Ez1099 Quick Start Guide
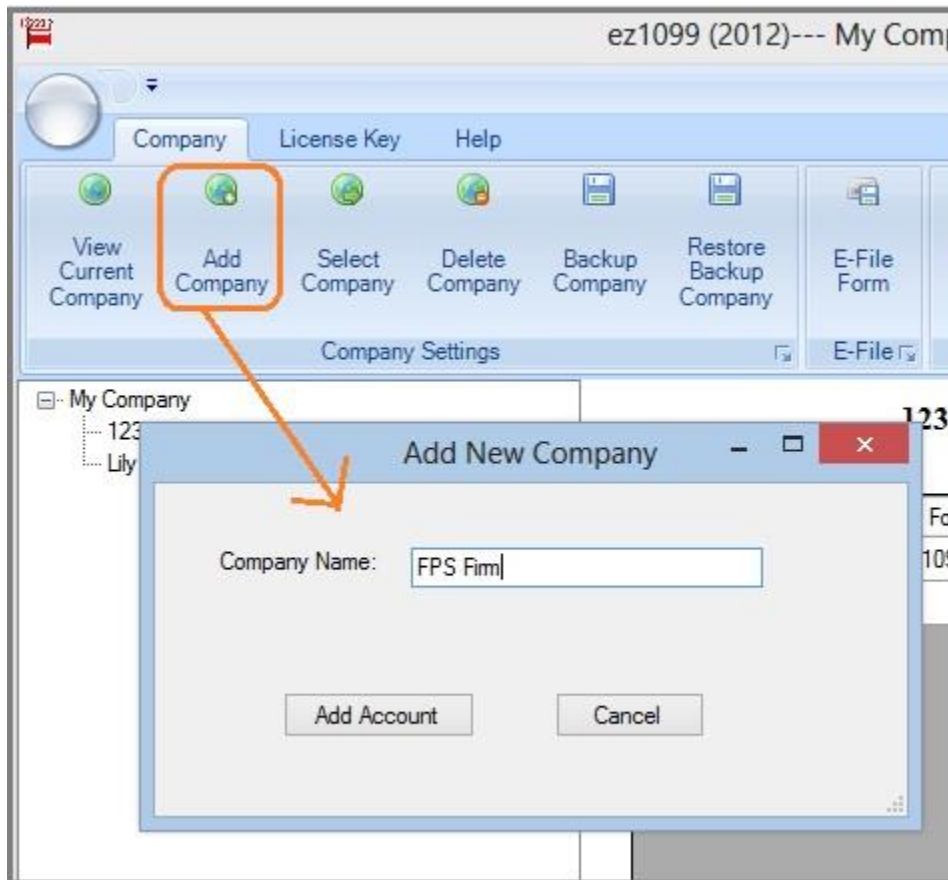
Step 1: Add New Account

There are two options to add new option:

Option 1: Add a new account from scratch

- Start ez1099 software, click the top menu "Company", then click sub menu "Add Company" to add a new company.

Option 2: Add a new account by duplicating current account

-- You can add a new company by clicking the top menu "Company", then click the sub menu "Backup Company" to duplicate the current company and data with a different name
- Click the top menu "Company", then click "Select Company" to select the new company as the current company.

Step 2: Add Recipient(s)

Add a new recipient

- Start ez1099 software, click the bottom link "Add Recipient" to enter a new recipient

