FileLocal™ Business User QuickStart Guide

Go to www.FileLocal-wa.gov

Set Up Your Account

1. Click **CREATE BUSINESS ACCOUNT**.
   - Create a username and password.
   - Enter your name, title, contact info. SIGN UP
   - We will send you an email message to confirm your account. Click the link inside to continue.
2. Choose or enter a security question to safeguard your account.
   - Enter the answer to the question. NEXT
3. Enter your 16-digit UBI, if you have one.
   - If you don't have a UBI for your business, click the link to determine if you need a UBI. NEXT
4. Enter the business information for your company: legal business name, trade name, location name, business type, NAICS code*, physical address, mailing address, and corporate/headquarters address, if applicable.

   *A link helps you find your NAICS code. NEXT
5. Click **ADD A NEW LOCATION** to set up any additional business locations you have.
   - For each location, enter the location name, trade name, contact info, federal tax ID, UBI, NAICS, and physical/mailing addresses. ADD
   - Repeat to add each location. You can also add more locations later. YES
6. Set up the tax forms you need to file.
   - Select the city, type of form, business location, account number, and filing frequency. ADD FORM
   - Tax Form Setup creates a blank form to be used as a template for future filings. Set up as many forms as needed. YES
   - Account Setup is complete.

FileLocal Support Desk

- Direct Line: 225-215-0052
- 800 Number: 1-877-693-4435
- Email: filelocal@e-govsystems.com

Apply for Business License

- Log in with the username and password you created when you set up your account.
- Click **APPLY FOR A GENERAL BUSINESS LICENSE**.

1. Read the Welcome page to determine if you need to apply for a GBL. NEXT
2. Choose the business location that needs a license. You should have already set up this location during account setup.
   - Choose the city/cities where you need to apply. Answer any extra questions. NEXT
3. Select the nature of business and provide a brief description of business activity.
   - Select the appropriate NAICS code* for this business location.

     *A link helps you find your NAICS code.
   - Indicate if you are a contractor.
   - Enter the date business was first conducted in this business location.
   - Provide your correspondence address if different from the business location address provided during account setup. NEXT
4. Update contact info, if needed. NEXT
5. Select the type of business and enter your FEIN (Federal Employer ID Number).
   - Answer any additional questions provided, such as information regarding owners, partners, or corporate officers. NEXT
6. Select the reason for applying. NEXT
7. Answer any city-specific questions. NEXT
8. Add comments or questions, if needed. NEXT
9. Review your GBL application to ensure it is correct and complete. Check the box to indicate the GBL application is accurate.
   - Enter your name and title, and choose your desired next step. NEXT
   - Your GBL application is complete. READY TO PAY

File Your Taxes

- Log in with the username and password you created when you set up your account.
- Click **FILE A NEW TAX FORM**.

1. **SELECT**: Choose the filing period for this return.
   - Select the form you want to file. You completed form setup when you set up your account.
   - Select the business location. NEXT
2. **PREPARE**: When the tax form is displayed, enter your gross receipts and any deductions.
   - There may be additional worksheets to complete, such as service apportionment, MATC, and square footage. These may vary by city. Watch for the worksheet icon. Click 🗐 to complete any available worksheets.
   - As you fill out the tax form, the calculations will update automatically.
   - Check the box to apply any listed debit or credit. This information is provided by the city. If you have questions about the debit or credit indicated, contact the city. NEXT
3. **REVIEW**: Your tax return is complete. READY TO PAY

Make a Payment

- When you complete a tax return or GBL application, it will go in the payment cart. You can complete multiple forms and pay once.
- FileLocal uses KUBRA, a third-party payment processor, to keep your financial data secure.
- Choose to pay by credit/debit card or bank account, and enter the payment info. CONTINUE
- Review your payment information. PAY NOW
- KUBRA will process the payment immediately.

RETURN TO FILELOCAL

You can always save your work in the Activity Center and complete any process later.

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Go to www.FileLocal-wa.gov
Your one stop for local business licensing and tax filing

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.
  > 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.
  > 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.
  > ACTIVITY CENTER – access GBL applications and tax forms you have initiated or filed, process renewals, and print completed activities.
  > ADD CLERICAL USER – create new users with limited permissions.
  > MANAGE CLERICAL USERS – change account settings for other users.
  > VIEW ACCOUNT CENTER – navigates to the Account Center home page with a list of key account features, direct links, and description.
  > SECURE MESSAGES – a secure mailbox to send and receive messages containing sensitive info that should not be sent via regular email.
  > VIEW STATEMENT – view activity statement and current balance for a location and city.
- **LOOKUP** – find contact info for the city and form you select.
- **SUPPORT > *CONTACT US*** – contact info for the FileLocal support desk.
  > 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.

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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.