

Importing Data Into EASITax 2007

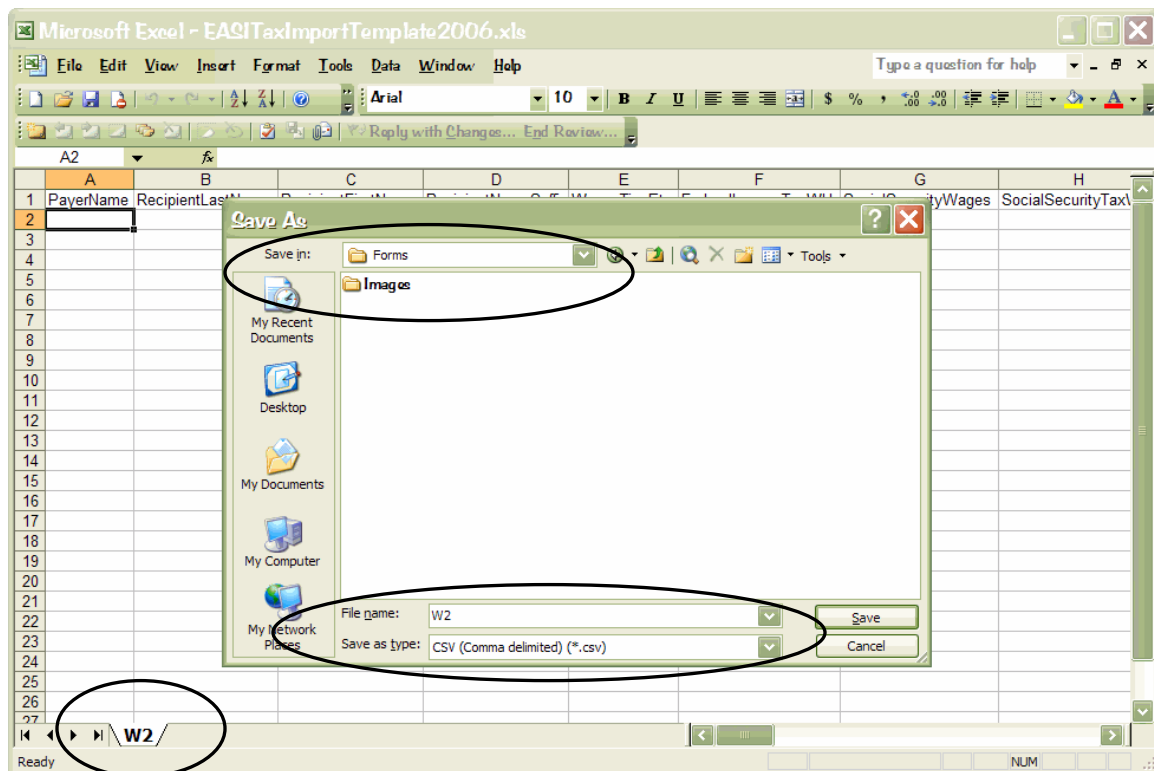
There are two different ways you can import data into EASITax. In one option you will save your data file to a specified location which will prompt EASITax, upon opening the program, to ask if you want to import the data it has located. The second option works much like any other program where you can browse to the file location and then instruct the program to import from that file into your selected database.

Option 1:

Using the EASITaxImport2007.xls file, place your data in the corresponding columns. For example, the recipient's social security number should go in recipientID column. Delete all of the other tabs from the file. You will now save the document using the 'SAVE AS' command. Choose 'comma delimited file (.csv)' as the type of file you want to save and use one of the following naming schemes.

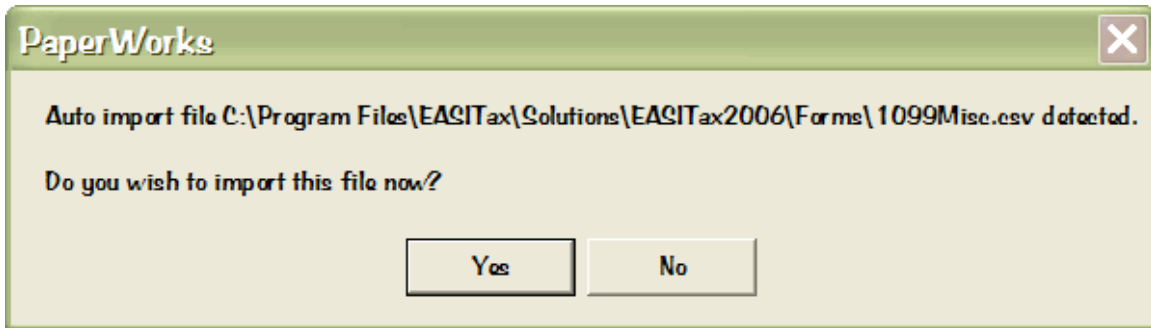
- W2 data should be saved as w2.csv
- 1099 Misc data should be saved as 1099misc.csv
- 1099 R data should be saved as 1099R.csv
- 1099 Int data should be saved as 1099INT.csv
- 1099 Div data should be saved as 1099DIV.csv