Step 3: Add a New Tax Form

Start ez1099 software, select one recipient and click "Add Forms" button to add a new form
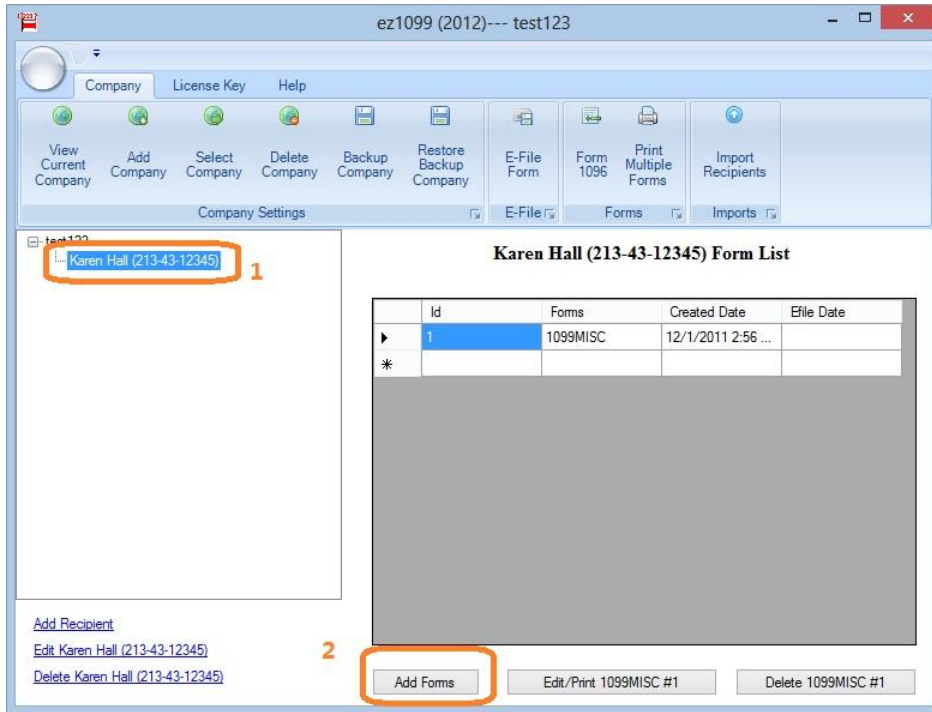
Select form type from dropdown list, enter information and save the form.
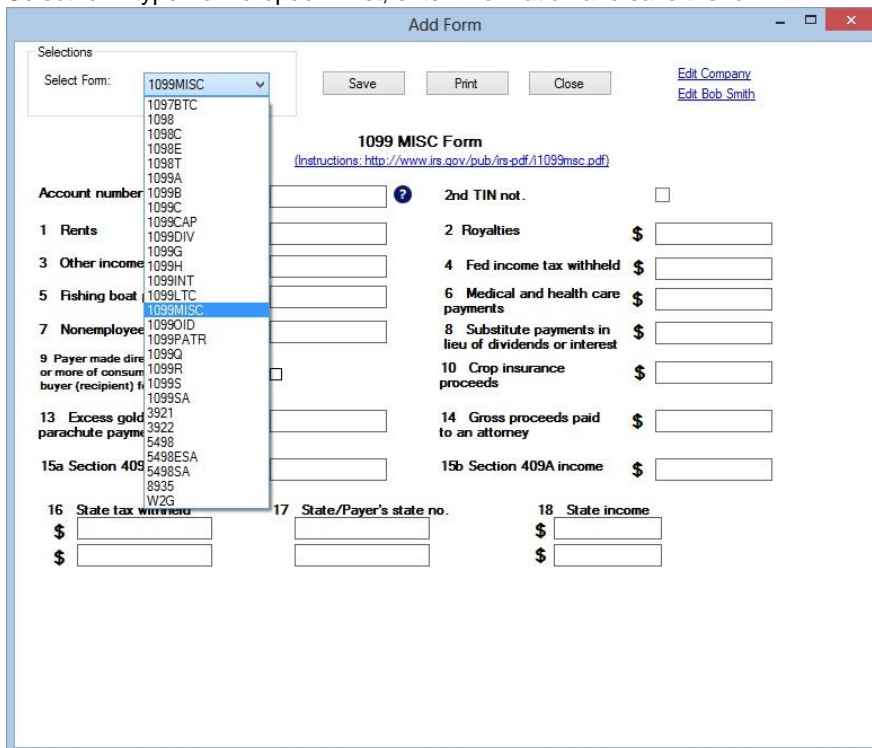
Step 4: Print Tax Forms

This article is about how to print the tax forms for one recipient. You can also check this article on how to print tax forms together for multiple recipients.

