

FileLocalTM Business User QuickStart Guide

Setup Your Account

- Click [CREATE BUSINESS ACCOUNT](#).
- Create a username and password. (at least 1 upper case letter, 1 lower case letter, 1 number and between 6-20 characters total). Enter User's contact information.
- Enter your Legal Business Name as it is registered with the Washington Department of Revenue. We recommend contacting the Washington Department of Revenue if you are not certain, as inputting the incorrect Legal Business Name can and will result in account errors. The Legal Business Name must match what the Washington Department of Revenue has on record.
- Enter your company mailing address and business structure.
- Enter your Trade Name as it is registered with the Washington Department of Revenue. We recommend contacting the Washington Department of Revenue if you are not certain, as inputting the incorrect Trade Name can and will result in account errors. The Trade Name must match what the Washington Department of Revenue has on record.
- Enter your 16-digit UBI, if you have one.
- If you are not certain what the last 7 digits of your UBI number are, you can obtain this information by contacting the Washington Department of Revenue or clicking the [LOOK UP MY UBI-16](#) to the right of the UBI field.
- If you do not have a UBI for your business, click the link beneath the UBI field to determine if you need a UBI.
- If your business is not required by the Washington Department of Revenue to have a UBI, you may choose [SKIP UBI QUESTION](#) to the right of the UBI field, to certify that you are not required to have a UBI.
- If you have a UBI, but do not know it, you can click the [LOOK UP MY UBI-16](#) option to the right of the UBI field, to obtain it. Alternatively, you can contact the Washington Department of Revenue directly to obtain your UBI as well.
- Enter the Physical address for the business or click *The physical address for this business location is the same as the mailing address entered above.*
- Create a security question and answer – *the answers are case sensitive.*
- We will send you an email message to confirm your account, along with an Activation Code that you will need to enter in to your FileLocal account to finalize the account creation.
- After entering the Activation Code – the website may prompt you to finalize the entry of your UBI number, if you do not have one, and are not required to obtain one by the Washington Department of Revenue, you may choose [I DON'T NEED A UBI](#).
- **Congratulations! Account setup is complete.**

Link an Existing Business License

- Upon first login after account creation, you will be greeted with a pop-up message that prompts you to either link an existing license or apply for a new license.
- If you already have a Business License, you will need to first link it to your FileLocal account before you can file tax returns or renew/print your license. To link your existing license from the pop-up screen, choose **LINK MY EXISTING LICENSES**. Alternatively, you can navigate to “My Account” from the **Account Center** dropdown menu and choose the option **LINK MY EXISTING LICENSES** from that screen as well.
- On the license linking screen, select your Business Location that the license is associated with – if you have not yet added a location, you can choose to add one on this screen as well. Once the location is added/selected, choose the applicable city or cities you want to link, then choose **NEXT**. Enter the license number for each applicable city. Once complete, choose the **LINK** option at the bottom of the page. You will see a confirmation message that your license is linked. If there is an error linking your license, it will appear on this screen with an explanation of why it could not be linked. Depending on the reason, you may need to contact website support, or your Taxing Authority for more information.

Apply for a new Business License

- If you need to apply for a license instead, choose the **APPLY FOR A LICENSE** option on the pop-up menu. Alternatively, you can navigate to the “My License Forms” dropdown menu and choose “Apply for a General Business License”. Fill out all of the required fields, and then proceed to the payment screen.
- Please note that once you have proceeded to the payment screen, you have a limited amount of time to complete successful payment before the website locks the transaction, which can delay the process.
- If the website locks the transaction, you must wait 24 hours for the transaction to unlock, at which point you can attempt payment again by navigating to the “My License Forms” dropdown menu and choosing “Activity Center”. There you will see a list of items, consisting of licenses, applications, tax filings, etc. You can navigate to the item you were attempting to pay for and choose **READY TO PAY** or **INFO** to the right of it to complete payment.

Set up a Business Location

- To set up a business location, you will need to begin by navigating to the “Account Center” drop-down menu and choose “My Account”.
- Here you can choose the option to add a business location **ADD ANOTHER LOCATION**.
- Fill out all of the required fields for your location. If there are any fields where you are not certain what to enter – please contact technical support for guidance.
- Once all the fields have been entered, choose **ADD** at the bottom to save your changes.