Save to: C:\Program Files\EASITax\Solutions\EASITax2007\Forms folder

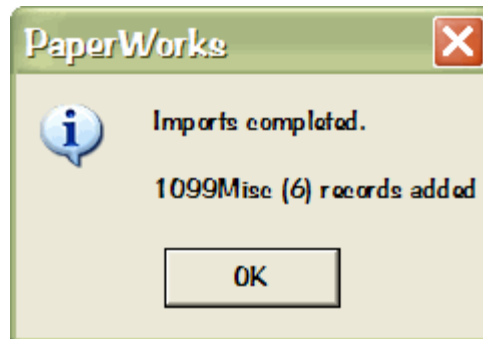


When you open EASITax it will advise that records have been found for import.

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When the import completes, you will be notified of the number of records that were imported.

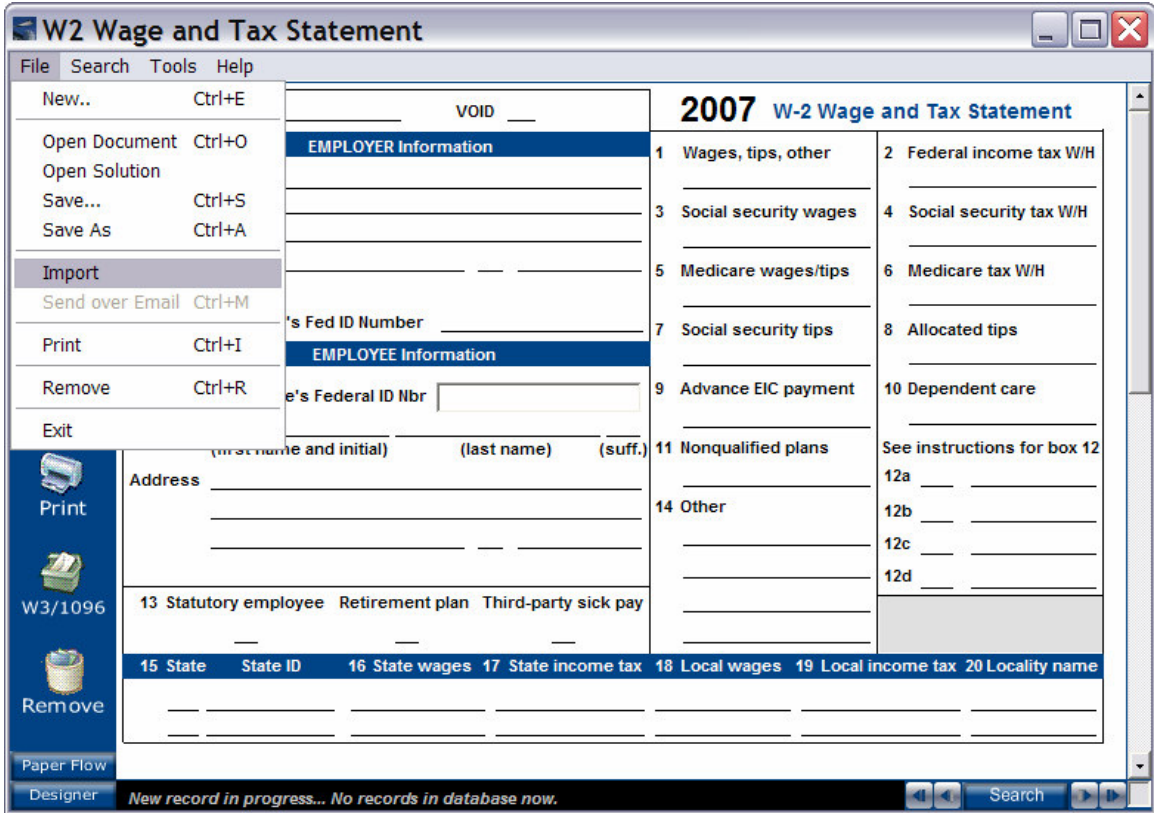


Option 2:

