# Step 1: Starting a Service Bureau Upload Session

### • Go to "Via the Service Bureau".

Current Filer: 55566	Form 1099 This is where vo	-MISC: Enter, Up ou can create new 1099-M	date and View ISC Forms or update exis	ting Forms (ast	erisk in status = warnin	os/errors)			
DerbyTest 1	Current Sort/Viev	v: +By TIN	<b>•</b> 4D					Current Query: All Record	ts 🗸 🕄
Select Another Filer Manage	Search Til	u-	TIP: Enter TIN digits						
Current Form: 1099-MISC 💌	Recipient TIN	Last Name/Company	First Name	Status	Account	Name Line 2	Street/Delivery	Ant/Suite/Other	City
	123-22-1002	ADAM	LILIAN	Panding	AC-05		PINECREST DRIVE RED 2	, ip control	CALGARY
Preparing My Forms 🙁	123-22-1002	Last Name 123456789 12	First Name 123456789 1	Pending	accountxxxxxaccou	Name2 123456789 1234	Deliv/St 12345678901234567890123456	Suite 1234567890123456	CALGARY
1	123-22-1031	BASILE	ANTHONY	Pending	AC-06		115-86 238TH ST		ORMOND BEACH
Work With My Tax Forms	123-22-1031	BASILE	ANTHONY	Pending	AC-06		115-86 238TH ST		ORMOND BEACH
Import New Tax Forms	123-22-1032	NORTON	DONALD G	Pending	AC-04		123 E LAIRD DR		FAIR HAVEN
	123-22-1033	NORTON	WALLACE G	Pending	AC-01		730 18TH AVE		BOUNTIFUL
Form lotais Reports	123-22-1033	NORTON	WALLACE G	Pending	123456		730 18TH AVE		BOUNTIFUL
	123-22-1049	YOUNG	MANUEL	Pending	AC-07		635 20TH STREET		CLINTON
2 Printing & Mailing	123-22-1050	OSAKI	JAMES	Pending	AC-15	% IANE OSAKI	2.1.2 KASU CHIVODA KU		5KUKE TOKVO 100 8974
	555-22-1234	Tuna	Charlie	Pending	AC-03 AC-56	76 JANE USANI	1000 Ocean St	Ant 2506	Santa Monica
Print/Mail Forms Myself	555-33-1234	Birch	Karen	Pending	AC-73	DBA Ace Computers	2535 N Central	, pt 2000	Beverly Hills
Via the Service Bureau	77-7441233	ACME Hardware, Inc.		Pending	AC-32	Attn: Accounting	1250 Broadway	Suite 30	New York
Via the Service Dureau	77-7441234	5-Star Software, Inc.		Pending	AC-38	Acctg MS 45	125 Bournes Ave	Suite 300	Lake City
Export Forms for Print/Mail	95-1234567	Action Investments		Pending	AC-02		123 Stanhope St		Avon
<ul> <li>Filing My Forms (*)</li> <li>Filing on Paper (via 1096)</li> <li>Electronic Filing</li> <li>Via the Service Bureau</li> <li>Help &amp; Extras (*)</li> <li>Help and Tutorials</li> <li>Correcting Filed Forms</li> <li>About the Service Bureau</li> <li>R S Pubs &amp; Links</li> <li>Recipients List</li> <li>W-9/B Notices</li> </ul>									

#### • Select the upload type.

Current Filer: 55566 12-1234565	Print From h	t <b>ing, Ma</b> ere you ca	ailing, Filing, an n initiate a new Upload	d Bulk Ti session, void	n Matchii a session or re	ng via the 1099 I eport on forms in past Up	Pro Servic	e Bureau						
DerbyTest 1 Select Another Filer Manage Current Form: 1099-MISC	Be	egin a The 1099	new Service Pro Service Bureau car	e Bureau	<b>I Uploa</b> I/or File your f	d Session orms for you! Click on th	e Help button f	or more informat	ion.					
Preparing My Forms (2)	My Forms  Printing & Mailing or E-Delivery Upload							Bulk Tin Matching Upload						
별 Import New Tax Forms I Form Totals Reports	Service Bureau Upload Sessions Use the options below to view, report, reprint or reset (void) prior completed Upload sess						sions.					Current Query: All sessions for this Filer  Current Query: All sessions for this Filer  Current Query: All sessions		
2 Printing & Mailing 🛞	Log Session   Filer TIN   Form Type   Form Count   Upload Task					Upload Task	Status Session Date Time Reset/Voided Upload Date I					Upload File Name		
Print/Mail Forms Myself Via the Service Bureau Export Forms for Print/Mail														
Filing My Forms     Image: Second Secon														

## Step 2: Completing a Service Bureau Upload

• At the "Create a Service Bureau Upload" screen, select options as necessary.