File Your Taxes

- To file a tax return, begin by choosing the dropdown menu option that says, “My Tax Forms”, then choose “File a New Tax Form”.
- Next, you will select your filing period, which has a popup explanation when the mouse is hovered over it that will go into detail regarding which month you should select. If you do not know your Filing Frequency, or what month you are supposed to file on, you can contact your Taxing Authority to obtain this information. The webpage will produce an error message if the incorrect filing frequency is selected.
- Next you will choose your tax form – the form that your particular business needs to select is mandated by your Taxing Authority. If you do not see your form listed, click the link below that reads “[Click here to set up the form](#)” to add the form.
- Lastly, you will choose your business location that you are filing for – if there is only one, then the webpage will default to that one – when done, choose **NEXT**.
- Fill out all of the required fields on the tax form, and then proceed to the payment screen.
- Please note that once you have proceeded to the payment screen, you have a limited amount of time to complete successful payment before the website locks the transaction, which can delay the process.
- If the website locks the transaction, you must wait 24 hours for the transaction to unlock, at which point you can attempt payment again by navigating to the “My Tax Forms” dropdown menu and choosing “Activity Center”. There you will see a list of items, consisting of licenses, applications, tax filings, etc. You can navigate to the item you were attempting to pay for and choose **READY TO PAY** or **INFO** to the right of it to complete payment.
- If you have any questions about how to fill out a tax form, we recommend reaching out to your Taxing Authority for specific instructions.
- If you experience any errors or unexpected behavior while filling out your tax form, we recommended contacting FileLocal support for more information.

Print a Business License

- To print an existing Business License – ensure that the license is first linked to your FileLocal account as previously described in the Link an Existing Business License section, and that the license is valid for the current license year.
- Start by clicking the “My License Forms” dropdown menu and choosing “Activity Center”.
- Then, at the top of this page, locate the license you want to print, and choose the **PRINT** button to the right of it.
- If you encounter an error when attempting to print the license, the Taxing Authority, or FileLocal Technical Support may be able to help. For instance, if you see an error that reads “License cannot be printed at this time, account is not current upon receipt date of license payment”, this error indicates that the license is unable to be printed due to an outstanding obligation with your Taxing Authority. You will need to contact the Taxing Authority to find out what is owed on the account.
- If you encounter other errors when printing, or unexpected behavior, please reach out to technical support for assistance.

Set up a Tax Form

- To set up a tax form for online filing, begin by clicking the “My Tax Forms” dropdown menu, and choose “Tax Form Setup”.
- On this page, choose **ADD A NEW TAX FORM**.
- Fill out the required fields and choose **ADD TAX FORM** at the bottom. If you do not know your City Account Number, Tax Form type, or your filing status (filing frequency), please contact your Taxing Authority for this information.
- If you receive an error message relating to your City Account Number being invalid, you will need to verify that the account number is active with your Taxing Authority.

Renew Your Business License

- To renew an existing Business License, begin by clicking the “My License Forms” dropdown menu, and choosing “Renew a license”.
- On this page, scroll down to the section titled “General Business Applications (GBL) and Renewals.”
- If your license is available for renewal on FileLocal, it will appear in this section, with an option to the right that reads **CONTINUE**. If you have multiple licenses available for renewal, they will be labeled with the year, and city. Click **CONTINUE** to begin the renewal process.
- Fill out all the required fields and proceed to the payment screen to complete the renewal.
- Please note that once you have proceeded to the payment screen, you have a limited amount of time to complete successful payment before the website locks the transaction, which can delay the process.
- If the website locks the transaction, you must wait 24 hours for the transaction to unlock, at which point you can attempt payment again by navigating to the “My License Forms” dropdown menu and choosing “Renew a License”. There you will see a list of licenses that are eligible for renewal, and you can navigate to the item you were attempting to pay for and choose **READY TO PAY** or **INFO** to the right of it, to complete payment.

Update Business/User Information

- If you need to update any information relating to your user, business, or location information, begin by clicking the “Account Center” dropdown menu, and choosing “My Account”.
- On this page, you will have purple “edit” buttons to the right of each category. User Information, Corporate Information, and Business Locations respectively.
- Click the  next to the category you need to modify, and you will be taken to a screen that contains all of the relevant information to that category.
- Once the information is entered, choose the  option at the bottom right, to save the changes.

Obtain Support

- If you need support with the navigation or operation of the website, please reach out to our Technical Support Helpdesk by choosing “Support” at the top of the screen.
- From this dropdown menu, you can choose “Contact Us” to place a phone call to our Technical Support Helpdesk.
- For faster support, you can alternatively choose “Email Us” from the “Support” dropdown menu and send us a message. Emails are typically answered within 24 hours.
- If you need support with Tax or Business License specific regulations, Account Numbers, or Tax Worksheet questions, please reach out to your Taxing Authority by clicking “Contact City”.
- On this page, click the “city” dropdown menu, and choose the city relevant to your concern.
- Their contact information will appear on this page.