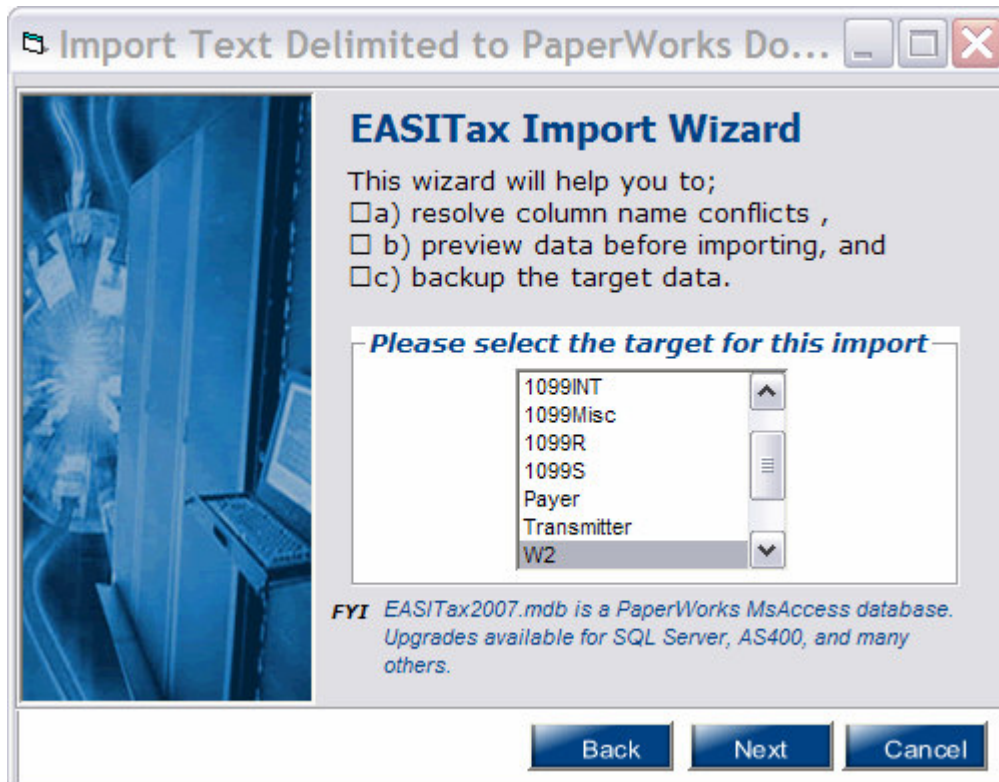
Save you data file to any location you choose. Make sure that the data is saved as a .csv (comma delimited file).

1. In EASITax go to the file menu option and then choose import.

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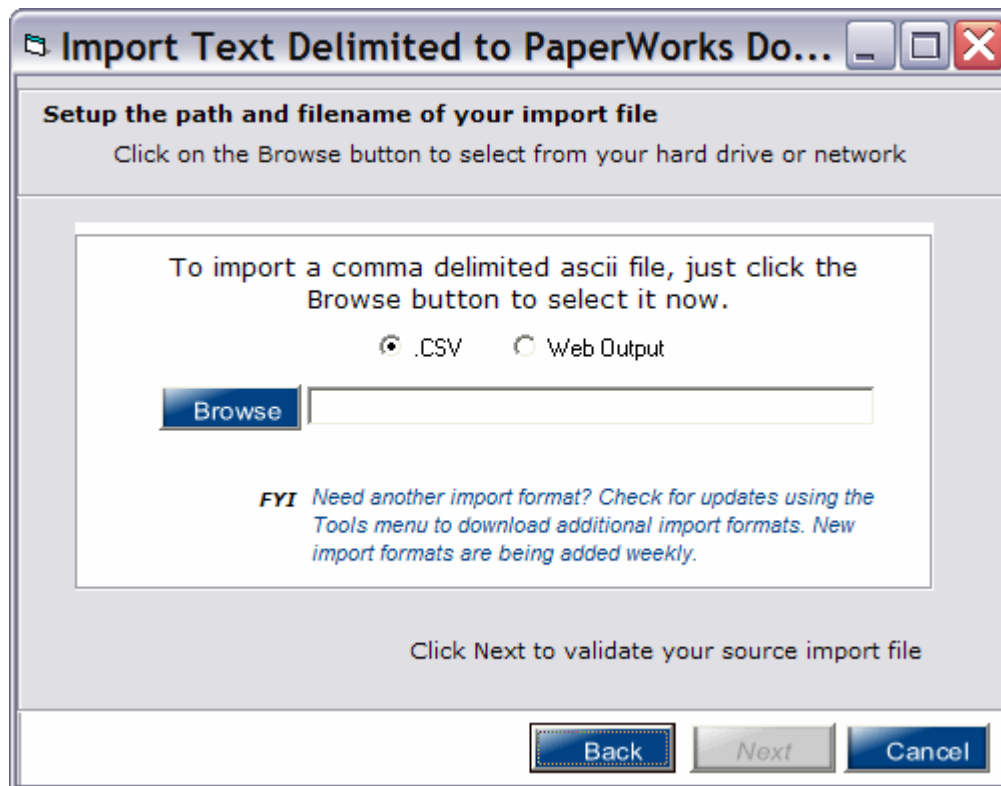