Option 1: Print the tax forms for one recipient
- Start ez1099 software, select the recipient, select the form and click the **Edit/Print Form** button
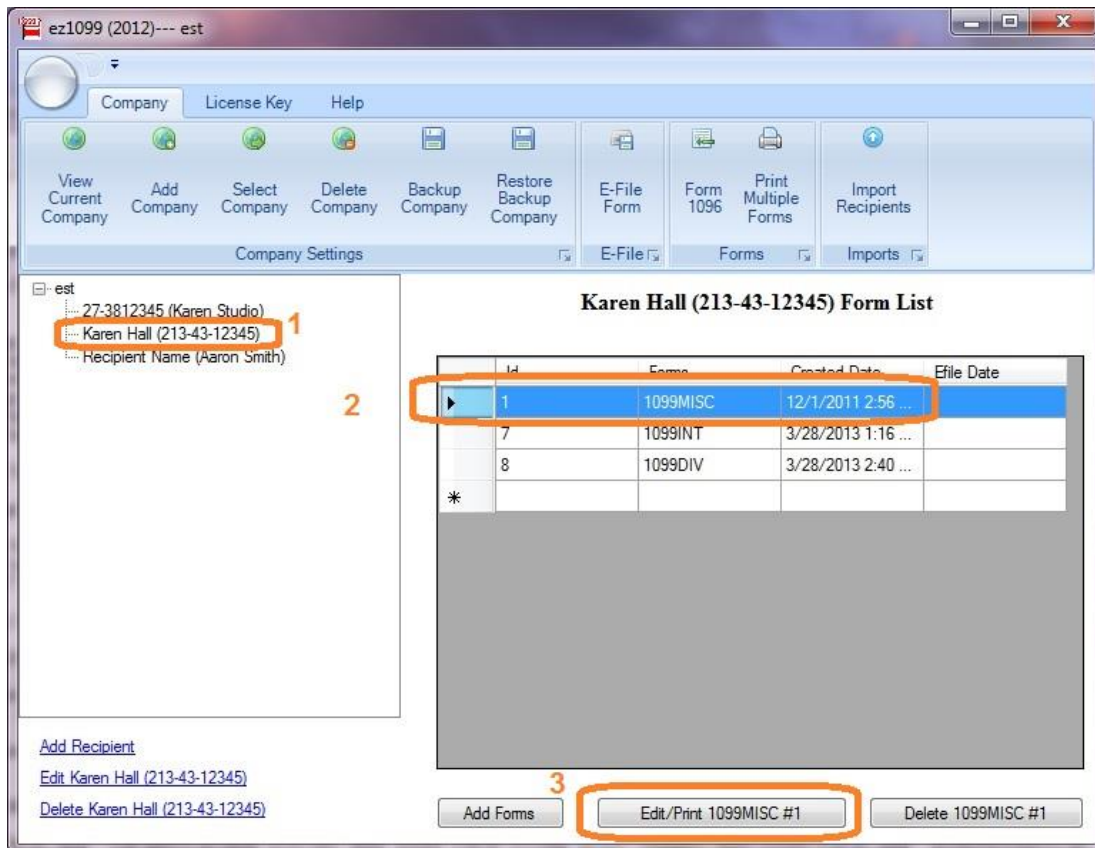
- Click the **Print** button on Form

- Print Forms**Recipient copies:**

- You can print form on white paper - Or you can fill data on pre-printed forms by choosing data only option for copy A

IRS copy:
The Red-ink form is required since IRS does not certify black-and-white substitute form. You need to choose the "Data only" option

PDF files
You can click the "PRINT TO PDF" button to print recipient copies into PDF files. However, this feature is only available for advanced version.

Option 2: Print multiple 1099 tax forms for multiple recipients in one step

How to Print Multiple 1099 Forms in One Step

Ez1099 software is the simple, fast and affordable tax forms preparing, printing and eFiling solution for businesses and accountants

Print Multiple 1099 tax forms in one step

This article is about how to print the multiple tax forms for IRS return. You can also check this article on how to print tax forms for one recipient.

- Start ez1099 software, click the top menu "Print Multiple Forms" to view print option screen. Select the forms you need to print and click the PRINT button.

- You can use the function to print IRS copies on red forms.
- You can also use this function to print recipient copies on pre-printed forms.
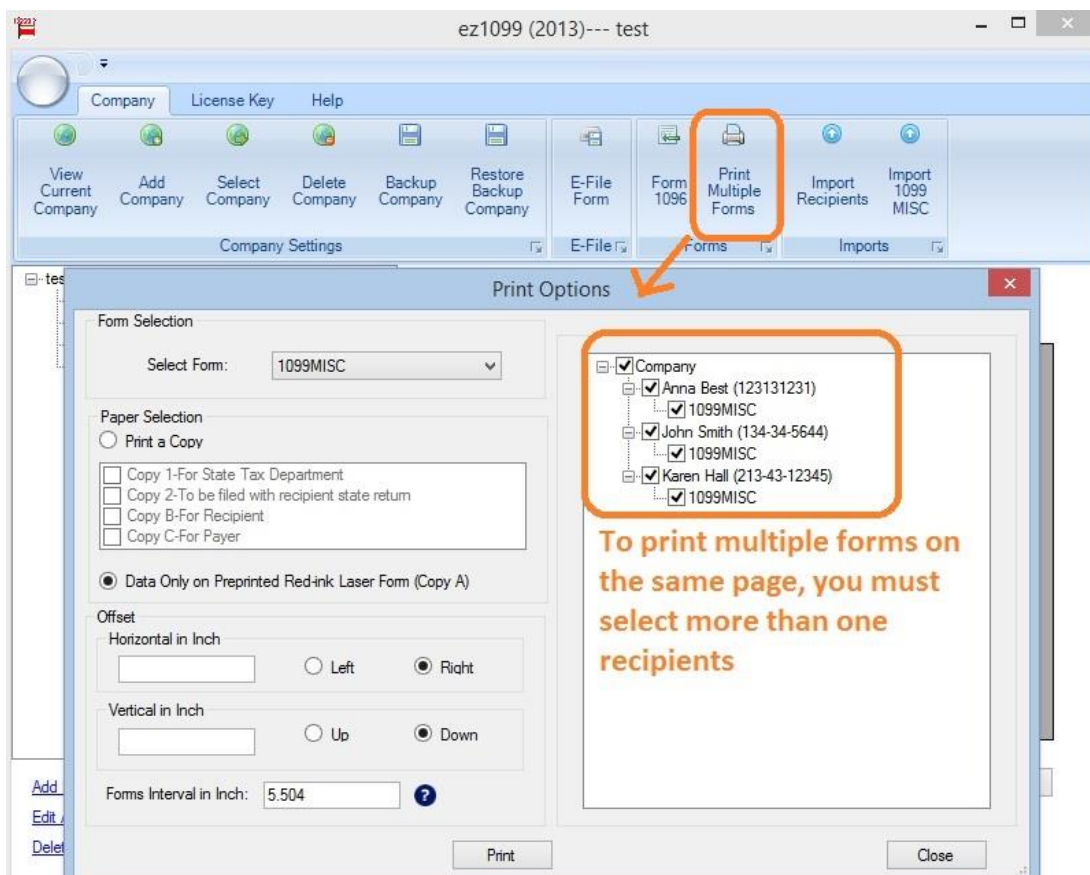
Print tax forms Into PDF format

