

Step 2: Completing a Service Bureau Upload

- At the “Create a Service Bureau Upload” screen, select options as necessary.

Create Upload File Wizard

Create a Service Bureau IRS Filing Upload

These options will help you create a file for Service Bureau Upload

Step	Options
1: Select Filers Specify which Filers should be processed	<input type="radio"/> All of my Filers <input type="radio"/> Select (Tag) Filers <input checked="" type="radio"/> Current: 55566
2: Form Types Select which tax forms will be included	<input type="radio"/> All Form Types <input type="radio"/> Select (Tag) Form Types <input checked="" type="radio"/> Current: 1099-MISC <input checked="" type="checkbox"/> File Original forms <input type="checkbox"/> File Corrections
3: Upload Action Choose replacement only if notified by the IRS	<input checked="" type="radio"/> Original (first) upload for these forms <input type="radio"/> Replacement <input checked="" type="checkbox"/> File the forms using CFS For ALL Filers in this upload session
4: Contact Information Who should be contacted if there are questions?	<input type="button" value="Update Contact"/> Full Name: Test Phone: 555-555-5555 Email: Test@Test.com
5: Printer For Totals & Instructions	<input type="button" value="Select a different Printer"/> Adobe PDF Documents*.pdf (winspool)
6: 1099-MISC Special Processing New requirement effective TY 2016	<input checked="" type="radio"/> e-File ALL 1099-MISC forms <input type="radio"/> e-File 1099-MISC forms with Box 7 Non-Employee Compensation only
* Extra Options	<input type="button" value="Error Scan: Not scanned"/> <input type="button" value="Folder: C:\1099 Pro\Pro99T17\Uploads"/>

- On the upload screen select “Manual Transfer”.

Submit a Service Bureau Upload

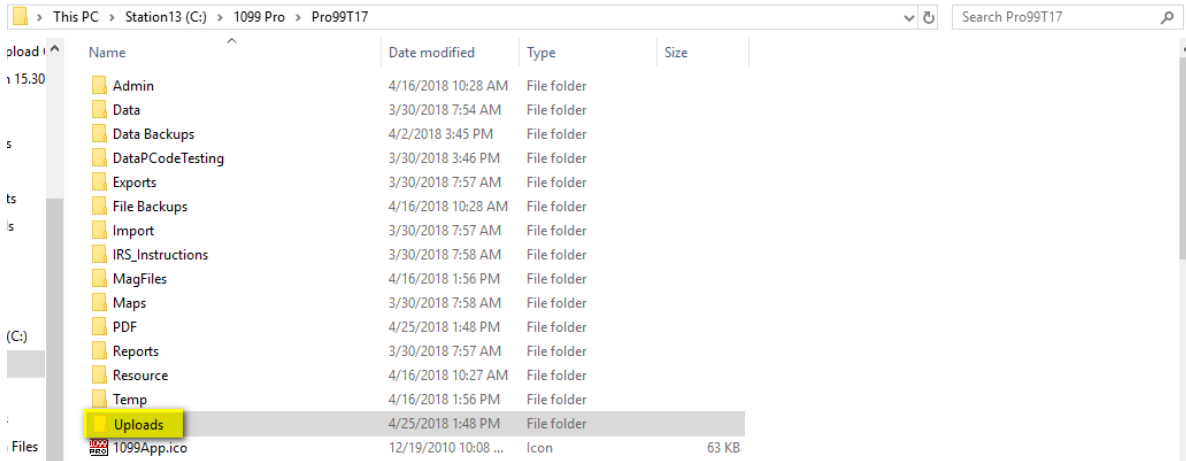
Submit a Service Bureau Upload

These options allow you to certify your data and transmit your Upload file

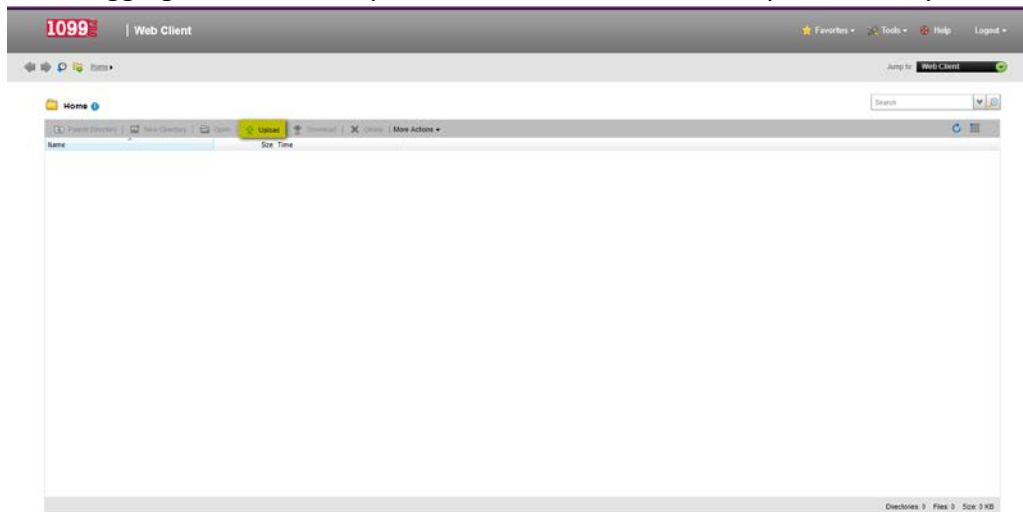
1: Review Totals Click the "View Control Totals Report" button	<input type="button" value="View Control Totals Report"/> If you do not agree with these Totals, Cancel this process below. <input type="button" value="Save Control Totals Report A9672071-0FYN017.PDF to Selected Location"/>
2: Confirm Totals Acknowledge Accuracy of Totals	Total forms in this upload: 15 Acknowledge the total by re-entering it here: <input type="text" value="0"/>
3: Transfer Method Choose Transfer Method	<input checked="" type="radio"/> Built-in HTTPS secure transfer (default/preferred method) <input type="radio"/> Built-in FTP using the Internet <input checked="" type="radio"/> Manual Transfer
4: Select Printer Select a Valid Printer	<input type="button" value="Select a different Printer"/> Adobe PDF Documents*.pdf (winspool)
5: Digital Signature Digitally Sign Transmission	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: <input type="text"/> (Type your name) Signature Date: <input type="text" value="April 25, 2018"/> at <input type="text" value="1:48PM"/>

Step 3: Uploading the File

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



- Once located, go to - <http://uploads.1099pro.com>
- Use Login: 1099upload
- Password: 2004
- After logging in, click the “Upload” button and choose the path where your file is saved.



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