Menus

- **HOME** – quick links to commonly used features.
- **MY TAX FORMS > FILE A NEW FORM** – start filing a new tax return using forms you set up.
- **MY TAX FORMS > TAX FORM SETUP** – manage the blank forms you set up and add new ones.
- **MY LICENSE FORMS > APPLY FOR A GENERAL BUSINESS LICENSE** – begin a business license application for a city (or cities) for a location you set up.
- **MY LICENSE FORMS > RENEW A LICENSE** – view and pay for license renewals that are due.
- **ACCOUNT CENTER > MY ACCOUNT** – manage your personal settings, change your password, update your security question, manage existing business locations, and add new locations.
- **ACCOUNT CENTER > ACTIVITY CENTER** – access GBL applications and tax forms you have initiated or filed, process renewals, and print completed activities.
- **ACCOUNT CENTER > ADD CLERICAL USER** – create new users with limited permissions.
- **ACCOUNT CENTER > MANAGE CLERICAL USERS** – change account settings for other users.
- **ACCOUNT CENTER > VIEW ACCOUNT CENTER** – navigates to the Account Center home page with a list of key account features, direct links, and description.
- **ACCOUNT CENTER > SECURE MESSAGES** – a secure mailbox to send and receive messages containing sensitive info that should not be sent via regular email.
- **ACCOUNT CENTER > VIEW STATEMENT** – view activity statement and current balance for a location and city.
- **CONTACT CITY** – find contact info for the city and form you select.
- **SUPPORT > CONTACT US** – contact info for the FileLocal support desk.
- **SUPPORT > EMAIL US** – send an email to open a support ticket with the FileLocal support team.
- **FAQ** – conduct a keyword search of all FAQs. Filter results based on city, form, or category.

Other Key Features

- **HELP** – Instructions and tool tips provide onscreen help. Searchable FAQ articles give more in-depth answers. The FileLocal support desk is available via phone, fax, or email.
- **RENEWALS** – Business licenses due for renewal are in the Activity Center. We will send you a secure message when there is a renewal to file.
- **CONSOLIDATION** – When you set up a tax form, the system will prompt you to consolidate multiple locations. Consolidation groups your locations under a single account number so you can file a one tax return with the city, instead of individual returns per location. (optional)
- **MULTI-CITY FORM** – When you file a new tax return, you have the option to choose the Multi-City Form, which lets you prepare the return for multiple cities on a single form.
- **MULTIPLE USER ROLES** – The first user on a business account is the primary standard user. Standard users have access to all features. There are 3 other roles with limited features: You can set up clerical users with file-only, pay- only, or file-and-pay privileges. Clerical users do not have access to management features.
- **PREPARERS** – If you prepare taxes for multiple companies, you may want to set up a preparer account, which lets you access all your clients' accounts with a single login. For security, clients have to approve your access to their accounts.

Click Paths

How do I...

- **ADD A NEW LOCATION?** Home > Account Information quick link > Add a New Location > enter information > Add. Or start with Account Center menu > My Account.
- **FIND A TAX RETURN I STARTED?** Home > Activity Center quick link > go to Tax section > click Continue for the tax return. Or start with Account Center menu > Activity Center.
- **CHANGE MY PASSWORD?** Home > Account Information > go to Additional Account Settings > Change Password. Or start with Account Center menu > My Account; or Account Center > View Account Center > Change Password.
- **CHANGE MY SECURITY QUESTION?** Home > Account Information > go to Additional Account Settings > Change Security Question. Or start with Account Center menu > My Account; or Account Center > View Account Center > Change Security Question.
- **ADD ANOTHER USER?** Account Center menu > Add Clerical User > choose the type of user to add > enter the user's contact information > create a username > Next > select locations for this user > Save. We will email the new user a temporary password with a link to FileLocal.
- **INACTIVATE A USER?** Account Center menu > Manage Clerical Users > select user > scroll down and uncheck the Activate box > Save
- **CHANGE MY BUSINESS ADDRESS?** Home > Account Information quick link > Edit (for the desired location) > update information > Save. Or start with Account Center menu > My Account.
- **CHANGE EMAIL NOTIFICATIONS?** Home > Account Information > Edit (for user info) > update email preferences > Save. Or Account Center > View Account Center > User Information.
- **FIND A TAX RETURN I STARTED?** Home > Activity Center quick link > go to Tax section > click Continue for the tax return. Or start with Account Center menu > Activity Center.

FileLocal Support Desk

Phone: 225-215-0052

Toll Free: 1-877-693-4435

Email: filelocal@neumo.com

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