Start ez1099 software and print the forms for recipients.
If you are not familiar with these steps, please refer to How to paper print 1099 tax form

On print options screen, you can choose the recipient copies you want to print and click the button "Print to PDF" to generate the digital files.

How to Efile 1099 Forms

Step 1: Start ez1099 software, set up account and enter 1099 form data
Step 2: Generate EFile document

- Click the top menu "E-file Form"

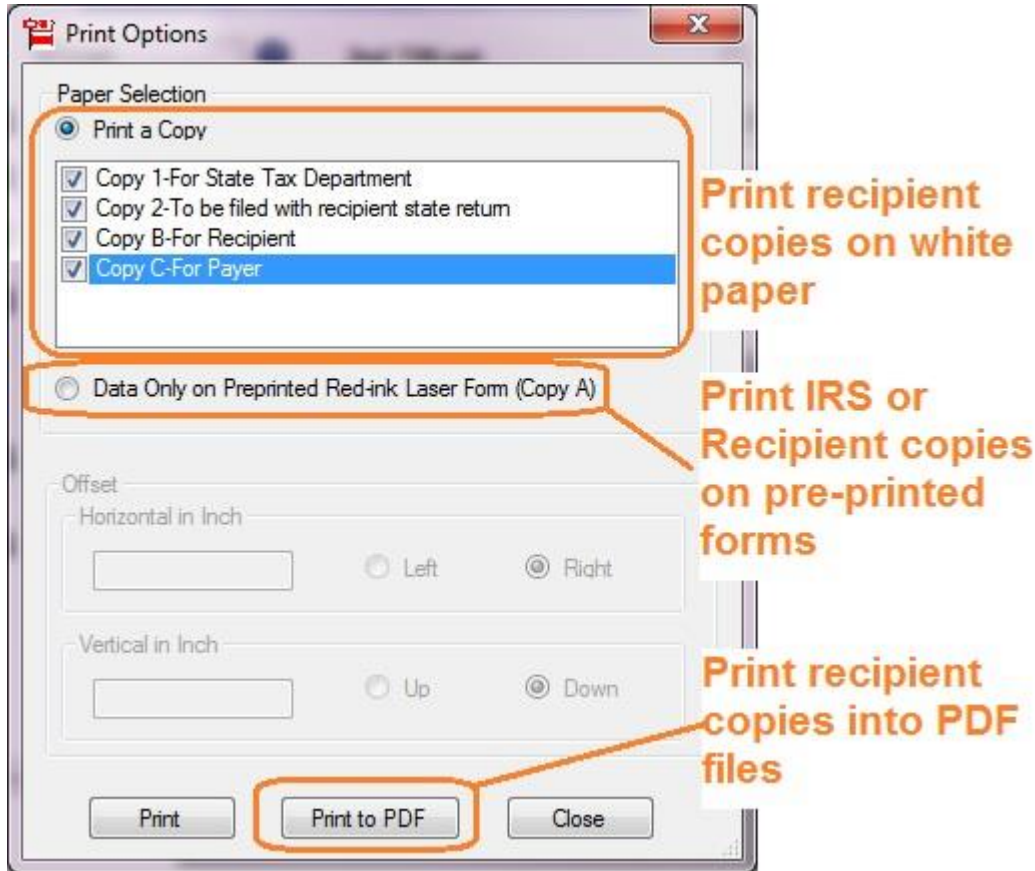- Enter the transmitter information and contact informationIf you are first time efile user, you can learn more about on how to apply TCC here

- Check the forms you want to include in this efile document

- Click the button "Create File" to generate the efile document that you can upload to IRS site.

