

IMPORT INTO CCH PROSYSTEM FX

Things to look out for:

- **M-1s (i.e. Tax Adjustments)** – The export function has not been built out for all M-1s. Therefore, the following M-1s will import, but any other M-1s posted within regroupTAX will NOT import at this time:
 - **Meals & Entertainment**
 - **Penalties**
 - **Federal Tax**
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HOW TO: IMPORT CSV FROM REGROUPTAX INTO CCH

Within the regroupTAX software:

Open the specific business client and click “Export”

Save the exported file to your computer

Within CCH ProSystem software:

Open the specific business client file

Select G/L Direct:

- TB Import
- G/L Direct Custom Import

Browse to find the export file created and saved on your computer

Select: regroupTAX from “select custom import” drop down

Check the following boxes under “Select import options” section:

- Account Descriptions
- Tax Codes
- Account Types

Click IMPORT

Question Prompt: “Import validation is complete. Do you want to continue updated G/L Direct data in the tax return?”

Click YES

Under G/L Direct, Click "G/L TO TAX"

Check the following boxes:

Remove existing M-3 values based on the M-3 transfer options selected
Keep existing data

Click OK

Recalc Return

ALL DONE!