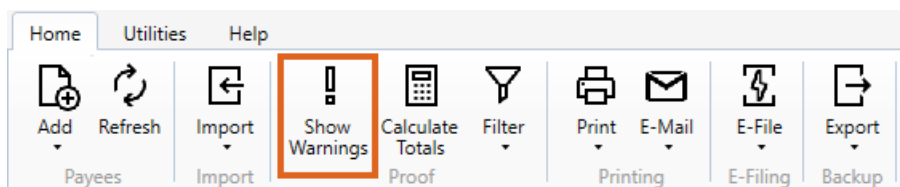
With the correct payer selected, choose the **Payees** button at the top of the window to review Payee information.



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



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.

Name	Address	City	State	TIN #	Control #
ABLE, JIM	RT 2 BOX 310	SHELBYVILLE IL			
BONKERS, ELMER	RR 1 BOX 33	SHELBYVILLE IL			
CRONIN, ALAN	1205 NORTH ELM	SHELBYVILLE IL			

Code	Amount
DD	\$54.00

State	Wages, tips	Income tax	Loc wages, tips	Income tax	Locality
IL	\$3,153.75	\$70.38			

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.

From the *Format* drop-down, select *Substitute* for 1099s when printing the Recipient Copy on white paper, *4 Up* for the W-2 employee copy, 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.

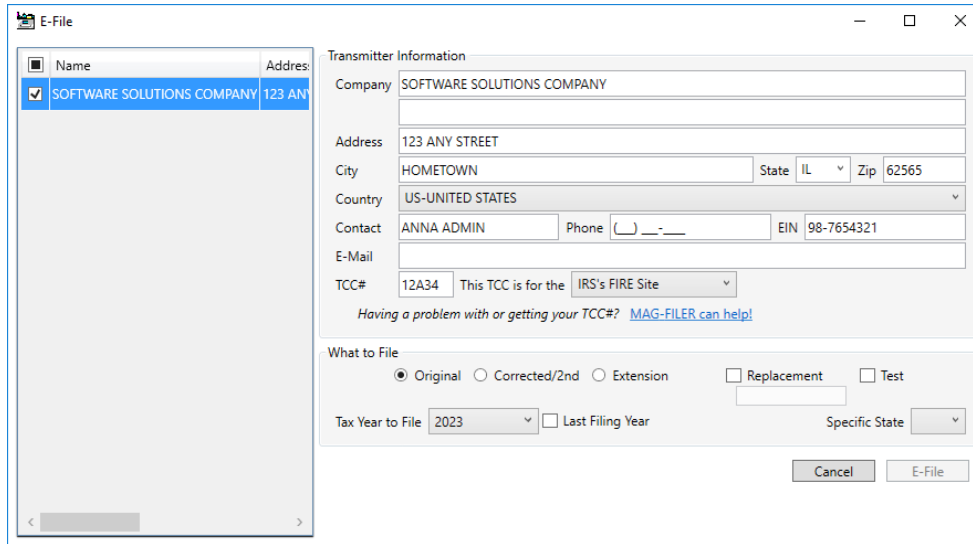


These forms can be folded to fit in a #9 or #10 window envelope. As window envelopes vary from different manufacturers, it is recommended to test folding one form to ensure the name and address display properly.

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 with the following fields and options:

- Transmitter Information:**
  - 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
  - Link: [Having a problem with or getting your TCC#? MAG-FILER can help!](#)
- What to File:**
  - Radio buttons:  Original,  Corrected/2nd,  Extension
  - Checkboxes:  Replacement,  Test
  - Tax Year to File: 2023,  Last Filing Year, Specific State:
- Buttons: Cancel, E-File

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. For W-2 forms, the *User ID* must be entered, and in the *Preparer Code*, select the appropriate option. 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.