

Create Preparer Account

- Click **CREATE TAX PREPARER ACCOUNT**.
- Choose **CONTINUE** if a preparer account is correct for your circumstance.
- Create a username and password. (at least 1 upper case letter, 1 lower case letter, 1 number and between 6-20 characters total)
- Fill out all required fields and choose **SIGN UP** at the bottom of the page once completed.
- An email will be sent to you, to confirm account creation. Follow the steps within the email to finalize account creation.
- **Congratulations! Account setup is complete.**

Connect to an Existing Client Account

- If the client already has an account set up in FileLocal, you can request permission to manage the account. Before you begin, you need to know the email address the client uses on the account.
- Log in with the username and password you created when you set up your tax preparer account.
- Choose **ADD EXISTING ACCOUNT**.
- Enter the client's email address that is associated with their FileLocal business account and choose **SEARCH**.
- Any business account with the email address entered will appear under **Existing User Accounts**.
- Select the client's account(s) using the checkbox in the left column, then choose **REQUEST TO MANAGE**.
- An email message will then be dispatched to the business account's email address, with your request to manage the account. The business account will appear as PENDING in your client list until approved.
- The email message will inform the client of your request and provide a unique confirmation code. The client must click the link to log into their business account then enter the confirmation code to approve your request.
- Once the client approves your request, the PENDING status of the business account in your client list will change to a **Select** option.
- If the client's account remains in PENDING status for an extended period, consider contacting them directly to determine why approval has not been granted. You can cancel or re-send approval requests directly from your preparer account.

Create a New Client Account

- If the client does NOT already have an account set up in FileLocal, you can set up the account. Before you begin, you will need to know the client's email address that they want associated with their FileLocal account.
- Log in with the username and password you created when you set up your tax preparer account.
- Choose **ADD NEW ACCOUNT**.
- Read the **Adding a New Client Account** information provided carefully to ensure that you need to set up an account. If you decide to create a new client account, choose **CONTINUE**.
- Follow the prompts to create a business account using the client's email address.
- An email will be dispatched to the client to confirm account setup and to grant you permission to manage the account.
- The client will need to follow the steps outlined in the email to approve the request to manage their account.

Working With a Clients Account

- Log in with the username and password you created when you set up your tax preparer account.
- Your client list will be displayed. Click **Select** next to the client you want to work with.
- The Portal will navigate into the client's account, showing your username and the client's username in the black banner at the top of the screen.
- When you are finished working in a client's account and you want to return to your preparer account, click **Go To Preparer Account** on the black banner at the top of the screen, alternatively, you can choose **LOG OFF** at the top right of the screen.

Remove a Client From Your Preparer Account

- If you no longer want to manage a client's account, click **Remove Link** in your client list.

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

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