Step 3: Go to: Fire.Irs.gov and upload the efile document

- IRS fire site for efile

https://fire.irs.gov/firev1r/default.aspx

If you have an account, click "Log On" otherwise, click "Create New Account" and follow the instruction. You can click here to view step by step guide on how to upload 1099 efile document to IRS.
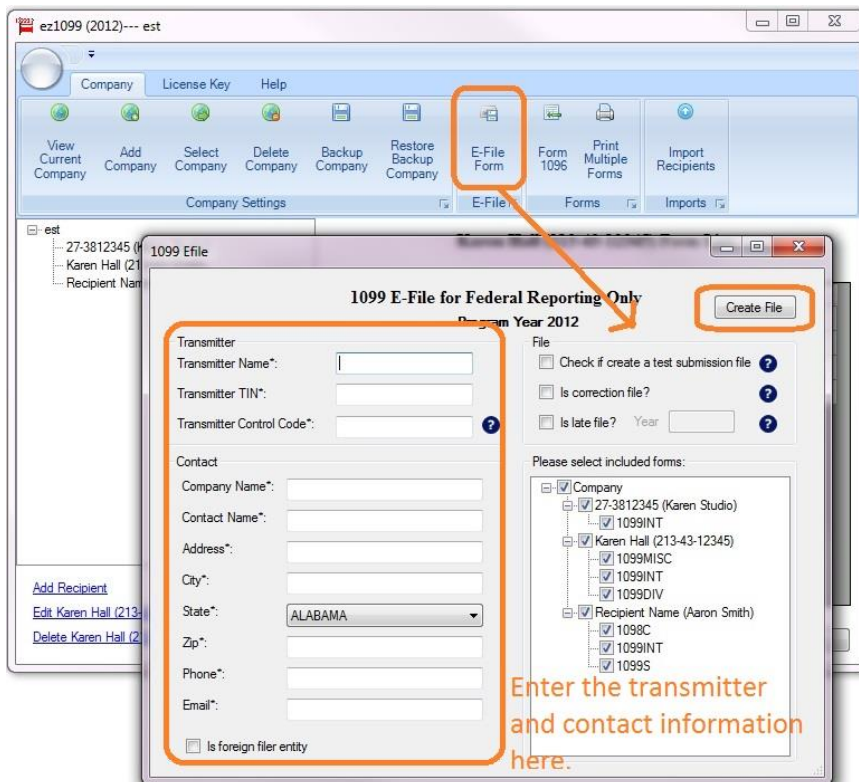
NOTE
If you are a **new user** of IRS EFILE service, you need to apply TCC code (Transmitter Control Code) to generate the efile document. You also need to create a FIRE account to upload your file.

● **How to request a transmitter control code (TCC)**

If you are new user of IRS efile service, you should request a transmitter control code (TCC) by filling out IRS Form 4419, "Application for Filing Information Returns Electronically."

Form 4419
http://www.irs.gov/pub/irs-pdf/f4419.pdf

You need to mail or fax the form to the IRS at least 30 days before the deadline for filing 1099s. The IRS will send your 5-character transmitter control code by mail once the application is approved.

Internal Revenue Service
Information Returns Branch
230 Murall Drive, Mail Stop 4360
Kearneysville, WV 25430

Or fax your completed Form 4419 to:
877-477-0572 (toll-free)
304-579-4105 (not toll-free)

Upon approval, a five-character alpha/numeric Transmitter Control Code (TCC) will be assigned and mailed to you. Form 4419 should be submitted to IRS at least 30 days before the due date of the returns for current year processing.

● **How to create a FIRE account**

If you are a new user, you need to create a FIRE account on the FIRE system. You need enter your company name, company address, company phone number, contact name and email address.

You can create the account before you get your transmitter control code.

https://fire.irs.gov/firev1r/default.aspx

How to Import Data

You can learn more here about how to import data to speed up 1099s, 1098s tax forms paper printing, pdf printing and e-filing here.