2. Select the target file for your import. In other words, if you are importing 1099MISC data you will want to click on 1099MISC and then click NEXT.



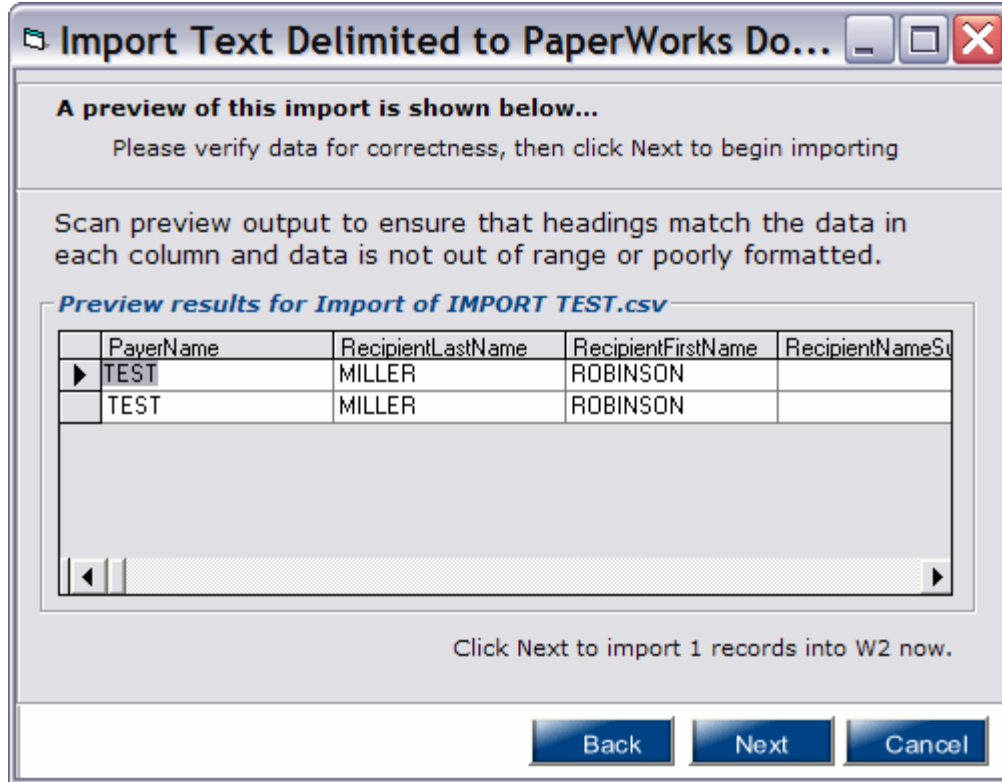
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3. Leave the file type as .CSV and use the BROWSE button to locate the import file on your computer. Click the NEXT button when you have your file located.



4. A preview will be displayed of the data that you are about to import. Validate that it is correct.

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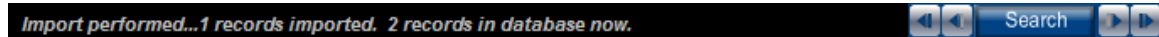


5. Click next when you have completed your validation and a confirmation of your import will be displayed.



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The status bar will change and give you an update on your data showing that the recent transaction was an import and your total number of records imported and the total number of records in the database.



Import performed...1 records imported. 2 records in database now.

Note – you may encounter situations where post import you are not able to view the data even though you have been told that the data was imported. Should that occur, simply exit EASITax and launch it again. Do not import the data a second time or you will have duplicate records. The reason this occurs is because the database needs to refresh in order to display the records that you have imported into the program. Closing the program and opening it again allows that refresh to occur.