Mag-Filer User Information

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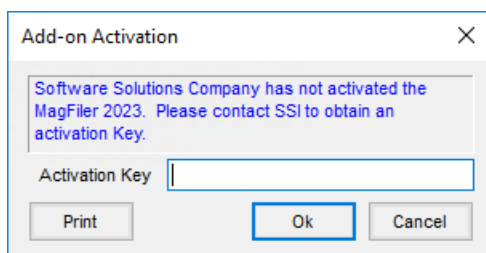
Enter the *Path to MagFiler Databases* or select the **Browse** icon to select where the Mag-Filer database will be created. It is recommended to create a folder where the current data is stored named *MagFiler2021*. Select this folder.

Select the version of Mag-Filer to be installed from the drop-down.
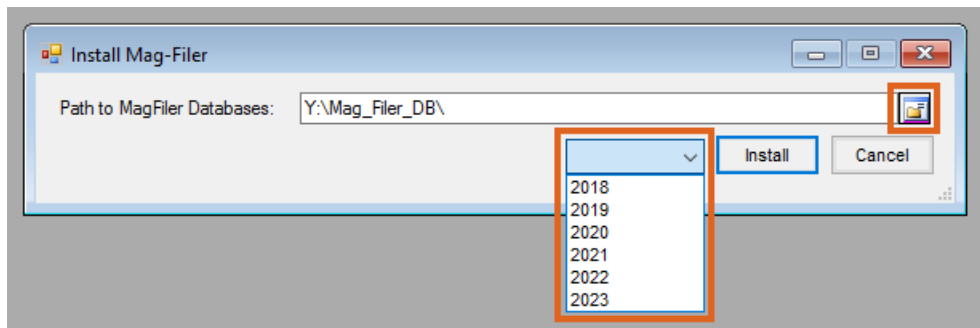
Select **Install**.
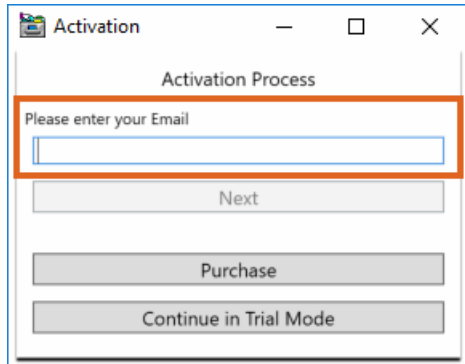
Enter the *Activation Key* provided by SSI Support.

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**.
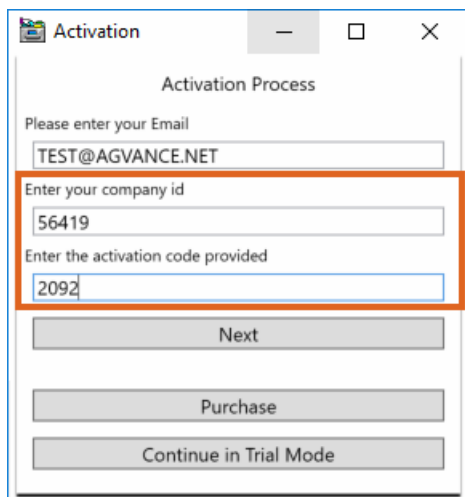

Additional fields display prompting for a *Company ID* and *Activation Code*. Enter the following in the appropriate fields.

Company ID: 56419
Activation Code: 2092

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.
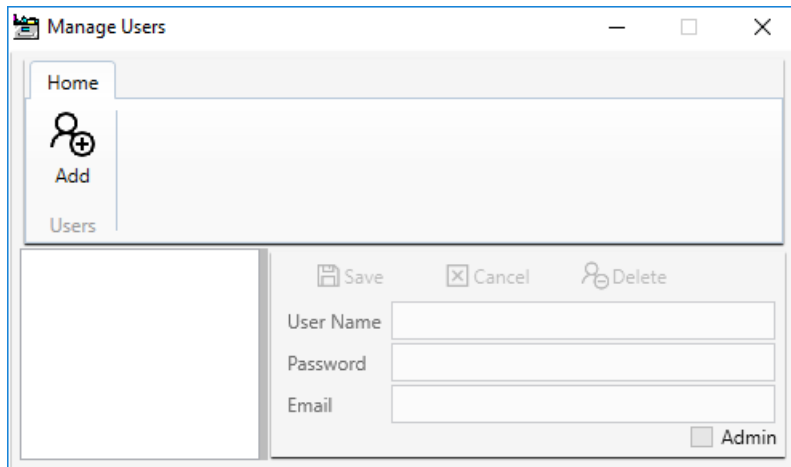
Creating Files

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.

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.

Agvance locates the file titled *IRSTAX.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. The *IRSTaxNEC* file should be imported into Mag-Filer using the manual import option.

Manually Importing Files

In Mag-Filer, go to *Utilities / Import / Payers and Payees from File.*
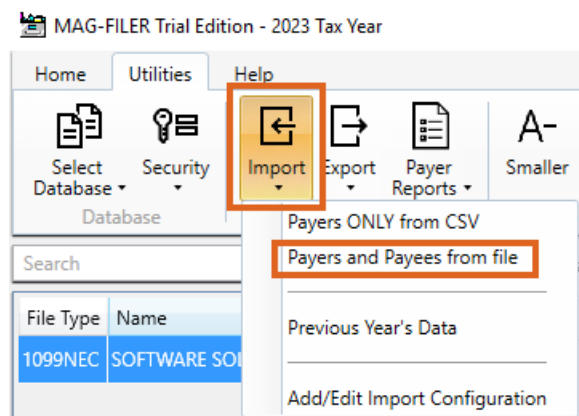
Select the file created from Agvance. Once the file is imported into Mag-Filer, the imported data should be reviewed, changes (if necessary) made, and forms printed and/or electronically filed.

Reviewing imported file information

On the *Home* tab within Mag-Filer, 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.
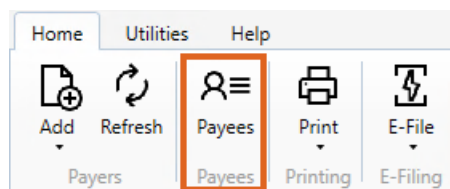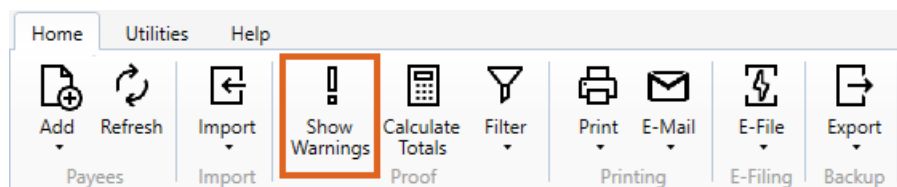
Select the **Calculate Totals** button at the top of the *Payee Information* window to review or print a totals report.

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.

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 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-Filer Payee Information* window. Select **Create New 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. 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.