1. Import 1099-misc form data

2. Import recipient data

3. Import previous year's data to the new version

# How to Share Data and Print Tax Forms Over Network

ez1099 2013 and later can support network version and allows multiple users to print the tax forms from the same account over network. Here is the guide on how to share the database file among multiple users to print 1099s, 1098s tax forms over network.

Option 1: Install ez1099 on Client Machines and Share the same Database File On the Server.
- 1. Download and install this 1099 software on one machine first and enter license key.

- 2. Start ez1099 application, setup company, employee and tax information and print one test form to make sure this 1099 application works normally.
You can learn more from
- How to print and file 1099 forms.

- 3. Copy this database file to server

Click the top menu "Company" then click "Backup Company" sub menu to copy current database file to a network folder. You can rename the file if needed
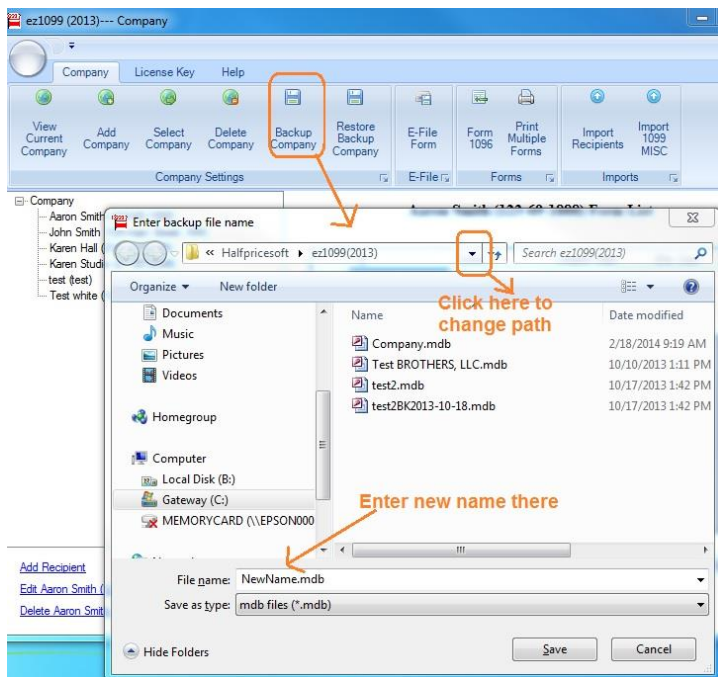
(Click image to enlarge)

- 4. Switch current account

Click top menu "Company" and click sub menu "select company" to switch the current company. Change the database path and name to the file on your server. Click the "OK" button to save your changes.
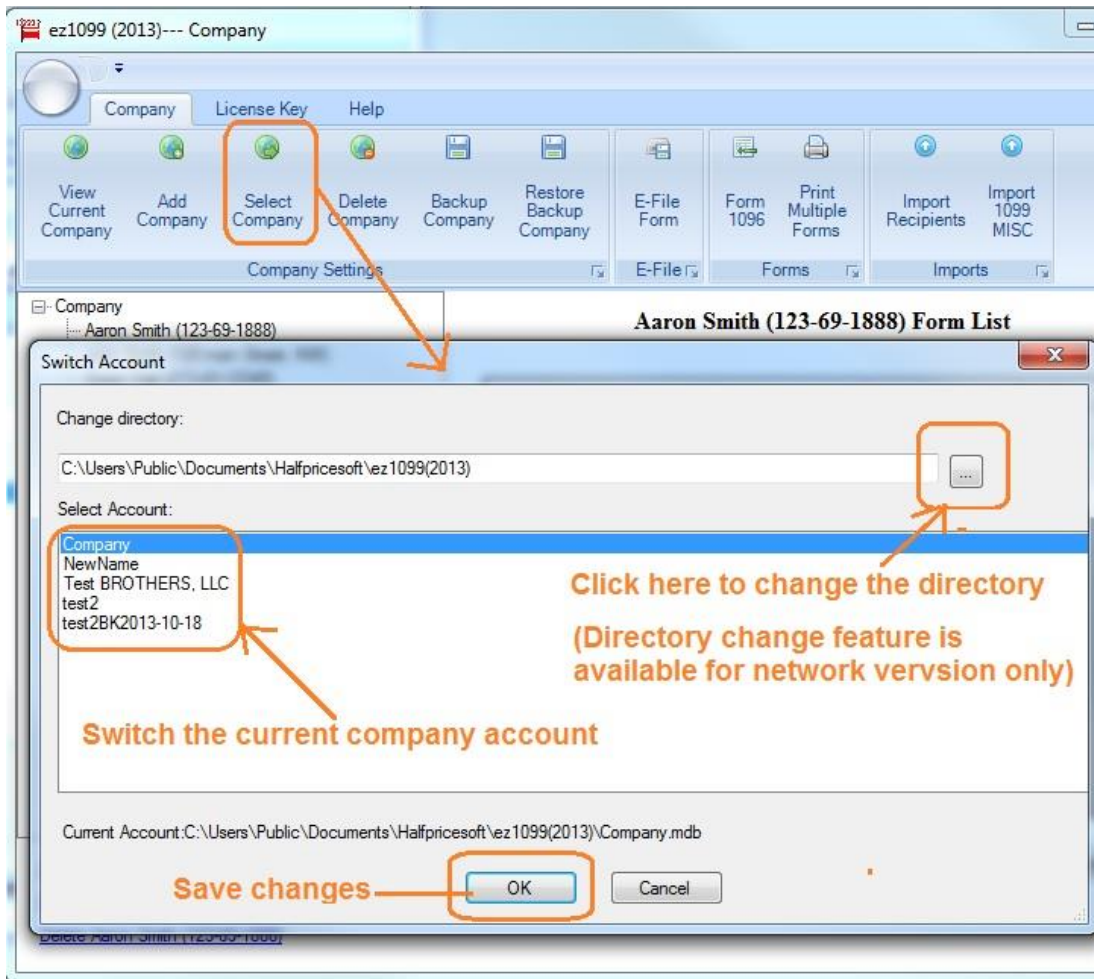
(Click image to enlarge)