elect Filers <ul> <li>All of my Filers</li> <li>Select (Tag) Filers</li> <li>Current: 55566</li> </ul> orm Types <ul> <li>All Form Types</li> <li>Current: 1099-MISC</li> <li>File Corr</li> <li>File Corr</li> <li>File Corr</li> <li>File Corr</li> </ul>	
orm Types     O All Form Types     O Select (Tag) Form Types     If File Original File Origina Fil	
	ginal forms rections
Impload Action       Impload Goriginal (first) upload for these forms       Impload         Inhoose replacement only       Impload Goriginal (first) upload for these forms       Impload         Impload for these forms       Impload       For ALL upload         Impload for these forms       Impload       For ALL upload	forms using CFS Filers in this session
Contact Information Who should be contacted f there are questions? Full Name: Test Phone: 555-5555 Email: Test@Test.com	
rinter or Totals & Instructions Select a different Printer Documents\*.pdf (winspool)	
099-MISC Special Processing         Vew requirement effective TY         2016	ion only
xtra Options	
rinter or Totals & Instructions       Select a different Printer       Adobe PDF Documents\*.pdf (winspool)         1099-MISC Special Processing lew requirement effective TY (2016       Image: Comparison of the second s	ion only

• On the upload screen select "Manual Transfer".

	Submit a Service Bureau Upload					
	These options allow you to certify your data and transmit your Upload file					
I: Review Totals	If you do not agree with these Totals, Cancel this process belo					
Totals Report" button	Save Control Totals Report A9672071-0FYN017.PDF to Selected Location					
2: Confirm Totals Acknowledge Accuracy of Totals Total forms in this upload: Acknowledge the total by re-entering it here: 0						
3: Transfer Method Choose Transfer Method	<ul> <li>Built-in HTTPS secure transfer (default/preferred method)</li> <li>Built-in FTP using the Internet</li> </ul>					
	O Manual Transfer					
1: Select Printer Select a Valid Printer	O Manual Transfer         Adobe PDF         Documents\*.pdf (winspool)					
1: Select Printer Select a Valid Printer 5: Digital Signature Digitally Sign Transmission	Manual Transfer      Adobe PDF     Documents\*.pdf (winspool)  Under penalties of perjury, I declare that I have examined the information returns and control totals contained in this transmission, and to the best of my knowledge and belief, they are true, correct, and complete.					
1: Select Printer Select a Valid Printer 5: Digital Signature Digitally Sign Transmission	Manual Transfer      Adobe PDF     Documents\*.pdf (winspool)  Under penalties of perjury, I declare that I have examined the information returns and control totals     contained in this transmission, and to the best of my knowledge and belief, they are true, correct,     and complete.      Signature:         [Type your name]     Signature:         [Type your name]					
1: Select Printer Select a Valid Printer 5: Digital Signature Digitally Sign Transmission	Manual Transfer      Adobe PDF     Documents\*.pdf (winspool)      Under penalties of perjury, I declare that I have examined the information returns and control totals     contained in this transmission, and to the best of my knowledge and belief, they are true, correct,     and complete.     Signature:         Agril 25, 2018     at 1:48PM					

## Step 3: Uploading the File

• File location is dependent on install directory. By default it is at - C:\1099 Pro\Pro99TXX\Uploads

> This	PC > Station13 (C:) > 1099 Pro > Pro	99T17			ٽ ~	
pload ( ^	Name	Date modified	Туре	Size		
1 15.30	Admin	4/16/2018 10:28 AM	File folder			
	Data	3/30/2018 7:54 AM	File folder			
	📊 Data Backups	4/2/2018 3:45 PM	File folder			
2	DataPCodeTesting	3/30/2018 3:46 PM	File folder			
	- Exports	3/30/2018 7:57 AM	File folder			
ts	File Backups	4/16/2018 10:28 AM	File folder			
s	📊 Import	3/30/2018 7:57 AM	File folder			
	IRS_Instructions	3/30/2018 7:58 AM	File folder			
	MagFiles	4/16/2018 1:56 PM	File folder			
	Maps	3/30/2018 7:58 AM	File folder			
(C)	PDF	4/25/2018 1:48 PM	File folder			
(0.)	Reports	3/30/2018 7:57 AM	File folder			
	Resource	4/16/2018 10:27 AM	File folder			
	Temp	4/16/2018 1:56 PM	File folder			
8 - C	Uploads	4/25/2018 1:48 PM	File folder			
Files	1099App.ico	12/19/2010 10:08	lcon	63 KB		

- Once located, go to <a href="http://uploads.1099pro.com">http://uploads.1099pro.com</a>
- Use Login: 1099upload
- Password: 2004

• After logging in, click the "Upload" button and choose the path where your file is saved.

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4 10 P 😼 ten	9	Jump fo	Web Chent	•
🔄 Home 🕖		Search		20
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		Directorie	es:0 Files:0	Size: 0 KB

• The upload is complete once the file appears on the main page.

1099	Web Client	
4 📦 🗭 🔯 Home •		
📋 Home 🕕		
E Parent Directory	🖬 New Directory   🖨 Open   🍲	😫 Upload   🔮 Download   🗙 Delete   More Actions 🗸
Name		Size Time
499/20/1-0rth019	2D <sup>9</sup> 33	5./5 ND 1/29/2029, 5300-10 APT