- 5. Set up the other client machines

- Download ez1099 on the second client machine by repeating Step 1
- Switch current account by repeating Step 4

Option 2: Install ez1099 on Server and Give Remote Access Permission to Multiple Users

You can download and install ez1099 on server and give access permissions to multiple users.

- 1. Log on server as administrator, download and install ez1099 on server.

- 2. Start this 1099 application, setup company, employee information and print one test check to make sure ez1099 works normally.
You can learn more from
- [How to print and file 1099 forms](#).

- 3. Log on client machine and test ez1099.

Each client should **enough permissions(read, write and execute permissions)** to access ezW2Correction application and database file.

How can I know I have enough permission to access the database on the server

- Open Windows Explore, navigate to the database folder on the server
- Select the database file by mouse, right click to view properties. You need to have read, write and execute permisson.
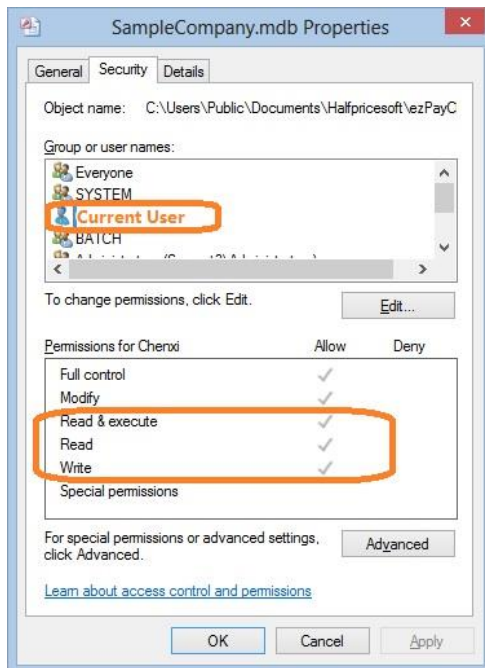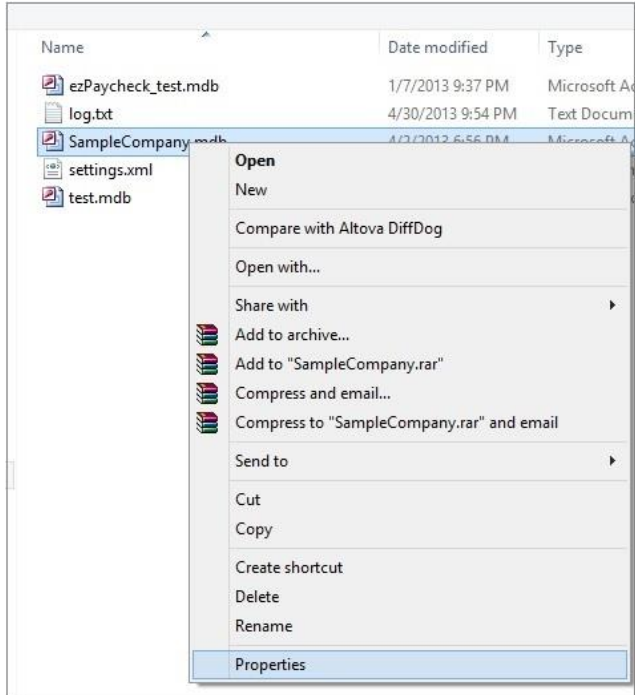
How to Roll Forward Data

Ez1099 software comes with new BACKUP and RESTORE function. It allows customers roll forward previous data easily to speed up tax form filing. Here is the step by step guide on how to roll forward tax form data

- for business owners and HR managers

- for accountants

#Option 1: For business owners and HR managers
Step 1. Install ez1099 2016 on your machine first
ez1099 software download
http://www.halfpricesoft.com/1099-software-free-download.asp

Step 2. Start ez1099 2015, click the top menu "Company -> Backup Company".
You can rename and save the database file to a folder or a flash disk. For example: you can rename the datbase file to "ABC Company 2016".
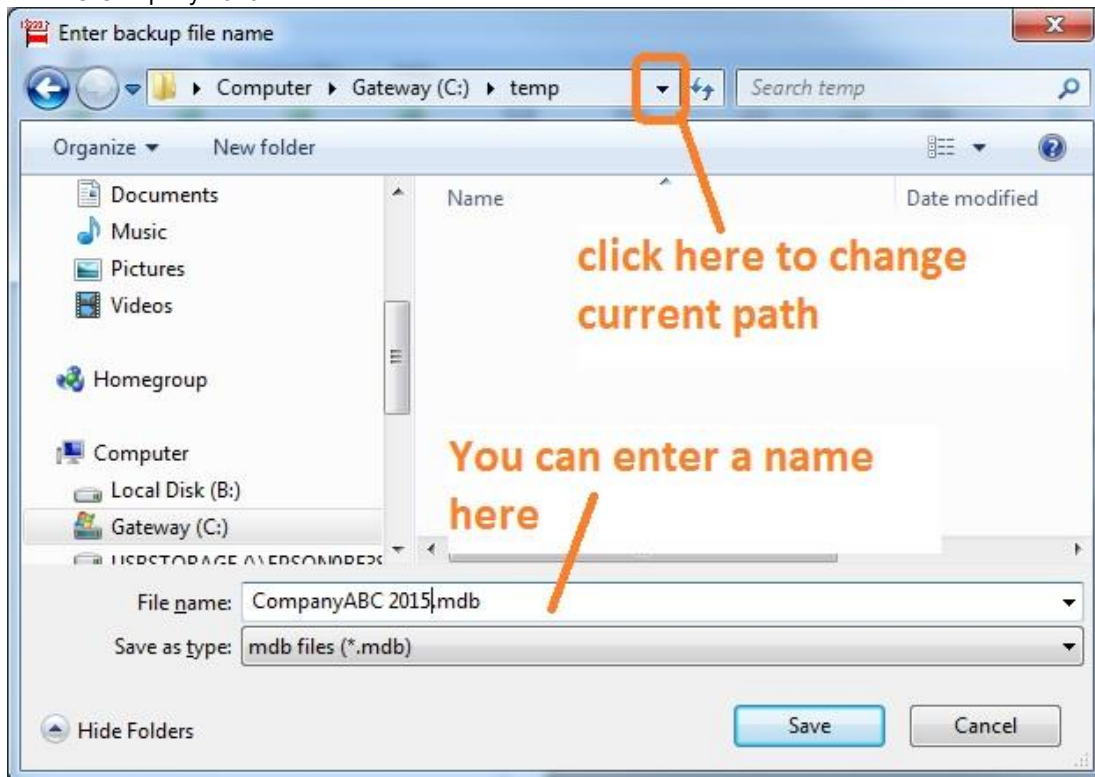
Step 3. Start ez1099 2016, click the top menu "Company-> Restore Backup Company".

Step 4. Switch the current current company database
Start ez1099 2016, select this new database file as your current database file by clicking the top menu "Company ->Select Company".

#Option 2: For accountants
If you are a CPA with many client accounts , it will be faster to transfer the data manually. Here are the steps on how to copy the data from ez1099 2015 folder to ez1099 2016 folder.

Step 1. Open ez1099 2015 database folder
The default database folder is:
C:\Users\Public\Documents\Halfpricesoft\ez1099(2015)

The database file is .mdb file (Microsoft Access Database file)

Step 2. Copy the .mdb files to Ez1099 2016 folder
The default database folder for ez1099 2016 is:
C:\Users\Public\Documents\Halfpricesoft\ez1099(2016)

If you are using multiple-user network version, you can copy the data to your shared folder on local machine or netowrk location.

Step 3: Switch current database
Start ez1099 2016, select one new database file as your current database file by clicking the top menu "Company Management->Select Company".